



Automate Your Campaign Creation: Leveraging Salesforce Screenflows for Multi-Channel Success



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fluent:cx

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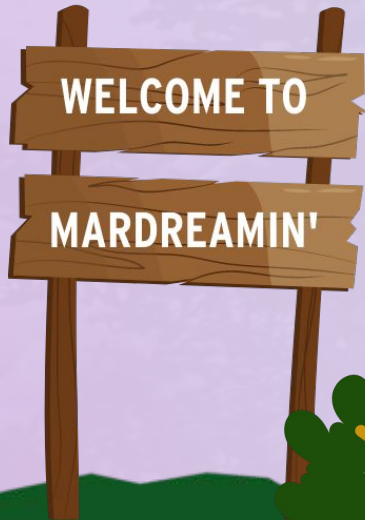
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Agenda

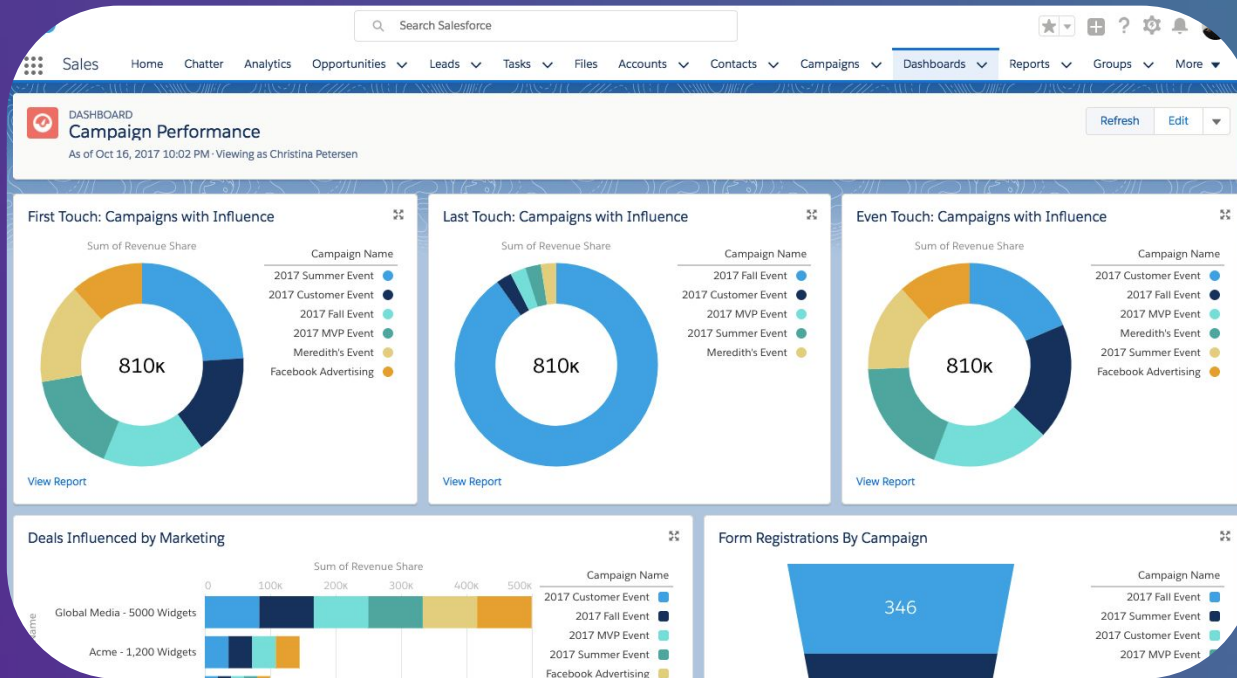
- Mastering Account Engagement and Campaign Influence
- Campaign Creation & adding campaign members: A Look Back at the "Old School" Method
- Crafting the Perfect Recipe: Ingredients & the Secret Sauce
- Demo: The Future of Campaign Automation at Your Fingertips



Mastering Account Engagement and Campaign Influence



Account Engagement and Campaign Influence



- **First touch**—This model gives 100% of the credit to the first campaign a prospect interacts with. It's useful for understanding which campaigns are best at capturing initial interest.
- **Even distribution**—In this model, we equally distribute credit across all campaigns a prospect has engaged with. It provides a balanced view of how multiple campaigns work together.
- **Last touch**—The opposite of First-Touch, this model credits the final campaign that a prospect interacts with before becoming an opportunity. This shows what closes the deal

The background features a soft-focus landscape of mountains in shades of blue, purple, and pink. A faint, semi-transparent illustration of a hand holding a pencil is visible on the right side. In the bottom-left corner, there is a small, stylized green plant with yellow flowers.

Campaign Creation & adding campaign members: A Look Back at the "Old School" Method

Campaign & Member Creation Process



A parent campaign hierarchy

Let's say our annual marketing plan allows for most of the standard channels, our parent structure could look like



Creating your marketing child campaigns and member statuses

Before we can start adding Prospects (Leads & Contacts) to Salesforce Campaigns, we need to create them including their respective member statuses:

Edit Clauddreamin_2024
* = Required Information

Campaign Owner
Claudia Hoops

*** Campaign Name**

Long Campaign Name
Clauddreamin_2024_Renew_27_10_24

Active

Type

Status

Start Date

End Date

Num Sent in Campaign

Parent Campaign

Campaign Level

Budgeted Cost in Campaign

Actual Cost in Campaign

Expected Revenue in Campaign

Expected Response (%)

Target Industry

Target Audience

Short Target Audience
Renew

Campaign Member Statuses (6)

Member Status	Is Default	Responded	Last Modified Date
Attended	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM <input type="text" value="v"/>
Clicked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM <input type="text" value="v"/>
Invited	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/27/2024, 12:55 PM <input type="text" value="v"/>
No Show	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM <input type="text" value="v"/>
Opened	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM <input type="text" value="v"/>
Registered	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM <input type="text" value="v"/>

[View All](#)

Adding Account Engagement Prospects (Leads & Contacts) to Campaigns with their status

...via Completion Actions

Completion Actions

Action: Add to campaign

Campaign: FlowDreamin2024

Campaign Member Status: Registered

+ Add Action + Add Conditional Group

- Forms/Handlers
- Emails
- Page Actions
- Custom Redirects
- Files

...Automation Rules

Automation Rules

Match Type: Match all Match any

Automation Rules are retroactive and affect all prospects that meet the selected criteria.

Prospect form: FlowDreamin2024

was completed successfully

+ Add new rule + Add new rule group

Actions

Add to CRM Campaign: FlowDreamin2024

Registered Refresh Data

Only campaigns that are connected to a Salesforce campaign appear. To connect a campaign, go to the Campaigns tab.

+ Add new action

...or Engagement Studio

ADD TO SALESFORCE CAMPAIGN

Cancel

Add to Salesforce Campaign

FlowDreamin2024

with status

Registered

When?

Immediately Wait

Save

Now...

*I'm planning an event called **Clauddreamin_2024** and I'm looking to advertise it via **Email**, my **Website**, via **Google Paid Search**, as well as on **LinkedIn**, in total on 4 different channels. While choosing the channels, I also decide running the event via multiple campaign types, for example on **LinkedIn** via **Organic Posts** and **Sponsored Content**.*



That means I have to create...



5x campaigns for Clauddreamin:

- Account Engagement
- Website/Organic Search
- Google Paid Search
- LinkedIn Organic Social
- LinkedIn Sponsored Content



- 1x form & LP per campaign & to ensure prospects are added to the right campaign
- Add to Account Engagement campaign
 - Add to the Website campaign
 - Add to the Google Ads campaign
 - Add to the LinkedIn Organic Social campaign
 - Add to the LinkedIn Sponsored Content campaign

P.S. Not to mention the additional completion actions like sending a confirmation email, adding prospects to lists or adding scoring points...

...and then I need to change a field....on all forms...

Thinking about that,
I will probably look like this 🤪



So there's got to be a better way...



Crafting the Perfect Recipe: Ingredients & the Secret Sauce



URL Tracking Parameters

Some of you might have worked with UTM parameters in your URL to understand in Google Analytics where your website traffic comes from. We are using this to automate the campaign naming convention and custom URL creation:

- UTM Source: Lead Source or Channel
- UTM Medium: Campaign Type
- UTM Campaign: Campaign Name
- UTM Content: Optional (*Specifies what was clicked to get to the page*)
- UTM Term: Optional (*Used for paid search campaigns to track keywords*)

Additionally, we are adding in two extra parameters in order to automate adding prospects (lead and contacts) to campaigns using the correct member status:

- SF Campaign ID: Created and added during Campaign creation process
- Member Status: Chosen and created during Campaign creation process

Examples in Action

UTM Source (Channel)

1. MCAE
2. SFMC
3. MCG

1. Facebook
2. LinkedIn
3. X
4. Instagram
5. TikTok

1. Names of webinars
2. Names of events

UTM Medium (Type)

1. Email
2. Nurture

1. OrganicSocial
2. PaidSocial
3. Sponsored Content
4. Display Advertising

1. Event
2. Webinar

Member Status

- Sent
- Opened
- Clicked
- Downloaded Whitepaper
- Completed Form

- Viewed
- Clicked
- Completed Form

- Invited
- Registered
- Attended
- No Show
- On Demand

Examples in Action

Campaigns
Clauddreamin_2024_Account Engagement_Email

Details Related

Campaign Owner Claudia Hoops	Parent Campaign Clauddreamin_2024
Campaign Name Clauddreamin_2024_Account Engagement_Email	Campaign Level
Long Campaign Name Clauddreamin_2024_Account Engagement_Email_New_Cons_27_10_24	Budgeted Cost in Campaign \$5,000
Active <input checked="" type="checkbox"/>	Actual Cost in Campaign
Type Email	Expected Revenue in Campaign
Status Planned	Expected Response (%) 0.00%
Start Date 12/10/2024	Target Industry Consulting
End Date 12/13/2024	Target Audience New lead generation
Num Sent in Campaign 0	Short Target Audience New
UTM Section	
UTM_Source Account Engagement	UTM_Content emailinvite
UTM_Medium Email	UTM_Term
UTM_Campaign Clauddreamin_2024_Account Engagement_Email	Basic Campaign URL https://www.claudmartech.de/clauddreamin2024

UTM Tracked URL

https://www.claudmartech.de/clauddreamin2024?
 utm_source=Account_Engagement&utm_medium=Email&utm_campaign=Clauddreamin_2024_Account_Engagement_Email&f_campaign_id=701Hs000002WNRA&member_status=Registered&utm_content=emailinvite



Campaign Member Statuses (6) New Change Default Status

Member Status	Is Default	Responded	Last Modified Date
Attended	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM
Clicked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM
Invited	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/27/2024, 12:55 PM
No Show	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM
Opened	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM
Registered	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM

[View All](#)



Demo: The Future of Automation at Your Fingertips





Search...



Campaign **Clauddreamin_2024**

[New Contact](#) [New Opportunity](#) [New Case](#)

Type	Status	Start Date	End Date
	Planned		

- New Lead
- Edit
- Delete
- Clone
- Submit for Approval
- Change Owner
- View Campaign Hierarchy
- Create Campaign Program
- Create URL
- Sharing
- Clone with Related

Engagement

Email Open Rate
0
0 Unique Email Opens

Email Click-Through Rate
0
0 Unique Email Clicks

Total Emails Delivered
0

Marketing Form Submissions
0
0 Total Marketing Form Submissions

Total Marketing Form Views
0

Unique Marketing Link Clicks
0

Total Landing Page Views
0

Landing Page Form Submissions
0
0 Total Landing Page Form Submissions

Details **Related**

Campaign Members by Status

We can't draw this chart because there is no data.

Activity

Calendar, Lists, WhatsApp, Email icons

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.

Type	Status	Start Date	End Date
	Planned		

Engagement

Include Child Campaigns

Email Open Rate

0

0 Unique Email Opens

Total Marketing Form Views

0

Marketing Form Submission Rate

0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions

Create Campaign Program

What campaign program would you like to build?

* Program Name:

* What is the parent campaign?:

[Complete campaign program details](#)

Details Related

Campaign Members by Status

We can't draw this chart because there is no data.

Activity

Calendar, Gantt, Kanban, Mail icons

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.

Campaign Clauddreamin_2024

New Contact New Opportunity New Case

Type	Status	Start Date	End Date
	Planned		



Create Campaign Program

Please complete the details of your campaign program:

* Type	Event	* Start Date	Dec 10, 2024
Status	Planned	* End Date	Dec 13, 2024
* Target Audience	New lead generation	Budget	\$50,000
* Target Industry	Consulting	Base URL	https://www.claudmartech.de/clauddreamin2024

Active

Change previous details Choose your channels

Engagement

Email Open Rate
0

0 Unique Email Opens

Total Marketing Form Views
0

Include Child Campaigns

Marketing Form Submission Rate
0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate
0

0 Total Landing Page Form Submissions

Details Related

Campaign Members by Status

We can't draw this chart because there is no data.

WhatsApp Email

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.

Campaign Events 2024

New Contact New Opportunity New Case

Type Status Start Date End Date Planned



Engagement

Include Child Campaigns

Email Open Rate 0 0 Unique Email Opens

Total Marketing Form Views 0

Marketing Form Submission Rate 0 0 Total Marketing Form Submissions

Landing Page Form Submission Rate 0 0 Total Landing Page Form Submissions

Create Campaign Program What channels (utm_source) would you like to market your campaign program on? Account Engagement Google Youtube Instagram TikTok X Facebook LinkedIn Website

Change campaign details

Choose your campaign types

Details Related

Table with 2 columns: Field Name, Value. Includes Campaign Owner (Claudia Hoops), Campaign Name (Events 2024), Long Campaign Name (Events 2024_Renew__23_10_24), Active (checked), Type, Status (Planned).

Table with 2 columns: Field Name, Value. Includes Parent Campaign, Campaign Level, Budgeted Cost in Campaign, Actual Cost in Campaign, Expected Revenue in Campaign, Expected Response (%) (0.00%).

Activity filters and list. Includes icons for calendar, list, chat, email. Filters: All time • All activities • All types. Upcoming & Overdue: No activities to show.

Campaign **Events 2024** [Share icon]

[New Contact] [New Opportunity] [New Case] [Dropdown]

Type	Status	Start Date	End Date
	Planned		

Engagement

Include Child Campaigns

Email Open Rate
0
0 Unique Email Opens

Total Marketing Form Views
0

Marketing Form Submission Rate
0
0 Total Marketing Form Submissions

Landing Page Form Submission Rate
0
0 Total Landing Page Form Submissions

Create Campaign Program

Please choose the campaign types for Account Engagement:

* Campaign Types (utm_medium)

- Nurture
- Email

[Change campaign channels] [Next]

Details	Related
Campaign Owner Claudia Hoops	Parent Campaign
Campaign Name Events 2024	Campaign Level
Long Campaign Name Events 2024_Renew__23_10_24	Budgeted Cost in Campaign
Active <input checked="" type="checkbox"/>	Actual Cost in Campaign
Type	Expected Revenue in Campaign
Status Planned	Expected Response (%) 0.00%

Activity

[Calendar] [Dropdown] [Gantt] [Dropdown] [Calendar] [Dropdown] [Envelope] [Dropdown]

Filters: All time • All activities • All types [Settings]

[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.

Campaign **Clauddreamin_2024**

Type	Status	Start Date	End Date
Event	Planned		

[New Contact](#) [New Opportunity](#) [New Case](#)

Create Campaign Program

You can now choose if you wish to create child campaigns for your chosen channel Account Engagement and type Email or create an utm tracked URL for your chosen parent campaign Clauddreamin_2024 only.

- * Please choose between campaign or URL below
- Campaign
 - URL

Please add your utm_content and utm_term optionally:

UTM Content	UTM Term
<input type="text" value="emailinvite"/>	<input type="text"/>
Parameter 1 Name	Parameter 1 Value
<input type="text"/>	<input type="text"/>
Parameter 2 Name	Parameter 2 Value
<input type="text"/>	<input type="text"/>

[Change campaign types](#) [Next](#)

Include Child Campaigns

Engagement

Email Open Rate

0

0 Unique Email Opens

Total Marketing Form Views

0

Marketing Form Submission Rate

0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions

Details **Related**

Campaign Members by Status

We can't draw this chart because there is no data.

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.

Type	Status	Start Date	End Date
Event	Planned		

Engagement

Email Open Rate

0

0 Unique Email Opens

Total Marketing Form Views

0

Details **Related**

Campaign Members by Status

We can't draw this chart because there is no data.

Include Child Campaigns

Marketing Form Submission Rate

0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions

Filters: All time · All activities · All types

Refresh · Expand All · View All

& 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.

Create Campaign Program

Please review & complete the details of your campaign and choose your default & responded Campaign Member Statuses:

▼ Campaign Details

<p>Parent Campaign Claudreamin_2024</p> <p>Campaign Name Claudreamin_2024_Account Engagement_Email</p> <p>* Status Planned</p> <p>Type Email</p> <p>Channel Account Engagement</p> <p><input checked="" type="checkbox"/> Active</p> <p>* Default Member Status Invited</p> <p>* Responded Member Statuses</p> <div style="border: 1px solid #ccc; padding: 5px; height: 150px;"> <ul style="list-style-type: none"> Attended No Show Completed Form Downloaded Whitepaper Registered </div>	<p>* Start Date Dec 10, 2024</p> <p>* End Date Dec 13, 2024</p> <p>* Target Audience New lead generation</p> <p>* Target Industry Consulting</p> <p>Budget (Budget left = \$50,000.00) \$5,000</p>
---	--

Create URL only instead
Create campaign & preview URL



Type	Status	Start Date	End Date
Event	Planned		

Engagement

Email Open Rate

0

0 Unique Email Opens

Total Marketing Form Views

0

Details Related

Campaign Members by Status

Create Campaign Program

Congratulations! Your campaign Clauddreamin_2024_Account Engagement_Email was successfully created. Below, you can review the parameters of your custom URL before creating it.

* Base URL

Campaign ID
701Hs00002WNX0IA4

* Member Status

Registered

Please select a choice.

UTM Source
Account Engagement

UTM Medium
Email

UTM Campaign
Clauddreamin_2024_Account Engagement_Email

UTM Term

UTM Content

Custom Parameter 1

Custom Parameter 2

Custom Parameter 1 Value

Custom Parameter 2 Value

[Create URL](#)

Include Child Campaigns

Marketing Form Submission Rate

0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions

Campaign Clauddreamin_2024

New Contact New Opportunity New Case

Type	Status	Start Date	End Date
Event	Planned		

Engagement

Include Child Campaigns

Email Open Rate

0

0 Unique Email Opens

Total Marketing Form Views

0

Create Campaign Program

Congratulations, your custom URL https://www.claudmartech.de/clauddreamin2024?utm_source=Account_Engagement&utm_medium=Email&utm_campaign=Clauddreamin_2024_Account_Engagement_Email&sf_campaign_id=701Hs000002WNXOIA4&member_status=Registered&utm_content=emailinvite has been created.

Next

Marketing Form Submission Rate

0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions

Details Related

Campaign Members by Status

We can't draw this chart because there is no data.

Activity

Calendar, Bar Chart, WhatsApp, Email icons

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.

Campaign Events 2024

New Contact New Opportunity New Case

Type Status Start Date End Date
Planned

Engagement

Include Child Campaigns

Create Campaign Program

Please choose the campaign types for Google:

* Campaign Types (utm_medium)

- OrganicSearch
- PaidSearch
- DisplayAdvertising

[Change campaign channels](#)
[Next](#)

Email Open Rate

0

0 Unique Email Opens

Marketing Form Submission Rate

0

0 Total Marketing Form Submissions

Total Marketing Form Views

0

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions

Details Related

Campaign Members by Status

We can't draw this chart because there is no data.

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

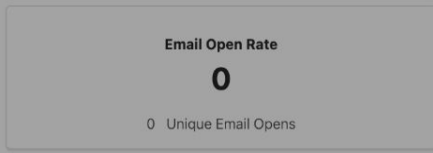
Upcoming & Overdue

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

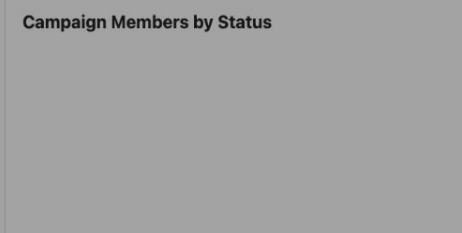
No past activity. Past meetings and tasks marked as done show up here.

Type	Status	Start Date	End Date
Event	Planned		

Engagement



Details Related



New Contact New Opportunity New Case

Create Campaign Program

You can now choose if you wish to create child campaigns for your chosen channel Google and type PaidSearch or create an utm tracked URL for your chosen parent campaign Clauddreamin_2024 only.

* Please choose between campaign or URL below

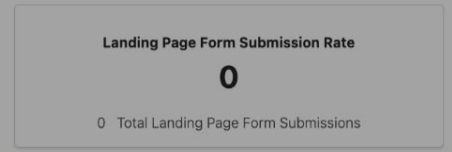
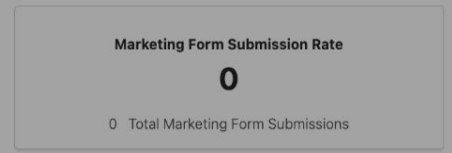
Campaign
 URL

∨ Please add your utm_content and utm_term optionally:

UTM Content	UTM Term
<input type="text" value="googlelead1"/>	<input type="text" value="clauddreamin2024"/>
Parameter 1 Name	Parameter 1 Value
<input type="text"/>	<input type="text"/>
Parameter 2 Name	Parameter 2 Value
<input type="text"/>	<input type="text"/>

[Change campaign types](#) [Next](#)

Include Child Campaigns



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.

Campaign
Clauddreamin_2024

Type	Status	Start Date	End Date
	Planned		

Engagement

Email Open Rate

0

0 Unique Email Opens

Total Marketing Form Views

0

Details **Related**

Campaign Members by Status

We can't view this chart because there is no data.

New Contact New Opportunity New Case

Marketing Form Submission Rate

0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions

Filters: All time • All activities • All types

Refresh • Expand All • View All

& 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.

Create Campaign Program

Please review & complete the details of your campaign and choose your default & responded Campaign Member Statuses:

▼ Campaign Details

<p>Parent Campaign Clauddreamin_2024</p> <p>Campaign Name Clauddreamin_2024_Google_PaidSearch</p> <p>* Status Planned</p> <p>Type PaidSearch</p> <p>Channel Google</p> <p><input checked="" type="checkbox"/> Active</p> <p>* Default Member Status Viewed</p> <p>* Responded Member Statuses</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Attended</p> <p>No Show</p> <p>Completed Form</p> <p>Registered</p> <p>Clicked</p> </div>	<p>* Start Date Dec 10, 2024</p> <p>* End Date Dec 13, 2024</p> <p>* Target Audience New lead generation</p> <p>* Target Industry Consulting</p> <p>Budget (Budget left = \$45,000.00) \$20,000</p>
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[Create URL only instead](#) [Create campaign & preview URL](#)

Campaign **Clauddreamin_2024**

Type	Status	Start Date	End Date
Event	Planned		

Engagement

Email Open Rate

0

0 Unique Email Opens

Total Marketing Form Views

0

Campaign Members by Status

We can't draw this chart because there is no data.

Create Campaign Program

Congratulations! Your campaign Clauddreamin_2024_Google_PaidSearch was successfully created. Below, you can review the parameters of your custom URL before creating it.

* Base URL

Campaign ID
701Hs00002WNXTIA4

* Member Status

UTM Source
Google

UTM Medium
PaidSearch

UTM Campaign
Clauddreamin_2024_Google_PaidSearch

UTM Term

UTM Content

Custom Parameter 1

Custom Parameter 1 Value

Custom Parameter 2

Custom Parameter 2 Value

[Create URL](#)

Include Child Campaigns

Marketing Form Submission Rate

0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions

& Overdue

No activities to show.

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

Campaign **Clauddreamin_2024**

New Contact New Opportunity New Case

Type	Status	Start Date	End Date
Event	Planned		

Engagement

Include Child Campaigns

Email Open Rate

0

0 Unique Email Opens

Total Marketing Form Views

0

Create Campaign Program

Congratulations, your custom URL https://www.claudmartech.de/clauddreamin2024?utm_source=Google&utm_medium=PaidSearch&utm_campaign=Clauddreamin_2024_Google_PaidSearch&sf_campaign_id=701Hs000002WNXTIA4&member_status=Registered&utm_content=googlelead1&utm_term=clauddreamin2024 has been created.

Next

Marketing Form Submission Rate

0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions

Details **Related**

Campaign Members by Status

We can't draw this chart because there is no data.

Activity

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.

Campaign Events 2024

New Contact New Opportunity New Case

Type Status Start Date End Date Planned

Engagement

Email Open Rate 0

0 Unique Email Opens

Total Marketing Form Views 0

Marketing Form Submission Rate 0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate 0

0 Total Landing Page Form Submissions

Include Child Campaigns

Create Campaign Program

Please choose the campaign types for LinkedIn:

- SponsoredContent
- PaidSocial
- DisplayAdvertising
- OrganicSocial

[Change campaign channels](#) [Next](#)

Details Related

Campaign Members by Status

We can't draw this chart because there is no data.

Activity

Activity filters and controls: calendar, list, chat, email icons with dropdowns.

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.

...et voilà...



Create Campaign Program

List of Campaigns created

5 of 5 items

Name	Budgeted Cost in Campaign
Clauddreamin_2024_Account Engagement_Email	\$5,000.00
Clauddreamin_2024_Google_PaidSearch	\$20,000.00
Clauddreamin_2024_LinkedIn_SponsoredContent	\$10,000.00
Clauddreamin_2024_LinkedIn_OrganicSocial	\$10,000.00
Clauddreamin_2024_Website_OrganicSearch	\$5,000.00

List of URLs created

5 of 5 items

Campaign Name	UTM Tracked URL
Clauddreamin_2024_Account Engagement_Email	https://www.claudmartech.de/clauddreamin2024?utm_source=Account_Engagement&utm_medium=Email&utm_campaign=Clauddreamin_2024_Account_Engagement_Email&sf_campaign_id=701Hs000002WNRA&member_status=Registered&utm_content=emailinvite&utm_term=clauddreamin2024
Clauddreamin_2024_Google_PaidSearch	https://www.claudmartech.de/clauddreamin2024?utm_source=Google&utm_medium=PaidSearch&utm_campaign=Clauddreamin_2024_Google_PaidSearch&sf_campaign_id=701Hs000002WNRE&member_status=Registered&utm_content=clauddreamin2024&utm_term=paid
Clauddreamin_2024_Website_OrganicSearch	https://www.claudmartech.de/clauddreamin2024?utm_source=Website&utm_medium=OrganicSearch&utm_campaign=Clauddreamin_2024_Website_OrganicSearch&sf_campaign_id=701Hs000002WNRE&member_status=Registered&utm_content=clauddreamin2024&utm_term=organic

Finish

Campaign
Clauddreamin_2024

Type Status Start Date End Date
Planned

Engagement

Email Open Rate

0

0 Unique Email Opens

Total Marketing Form Views

0

Details Related

Campaign Members by Status

Search...



New Contact New Opportunity New Case

Include Child Campaigns

Marketing Form Submission Rate

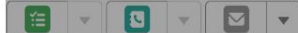
0

0 Total Marketing Form Submissions

Landing Page Form Submission Rate

0

0 Total Landing Page Form Submissions



Filters: All time · All activities · All types

Refresh · Expand All · View All

& 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.



CAMPAIGN > CLAUDDREAMIN_2024

Campaign Hierarchy

▾ [Clauddreamin_2024](#) **current**

Planned

[Clauddreamin_2024_Account Engagement_Email](#)

12/10/2024

12/13/2024

\$5,000

Email

Planned

[Clauddreamin_2024_Google_PaidSearch](#)

12/10/2024

12/13/2024

\$20,000

PaidSearch

Planned

[Clauddreamin_2024_LinkedIn_OrganicSocial](#)

12/10/2024

12/13/2024

\$10,000

OrganicSocial

Planned

[Clauddreamin_2024_LinkedIn_SponsoredContent](#)

12/10/2024

12/13/2024

\$10,000

SponsoredContent

Planned

[Clauddreamin_2024_Website_OrganicSearch](#)

12/10/2024

12/13/2024

\$5,000

OrganicSearch

Planned



Campaign
Clauddreamin_2024_Account Engagement_Email

Campaign Member Statuses (6) New Change Default Status

Member Status	Is Default	Responded	Last Modified Date
Attended	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM
Clicked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM
Invited	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/27/2024, 12:55 PM
No Show	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM
Opened	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM
Registered	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/27/2024, 12:55 PM

[View All](#)

Custom URLs (1) New

Custom URL Name	utm_content	utm_term	UTM Tracked URL
Account Engagement_Email_Registered	emailinvite	clauddreamin2024	https://www.clauddreamin.de/clauddreamin2024?utm_source=Account_Engagement&utm_medium=Email&utm_campaign=Clauddreamin_2024_Account_Engagement_Email&utm_term=clauddreamin2024

[View All](#)



Form Fields Preview

First Name (a)*

Last Name (a)*

Email (a)*

Company (a)*

UTM Source (a) (hidden)

UTM Medium (a) (hidden)

UTM Campaign (a) (hidden)

UTM Content (a) (hidden)

UTM Term (a) (hidden)

SF Campaign ID (a) (hidden)

Campaign Member Status (a)



Campaign Member
Clauddreamin_2024_Account Engagement_Email

First Name	Last Name	Status	Company (Account)
Claudia	Hoops	Registered	Clauddreamin

UTM Section

utm_source_first_touch	Account_Engagement
utm_medium_first_touch	Email
utm_campaign_first_touch	Clauddreamin_2024_Account_Engagement_Email
utm_content_first_touch	emailinvite
utm_term_first_touch	clauddreamin2024

Summary

- **Channel & Campaign Setup:** With one Screenflow, we identified all event channels, campaign types, and member statuses.
- **Automated Campaign Creation:** The flow created all necessary Salesforce campaigns with custom landing page URLs and tracking parameters ready to use.
- **Seamless Tracking:** Embedded UTM values within landing pages allow for accurate tracking across channels.
- **Auto-Assignment of Leads & Contacts:** Leads & Contacts can now be added automatically to campaigns with pre-set member statuses.



Questions?



Thank You!

