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MParDreamin' 2022

Key Questions for Nonprofits Considering Campaign Influence

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Agenda

- What is Campaign Influence?
- Campaign Influence models
- Considerations for Nonprofits
- What Next?

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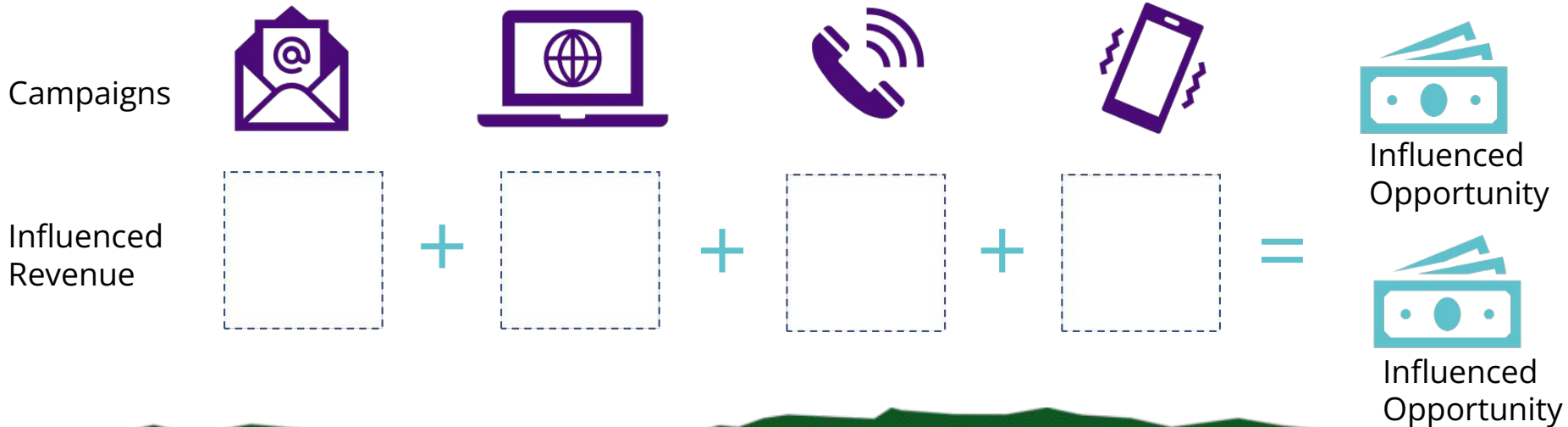
What is Campaign Influence?

How can it help your nonprofit?

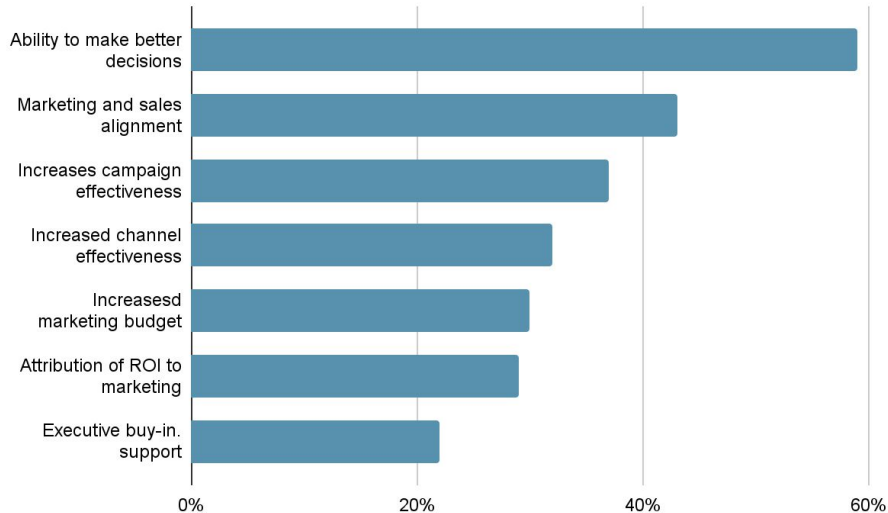
What is Marketing Attribution? (a.k.a. Campaign Influence in Salesforce)



The identification of a set of MARKETING activities ("events" or "touchpoints") that contribute to a desired outcome, and then the assignment of a value to each of these activities.



Top Benefits of implementing a revenue attribution strategy



Source:

Revenue Attribution Outlook Survey
Conducted by Ascend2 and Research Partners
Published November, 2020

“Half the money I spend on advertising is wasted; the trouble is I don’t know which half.”

John Wanamaker

Key Terminology



- **Salesforce Campaigns**

Define types, organize assets, add members, create hierarchies, and then track and report on performance.

- **Connected campaigns**

Connecting Salesforce and MCAE campaigns. Must be enabled to accurately attribute revenue across campaigns.

- **Campaign Status**

A Campaign must be Active for it to be considered influential.

- **Campaign Members**

Establishes a relationship between a Contact and a Campaign. A contact must be a campaign member for a campaign to have been considered influential towards a related opportunity.

- **Campaign Member Association**

Date contact is added as a campaign member.

- **Campaign Member Status**

Reflects a level of engagement a Contact has with a Campaign. Some status are considered "Responded".

- **Opportunity Contact Roles**

Show that a Contact is playing an influencing role in a particular Opportunity. Need to be properly assigned to Opportunities for attribution to work. (e.g. family member, P2P fundraiser, employee)

- **Auto-Association**

Allows and sets parameters for Salesforce to determine association between Campaigns and Opportunities.

- **Campaign Influence Record**

Record to connect campaign members who are also assigned a contact role on an open opportunity.

Campaign Influence: Auto-Association

- Allows Salesforce to automatically create links between your Opportunities and Campaigns.
- Auto-association can be broken down into two parts:
 - Time Frame
 - Rules

SETUP
Auto-Association Settings

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 as

Campaign Influence Time Frame 90 days

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

Field	Operator	Value	
<input checked="" type="checkbox"/> --None--	--None--		AND
Campaign Name	--None--		AND
Campaign Start Date	--None--		AND
Campaign End Date	--None--		AND
Type	--None--		AND
Campaign Record Type	--None--		AND
Campaign Status	--None--		
Expected Revenue in Campaign			
Budgeted Cost in Campaign			
Actual Cost in Campaign			
Expected Response (%)			
Active			
Campaign Created Date			

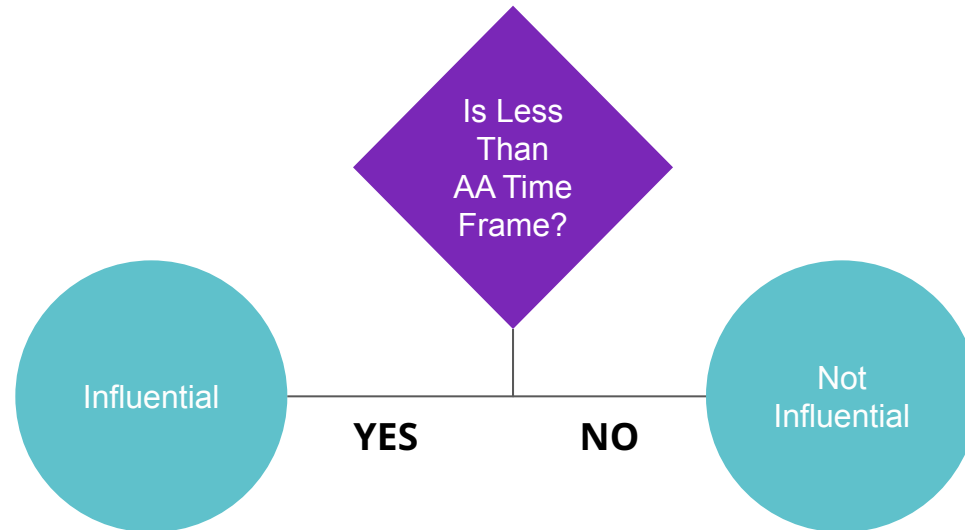
Save Cancel

Determining if a Campaign is Influential



Opportunity Created Date

- Campaign Member Created Date (First Association Date)



* Assumes all defined Auto-Association rules are also met.



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Determining if a Campaign is Influential



Auto-Association Time Frame: 10 Days

	Scenario A	Scenario B	Scenario C
Opportunity Created Date	November 4	November 30	October 15
Campaign Member Date	November 2	November 2	November 2
Difference (Days)	2	28	- 18 days
Influential?	YES	NO	(YES)



Campaign Influence Models

Which is right for your nonprofit?

Default Attribution Model in Salesforce



- Default model of attribution in Salesforce is Primary Campaign Source
- Lookup field to Campaign; only one Campaign for each Opportunity.
- The "Primary Source Campaign" will receive 100% of the credit.
- Can be manually overwritten

Other Models Introduced with Marketing Cloud Account Engagement



Last Touch

100% of credit is given to last influence eligible campaign

First Touch

100% of credit is given to first influence eligible campaign

Even Distribution

Equal credit is given to all influence eligible campaigns within influential time frame

PROS

EASY TO UNDERSTAND & IMPLEMENT

MORE BALANCED APPROACH

CONS

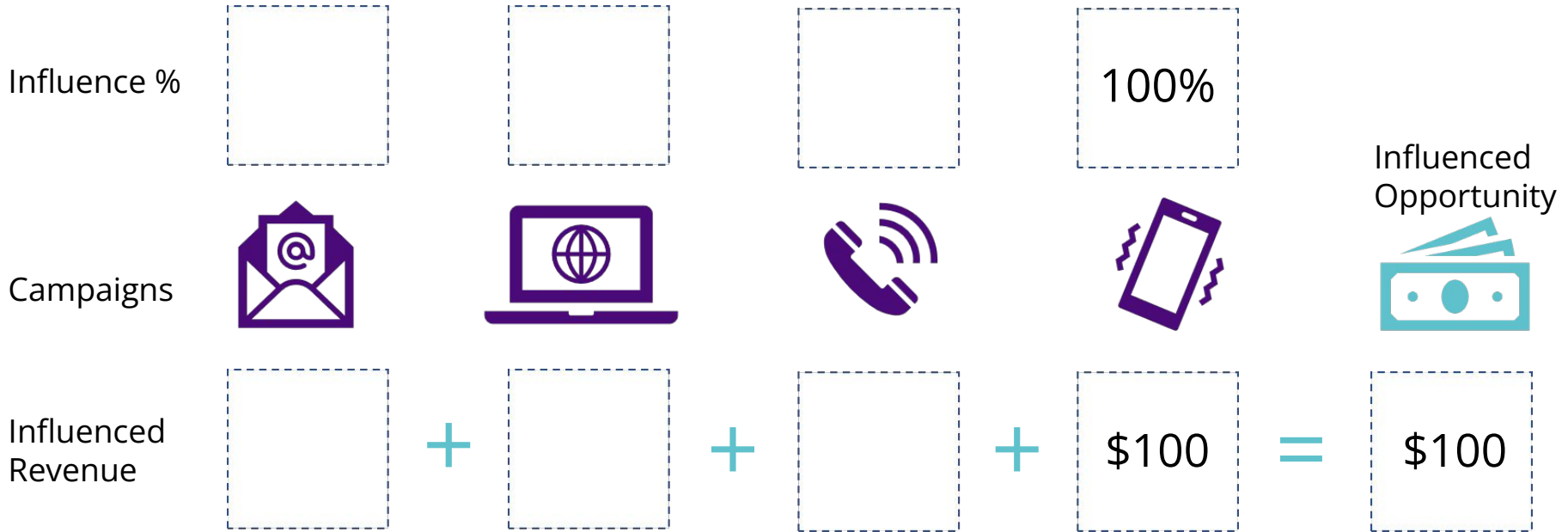
IGNORES OTHER TOUCHPOINTS

IGNORES RELATIVE IMPORTANCE OF EACH TOUCHPOINT

Last Touch Model



100% of credit is given to last influence eligible campaign
How well did this campaign do at closing opportunities?



First Touch Model



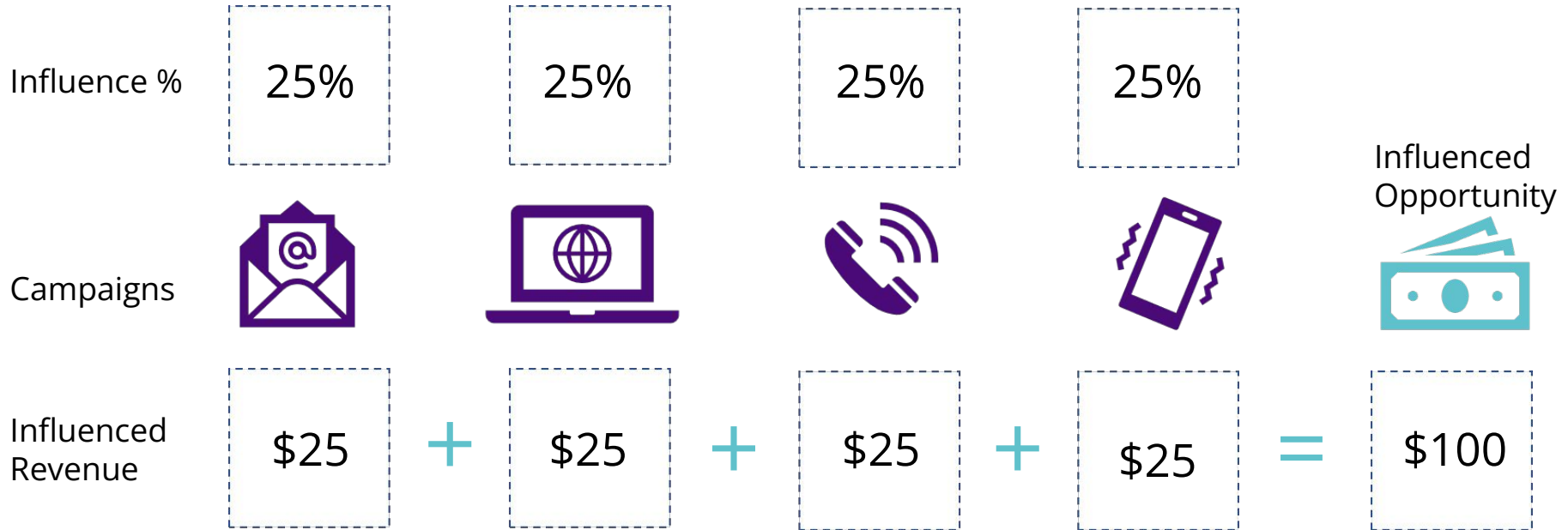
100% of credit is given to first influence eligible campaign
How well did this campaign do at initiating opportunities?



Even Touch Model



Equal credit is given to all influence eligible campaigns within influential time frame
How many touchpoints are needed to close opportunities?





Considerations for Nonprofits

Does campaign influence fit your nonprofit?

Marketing Considerations



- Being built on Salesforce, campaign influence is bound by the nature of the platform being sales oriented and not marketing oriented
- Must be a lead or contact to be assigned campaign membership; therefore campaign influence difficult to use for MCAE Visitors (unknown) and Prospects (known)
- Challenge with measuring marketing efforts like digital ads, social posts, and ungated website content before someone becomes a known prospect synched to a Lead or Contact

Campaign
Influence
Ineffective

Campaign
Influence
Effective



General Considerations for Fundraisers



- Intended to measure influence of MARKETING campaigns, not fundraising activities
 - Will not capture donor stewardship activities like phone calls and 1:1 meetings which are captured as activities on the opportunity but not campaign activities
- Model suitability varies by fundraising channel
 - First touch/Last touch more suitable for shorter cycles like direct response, ticketed events and ecommerce
 - Even distribution more suitable for longer cycles
 - Not suitable for channels not driven by marketing activity like peer asks and corporate giving
- Household considerations
 - If using NPSP with household member contact roles, campaign influence can be split between primary donor and household members
- Campaign Hierarchy
 - Choose your campaign membership carefully; otherwise you risk splitting influence across levels of the campaign, particularly in an even touch model

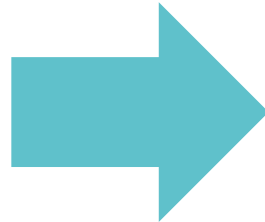
Opportunities on Campaign Records



Once you enable Campaign Influence, your campaign records will show information related to your Default model

Opportunities component

Campaign Results and
Campaign Hierarchy Info
rollup numbers



Influenced opportunities
and revenue instead of all
opportunities and
revenue

Direct Response Considerations



- Most direct response campaigns are typically multi-channel consisting of mail, email, phone, text or other channels
- Separate campaigns needed for each mailing, email, etc. to track influence of each individually; could stop at the channel level if not concerned with individual versions
- Campaign membership is often established with completion actions triggered by responses (email opens and clicks); assigning campaign membership for sent is often more manual and involved
- Manual assignment of campaign members through lists and file imports related to offline activities like mail and outbound calling

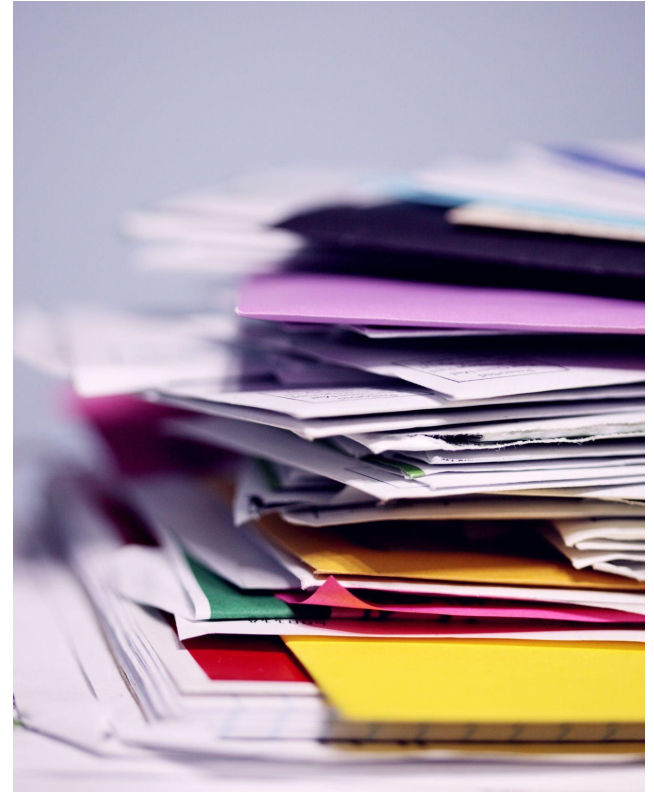


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Online Fundraising Considerations



- Be mindful of intermediary online activities on the path to your donation form to avoid splitting influence (depending on model) from intended source of influence
 - Landing pages
 - Website tracking plugin or code
 - RedirectURL
- Consider the following options to address:
 - Exclude specific landing pages from auto association
 - Avoid using Redirect URLs in emails
 - Avoid using tracking plugins or code on your donation forms
 - Send visitors directly to donation forms where possible

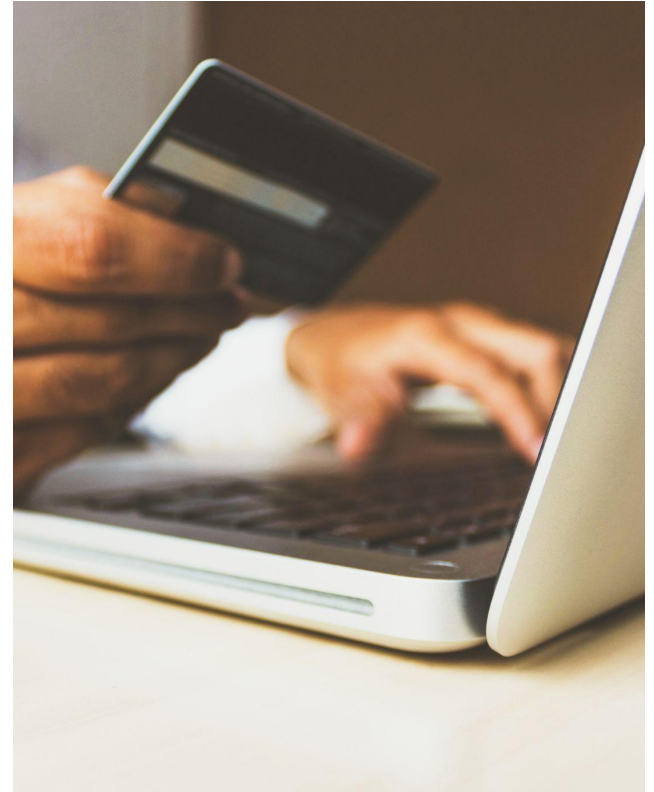


Photo by [rupixen.com](https://www.rupixen.com) on [Unsplash](https://www.unsplash.com)

Recurring Gift Considerations



- Campaign influence may (and will likely change) with each monthly payment
 - What motivated them to become a monthly donor will only get credit for the first and possibly early payments
 - Monthly donors are more likely to read your monthly newsletter
 - If employing last touch, don't be surprised to see your monthly newsletter get credit for monthly donations

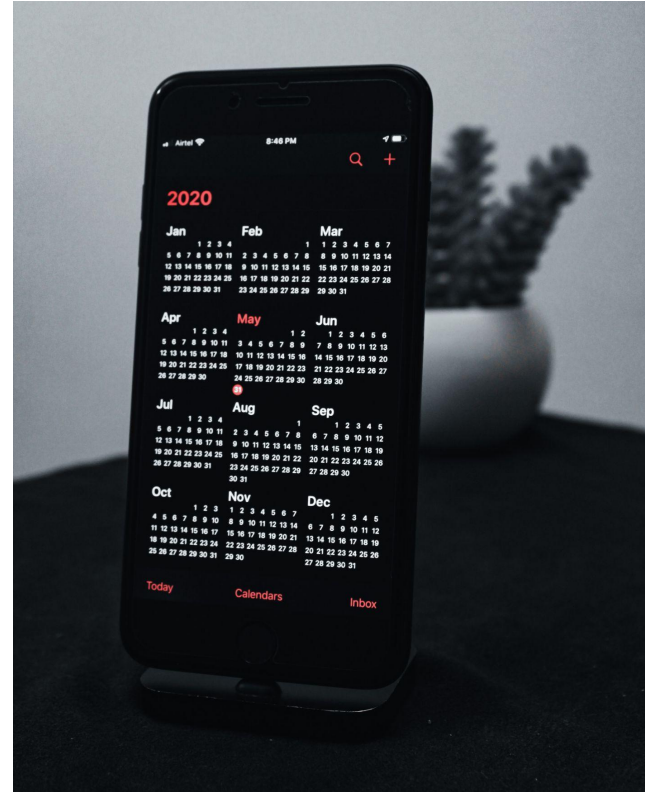


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Payroll/Matching Gift Considerations



- Typically not driven by marketing activity and therefore should not receive campaign influence
- Matching gifts made by the company are influenced by the employee who made the initial gift
- Depending on system used, employee and company account may both have contact roles and split influence

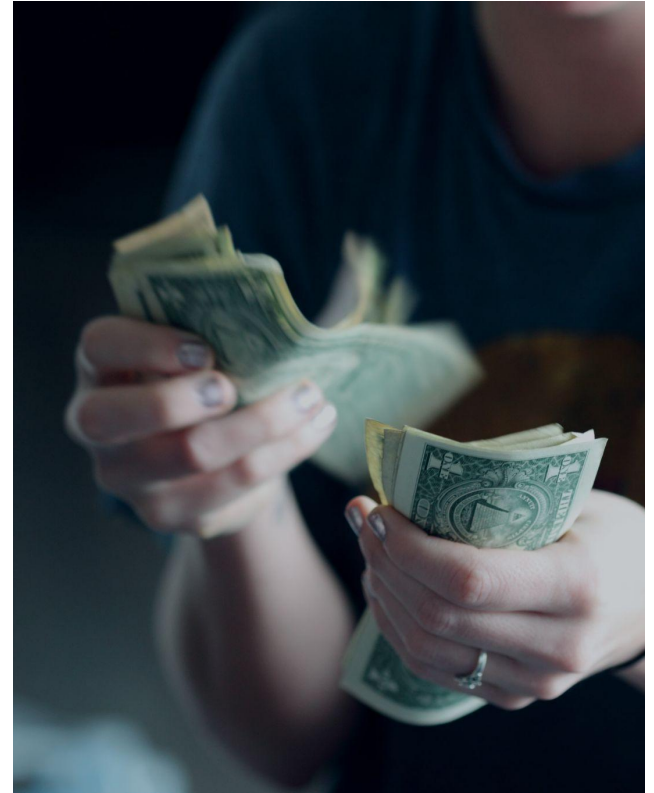


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Corporate/Major/Planned Gift Considerations



- Longer cycle from initiation to close
 - Can trigger negative value influence calculation seen earlier
 - Campaigns that occur after opportunity is opened are considered influential as long as the opportunity remains open
- The types of activities that are considered more influential in closing an opportunity are likely to be things like phone calls and face-to-face meetings – these are not part of campaign influence
- Lower engagement touchpoints may receive disproportionate revenue influence relative to their actual influence

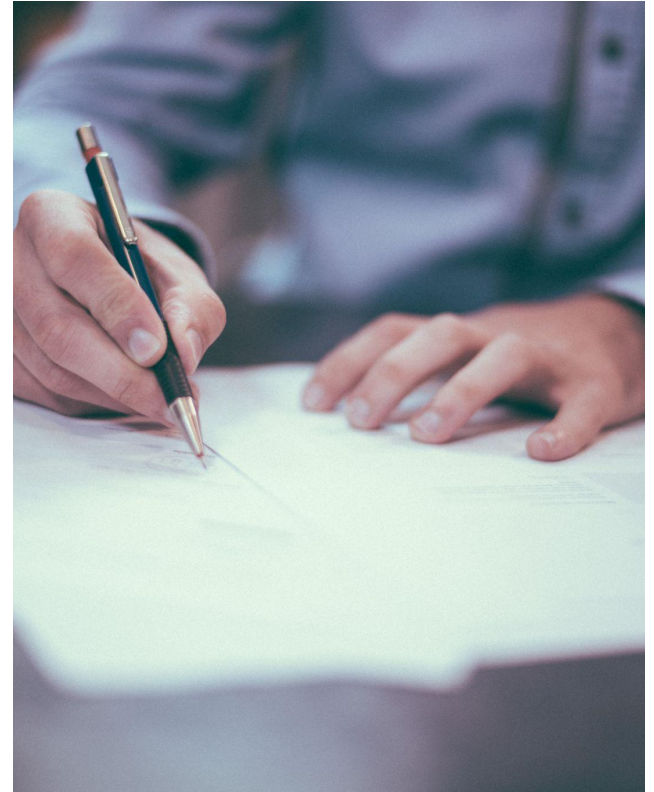


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Peer-to-Peer Considerations



- Donations to participants and teams are the result of their personal asks to their contacts, not the actions of your marketing activities
 - Many digital fundraising systems map participants to campaigns; auto association rules should be used to exclude these campaign record types
 - Participants often have a contact role on the opportunity for their donors
- Registration fees more likely to be influenced by marketing
 - Registration fees should still generate an Opportunity record
 - Take notes of how registration fees are captured.
 - Is there a unique opportunity record type?
 - Custom fields from P2P provider?
 - How are self-donations handled? Same or separate Opportunity record?



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What Next?

What should you do if your nonprofit wants to proceed?

Questions to ask when enabling Campaign Influence



- Does Campaign Influence fit with our revenue mix?
- What model best aligns with our fundraising channels and marketing activity?
- What time frame is considered influential to us? Is it universally appropriate across fundraising channels?
- What rules can we use to isolate influential campaign activity? e.g. use campaign record types
- How should we structure our campaign hierarchy and membership?



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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You can find out more about Heller consulting at
teamheller.com

