



Salesforce Flows 101 For Marketers

Boost your marketing automation with the power of Salesforce Flow



Learn. Network. Grow.

MParDreamin' 2022

Salesforce Flows 101 for Marketers

Heather Rinke

Salesforce Product Director, Sercante



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In this session...

- Intro to Salesforce Flow
- What you can do in a Flow
- Examples where Flow can help Marketing and Sales teams
- More ideas of what you can do with Flow
- Flow building basics and tips

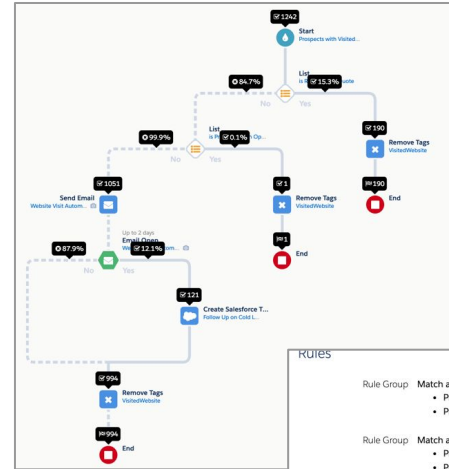
Marketing Cloud Account Engagement Automations



Most Marketing Automation tools come with their own automation capabilities.

Marketing Cloud Account Engagement (Pardot) comes packed with marketing automation features:

- Completion Actions
- Page Actions
- Automation Rules
- Engagement Studio
- Static & Dynamic Lists
- Scoring & Grading



Take Action When	Prospect Field Type	Operator
Prospect Default Field	State	is
Value		
Washington		
Action		Queue
Assign to queue	Washington Sales	
+ Add Action to Group		
Delete Group		

RULES

Rule Group Match any

- Prospect custom field: Next Outreach Topic is 'N/A'
- Prospect custom field: Next Outreach Date days in future greater than or equal to '1'

Rule Group Match any

- Prospect list: Prospect is on list Next Outreach from SFDC Tasks Repeating 1st LP - Drums email
- Prospect list: Prospect is on list Next Outreach from SFDC Tasks Repeating 2nd LP - Quote Received? email
- Prospect list: Prospect is on list Next Outreach from SFDC Tasks Repeating 2nd LP - Checking Inventory? email
- Prospect list: Prospect is on list Next Outreach from SFDC Tasks Repeating 2nd LP - Quote Decision Made? email
- Prospect list: Prospect is on list Next Outreach from SFDC Tasks Repeating 4th LP Prospect - Have Waste? email
- Prospect list: Prospect is on list Next Outreach from SFDC Tasks Repeating 3rd LP Customer - Have Waste? email
- Prospect list: Prospect is on list Next Outreach from SFDC Tasks currently in program

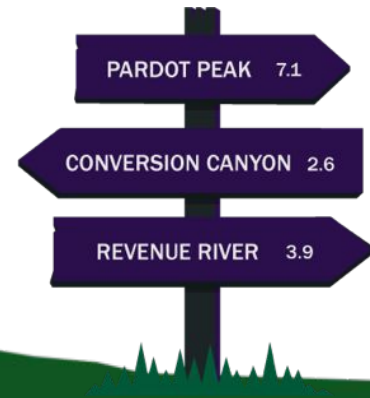
Actions

- Remove prospect from list Next Outreach from SFDC Tasks Repeating 1st LP - Drums email
- Remove prospect from list Next Outreach from SFDC Tasks Repeating 2nd LP - Quote Received? email
- Remove prospect from list Next Outreach from SFDC Tasks Repeating 2nd LP - Checking Inventory? email
- Remove prospect from list Next Outreach from SFDC Tasks Repeating 2nd LP - Quote Decision Made? email
- Remove prospect from list Next Outreach from SFDC Tasks Repeating 4th LP Prospect - Have Waste? email
- Remove prospect from list Next Outreach from SFDC Tasks Repeating 3rd LP Customer - Have Waste? email
- Remove prospect from list Next Outreach from SFDC Tasks currently in program

When you might need more help...



- Anything with math - Pardot can increment values, but not perform calculations
- Copy values from one field to another
- Actions triggered on a field value change
- Custom User notifications
- Reading information from Tasks
- Updating related objects
- Injecting data from Custom Objects



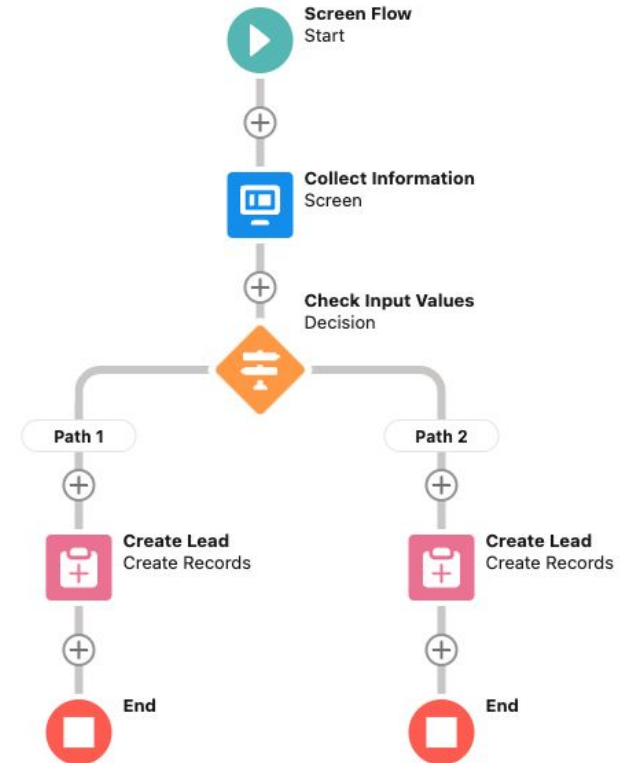
Salesforce Flow can help!



Salesforce Flow can help!



- Build complex business processes and automations using clicks, not code.
- Flows let you build customized user experiences and can save time by making sure the right actions are completed at the right time
- Because they are declarative, they can be easier to manage than a developed (i.e. Apex) solution
- Endless use cases!



Types of Flows



A flow's type determines which elements and resources are supported and how the flow can be distributed.

There are different types of flows available based on how you want the automation to run.

We're going to focus on:

- Record Triggered Flow
- Screen Flow

New Flow

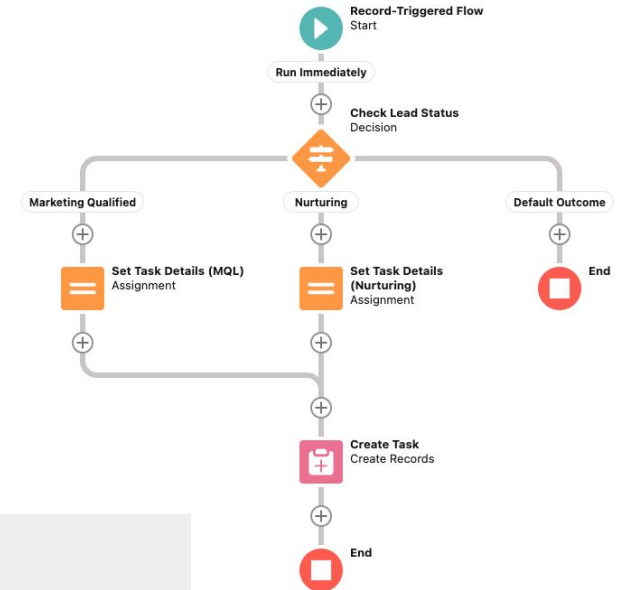
Core All + Templates

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

Record Triggered Flows



- **When you would use it:**
 - When you want a background process to automatically take an action(s) when a record is created, updated, or deleted.
- **How they are launched:**
 - Launches independently when a record is created, updated, or deleted and meets entry criteria
- **Benefits**
 - Reduce time on manual repetitive tasks
 - Reduced human error



Examples:

- Create a task when a Lead is created or the status changes
- Update related Contact fields when an Account field changes

Screen Flows

- **When you would use it:**
 - Guided screen interface that users can interact with to view/add/update information, create records, etc.
 - Good for customizing user experience and guide them through process steps
- **How they are launched:**
 - Common uses include launching from an action button or displayed on a Lightning record page
- **Benefits**
 - Improved user experience
 - Consistent process
 - Reduced manual decision making

The screenshot shows a Salesforce screen flow interface. At the top, there are three tabs: 'Nurturing', 'Disqualified', and 'Converted'. A blue button labeled 'Mark Status as Complete' is in the top right corner. The main content area is split into two columns. The left column contains a list of lead records with fields for phone number, email, and website. The right column contains two summary cards: 'Lead Rating' showing a score of 128 and a grade of B+, and 'Lead Qualification' showing the status as 'Marketing Qualified' and a list of next steps. A 'Next' button is located at the bottom right of the screen flow.

Phone Number	Email	Website
555-8428		
555-0199		
@example.com		
		www.norcomedical.net
		atus
		ing Qualified
		employees

Lead Rating

🔥🔥🔥

Pardot Score: 128
Pardot Grade: B+

Lead Qualification

Lead Status is **Marketing Qualified**
Last Activity was

What took place?

- Made a Call
- Sent an Email
- Contacted
- Meeting Held
- Demo Held

What's the Next Step?

- Keep Working
- Send Back to Marketing
- Opportunity Identified
- Disqualify

Details

Next

Examples:

- Walk user through creation of a new lead or opportunity
- Quick Start of setting up accounts
- Agent phone script guidance

What can you do in a flow?



A few of the most common actions:

- **Screen Element** - lets you guide users:
 - through a process
 - entering information
 - just display information
- **Actions** - Do something (predefined) like:
 - send an email alert
 - post a slack message
 - submit records for approval
 - custom developed actions (Apex)

Interaction



Screen

Collect information from users who ru...



Action

Perform an action outside of the flow. ...

What can you do in a flow?



A few of the most common actions:

- **Assignment** - Set values that you can use within the flow
- **Decision** - Take different actions based on criteria
- **Loop** - Lets you work with at multiple records one at a time

Logic



Assignment
Set variable values.



Decision
Create paths for the flow to take base...



Loop
Iterate over a collection of values or re...

What can you do in a flow?



A few of the most common actions:

- **Create Records** - Create a Salesforce record(s) and specify field values.
- **Update Records** - Update values on Salesforce record(s).
- **Get Records** - Find Salesforce record(s) that meet specific criteria, that you can use within the flow

Data

-  **Create Records**
Create Salesforce records using value...
-  **Update Records**
Update Salesforce records using valu...
-  **Get Records**
Find Salesforce records, and store the...

How can Salesforce Flow help Marketing and Sales teams?



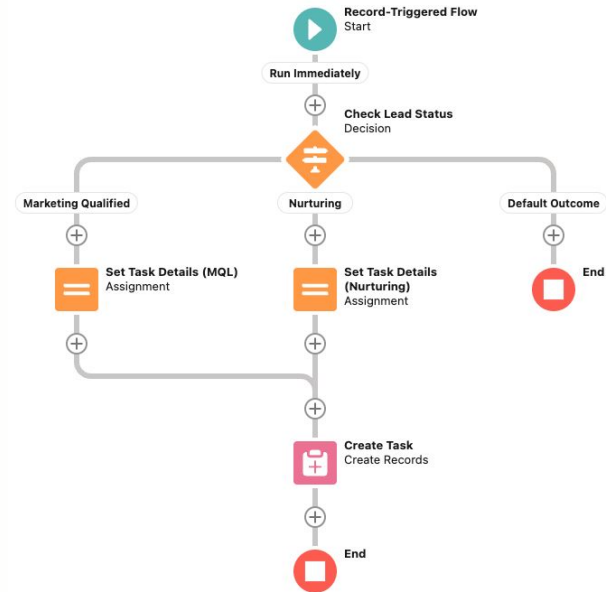
Example #1



Requirement:

Send a custom email or task when Lead is created or status changes to:

- Marketing Qualified
- Nurturing



Example #2



Requirement:

Step Sales through qualification questions to help them assess and prioritize their opportunities.

Lead Action

Lead Status is **Open - Not Contacted**
Last Activity was **October 31, 2022**

• What took place?

- Made a Call
- Sent an Email
- Contacted
- Meeting Scheduled
- Meeting Held
- Demo Scheduled
- Demo Held

• What's the Next Step?

- Keep Working
- Send Back to Marketing
- Disqualify
- Opportunity Identified

Next



What else can you do with Flow?



Quick Wins

- Update account and move new customers to onboarding path when opportunity is closed-won
- (Re)assign lead or contact based on status change
- Send custom email when field changes or no activity for x days
- Trigger field updates based on specific actions
- Transfer data from one field to another on the same/different object(s)
- Date stamping when something happens (*i.e. Lead/Opportunity stages*)
- Standardize campaign member statuses on campaign creation
- Set a 'Marketable' field used by Marketing Data Sharing (Account Engagement)

What else can you do with Flow?



Taking it a step further

- Set Lead/Contact Persona based on Title criteria (includes / does not include)
- Record and track UTM touchpoints as a custom object or on the campaign member status
- Grab information from an external system
- Using guided process to let Sales enroll their Contacts in specific types of campaigns
- Manage replies to Pardot emails
- Automatically convert a Lead that meets specific criteria
- Work with Pardot data or perform Pardot Admin actions from flow ([Flow Actions for Pardot](#))

Flow Building Basics



The Flow Builder



The place where you build and test your flows.

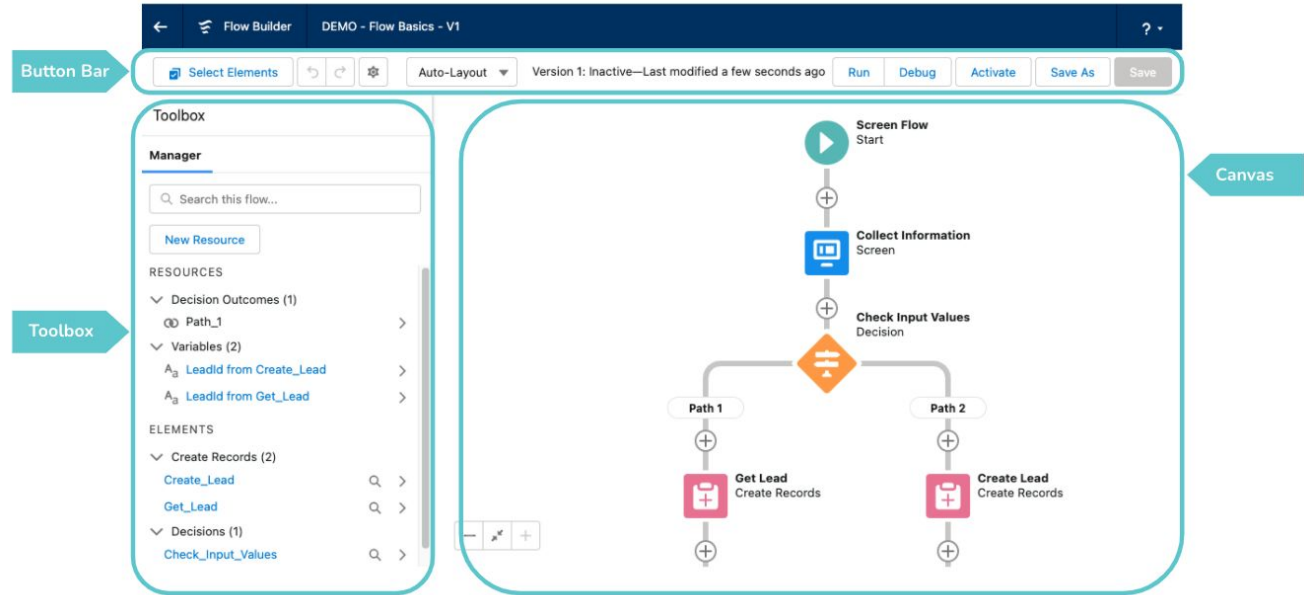
Setup > Process Automation > Flows

Use the **New Flow** button to begin creating a new flow.

Toolbox - Contains Elements and Resources to build your flow

Canvas - Working area, where you build flow by adding Elements

Button Bar - where you can view flow information and Run/Debug



Flow Building Tips & Best Practices



- **Diagram the process before your start building** - work with team members to document or whiteboard the process so everyone is aligned before starting the building
- **Build in a Sandbox** - so you can test without impacting business!
- **Be specific about your start conditions** - so the flow runs only when you want it to
- **Be specific when using Get elements** - so that you are getting only records you need to work with in this specific flow
- **Cut/Copy/Paste Elements**
 - Use the Copy Element and Paste Element options to duplicate elements which can be a time saver!
 - The Cut Element and Paste Element options lets you move an element to another spot in your flow

Flow Building Tips & Best Practices



- **Save often** – While building a flow it's a good idea to Save your flow often so you don't lose any work. You can perform a quick save on Flows that haven't been activated instead of having to save as another version.
- **Opening existing Flows** – Clicking on the flow name on the Flows page will open the Active flow. If you have saved a new version of the flow but haven't activated it, you need to go into View Details (click the arrow to the right of the flow in the list view) to view and open the newer inactive version.
- **Test/Debug** - use the Debug and Flow Tests features to test your flow before activating
- **Activate when ready!** – Once you're ready to run the flow live, deploy from sandbox to production and remember to activate it.

Resources to get you started



Learning Flow

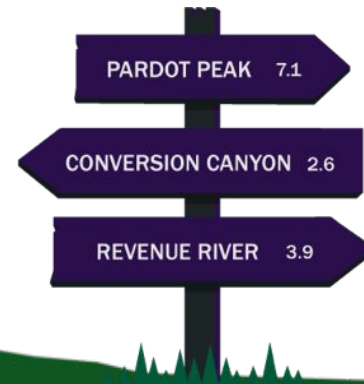
- Trailhead: [Record-Triggered Flows](#)
- Trailhead: [Build Flows with Flow Builder](#)
- Trailhead: [Automate Your Business Processes with Salesforce Flow](#)
- [Salesforce Automation Trailblazer Community](#)
- #processes-flows-wfrs channel in the [#OhanaSlack workspace](#)
- [An Introductory Guide to Salesforce Flow for Marketers](#) (The Spot)
- [6 New Videos to Help You Understand Flow Builder](#) (Admins Blog)
- [New and Updated Flow Resources to Make Your Life Easier](#) (Salesforce Admins Blog)
- [The Ultimate Guide to Flow Best Practices and Standards](#) (Salesforce Admins Blog)

Step by Step guides:

[How to Manage Salesforce Campaign Activation with a Simple Flow](#) (TheSpot)

[How to Automatically Create Campaign Member Statuses in Salesforce](#) (Jenna Molby)

[How to Effectively Add Opportunity Contact Roles \(Flow\)](#) (GreenKey Digital Blog)



Where to next?



[A Salesforce Flow for Pardot Contact Role Woes](#)



Day 2

2:20pm - 2:45pm ET



[Automating Campaign Management in Salesforce](#)



Day 3

10:40am - 11:05am ET



[How to Bring Pardot Capabilities into Salesforce Flow](#)



Day 3

12:05pm - 12:45pm ET

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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!

Heather Rinke
heather@sercante.com