MPAR DREAMIN' by SERCANTE

Learn. Network. Grow.

MParDreamin' 2022

A Salesforce Flow for your Contact Role Woes

Teresa Suan
CRM & Marketing Automation Strategist
Cloudtegic

Max Bradley
CRM & Marketing Automation Strategist
Cloudtegic

Teresa Suan
CRM & Marketing Automation Strategist

Cloudtegic

Max Bradley
CRM & Marketing Automation Strategist

Cloudtegic

A Salesforce Flow for your Contact Role Woes

- What is an Opportunity Contact Role?
- How Contact Roles Work
- How to “Enforce” Contact Role Entry

Special Thanks To Our Sponsors

Title

Platinum

Gold

Silver

Opportunity Contact Role

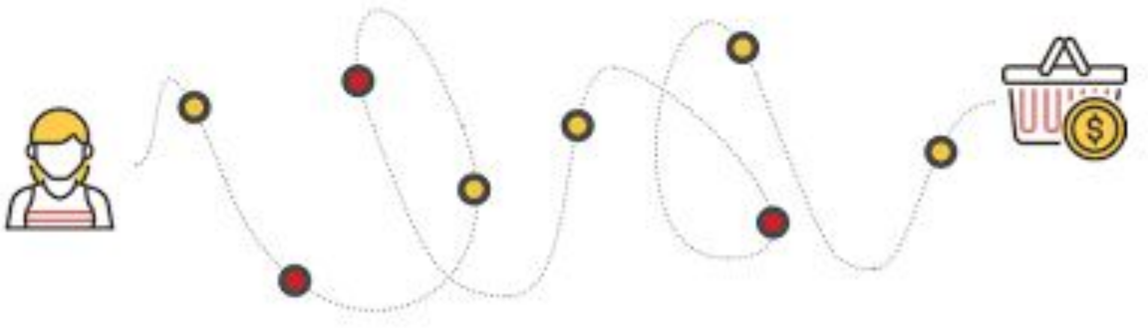
- ❖ What is a Contact Role?
  - ➢ Missing link
- ❖ Why Contact Roles?
  - ➢ Marketing Attribution missed
  - ➢ Demonstrate Marketing Efforts
- ❖ Make sure Contact Roles are used
  - ➢ This is a ‘how-to’ session
- ❖ Contact Roles picks up on Revenue
- ❖ Only path to Multi-Touch Marketing Attribution
- ❖ Marketing and Sales will be aligned

Why do we need Contact Roles?

- ❖ Marketing Attribution
- ❖ Campaign Influence

Marketing Attribution

The practice of evaluating the marketing touchpoints a consumer encounters on their path to purchase.



Campaign Influence Models

- Contacts MUST be Campaign Members
- Contacts MUST be associated to Opportunities using the Contact Role related list
- ‘Campaign Influence’ + ‘Additional Models’ must be enabled and active
- Campaign Influence Models not available in Pardot Growth Edition. Only available in Editions Plus and up

Campaign Influence Models

First Touch Model

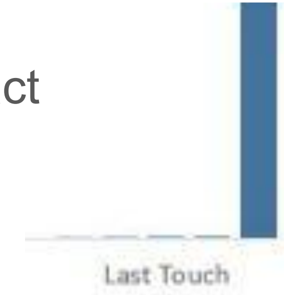
❖ Attributes all Opportunity value to **<u>first</u>** Campaign* that the Contact interacted with

Even Distribution Model

❖ Attributes an even split of the Opportunity dollar amount to ALL Campaigns* that the Contact interacted with

Last Touch Model

❖ Attributes all Opportunity value to **<u>last</u>** Campaign* that the Contact interacted with



Campaign Influence

- Campaign Influence and importance to Marketers
  - At the Opportunity level it allows you to view all of the Campaign touchpoints that contributed to a deal.
  - At the Campaign level you can see influenced Opportunities along with all other relevant information.

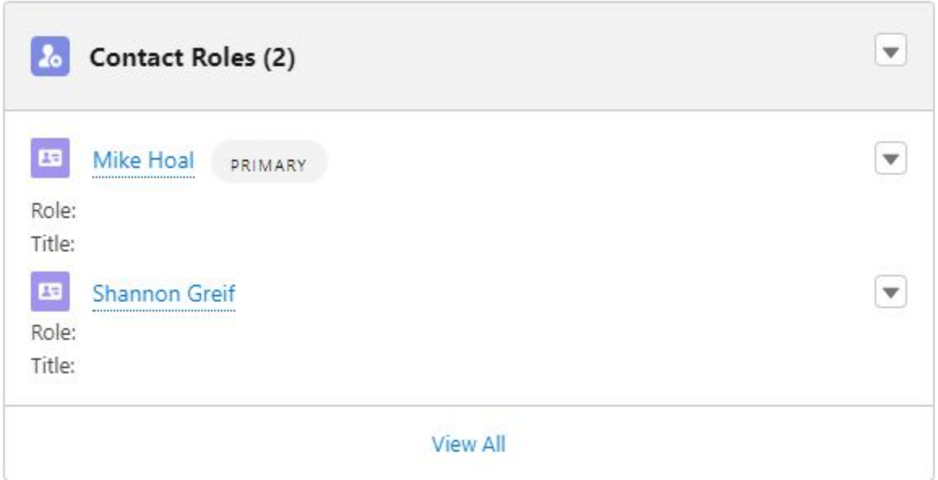
Influenced Opportunities (5)

Opportunity Name	Contact Name	Revenue Share	Amount
GGP, LLC.-	Shannon Greif	$1,952.36	$1,952.36
Cloudtegic-	Mike Hoal	$99,999.92	$199,999.84
Edge Emergency Generator		$75,000.00	$75,000.00
Evergreen Builders Supply-	Jody Maxfield	$0.00	$32,154.00
Cloudtegic-	Shannon Greif	$99,999.92	$199,999.84

View All

How Contact Roles Work

- Pardot Prospects are closely connected with their associated Contact record
- Contact records do not have a direct relationship with Opportunities
- To get around this, Salesforce developed an object called ‘Contact Roles’, which creates a link between Contacts and the role they play in an Opportunity.
- Contact Roles are “the bridge” that connects Opportunity records to Contact records



Contact Roles

- **Non-Negotiable**

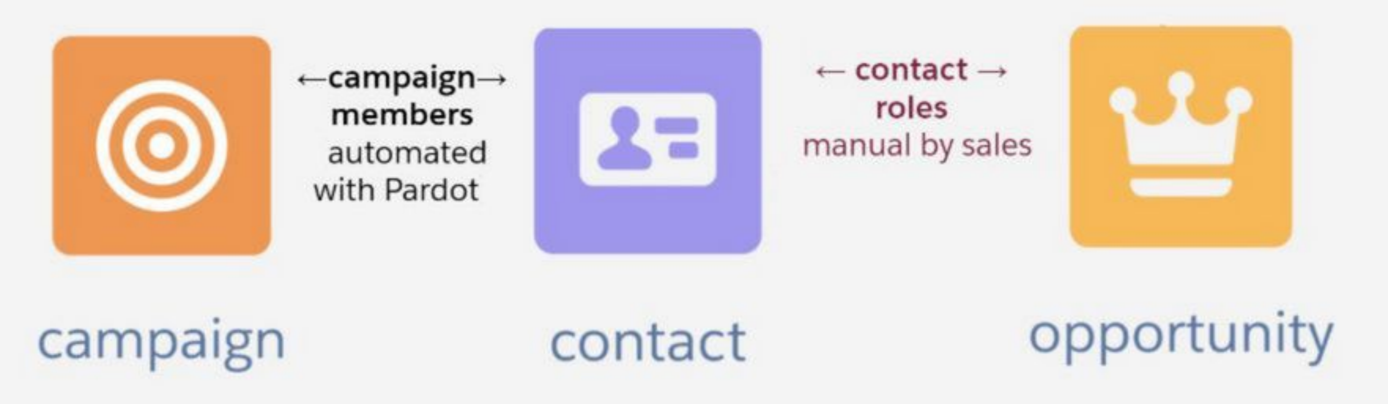
  Must have at least one Contact Role on an Opportunity to see any ROI

- **Sales Team Buy-In**

  Requires a conversation and buy-in from your sales team

- **Option to Automate**

  Can be manual or automated

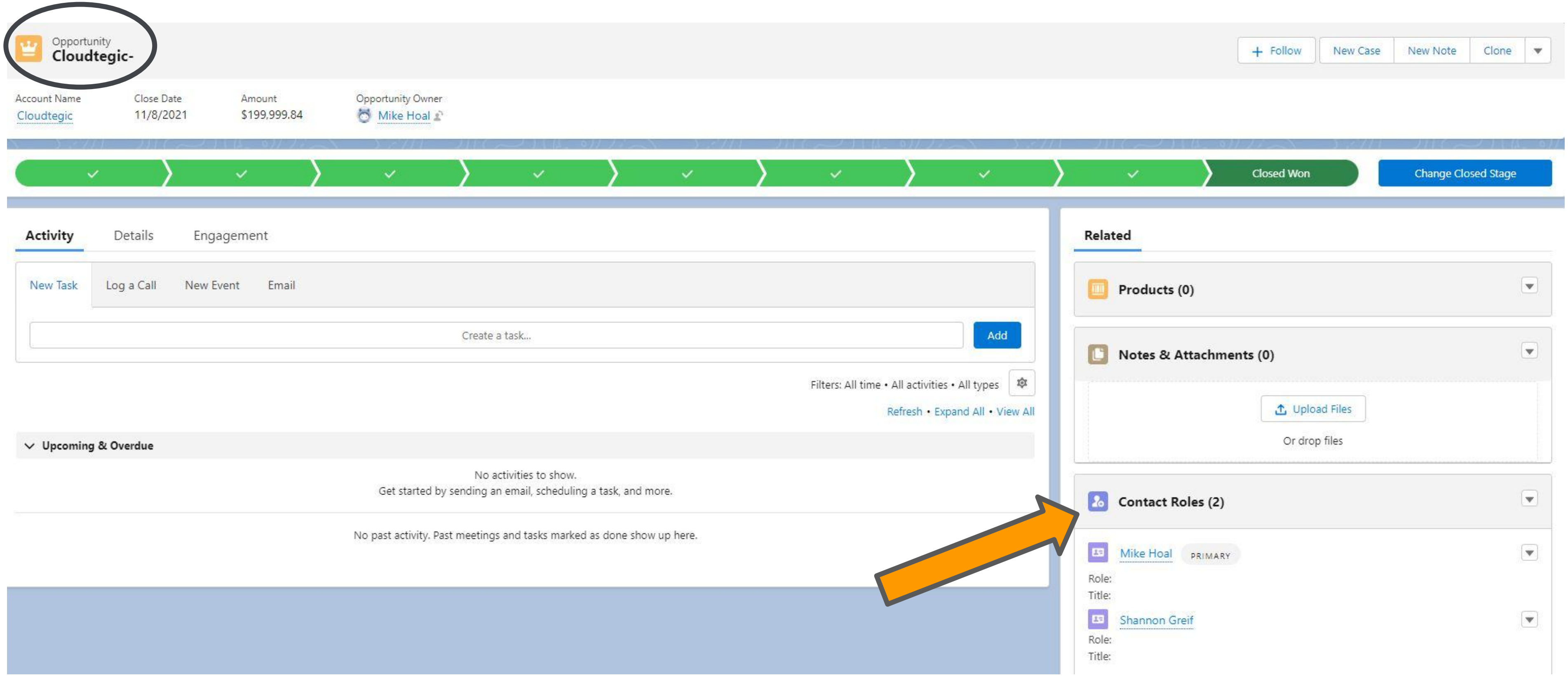


How do we ensure Salesforce Users enter Opportunity Contact Roles?

How do we ensure Salesforce Users enter Opportunity Contact Roles?

Build a Flow and a Validation Rule that makes a Contact Role *required* upon save of an Opportunity record

Contact Roles



Step #1: Create Field

Opportunity Custom Field

Contact Role ID

Back to Opportunity Fields

Validation Rules [0]

Custom Field Definition Detail Edit | Set Field-Level Security | View Field Accessibility | Where is this used?

Field Information

Field Label	Contact Role ID	Object Name	Opportunity
Field Name	Contact_Role_ID	Data Type	Text
API Name	Contact_Role_ID__c		
Description	This is the ID of the Opportunity Contact Role associated with this record		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

*optional to make hidden on page layout

Step #2: Create Validation Rule

Opportunity Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is wr
the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save | Save & New | Cancel

Rule Name: Contact_Role_Required

Active: ☑

Description: This Validation Rule checks to see if the Contact Role is populated.

Error Condition Formula

Example: Discount_Percent__c>0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field | Insert Operator

```
ISPICKVAL(StageName, "Closed Won") && ISBLANK(Contact_Role_ID__c)
```

Functions

-- All F

ABS
ACC
ADD
AND
ASC

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

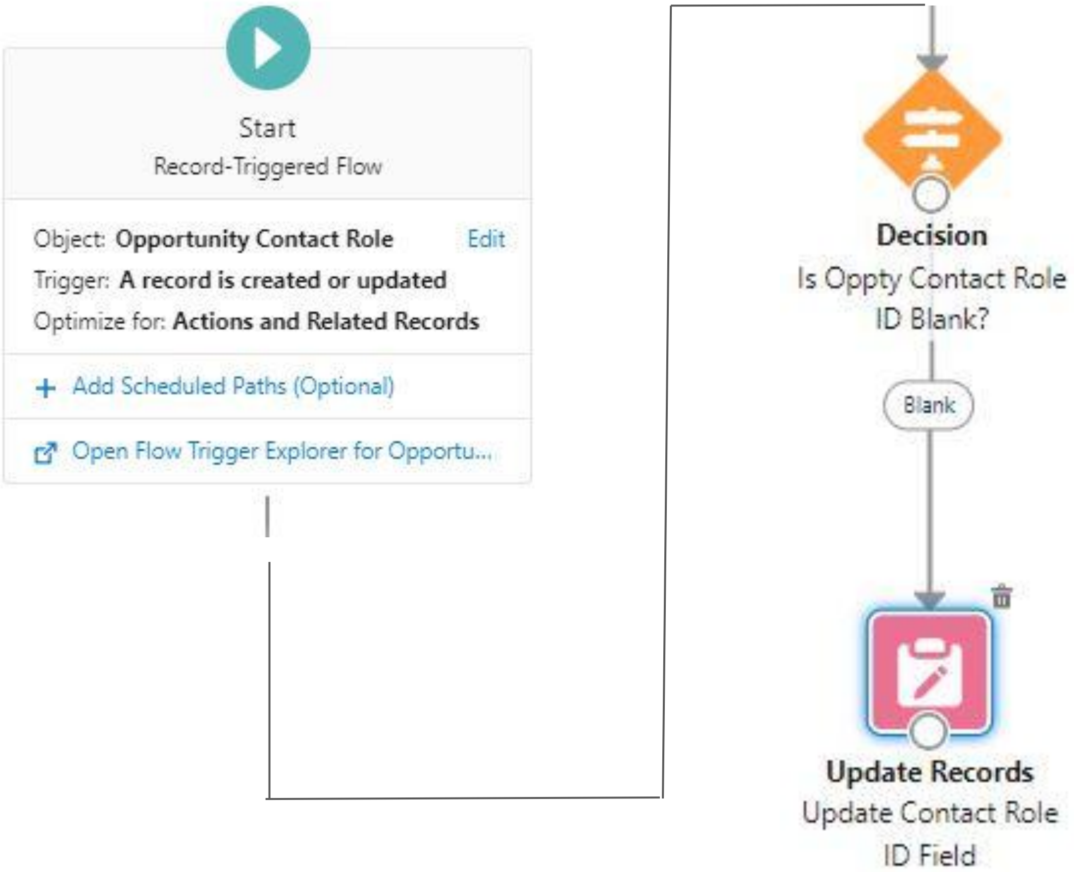
Error Message: Please provide a Contact Role before saving this Opportunity record

Error: You must enter a value

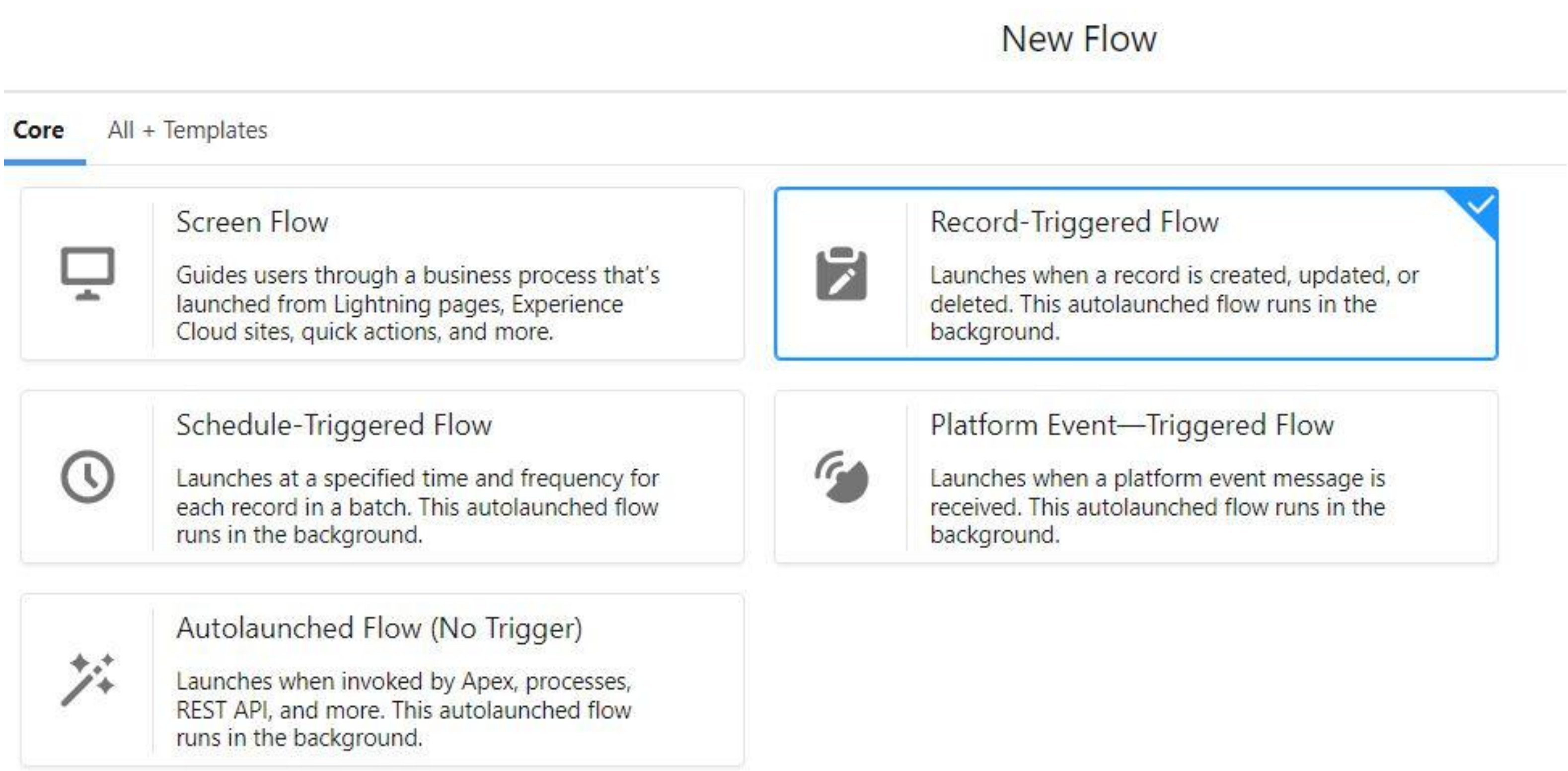
This error message can either appear at the top of the page or below a specific field on the page

*optional to set stage for validation rule

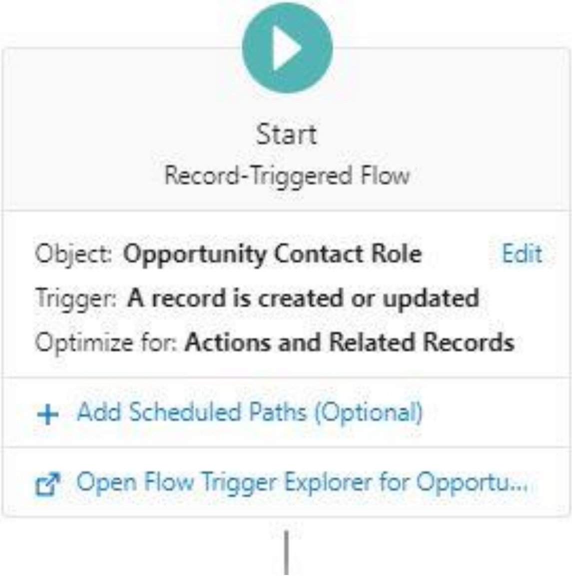
Step #3: Create Record-Triggered Flow

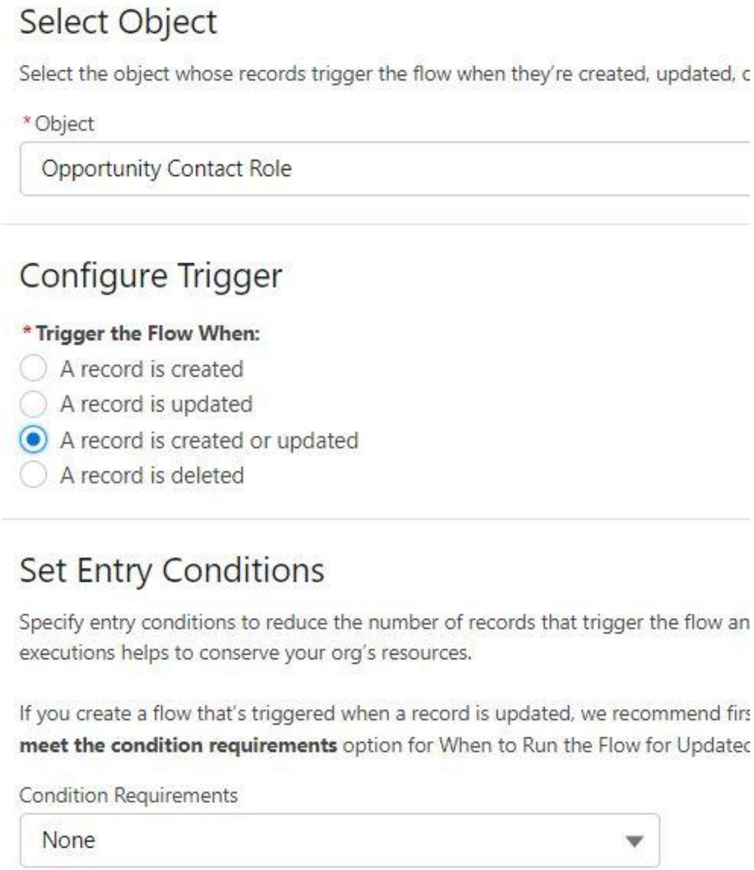


Step #3: Create Record-Triggered Flow

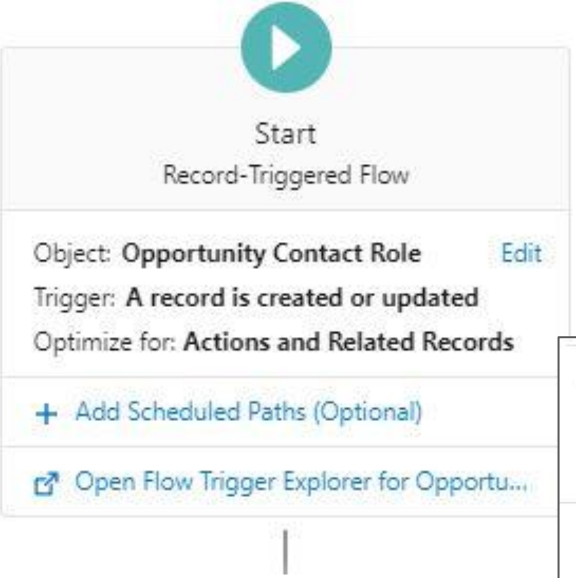


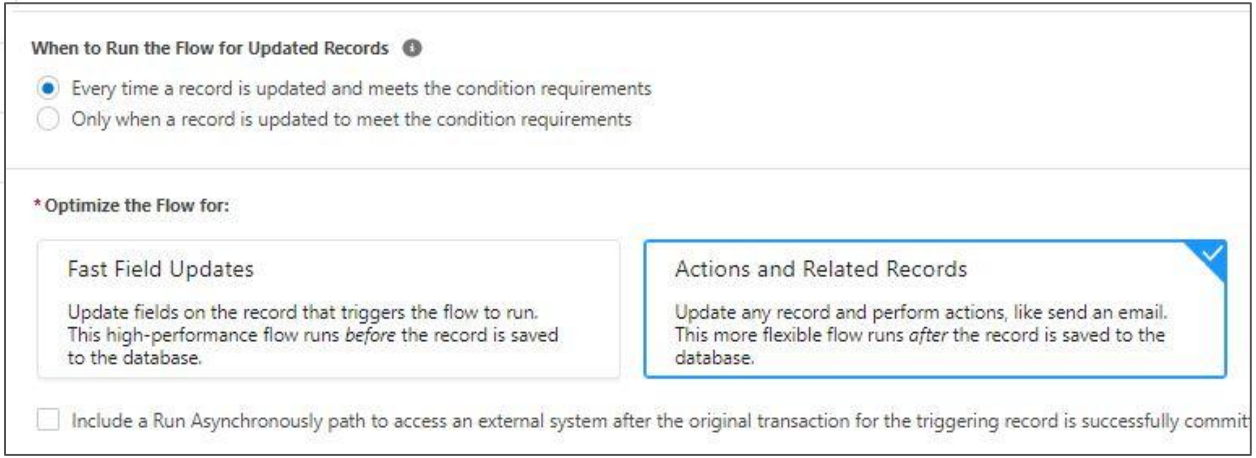
Step #3: Create Record-Triggered Flow



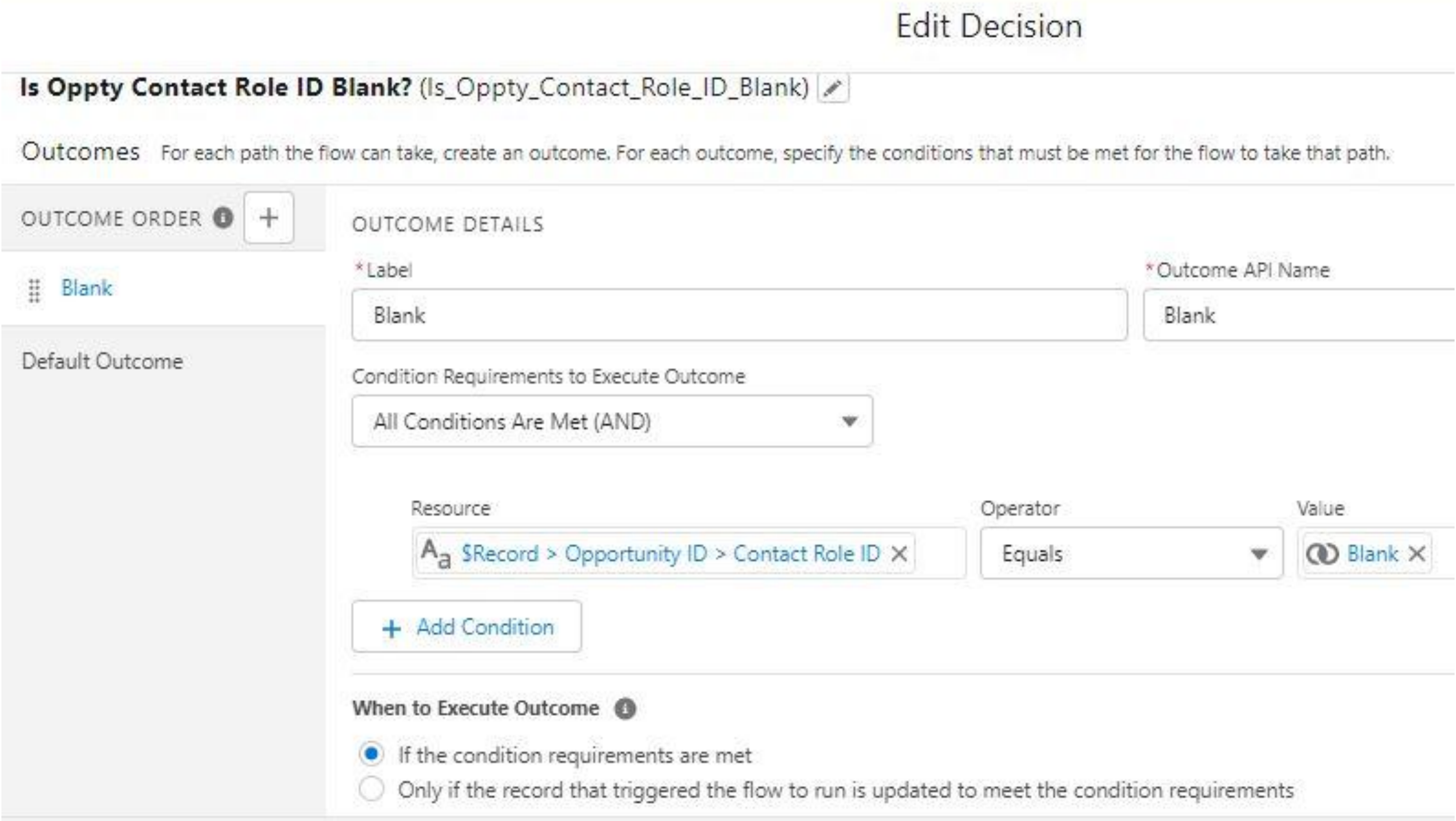


Step #3: Create Record-Triggered Flow





Step #3: Create Record-Triggered Flow



Step #3: Create Record-Triggered Flow

New Update Records

Update Salesforce records using values from the flow.

* Label

Update Contact Role ID Field

* API Name

Update_Contact_Role_ID_Field

Description

This updates the Contact Role ID field in the Opportunity with the Opportunity Contact Role ID

*** How to Find Records to Update and Set Their Values**

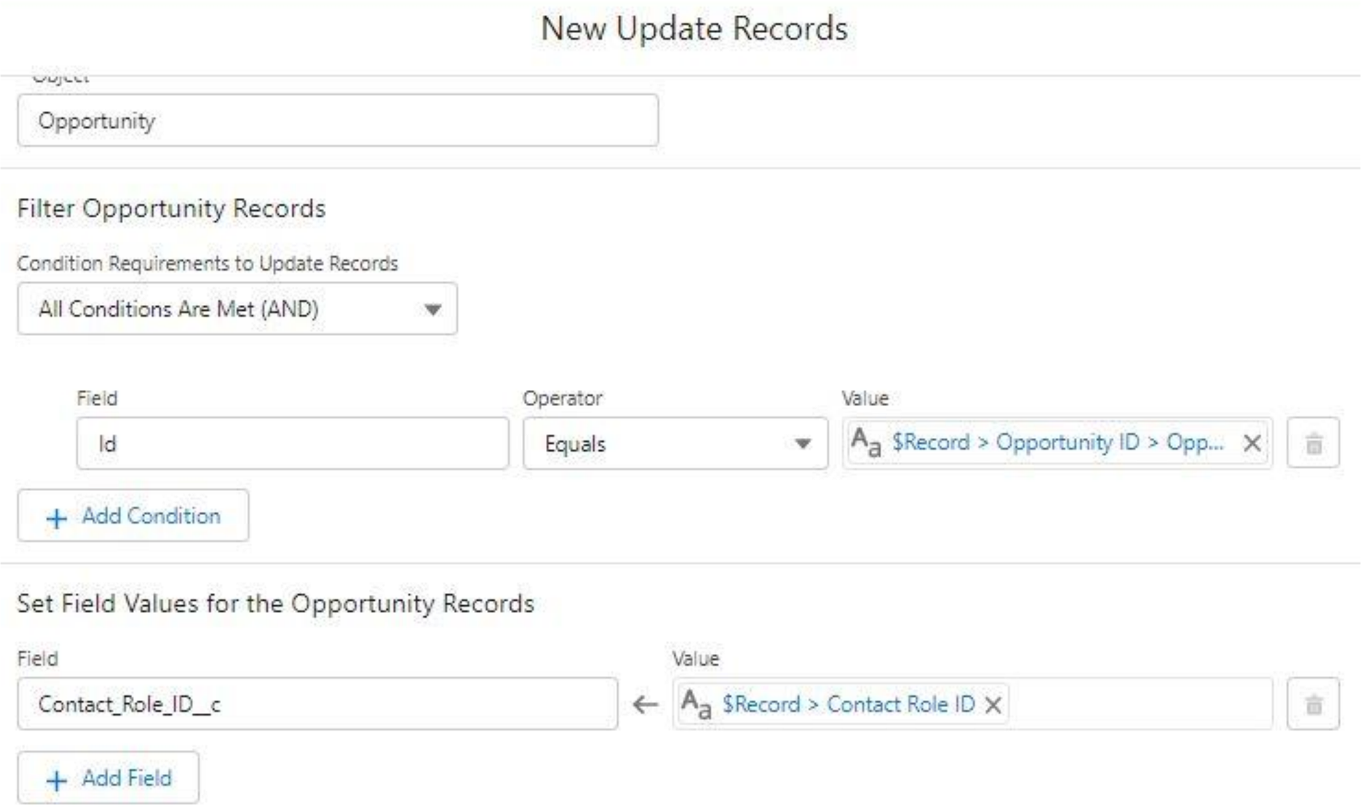
- ○ Use the opportunity contact role record that triggered the flow
- ○ Update records related to the opportunity contact role record that triggered the flow
- ○ Use the IDs and all field values from a record or record collection
- ● Specify conditions to identify records, and set fields individually

Update Records of This Object Type

* Object

Opportunity

Step #3: Create Record-Triggered Flow



Step #3: Create Record-Triggered Flow

Flow Label

Flow Detail

Edit | Open | Run | Delete

Flow Label	Contact Role Flow	Flow API Name	Contact_Role_Flow
Description	When an Opportunity Contact Role is created or updated, this flow looks for the if the {!$Record.Opportunity.Contact_Role_ID_c} is blank. If so, it will update the Contact_Role_ID_c field with the associated Opportunity Contact Role ID. A Validation Rule can be used in conjunction with this on the Opportunity object to check for if the Contact_Role_ID_c field is blank and alert the user to add an Opportunity Contact Role.	Namespace Prefix	
		Type	Autolaunched Flow
Environments	Default	URL	/flow/Contact_Role_Flow
Active Version		Activated/Deactivated By	
Trigger	Record—Run After Save	Created By	
Modified By			

Demo

Considerations...

- ❖ Select Opportunity Stages
- ❖ User Training
- ❖ Best Practice - Multiple Contact Roles

Special Thanks To Our Sponsors

Title

SERCÂNTE salesforce

Platinum

DESELECT stensul tray.io

Gold

FormAssembly LeanData STACK MOXIE THE SPOT FOR PARDOT by SERCANTE

Silver

MarketingOps Goldcast THE SPOT FOR PARDOT JOBS GREENKEY FIONTA

Questions?

Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

Teresa Suan
teresa@cloudtegic.com

Max Bradley
max@cloudtegic.com

Resources

https://www.salesforceben.com/the-drip/4-ways-to-create-salesforce-contact-roles-and-get-accurate-campaign-influence-reporting/

https://www.linkedin.com/pulse/everything-marketing-admin-needs-know-salesforce-schneider-mba

https://www.salesforceben.com/the-drip/introduction-to-contact-roles-pardot/

https://www.salesforceben.com/the-drip/introduction-to-contact-roles-pardot/

Right click on each image to replace it with your ideal image

Title

Optional description

Title

Optional description

Title

Optional description

MAR DREAMIN'
by SERCANTE

MAR DREAMIN'
by SERCANTE

Step 1

Step 2

Step 3

Step 4

Step 1

Step 2

Step 3

Welcome Speakers!

The MarDreamin' Team would like to thank you for your participation in this incredible event. It is because of you that we are able to provide a global community of Marketers with the best tips and tricks in the world of Salesforce and marketing automation.

Sharing our knowledge is one of the key goals for this event. We understand that by doing so we are growing the community which ultimately means growing the "pie" - and that means more opportunities for everyone. Whether you're joining us from California, Spain or even Australia we welcome you to this event and hope you share our enthusiasm.

Again, thank you for your time and for sharing your gift with others.

You're all incredible trailblazers!

If you have any questions please don't hesitate to reach out to us.

Branding

<u>FONTS</u>
Please stick to the following fonts when designing your presentation

Open Sans
This font is used in the body and subtitles. For body text select 14px (or as close as possible - adjust as needed); for subtitles select 18px; normal font-weight

Overpass
This font is used for headers. For slide headers select 30px; bold font-weight

Arial
This font can be used to substitute either font should they not be available to the presenter(s)
Please follow attributes listed above

<u>COLORS</u>
Please stick to the following colors when designing your presentation

HEX Color Codes (*As Displayed in Google Sheets*)

Dark Purple - #4AOA77FF

Violet Purple - #7A27B7FF

Teal - #5AC8CFFF

Black - #000000

Charcoal - #12171A

White - #FFFFFF

Branding

<u>Assets</u>

Please use the following assets as you see fit through your presentation.

MPAR DREAMIN'
by SERCANTE

Right click on each image to replace it with your ideal image

Learn. Network. Grow.

MParDreamin' 2022

Session Title

Speaker Full Name

Title, Company

Use this slide if you are presenting on your own