



Unifying Your Marketing Funnel With Campaign Members



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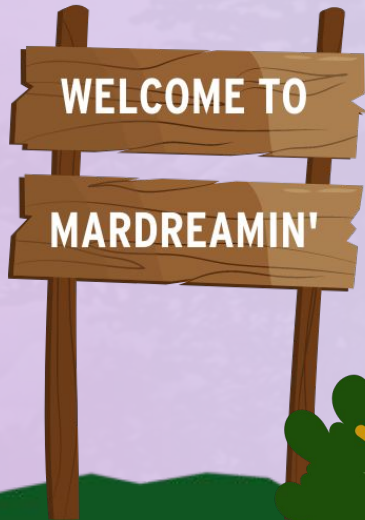
GRIDMATE

THE SPOT
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FÍONTA

Agenda

- Why you need a unified funnel
- Connecting the Lead and Contact Objects
- Creating Accounts as Campaign Members with Flow
- Using Formula Fields and Flows on the Campaign Member



A brief history of the Lead object

Lead object did not exist when Salesforce was originally built. Look at the Lead ID prefix 00Q... The Contact ID prefix is 003. Account ID prefix is 001.

The lead is very useful because it is not tied to an account, can be owned in a queue, and is great for businesses with lots inbound activity and very large or unknown TAM.

Helps provide clear delineation between which targets your sales development representatives (SDRs) and your account executives (AEs) focus on.





The Lead object is dead



The Lead object is dead... If you want to do ABM

Long live the lead! But the lead is flawed...

A lot of Salesforce functionality for linking accounts, opportunities, and campaigns relies on the Contact object.

Our organization built our processes dependent on the Lead object and Lead conversion.



SupportLogic

Predictive and Generative AI for Customer Support

Uses Natural Language Processing, Sentiment Analysis, AI and ML to help Customer Support (and Success) teams solve their toughest challenges.

- Prevent customer escalations
- Speed up resolution time
- Increase customer satisfaction and loyalty
- Increase team efficiency and retention



Top reasons for using the Lead didn't apply to us

Our TAM is very well defined - high percentage of accounts we want to sell to already exist in Salesforce.

Very little inbound traffic.

SDRs and AEs prospect into accounts together.

Lead activity does not roll up to the account.

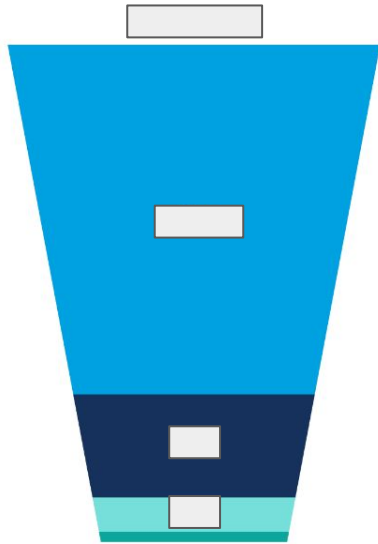
Requires multiple reports for accounts that were mid-funnel.

A decorative graphic in the bottom-left corner of the slide, consisting of green leaves and yellow flowers.

Before

Current Lead Stage

All Time



Marketing Lifecycle

- Target ■
- Prospect ■
- MQL ■
- SAL ■

[View Report \(ML L](#)

Current Contact Stage



Marketing Lifecycle

- SAL ■
- SQL ■
- SAO ■

[View Report \(ML Cont](#)

We couldn't attribute funnel progression to campaigns

Contacts are the connection between opportunities and campaigns.

If a key influencer who is not a contact attends a webinar, that attribution will not show.



We couldn't track funnel velocity

We tracked some metrics using the lead. Others using the contact.

We couldn't answer simple questions like *How many MQLs do we create week over week?* because once an MQLs are converted to contacts they do not show on a leads report.



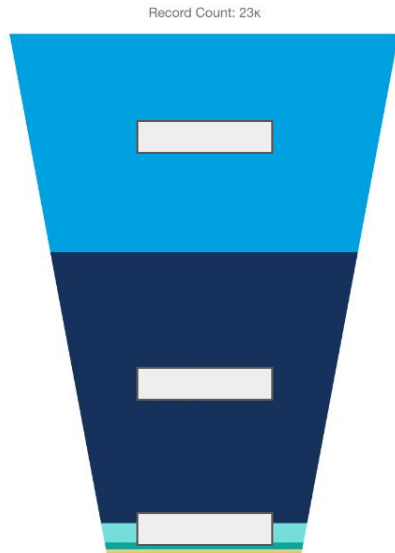
Unified Marketing Funnel

A unified marketing funnel refers to a single view that combines data from Leads and Contacts. It eliminates the need for separate reports and gives a more holistic view of how prospects progress through the funnel. With a unified funnel, you can track individuals and accounts from start to finish and better understand how your marketing efforts are performing.



After

Individuals



Marketing Lifecycle Stage

- Prospect ■
- Target ■
- SAL ■
- MQL ■
- SAO ■
- SQL ■

Targets

20K

[View Report \(GM - Funnel Metrics - Targets\)](#)

Prospects

12K

[View Report \(GM - Funnel Metrics - Prospec...\)](#)

MQLs

1.1K

[View Report \(GM - Funnel Metrics - MQLs\)](#)

SALs

134

[View Report \(GM - Funnel Metrics - SALs\)](#)

SQLs

1.3K

[View Report \(GM - Funnel Metrics - SQLs\)](#)

SAOs

1.2K

[View Report \(GM - Funnel Metrics - SAOs\)](#)

[View Report \(GM - Marketing Funnel \(Unified\)\)](#)

One Object for Leads AND Contacts

The Campaign Member object uses a Whold to reference the related record.

Using Formula Fields, you can pull any data from leads or contacts into the Campaign Member.

Track funnel progression in a dedicated campaign -> Marketing Funnel - Individuals.

Use Flow to create a CM when a new lead is created.

```
IF ( NOT(ISBLANK(Contact.Id )), Contact.MQL__c,  
IF ( NOT(ISBLANK(Lead.Id)), Lead.MQL__c,  
IF ( Account.of_MQLs__c > 0, TRUE, FALSE)))
```

Formula Field Outline

```
IF(NOT(ISBLANK  
(Contact.Id)),  
Contact.Field
```

```
IF(NOT(ISBLANK  
(Lead.Id)),  
Lead.Field,
```

```
Account.Field,  
NULL  
)
```

One Object for Leads AND Contacts

Check boxes indicate a CM's current stage in the marketing funnel.

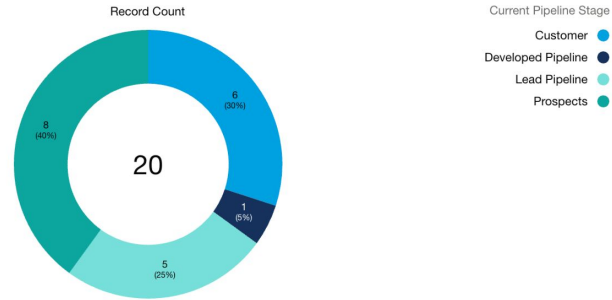
Datestamp fields (stamped by Flows) allow us to track funnel velocity, week over week MQLs, SAOs, and attribute jumps in those metrics to concurrent campaigns.

```
IF ( NOT(ISBLANK(Contact.Id )), Contact.MQL__c,  
IF ( NOT(ISBLANK(Lead.Id)), Lead.MQL__c,  
IF ( Account.of_MQLs__c > 0, TRUE, FALSE)))
```



And Accounts!

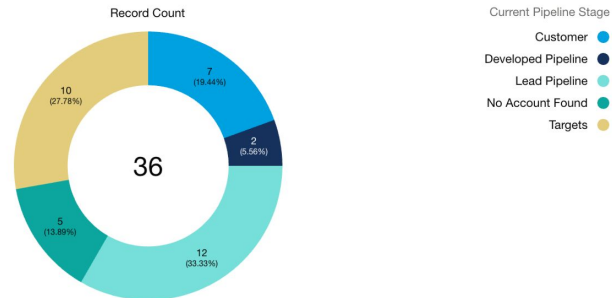
Registered Accounts



[View Report](#)

As of Today at 8:52 PM

Registered Individuals



[View Report](#)


As of Today at 8:52 PM



And Accounts!

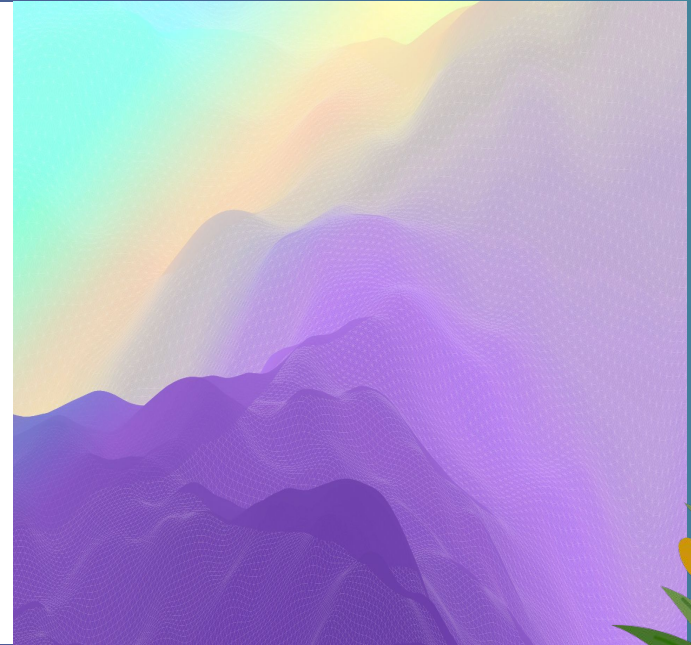
Accounts can also be Campaign Members meaning you can use the CM for ABM tracking.

```
IF ( NOT(ISBLANK(Contact.Id )), Contact.MQL__c,  
IF ( NOT(ISBLANK(Lead.Id)), Lead.MQL__c,  
IF ( Account.of_MQLs__c > 0, TRUE, FALSE)))
```

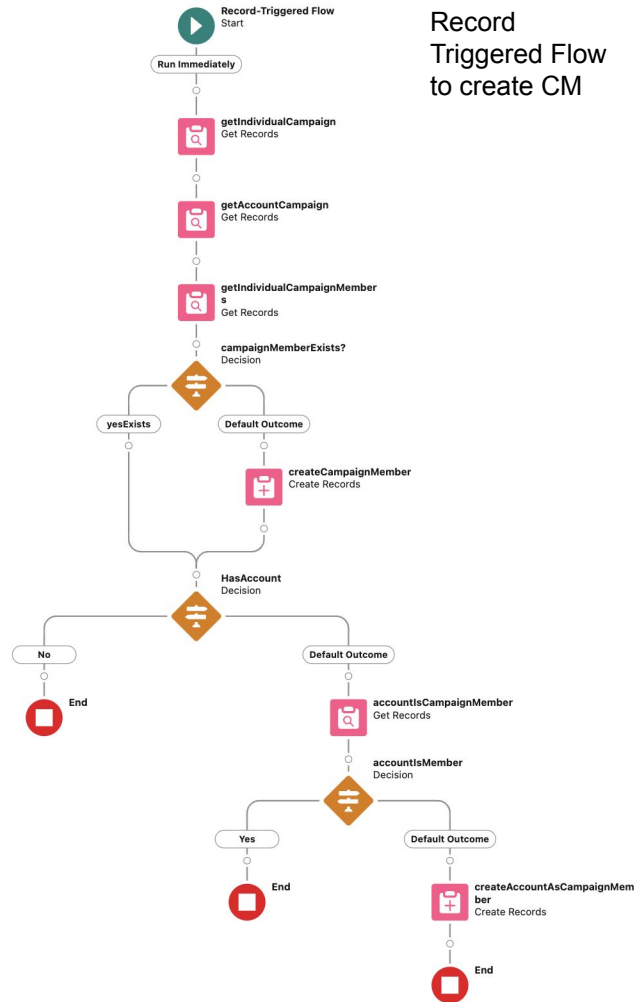


And Accounts!

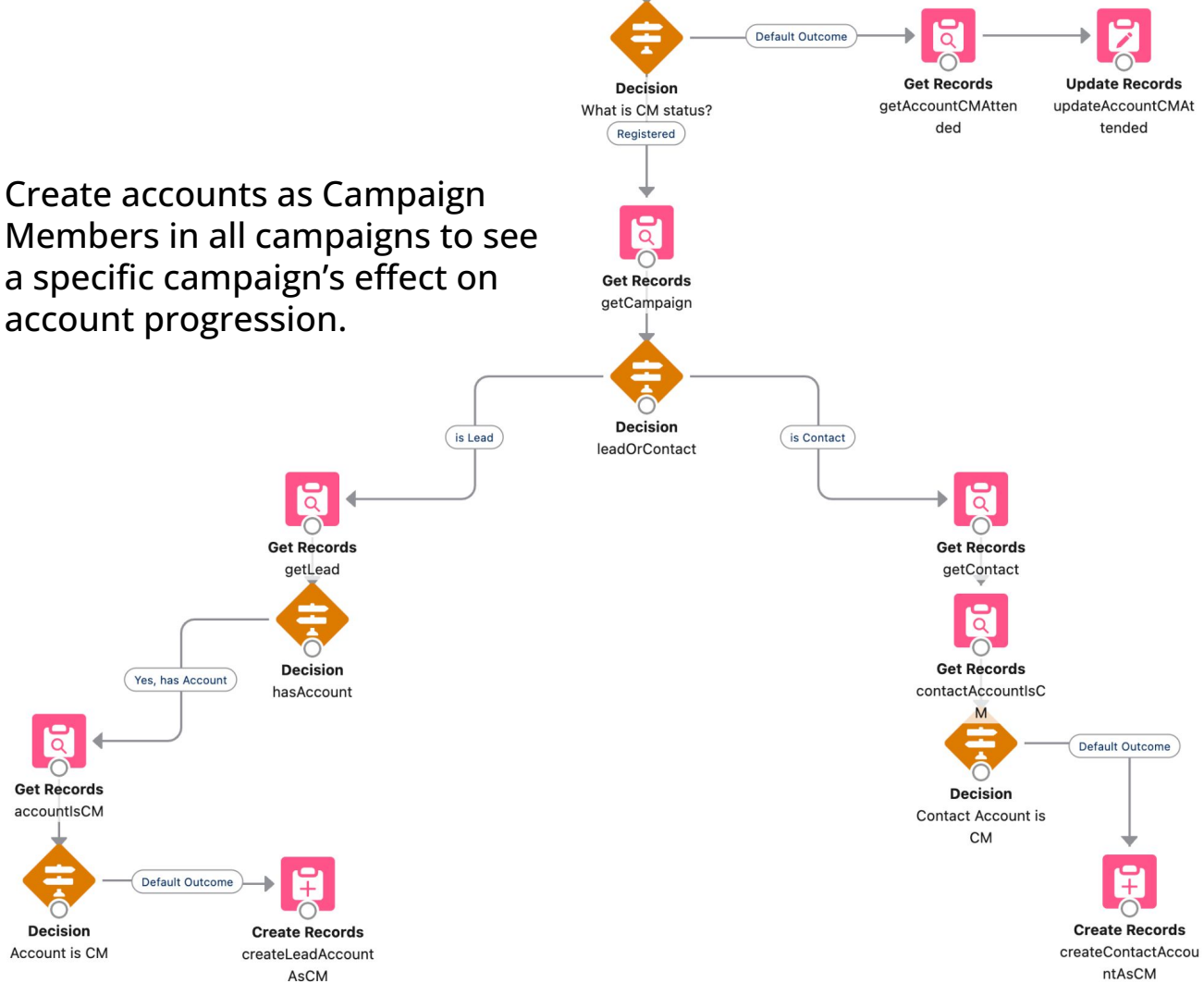
Create Accounts as CMs and track them in their own separate campaign -> Marketing Funnel - Accounts



Record Triggered Flow to create CM



Create accounts as Campaign Members in all campaigns to see a specific campaign's effect on account progression.



We can attribute funnel progression to campaigns

Stamping an Account's Initial Opportunity Stage when they enter a specific campaign.

Formula field tracks the Current Opportunity Stage.

Initial Opportunity Stage ▾	Current Opportunity Stage ▾
Nurture - Marketing	<input type="text"/>
Nurture - AE	<input type="text"/>
Nurture - Marketing	<input type="text"/>
Nurture - Marketing	<input type="text"/>
Nurture - Marketing	<input type="text"/>
Discovery	<input type="text"/>
Nurture - AE	<input type="text"/>
N/A	<input type="text"/>
Proposal	<input type="text"/>



After

Engaged Accounts

Net New Accounts

4.2K

Any Acct with at least 1 person engaged w/ mktg or sales
[View Report \(GM - Funnel Metrics - Prospect Accounts\)](#)

Marketing Qualified Accounts

1.1K

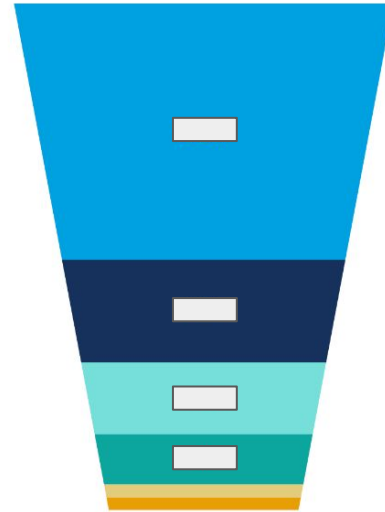
Any acct with at least 1 MQL
[View Report \(GM - Funnel Metrics - MQL Accounts\)](#)

Marketing Stage - Account

Record Count: 4.7k

Marketing Lifecycle Stage

- Target ■
- Prospect ■
- MQL ■
- SAL ■
- SQL ■
- Customer ■
- SAO ■



[View Report \(GM - Marketing Funnel \(Accounts\)\)](#)

Sales Accepted Accounts

678

Any Acct with at least 1 SAL
[View Report \(GM - Funnel Metrics - SAL Accou\)](#)

Sales Qualified Accounts

1.3K

Any Acct with at least 1 SQL (Meeting Schedul
[View Report \(GM - Funnel Metrics - SQL Accou\)](#)

Sales Accepted Opportunity A...

3.1K

All accounts with at least 1 opp that has progre
[View Report \(GM - Funnel Metrics - SAO Accou\)](#)

We can track funnel velocity

Days - Target to SAO



[View Report \(GM - Funnel Metrics - Target to SAO\)](#)

MQLs Month over Month



Thank You!

