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MParDreamin' 2022

A Salesforce Flow for your Contact Role Woes

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A Salesforce Flow for your Contact Role Woes

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

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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?

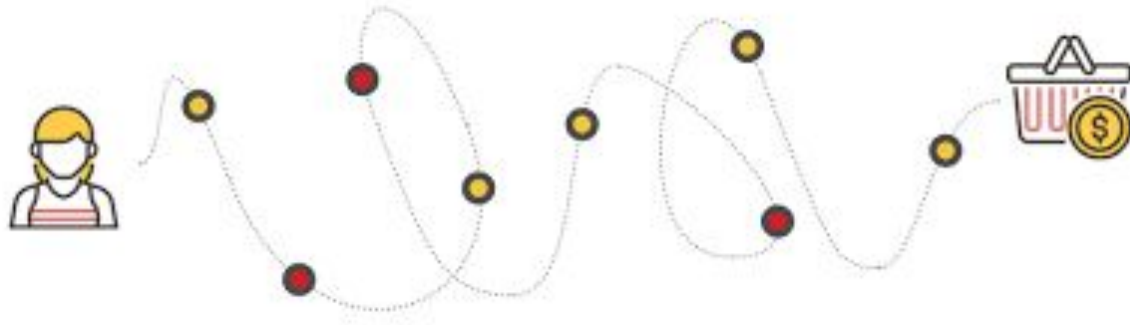


- ❖ Marketing Attribution
- ❖ Campaign Influence



Marketing Attribution

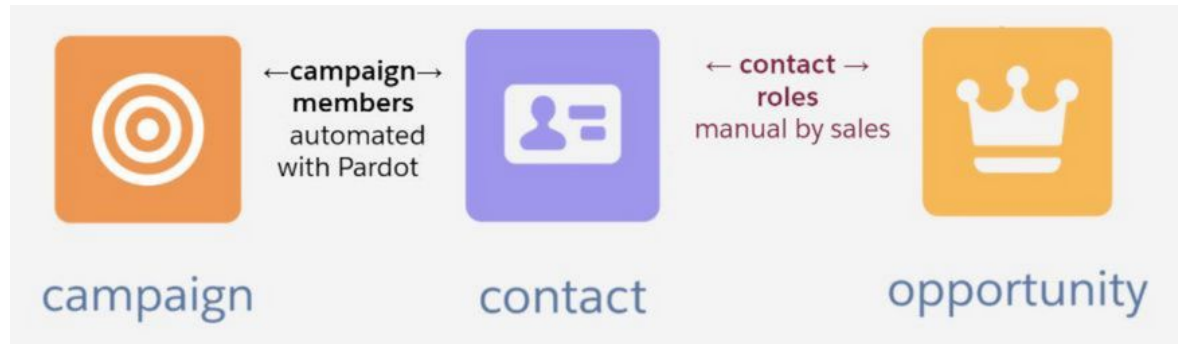
The practice of evaluating the marketing touchpoints a consumer encounters on their path to purchase.



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 **first** 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 **last** Campaign* that the Contact interacted with



Campaign Influence



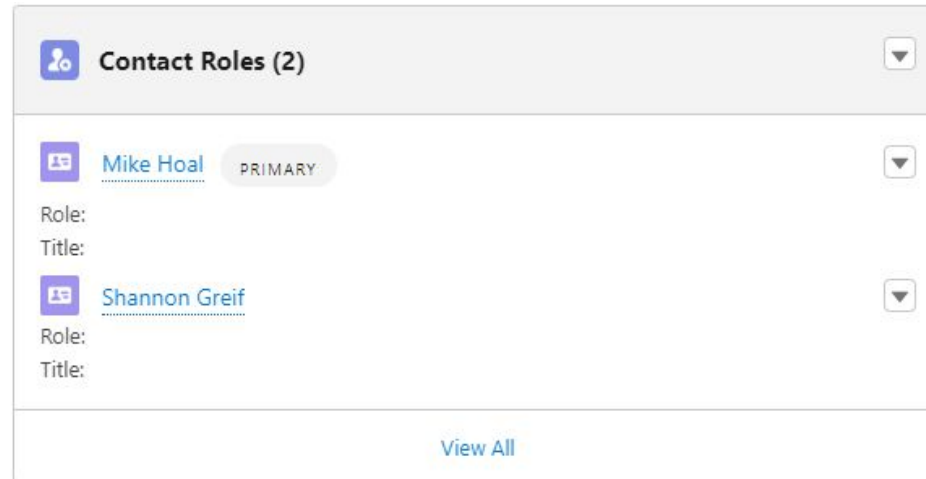
- ❖ Campaign Influence and importance to Marketers
 - At the Opportunity level it allows you to view all of the Campaign touchpoints that contributed to a deal.
 - At the Campaign level you can see influenced Opportunities along with all other relevant information.

Influenced Opportunities (5)			
Opportunity Name	Contact Name	Revenue Share	Amount
GGP, LLC-	Shannon Greif	\$1,952.36	\$1,952.36
Cloudtegit-	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
Cloudtegit-	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**

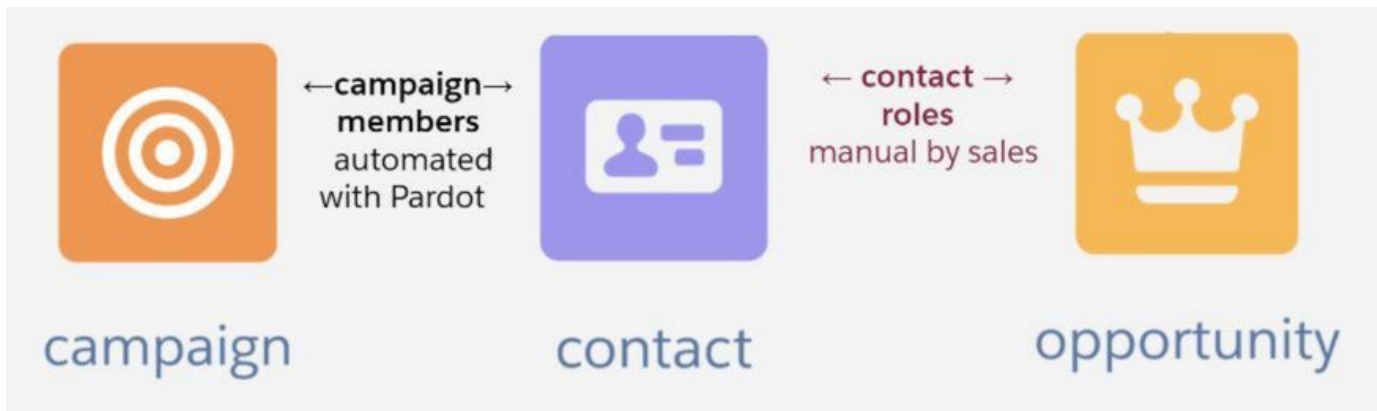
Must have at least one Contact Role on an Opportunity to see any ROI

- ❖ **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



[+ Follow](#) [New Case](#) [New Note](#) [Clone](#) [▼](#)

Account Name [Cloudtegic](#) Close Date 11/8/2021 Amount \$199,999.84 Opportunity Owner [Mike Hoal](#)



Activity Details Engagement

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Create a task...

Add

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

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[Contact Roles \(2\)](#)

[Mike Hoal](#) PRIMARY

Role:

Title:

[Shannon Greif](#)

Role:

Title:



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	<u>Opportunity</u>
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 what the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

SaveSave & NewCancel

Rule Name

Active☒

Description

Error Condition Formula

Example: [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

Functions

-- All Functions
ABS
ACC
ADD
AND
ASC

Error Message

Example:

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

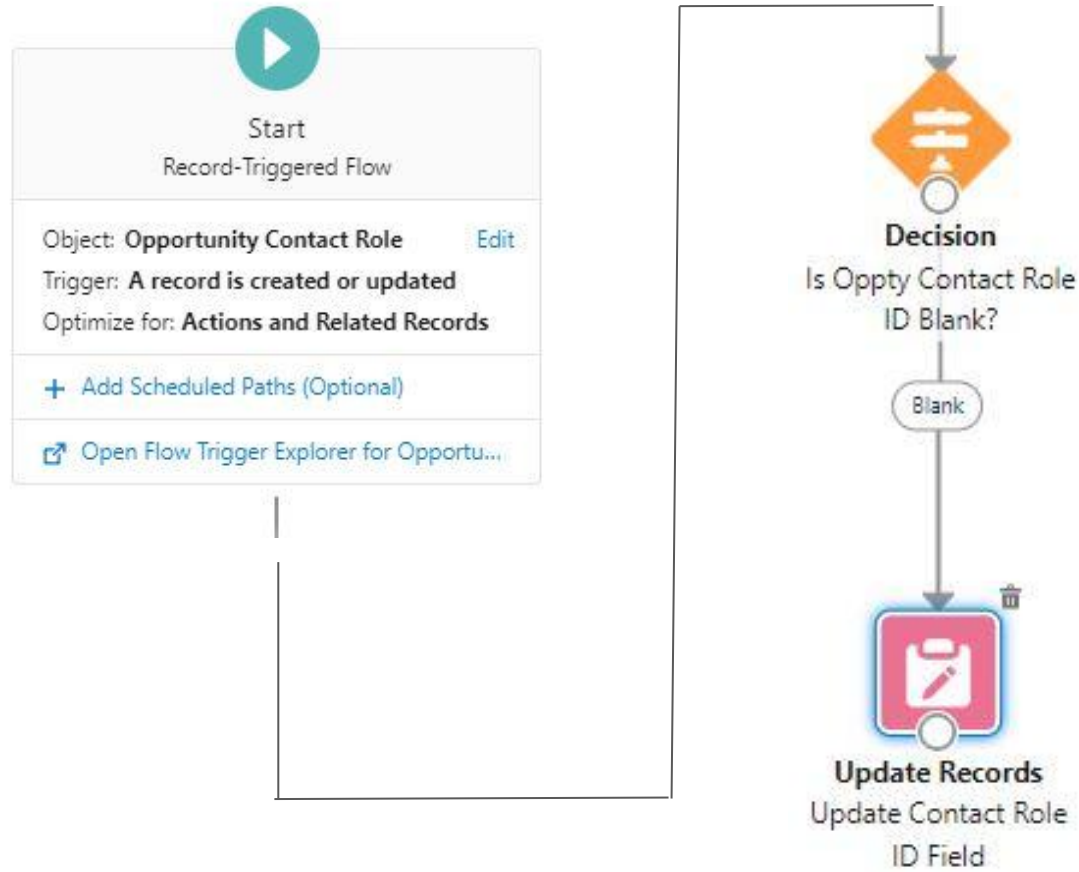
Error Message

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



New Flow

Core All + Templates



Screen Flow

Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.



Record-Triggered Flow

Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.



Schedule-Triggered Flow

Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.



Platform Event—Triggered Flow

Launches when a platform event message is received. This autolaunched flow runs in the background.




Autolaunched Flow (No Trigger)

Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Step #3: Create Record-Triggered Flow





Start

Record-Triggered Flow

Object: **Opportunity Contact Role** [Edit](#)

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Records**

[+ Add Scheduled Paths \(Optional\)](#)

[Open Flow Trigger Explorer for Opportu...](#)

Select Object

Select the object whose records trigger the flow when they're created, updated, c

* Object

Opportunity Contact Role

Configure Trigger

* **Trigger the Flow When:**

- ☐ A record is created
- ☐ A record is updated
- ☒ A record is created or updated
- ☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow an executions helps to conserve your org's resources.


If you create a flow that's triggered when a record is updated, we recommend fir
meet the condition requirements option for When to Run the Flow for Updatec

Condition Requirements

None

Step #3: Create Record-Triggered Flow





Start
Record-Triggered Flow

Object: **Opportunity Contact Role** [Edit](#)

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Records**

[+ Add Scheduled Paths \(Optional\)](#)

[Open Flow Trigger Explorer for Opportu...](#)

When to Run the Flow for Updated Records ⓘ

- ☒ Every time a record is updated and meets the condition requirements
- ☐ Only when a record is updated to meet the condition requirements

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records ✓

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

- ☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Step #3: Create Record-Triggered Flow



Edit Decision

Is Oppty Contact Role ID Blank? (Is_Oppty_Contact_Role_ID_Blank) ✎

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER ⓘ +

Blank

Default Outcome

OUTCOME DETAILS

*Label

Blank

*Outcome API Name

Blank

Condition Requirements to Execute Outcome

All Conditions Are Met (AND) ▼

Resource

Aa \$Record > Opportunity ID > Contact Role ID ✕

Operator

Equals ▼

Value

Blank ✕

+ Add Condition

When to Execute Outcome ⓘ

- ☒ If the condition requirements are met
- ☐ Only if the record that triggered the flow to run is updated to meet the condition requirements

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



New Update Records

Object

Opportunity

Filter Opportunity Records

Condition Requirements to Update Records

All Conditions Are Met (AND)

Field

Id

Operator

Equals

Value

Aa \$Record > Opportunity ID > Opp...



+ Add Condition

Set Field Values for the Opportunity Records

Field

Contact_Role_ID__c

Value

← Aa \$Record > Contact Role ID



+ Add Field

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	
Environments	Default	Type	Autolaunched Flow
Active Version		URL	/flow/Contact_Role_Flow
Trigger	Record—Run After Save	Activated/Deactivated By	
Modified By		Created By	



Demo

Considerations...



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



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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!

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Max Bradley
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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

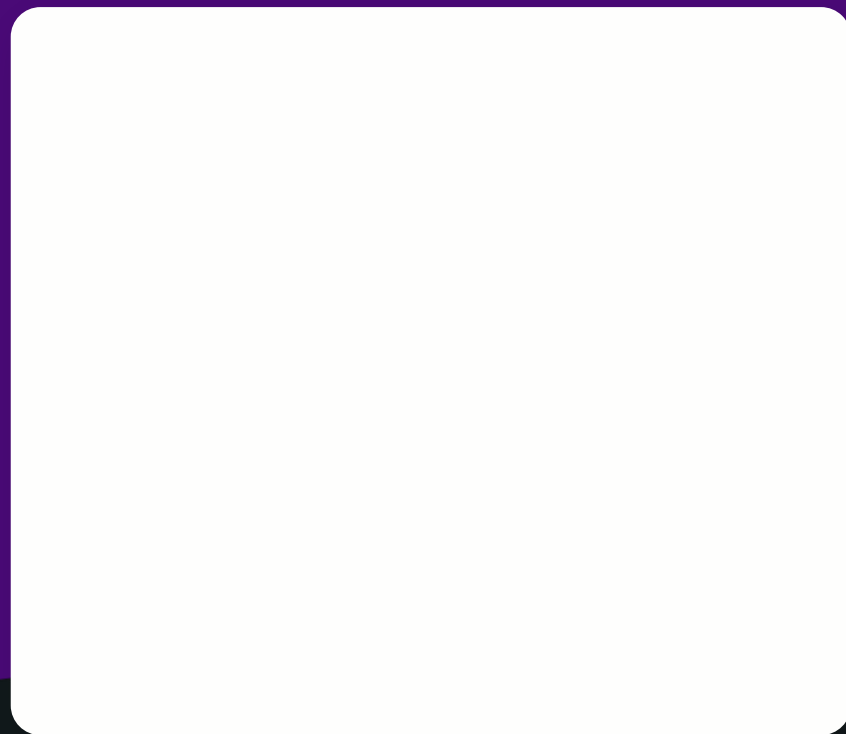
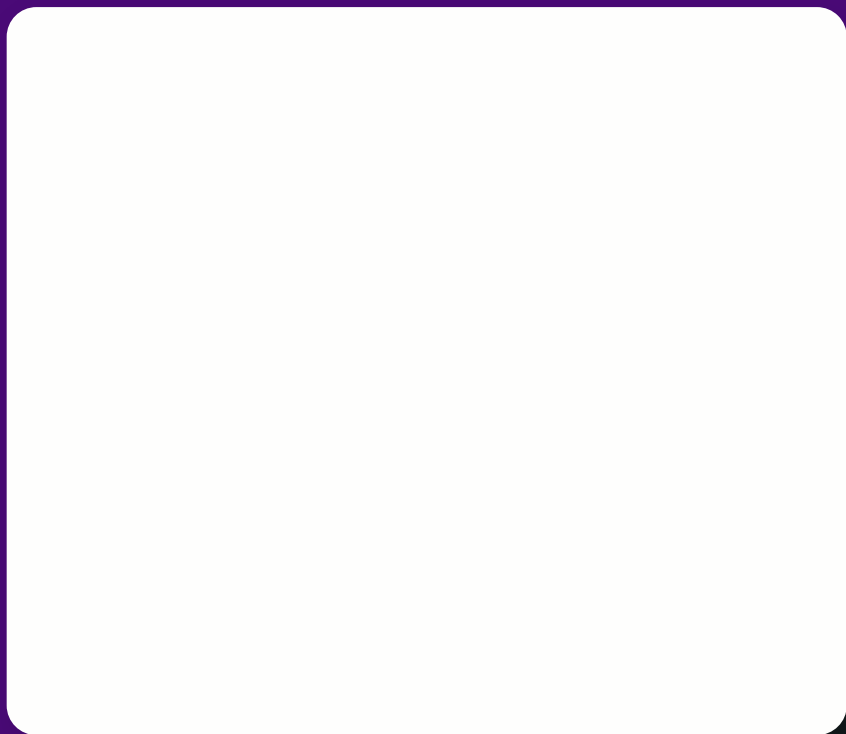
Title

Optional description

Title

Optional description







Step 1

Step 2

Step 3

Step 4

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

Step 1

Step 2

Step 3

PARDOT PEAK 7.1

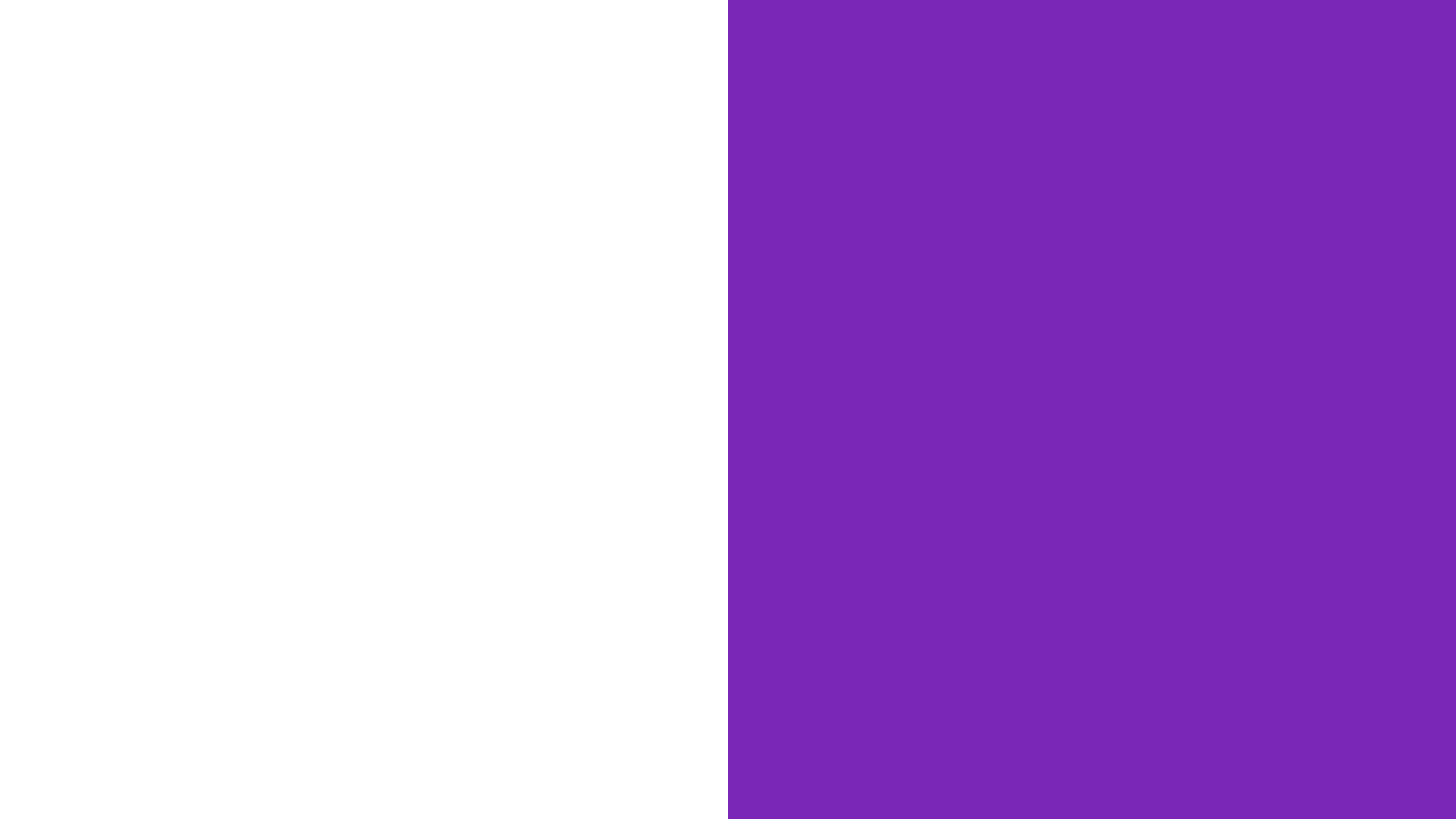
CONVERSION CANYON 2.6

REVENUE RIVER 3.9













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



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Overpass

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Arial

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Violet Purple - #7A27B7FF

Teal - #5AC8CFFF

Black - #000000

Charcoal - #12171A

White - #FFFFFF

Branding



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PARDOT PEAK 7.1

CONVERSION CANYON 2.6

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Session Title



Speaker Full Name

Title, Company

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