



Campaign Management with Account Engagement



Brandon Walton

Cypress Learning Solutions. Inc, Founder



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Agenda

- Overview of Campaign Architecture (Salesforce & MCAE/Pardot)
- Enabling Engagement History
- Working with Campaign Hierarchies
- Campaign Reporting in Salesforce



Goals

Historical Context

Review Latest Features

Connecting the Dots

Architectural Understanding



Campaign Architecture



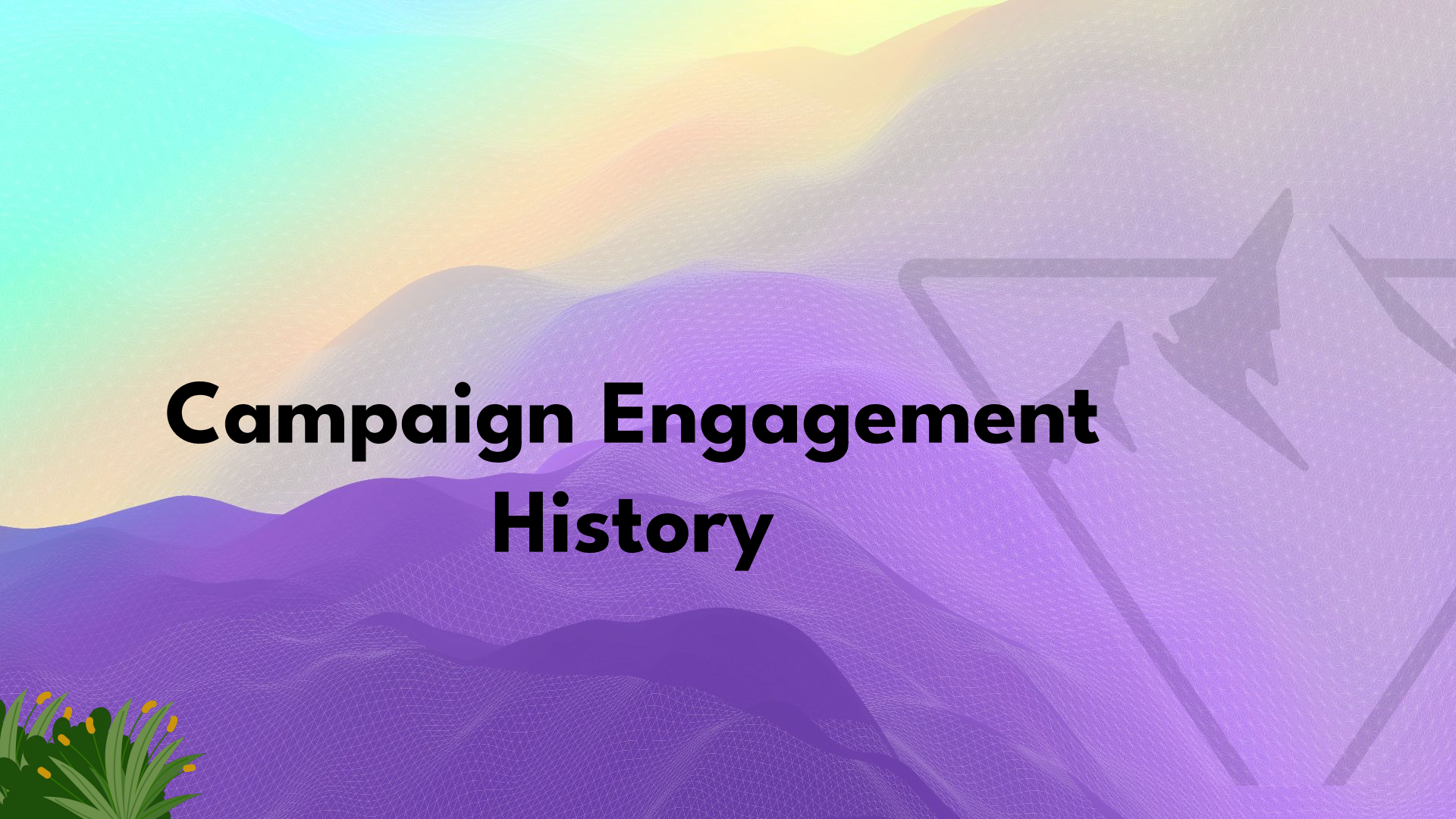
A Brief History: The Evolution of Campaign Management in MCAE (Pardot)

Pardot
Campaigns

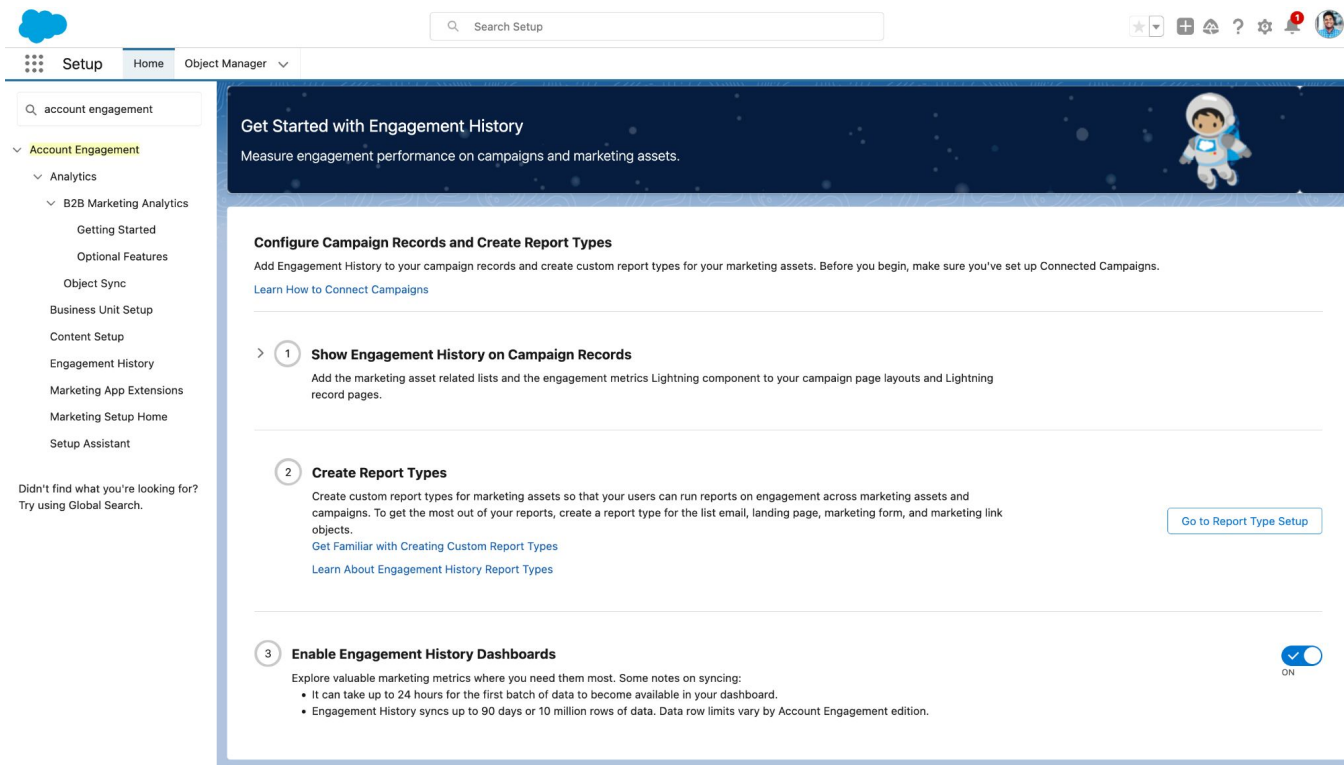
Connected
Campaigns

Campaign
Engagement
History

Campaign Engagement History



Configure Campaign Engagement History



The screenshot shows the Salesforce Setup interface. At the top, there's a search bar for 'Search Setup' and navigation icons. The left sidebar shows the 'Setup' menu with 'Account Engagement' expanded. The main content area is titled 'Get Started with Engagement History' and contains three numbered steps for configuration.

Get Started with Engagement History
Measure engagement performance on campaigns and marketing assets.

Configure Campaign Records and Create Report Types
Add Engagement History to your campaign records and create custom report types for your marketing assets. Before you begin, make sure you've set up Connected Campaigns.
[Learn How to Connect Campaigns](#)

- 1 Show Engagement History on Campaign Records**
Add the marketing asset related lists and the engagement metrics Lightning component to your campaign page layouts and Lightning record pages.
- 2 Create Report Types**
Create custom report types for marketing assets so that your users can run reports on engagement across marketing assets and campaigns. To get the most out of your reports, create a report type for the list email, landing page, marketing form, and marketing link objects.
[Get Familiar with Creating Custom Report Types](#)
[Learn About Engagement History Report Types](#)
- 3 Enable Engagement History Dashboards**
Explore valuable marketing metrics where you need them most. Some notes on syncing:
 - It can take up to 24 hours for the first batch of data to become available in your dashboard.
 - Engagement History syncs up to 90 days or 10 million rows of data. Data row limits vary by Account Engagement edition.

Go to Report Type Setup

ON

Campaign Engagement History Related Lists

Lightning App Builder | Pages | Campaign Record Page | ? Help

Desktop | Shrink To View | Analyze | Activation... | Save

Components

Search...

- Quip Notifications
- Recent Items
- Recommendations
- Record Detail
- Related List - Single
- Related List Quick Links
- Related Lists
- Related Record
- Report Chart
- Rich Text
- Salesforce Anywhere Messages
- Send Email Later - Pending List
- Surveys
- Tableau View
- Tableau View BETA
- Tabs
- Topics
- Trending Topics
- Visualforce

Custom (0)

No components available.

Get more on the AppExchange

Campaign Hierarchy (6+)

Campaign Name

- 2-Day Salesforce End-User Bootcamp
- 3-Day Pandot Admin Bootcamp
- 3-Day Salesforce Admin Bootcamp
- Eventbrite
- Pandot Admin Bootcamp
- Qualified Chat

View All

Attachments (0) [Upload Files](#)

[Upload Files](#)

Or drop files

Campaign Member Statuses (3) [New](#) [Change Default Status](#)

Member Status	Is Default	Responded	Last Modified Date
Connected	<input type="checkbox"/>	<input type="checkbox"/>	9/28/2023 11:02 AM
Responded	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/28/2023 11:00 AM
Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9/28/2023 11:00 AM

View All

Landing Pages (0) [New](#)

List Emails (0)

Marketing Forms (0)

Marketing Links (0)

Snippet Assignments (0) [New](#)

Page

*Label

Campaign Record Page

*API Name

Campaign_Record_Page

*Page Type

Record Page

Object

Campaign

Template

Header, Subheader, Right S... [Change](#)

Description

Upcoming & Overdue

No activities to show.

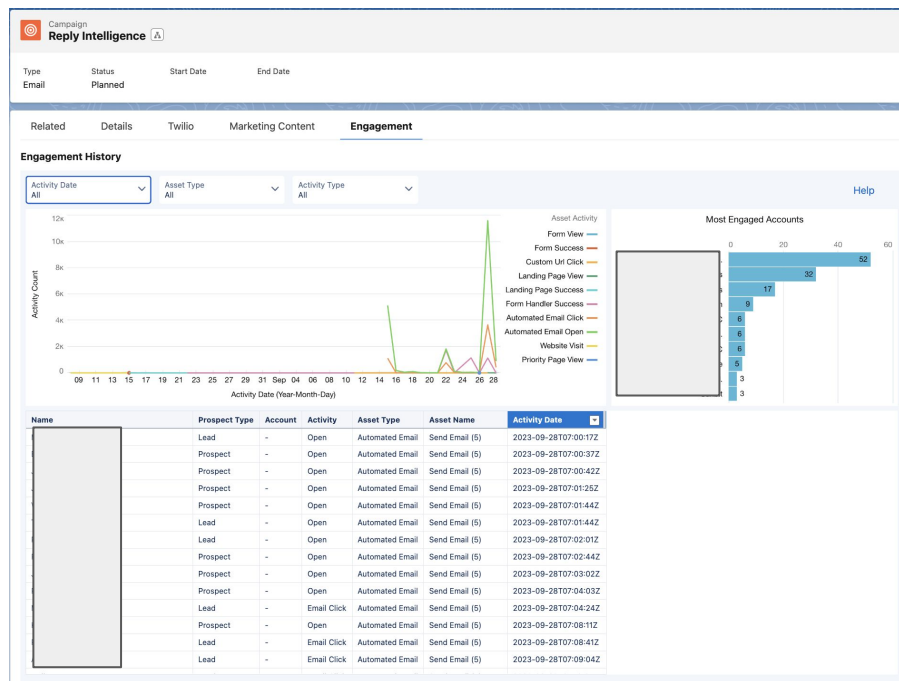
Get started by sending an email, scheduling a task, and more.

To change what's shown, try changing your filters.

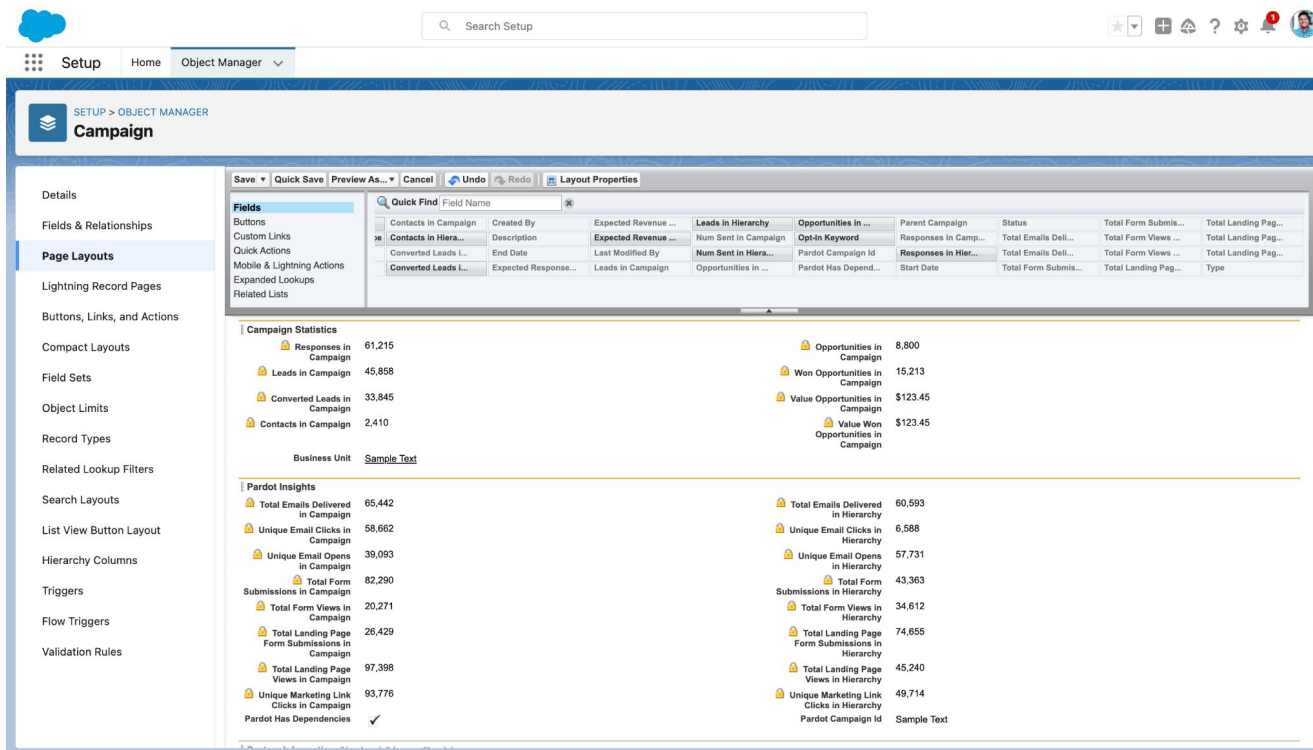
[Show All Activities](#)

Tips

Campaign Engagement History Dashboards



Campaign Page Layouts with MCAE/Pardot



The screenshot displays the Pardot Campaign Setup interface. The left sidebar contains navigation options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, Triggers, Flow Triggers, and Validation Rules.

The main content area is titled "Campaign" and includes a "Quick Find" search bar. Below the search bar is a table of fields:

Fields	Quick Find	Field Name
Buttons	Contacts in Campaign	Created By
Custom Links	Contacts in Hiera...	Description
Quick Actions	Converted Leads L...	End Date
Mobile & Lightning Actions	Converted Leads L...	Expected Response...
Expanded Lookups		Leads in Campaign
Related Lists		Opportunities in ...

Below the fields table are two sections: Campaign Statistics and Pardot Insights.

Campaign Statistics

Responses in Campaign	61,215	Opportunities in Campaign	8,800
Leads in Campaign	45,858	Won Opportunities in Campaign	15,213
Converted Leads in Campaign	33,845	Value Opportunities in Campaign	\$123.45
Contacts in Campaign	2,410	Value Won Opportunities in Campaign	\$123.45

Pardot Insights

Business Unit	Sample Text
Total Emails Delivered in Campaign	65,442
Unique Email Clicks in Campaign	58,662
Unique Email Opens in Campaign	39,093
Total Form Submissions in Campaign	82,290
Total Form Views in Campaign	20,271
Total Landing Page Form Submissions in Campaign	26,429
Total Landing Page Views in Campaign	97,398
Unique Marketing Link Clicks in Campaign	93,776
Pardot Has Dependencies	✓

Additional insights on the right side of the Pardot Insights section:

Total Emails Delivered in Hierarchy	60,593
Unique Email Clicks in Hierarchy	6,588
Unique Email Opens in Hierarchy	57,731
Total Form Submissions in Hierarchy	43,363
Total Form Views in Hierarchy	34,612
Total Landing Page Form Submissions in Hierarchy	74,655
Total Landing Page Views in Hierarchy	45,240
Unique Marketing Link Clicks in Hierarchy	49,714
Pardot Campaign Id	Sample Text

Campaign Hierarchies

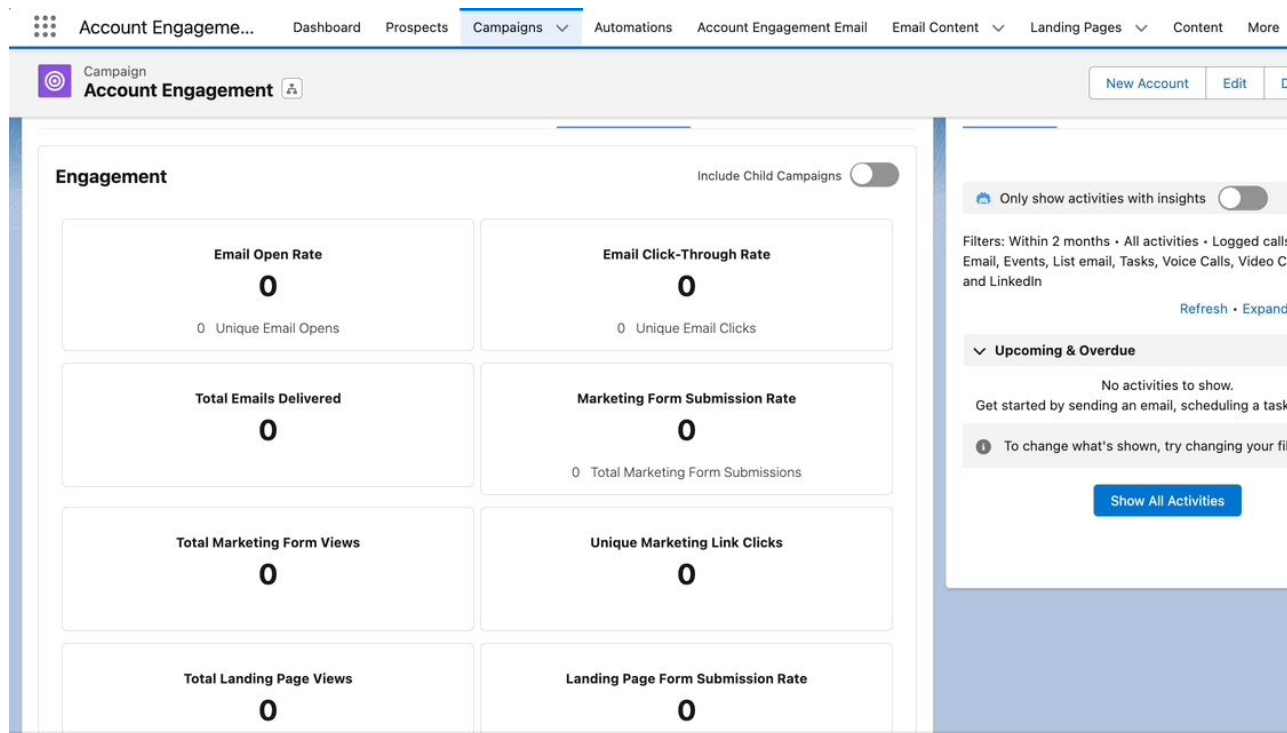


Campaign Hierarchies

CAMPAIGN > ACCOUNT ENGAGEMENT				
Campaign Hierarchy				
CAMPAIGN NAME	START DATE	END DATE	TYPE	STATUS
<ul style="list-style-type: none"> ▼ Account Engagement current 			Other	In Progress
<ul style="list-style-type: none"> > 2-Day Salesforce End-User B... 	11/2/2020		Seminar / Conference	In Progress
<ul style="list-style-type: none"> > 3-Day Pardot Admin Bootcamp 	6/2/2020	7/7/2020	Seminar / Conference	In Progress
<ul style="list-style-type: none"> > 3-Day Salesforce Admin Boot... 	11/2/2020		Seminar / Conference	In Progress
<ul style="list-style-type: none"> Eventbrite 			Seminar / Conference	In Progress
<ul style="list-style-type: none"> Pardot Admin Bootcamp 	11/2/2020		Email	In Progress
<ul style="list-style-type: none"> Qualified Chat 			Advertisement	In Progress
<ul style="list-style-type: none"> Reply Intelligence 			Email	Planned
<ul style="list-style-type: none"> Siftrock 			Advertisement	In Progress



Engagement Metrics & Campaign Hierarchies



The screenshot displays a marketing dashboard for a campaign named "Account Engagement". The navigation bar includes "Account Engagem...", "Dashboard", "Prospects", "Campaigns", "Automations", "Account Engagement Email", "Email Content", "Landing Pages", "Content", and "More". The campaign name "Account Engagement" is prominently displayed with a "New Account", "Edit", and "D" button.

The main section is titled "Engagement" and includes a toggle for "Include Child Campaigns". It features eight metric cards, each showing a value of 0:

- Email Open Rate: 0 Unique Email Opens
- Email Click-Through Rate: 0 Unique Email Clicks
- Total Emails Delivered: 0
- Marketing Form Submission Rate: 0 Total Marketing Form Submissions
- Total Marketing Form Views: 0
- Unique Marketing Link Clicks: 0
- Total Landing Page Views: 0
- Landing Page Form Submission Rate: 0

On the right side, there are filters for "Only show activities with insights" and "Filters: Within 2 months • All activities • Logged calls Email, Events, List email, Tasks, Voice Calls, Video C and LinkedIn". Below this is a section for "Upcoming & Overdue" activities, which currently shows "No activities to show." and a "Show All Activities" button.

Best Practices: Working with Hierarchies & Engagement History

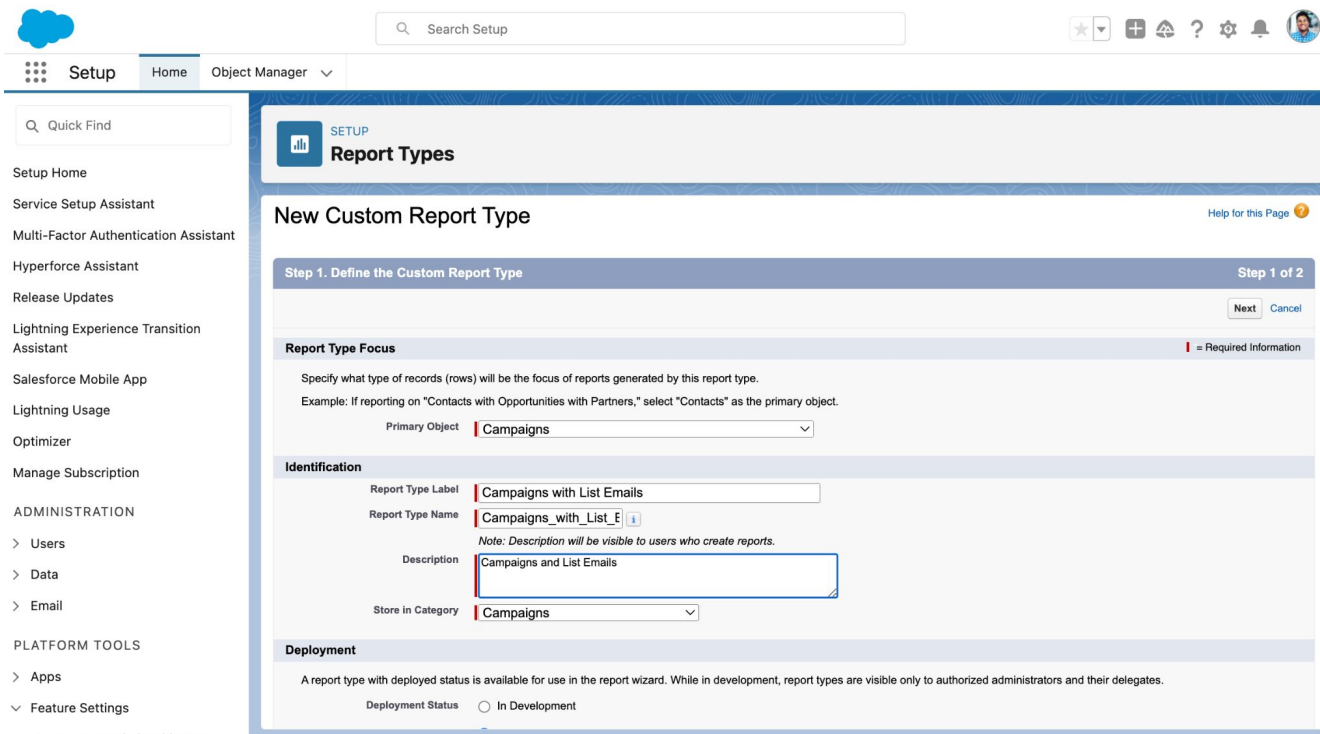
- Create an 'Account Engagement' Top Level Campaign
- Create a 'Sales View' and a 'Marketers View' for Campaign Page Layouts
- If needed, Use Campaign Record Types



Campaign Reporting



Report Types with Engagement History



The screenshot displays the Salesforce Setup interface for configuring a new custom report type. The left sidebar contains navigation options such as 'Setup Home', 'Service Setup Assistant', and 'Administration'. The main content area is titled 'New Custom Report Type' and is divided into several sections:

- Step 1. Define the Custom Report Type:** This section is the current step in a two-step process. It includes 'Next' and 'Cancel' buttons.
- Report Type Focus:** A section where the user specifies the primary object for the report. The 'Primary Object' is set to 'Campaigns'. A red exclamation mark icon indicates required information.
- Identification:** This section contains fields for:
 - Report Type Label:** 'Campaigns with List Emails'
 - Report Type Name:** 'Campaigns_with_List_E' (with a help icon)
 - Description:** 'Campaigns and List Emails' (with a help icon)
 - Note:** 'Description will be visible to users who create reports.'
 - Store In Category:** 'Campaigns'
- Deployment:** A section with a note: 'A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.' The 'Deployment Status' is set to 'In Development'.

Report Types with Engagement History

SETUP Report Types

Edit Custom Report Type Help for this Page

Campaigns with List Emails

Changes you make to this report type will affect existing reports created from it.
 We recommend that you clone any report type you wish to edit, rather than change a working report type.

Object Relationships Save Cancel

This report type will generate reports about Campaigns. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Campaigns
Primary Object

B List Emails x

A to B Relationship:

Each "A" record must have at least one related "B" record.

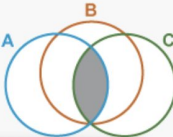
"A" records may or may not have related "B" records.

C List Email Sent Results x

B to C Relationship:

Each "B" record must have at least one related "C" record.

"B" records may or may not have related "C" records.



The selected object has no further relatable objects. [More Info](#)

Save Cancel

Report Types with Engagement History

Report: Campaigns with List Emails
New Campaigns with List Emails Report

[Enable Field Editing](#)

<input type="checkbox"/> Name ↑	Total Sent	Sent Via	Click To Open Ratio	Unique Clicks	Unique Opt Outs	Total Spam Complaints	Total Opens
<input type="checkbox"/> (Second Version) BNC: 3-Day Salesforce Admin Bootcamp Early Bird Registr...	5	Pardot	0.00%	0	0	0	7
	5	Pardot	0.00%	0	0	0	5
Subtotal	10		0.00%	0	0	0	12
<input type="checkbox"/> 11-24-2020: December Salesforce Admin Fundamentals Promo (1)	8,586	Pardot	1.72%	20	12	0	1,378
Subtotal	8,586		1.72%	20	12	0	1,378
<input type="checkbox"/> 11-25-2020: December Salesforce Admin Fundamentals Promo (1)	9,171	Pardot	2.15%	25	13	0	1,414
Subtotal	9,171		2.15%	25	13	0	1,414
<input type="checkbox"/> -26-2020: December Salesforce Admin Fundamentals Promo THANKSGIVI	9,202	Pardot	2.32%	23	7	0	1,169
Subtotal	9,202		2.32%	23	7	0	1,169
<input type="checkbox"/> -27-2020: December Salesforce Admin Fundamentals Promo BLACK FRIDA	9,228	Pardot	2.16%	23	14	0	1,260
Subtotal	9,228		2.16%	23	14	0	1,260
<input type="checkbox"/> 11-30-2020: December Salesforce Admin Fundamentals Promo (3)	3	Pardot	0.00%	0	0	0	3
	4	Pardot	0.00%	0	0	0	8
	9,248	Pardot	1.49%	18	26	0	1,423
Subtotal	9,255		1.49%	18	26	0	1,434
<input type="checkbox"/> -1-2020: December Salesforce Admin Fundamentals Meet Your Instructors	3	Pardot	0.00%	0	0	0	3

Row Counts Detail Rows Subtotals Grand Total



Best Practices: Building Campaign Reports in Salesforce

- Salesforce Reports != Analytics Studio
Report Types should be specific to the Marketing Asset (Email, Landing Page, Forms, Links)
- Use the button when creating report types to determine if 'A' MUST be related to 'B' in order to appear in the report
- Plan on building a Dashboard consisting of different Report Types to tell a bigger story



Thank You!

