

Secrets and Mysteries of Campaign Influence

Intermediate | Admin



Bill Fetter

UnFettered Marketing

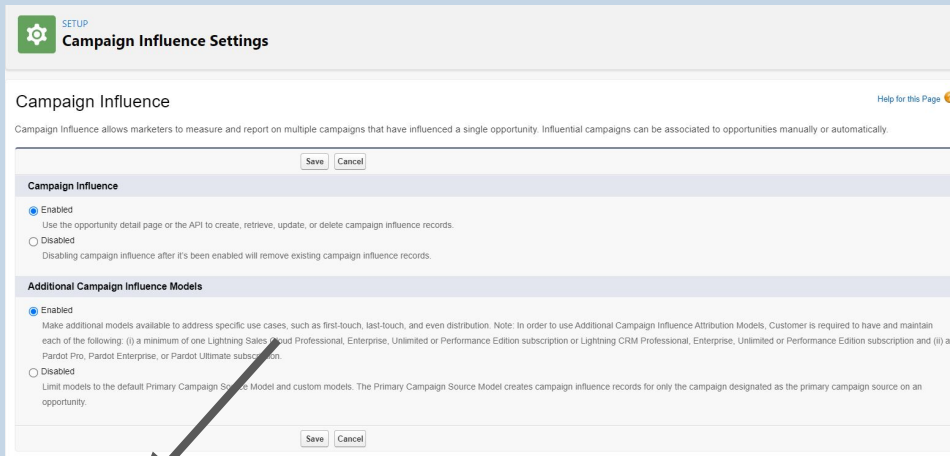


When Should I Adopt Customizable Campaign Influence?



Setup

Fine Print:



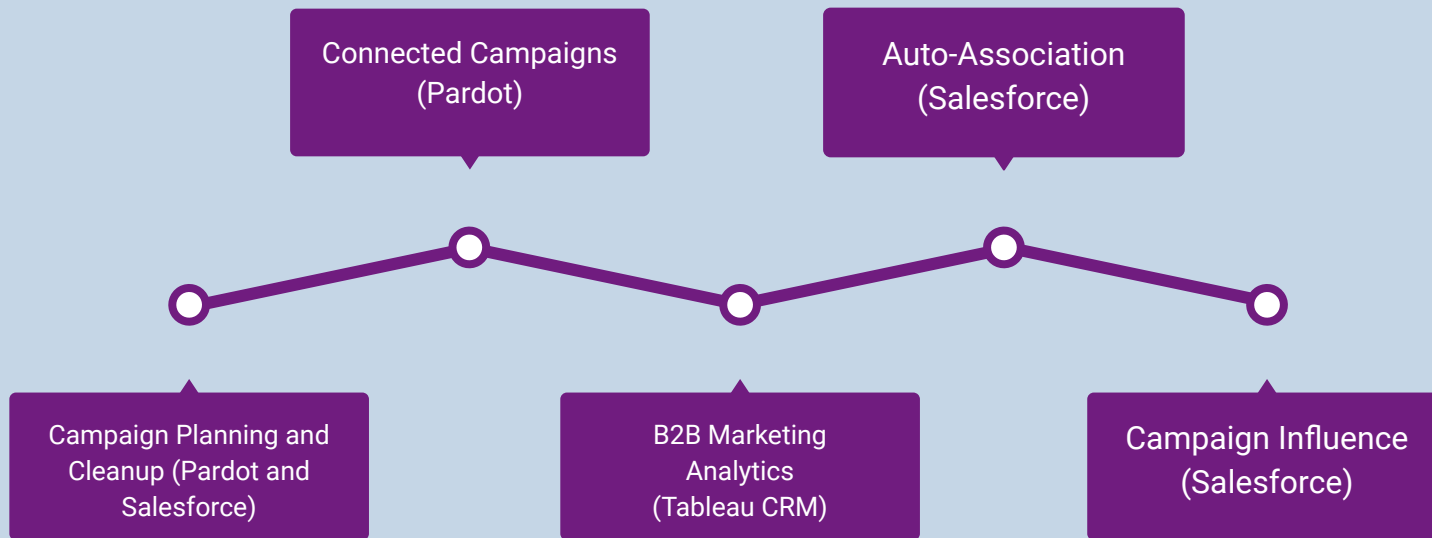
The screenshot shows the 'Campaign Influence Settings' page in a 'SETUP' mode. It has a 'Help for this Page' link. Below the title, there's a brief description: 'Campaign Influence allows marketers to measure and report on multiple campaigns that have influenced a single opportunity. Influential campaigns can be associated to opportunities manually or automatically.' There are 'Save' and 'Cancel' buttons. The main content is divided into two sections: 'Campaign Influence' and 'Additional Campaign Influence Models'. Both sections have radio buttons for 'Enabled' and 'Disabled'. The 'Enabled' option is selected in both. The 'Additional Campaign Influence Models' section includes a detailed note about the requirements for using these models, which is highlighted by a large arrow pointing to the explanatory text below.

Note: In order to use Additional Campaign Influence Attribution Models, Customer is required to have and maintain each of the following: (i) a minimum of one Lightning Sales Cloud Professional, Enterprise, Unlimited or Performance Edition subscription or Lightning CRM Professional, Enterprise, Unlimited or Performance Edition subscription and (ii) a Pardot Pro, Pardot Enterprise, or Pardot Ultimate subscription.

- Current: Growth, Plus, Advanced and Premium
- Legacy: Standard, Pro, Ultimate, Enterprise
- You have to ask for the upgrade



Setup Roadmap



What do we Need?

Contributing Elements


- Pardot
 - Connected Campaigns
 - Add to CRM Campaign Actions
- Salesforce Campaigns
 - Custom Fields/Record Types (Recommended)
 - Campaign Members
 - Custom Campaign Member Statuses
- Influence Settings
 - Time
 - Rules
 - Models
- Opportunities
 - Contact Roles (less reliance on conversion)
- Related Lists
 - Campaigns
 - Opportunities
 - Leads
 - Contacts
 - Accounts
- Reporting



Salesforce Campaigns

Pardot Makes Salesforce Campaigns Truly Useful

- Activating *Connected Campaigns* forces you to use them!
- Do (Always) Create Custom Member Statuses
 - Build a library of Standard statuses that everyone can agree on
- The Responded Checkbox is your friend

 Campaign Member Statuses (2)			
2 items • Sorted by Member Status • Updated a few seconds ago			
	Member Status ↑	Is Default	Responded
1	Responded	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>

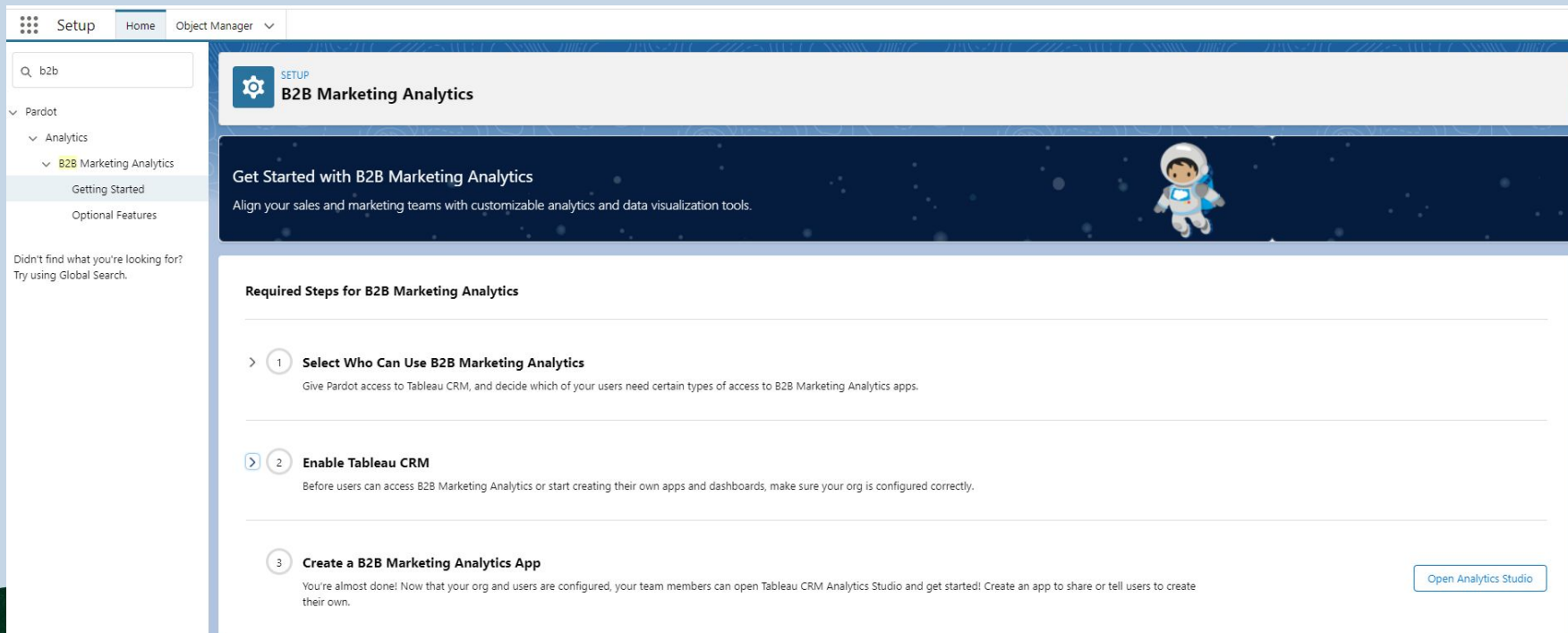
Salesforce Campaign Filtering

How do you want to organize?

- The Key with Campaign influence and Reporting is **Filtering**
- You can create **custom fields** on Campaigns
 - Useless for Pardot (today)
 - *Essential* for Influence and Reporting
- You can create record types for campaigns



Setup B2B Marketing Analytics



The screenshot shows the Salesforce Setup interface for B2B Marketing Analytics. The left sidebar contains a search bar with 'b2b' and a navigation menu with 'Pardot', 'Analytics', and 'B2B Marketing Analytics' (sub-items: 'Getting Started', 'Optional Features'). The main content area has a header 'B2B Marketing Analytics' and a hero section with the text 'Get Started with B2B Marketing Analytics' and 'Align your sales and marketing teams with customizable analytics and data visualization tools.' Below this is a section titled 'Required Steps for B2B Marketing Analytics' with three numbered steps: 1. 'Select Who Can Use B2B Marketing Analytics', 2. 'Enable Tableau CRM', and 3. 'Create a B2B Marketing Analytics App'. A button 'Open Analytics Studio' is located at the bottom right.

Setup Home Object Manager

Q b2b

Pardot

Analytics

B2B Marketing Analytics

Getting Started

Optional Features

Didn't find what you're looking for?
Try using Global Search.

SETUP
B2B Marketing Analytics

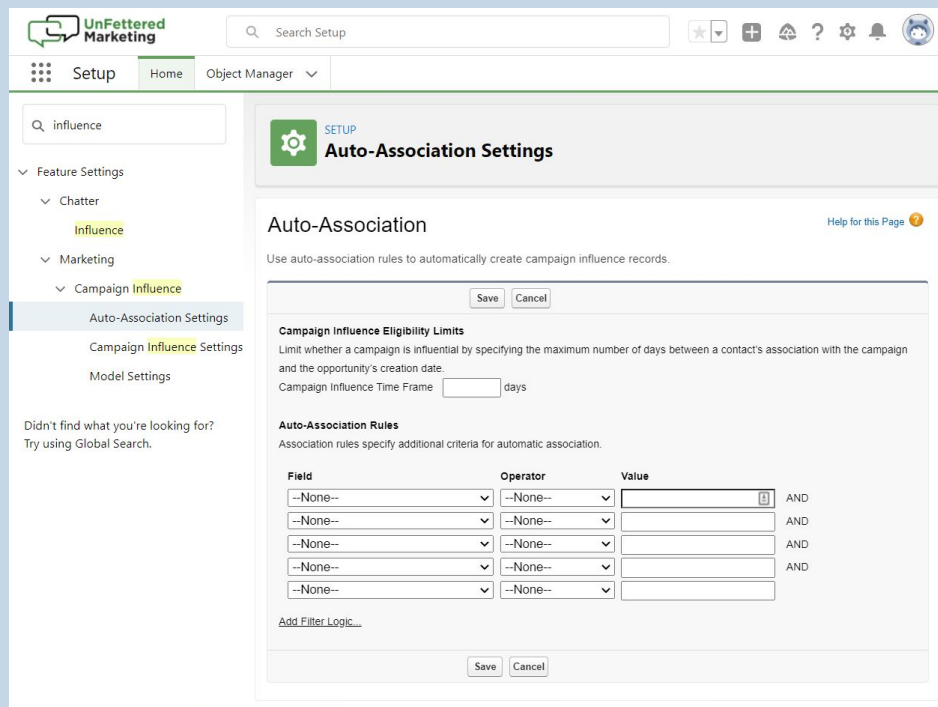
Get Started with B2B Marketing Analytics
Align your sales and marketing teams with customizable analytics and data visualization tools.

Required Steps for B2B Marketing Analytics

- 1 **Select Who Can Use B2B Marketing Analytics**
Give Pardot access to Tableau CRM, and decide which of your users need certain types of access to B2B Marketing Analytics apps.
- 2 **Enable Tableau CRM**
Before users can access B2B Marketing Analytics or start creating their own apps and dashboards, make sure your org is configured correctly.
- 3 **Create a B2B Marketing Analytics App**
You're almost done! Now that your org and users are configured, your team members can open Tableau CRM Analytics Studio and get started! Create an app to share or tell users to create their own.

Open Analytics Studio

Auto Association Settings



UnFettered Marketing | Search Setup

Setup Home Object Manager

influence

- Feature Settings
 - Chatter
 - Influence**
- Marketing
 - Campaign Influence**
 - Auto-Association Settings
 - Campaign Influence Settings
 - Model Settings

Didn't find what you're looking for? Try using Global Search.

Auto-Association Settings

Auto-Association [Help for this Page](#)

Use auto-association rules to automatically create campaign influence records.

Save Cancel

Campaign Influence Eligibility Limits
Limit whether a campaign is influential by specifying the maximum number of days between a contact's association with the campaign and the opportunity's creation date.
Campaign Influence Time Frame days

Auto-Association Rules
Association rules specify additional criteria for automatic association.

Field	Operator	Value	
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND

[Add Filter Logic...](#)

Save Cancel



Auto Association: Time +/-

Auto-Association Help for this Page ?

Use auto-association rules to automatically create campaign influence records.

Campaign Influence Eligibility Limits

Limit whether a campaign is influential by specifying the maximum number of days between a contact's association with the campaign and the opportunity's creation date.

Campaign Influence Time Frame days

Auto Association: Rules

Auto-Association Rules
Association rules specify additional criteria for automatic association.

Field	Operator	Value			
--None--	▼	--None--	▼	<input type="text" value=""/>	AND
--None--	▼	--None--	▼	<input type="text" value=""/>	AND
--None--	▼	--None--	▼	<input type="text" value=""/>	AND
--None--	▼	--None--	▼	<input type="text" value=""/>	AND
--None--	▼	--None--	▼	<input type="text" value=""/>	

[Add Filter Logic...](#)

Make a plan!


Rule Strategies:

- Record Types
- Member Status
- “Responded” = True
- Custom Campaign Fields
- Hierarchy Based

This filters not only what is considered influential, but what appears in your campaign influence reports



Basic Setting: Enabled | Enabled

 **SETUP**
Campaign Influence Settings

Campaign Influence Help for this Page

Campaign Influence allows marketers to measure and report on multiple campaigns that have influenced a single opportunity. Influential campaigns can be associated to opportunities manually or automatically.

Save Cancel

Campaign Influence

Enabled
Use the opportunity detail page or the API to create, retrieve, update, or delete campaign influence records.

Disabled
Disabling campaign influence after it's been enabled will remove existing campaign influence records.

Additional Campaign Influence Models

Enabled
Make additional models available to address specific use cases, such as first-touch, last-touch, and even distribution. Note: In order to use Additional Campaign Influence Attribution Models, Customer is required to have and maintain each of the following: (i) a minimum of one Lightning Sales Cloud Professional, Enterprise, Unlimited or Performance Edition subscription or Lightning CRM Professional, Enterprise, Unlimited or Performance Edition subscription and (ii) a Pardot Pro, Pardot Enterprise, or Pardot Ultimate subscription.

Disabled
Limit models to the default Primary Campaign Source Model and custom models. The Primary Campaign Source Model creates campaign influence records for only the campaign designated as the primary campaign source on an opportunity.

Save Cancel

Model Settings

Multiple Models Can Be Active at Once

SETUP **Model Settings**

Campaign Influence Model Setup [Help for this Page](#)

New Attribution Model

Action	Name	Default Model i	Locked i	Active i	Record Preference i	Last Modified By	Last Modified On
Edit	Primary Campaign Source Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Records	Bill Fetter	9/23/2021
Edit	First Touch Model	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Records with >0% Attribution	Bill Fetter	9/23/2021
Edit	Last Touch Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Records with >0% Attribution	Bill Fetter	9/22/2021
Edit	Even Distribution Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Records with >0% Attribution	Bill Fetter	9/22/2021

Default is What You See.

Active is what you can report on!

Influence is...

An Opportunity Contact Role (Presence)

An Opportunity (Time)

A Campaign Member (Time + Filtering)



A Moment on Contact Roles...

 **Contact Roles (0)**

[Add Contact Roles](#)

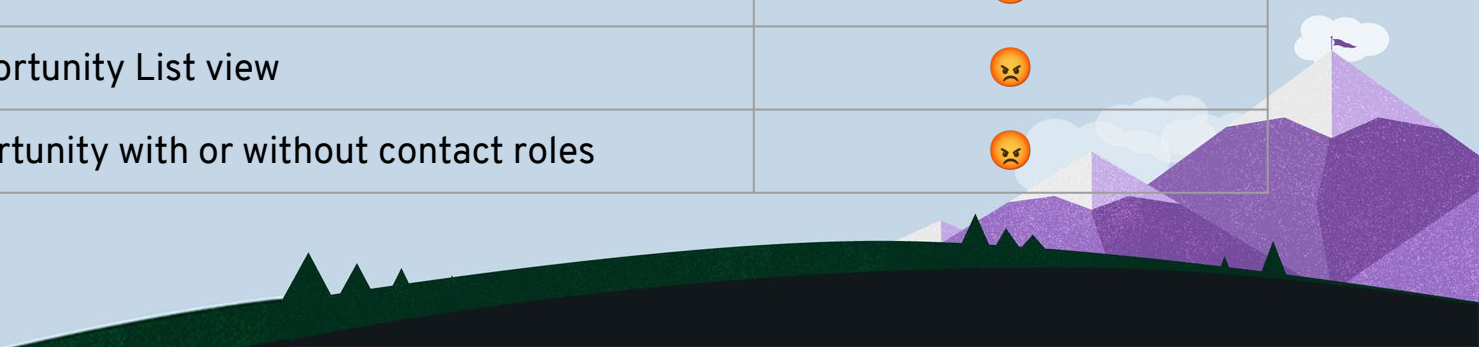
[Edit Contact Roles](#)

No Role, No Influence!



Getting Contact Roles Automatically...

Method of Opportunity Creation	Automatic Contact Role
Convert from Lead & Create Opportunity at Same time	😊
Convert from Lead & Create Opportunity Later	😞
Create from Contact	😊
Create from Account	😡
Create from Opportunity List view	😡
Clone from Opportunity with or without contact roles	😡



Influence Starts in Pardot

+ Completion Actions



Add to CRM Campaign



with status



Refresh

Data to

Only Pardot campaigns that are connected to a CRM campaign appear. To connect a campaign, go to the Campaigns tab.

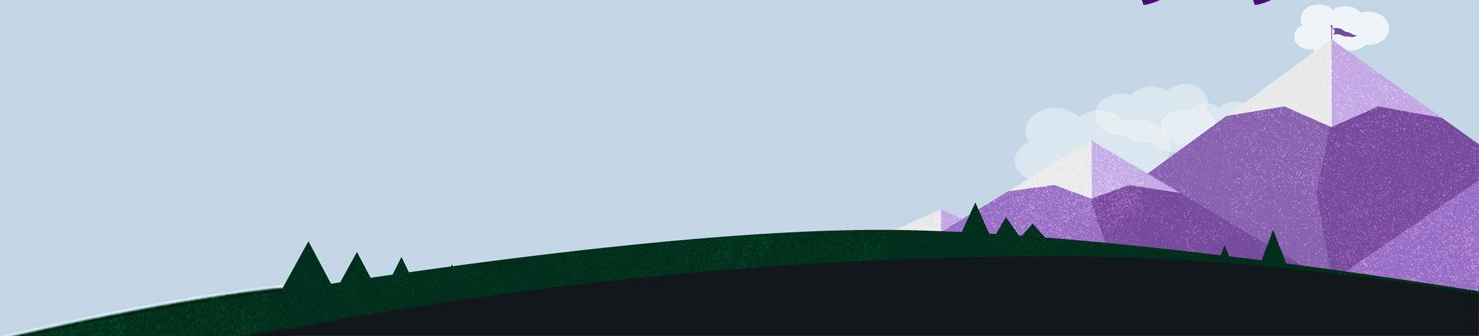
*Adding to a CRM campaign does not sync a prospect to salesforce...
...But the action is still remembered
To Update a member status, also add to CRM Campaign...*



“

The First Associated date is the same as the Campaign Member created date.

”



Campaign Time Calculation

Opportunity Create Date - Campaign Member Create Date = Must be *Less Than* Time Window

Time Frame	30 Days
Opportunity Create Date	Oct 30
Campaign Member Create Date	Oct 10
Difference Between Dates	20 Days

Time Frame	30 Days
Opportunity Create Date	Oct 30
Campaign Member Create Date	Dec 10
Difference Between Dates	-41 Days

Time Frame	30 Days
Opp Create Date	Jan 1
Opp Close Date	Aug 1
Campaign Member Create Date	Jul 13 (-194)!!



Campaign Member Creation Sequence

10/1 10/2 10/3 10/4 10/5 10/6 10/7

Conversion Event (ex: Download)



Add to CRM Campaign 1



Sync to Salesforce



Campaign 1 Member Create Date



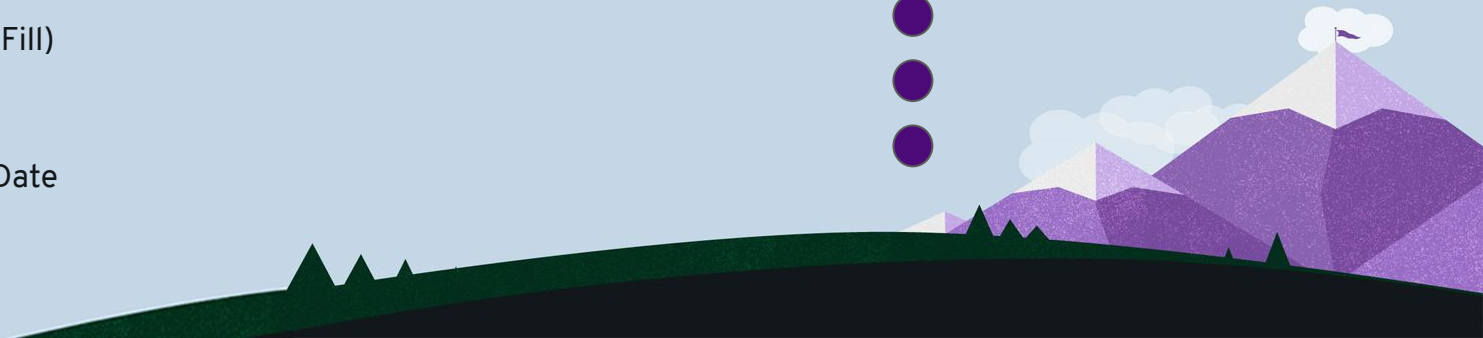
Significant Activity (ex: Form Fill)



Add to CRM Campaign 2



Campaign 2 Member Create Date



Campaign Member Creation Sequence

10/1 10/2 10/3 10/4 10/5 10/6 10/7

Conversion Event



Add to CRM Campaign 1



Sync to Salesforce



Campaign 1 Member Create Date



Significant Activity



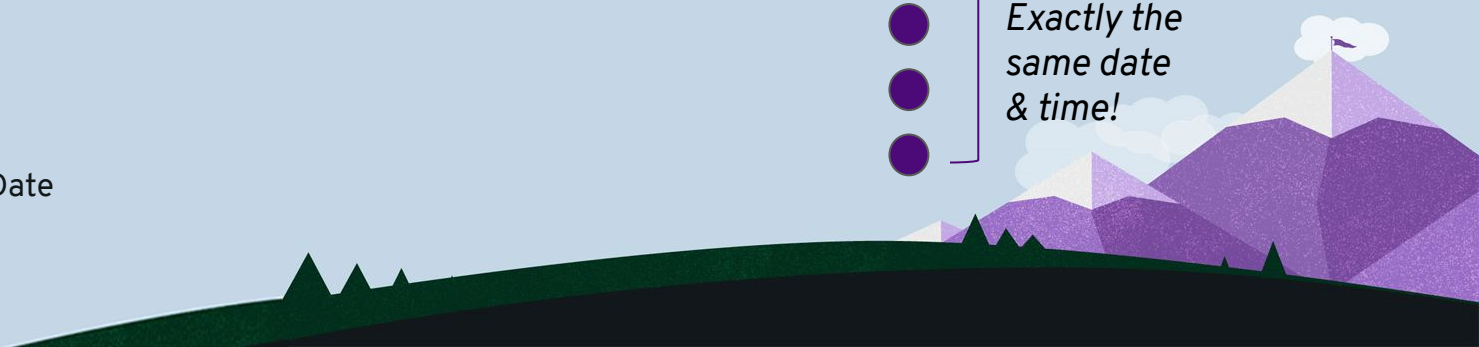
Add to CRM Campaign 2



Campaign 2 Member Create Date

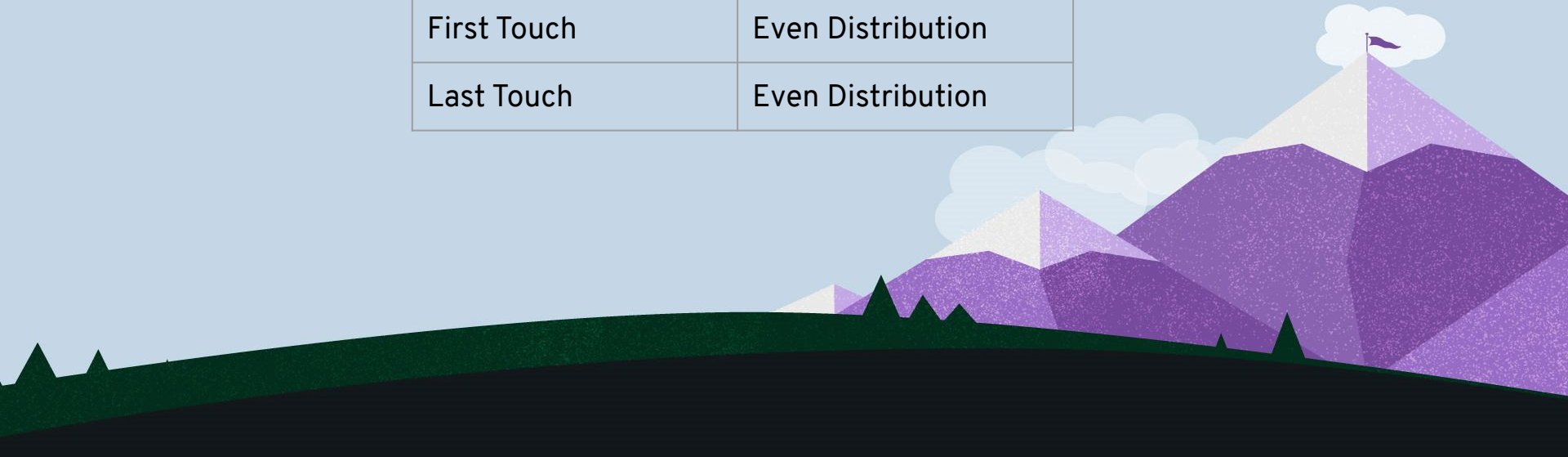


*Exactly the
same date
& time!*



What if there's a tie?

Model	Result
Even Distribution	Even Distribution
First Touch	Even Distribution
Last Touch	Even Distribution



“

Which Campaign Members and which Actions do you want to count toward opportunity influence?

”



Salesforce Campaign Hierarchy

How do you want to organize?

- You can use it, but be careful!
 - 2-3 Levels Maximum
- Gotchas with Campaign Influence and Hierarchies



Hierarchy Vs Influence

Level 1 (Type)

Webinars

Level 2 (Activity)

Webinar 1

Webinar 2

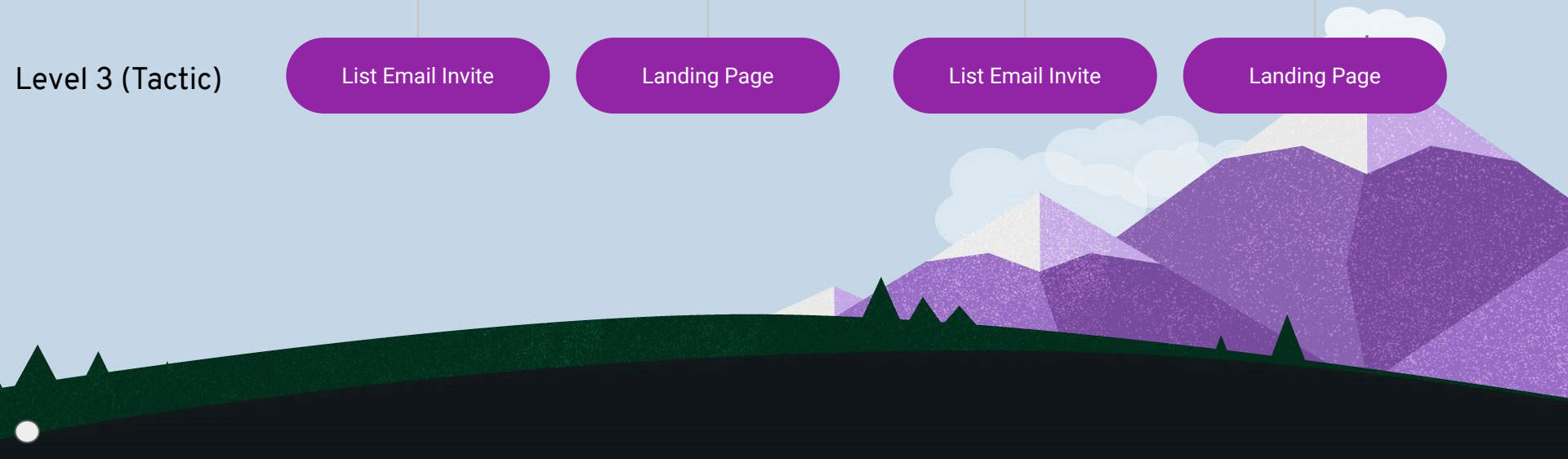
Level 3 (Tactic)

List Email Invite

Landing Page

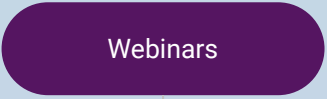
List Email Invite

Landing Page

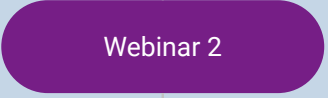
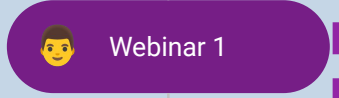


Level 1 (Type)

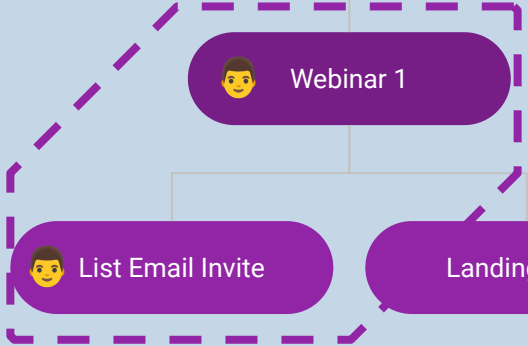
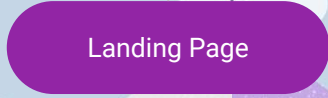
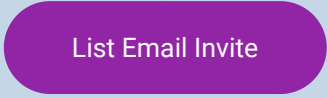
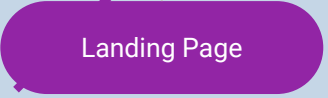
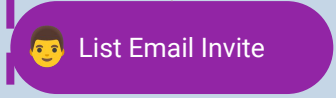
Membership in both
Splits Influence
Between Levels!!



Level 2 (Activity)



Level 3 (Tactic)



What Do These Mean?

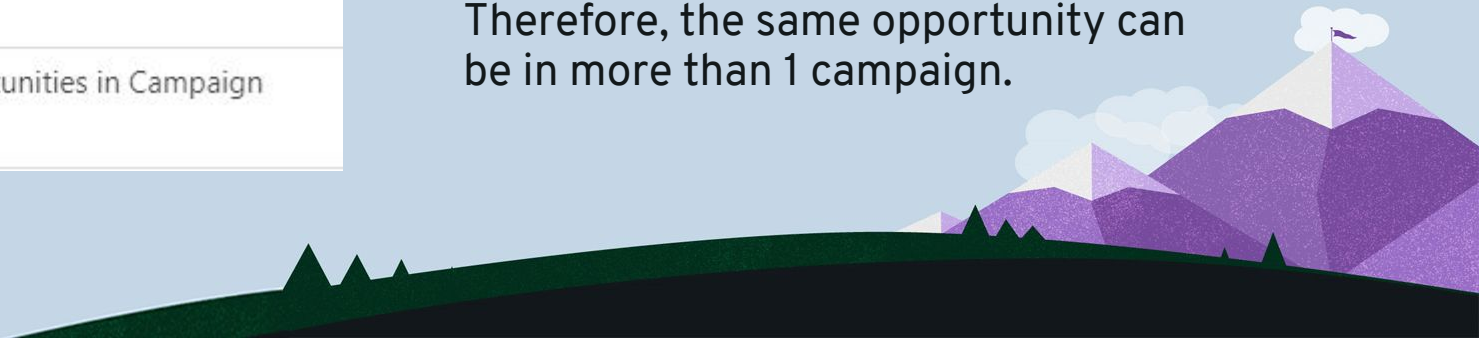
It's not what you think...

Opportunities in Campaign	3
Won Opportunities in Campaign	0
Value Opportunities in Campaign	\$11,250
Value Won Opportunities in Campaign	\$0

Opportunities and #Won are the absolute number.

Value is the sum of **attributed** value, not the **total** value, and if you use even distribution, it floats.

Therefore, the same opportunity can be in more than 1 campaign.



Where to Find Influence

LEADS | CONTACTS | ACCOUNTS | OPPORTUNITIES

Related

Campaign Influence (2)

Monthly Email Newsletter

Contact Name: **Betty Bair**
Influence (%): 50.00%
Revenue Share: \$500.00

Sales Emails

Contact Name: **Betty Bair**
Influence (%): 50.00%
Revenue Share: \$500.00

[View All](#)

Campaign Influence

Influence By Campaign: All Opportunities

Influence By Campaign Type: All Opportunities

Revenue Share

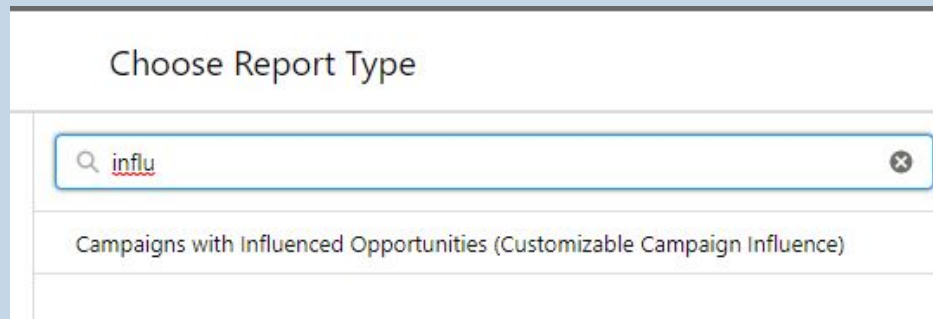
View All

Influence Reporting

Difference with Campaign Reporting

Campaign Reporting can use all your predefined filters on campaigns.

Influence Reporting is already pre-filtered to *influenced opportunities only*, but you can use filters to refine further.

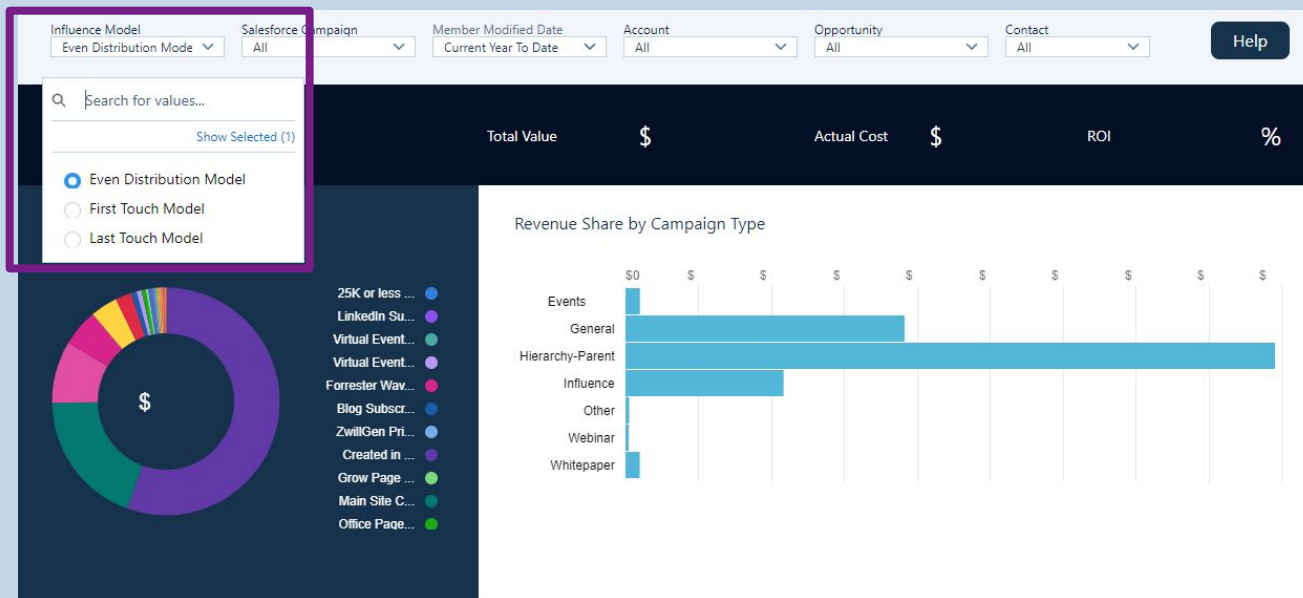


Choose Report Type

Search:

Campaigns with Influenced Opportunities (Customizable Campaign Influence)

Reporting: Tableau CRM Multi-Touch Dashboard



SF Reporting: Campaigns with Influenced Opportunities

	Account Name	Model Name	Influence (%)	Revenue Share
1	Farmers Coop. of Florida	Primary Campaign Source Model	0.00%	\$0.00
1	Farmers Coop. of Florida	Even Distribution Model	100.00%	\$10,000.00
1	Farmers Coop. of Florida	Last Touch Model	100.00%	\$10,000.00
1	Farmers Coop. of Florida	First Touch Model	100.00%	\$10,000.00

Thanks for Dreamin!



billfetter

You can find me on LinkedIn or visit my blog
at unfetteredmarketing.com/blog



Resources

Connected Campaigns Implementation Guide:

https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/pardot_connected_campaigns_implementation_guide.pdf

B2BMA Implementation Guide

https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/pardot_b2bma_implementation_guide.pdf

Salesforce Implementation Guide:

https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/campaign_influence_implementation_guide.pdf

Auto Influence Time Frame Help Article

<https://help.salesforce.com/s/articleView?id=000335526&type=1>

Jen Kasin's Blog Article on Auto-Association:

<https://greenkeydigital.com/campaign-influence-auto-association/>



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