MARDREAMIN'

Customize & Automate Your Lead Lifecycle in Salesforce

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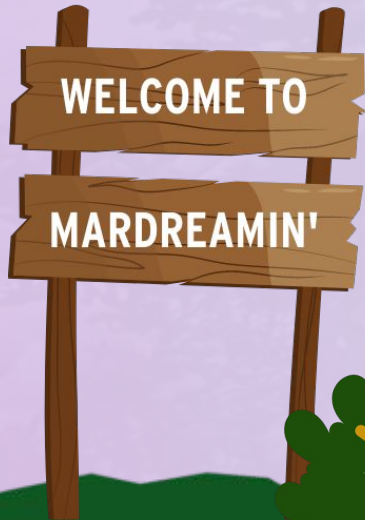
Agenda

- The Importance of Lifecycle Statuses
- Update Options
- Demo
- Closing the Feedback Loop
- Summary and Q&A

WELCOME TO

MARDREAMIN'

The Importance of Lifecycle Statuses

What Does This Mean?

Put yourself in the shoes of a BDR or SDR.

Account Engagement Information

Account Engagement Grade

Account Engagement Score
162

Account Engagement Information

Account Engagement Grade
B+

Account Engagement Score
72

Without context, one could easily assume that the first lead is better based on score alone.

The Sales Team Needs Context

Regardless of where the data is coming from, marketing has the context and MUST provide it to sales. This can be done by translating numbers, letters, and codes into defined lifecycle statuses.

Lifecycle Status Best Practices
- Develop in collaboration with sales leadership
- Have agreed upon SLAs
- Review & update regularly based on feedback from sales

Lifecycle Status Best Practices

Best practices to follow when developing lifecycle statuses.

Best Practices
- Develop in collaboration with sales leadership
- Have agreed upon SLAs
- Review & update regularly based on feedback from sales

Lifecycle Matrix

|	Grade			
	A	B	C	D
>=100	Hot MQL	Hot MQL	Hot MQL	Hot MQL
75-99	Hot MQL	MQL	MQL	MQL
50-74	MQL	Inquiry	Inquiry	Inquiry
1-49	Inquiry	Inquiry	Inquiry	Inquiry
0	Suspect	Suspect	Suspect	Suspect

Scorc

Update Options

Engagement Studio

This is a simple solution but...

- Can only run once per day.
  - This could impact speed-to-lead requirements.

- Logic can quickly become to complex for for complex rule logic.
  - Moving logic into dynamic lists is an option, but could result in speed/performance issues (trust me on this one).

- Can't do anything related to "math" or copy values from one field to another.
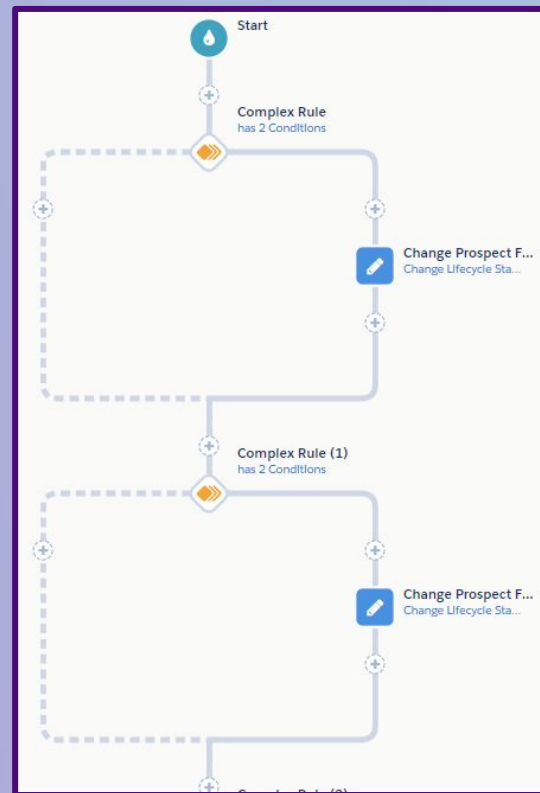
Salesforce Flow

Key Advantages

- Actions triggered on a field value change
- No limitations on run frequency
- Can perform mathematical calculations
- Copy values from one field to another
- Custom user notifications
- Read information from Tasks
- Update related objects
- Inject data from Custom Objects

Salesforce Flow

Considerations

- Prospects must be in Salesforce for the process to work.

- Flows are object specific. A flow based on the lead object will only update leads.
  - A flow on the contact object would be needed to update contacts.

- Account Engagement scores can only be updated in Account Engagement.
  - If scores are updated in SFDC, they will revert back to the Account Engagement value when they sync.
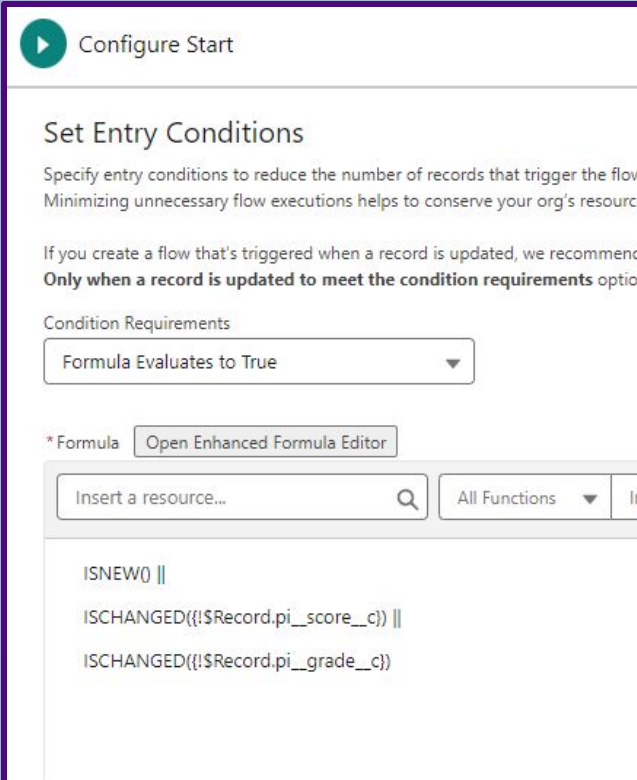
Flow Design

Flow Design

Entry Conditions

- Record-triggered flow (lead object)

- Triggered when new leads are created or Account Engagement or Score changes
  - Conditions could be based on other fields, like intent data or anything else in Salesforce!

Flow Design

Decision Element

- Lifecycle criteria added into decision element

- Condition logic can be applied to address even the most complex needs

- Individual outcomes defined for each lifecycle status

Flow Design

Resources

- Formulas are another great flow feature

- In this example, a formula is used to set the first MQL date

- Actions
  - If value is blank, use today's date
  - If value is not blank, retain the current value

Edit Formula

* API Name ⓘ

Set_First_MQL_Date

Description

Sets the fist MQL date to day if blank.

* Data Type ⓘ

Date

* Formula   Open Enhanced Formula Editor

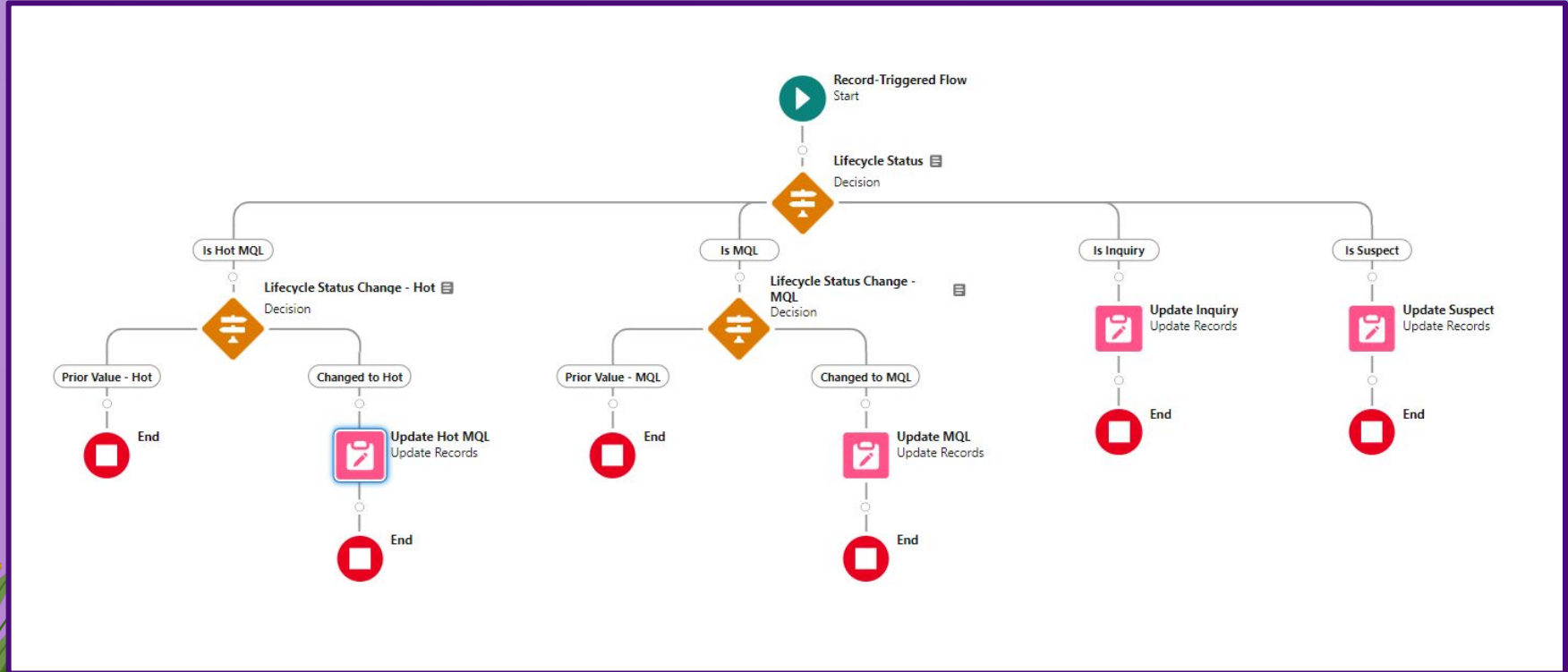Insert a resource... 🔍 | All Functions ▾ | Insert a function... 🔍 | Select an Operator... ▾

IF(ISBLANK({!$Record.First_MQL_Date__c}), TODAY(), {!$Record.First_MQL_Date__c})

Check Syntax

Cancel   Done

Flow

Flow Review & Demo

Test Records

Name	Email	Grade	Score	Expected Result
Alicea Ducroe	aducroedv@walmart.com	C	0	Suspect
Donal Belz	dbelzdt@geocities.com	B	63	Inquiry
Gates McBeith	gmcbeithds@163.com	B	82	MQL
Sharyl Radcliffe	sradcliffedr@goo.gl	A+	76	Hot MQL

Closing the Feedback Loop

All Marketing Leads are HOT!

"These are hot leads and need to be called immediately"
- Every Marketer
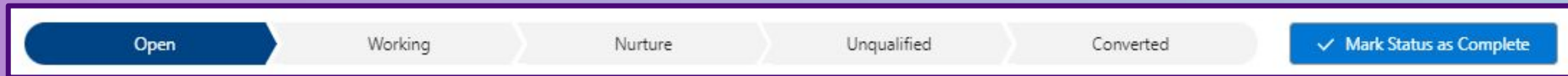
In the real world...
- Not every lead is going to be ready to purchase
- Some need to be nurtured
- Sales needs the ability to provide feedback based

Leads should be followed up on based on the agreed upon SLAs.

Lead Statuses to the Rescue

| Open | Working | Nurture | Unqualified | Converted | ✓ Mark Status as Complete |

Since our sales teams are working in Salesforce we can use changes in the lead status to inform our lifecycle statuses.

Key Points to Remember
- Lifecycle statuses are based on Account Engagement grades and scores
- Account Engagement scores can only be modified in Account Engagement
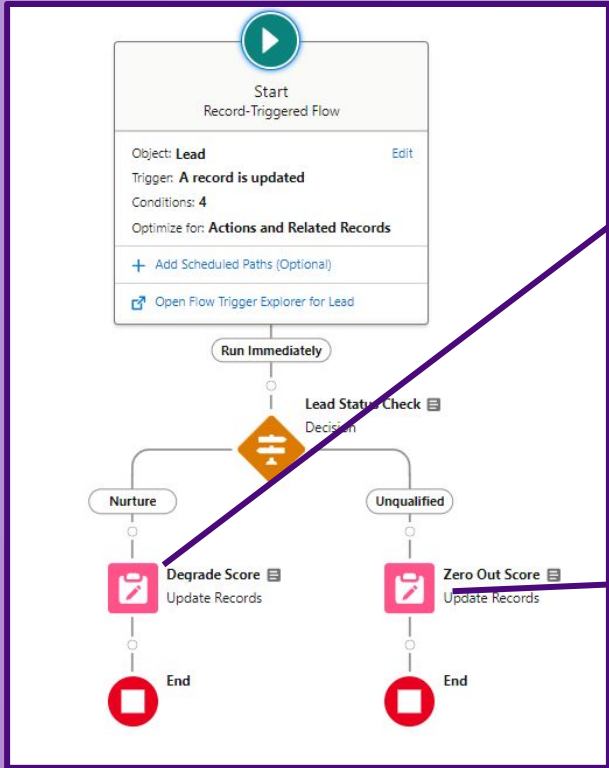
Flow + Automation Rules

Updating Account Engagement Scores based on changes in Salesforce requires custom fields (checkbox), flow, and automation rules in Account Engagement.

| Status change triggers flow | Flow updates check box | Automation Rule triggered by check box | Automation Rule changes score & unchecks box | Lifecycle flow triggered by score change |

This allows sales to change scores (and lifecycle statuses) by updating the stage.

- Change to Nurture → Update to Inquiry
- Change to Unqualified → Update to Suspect

Summary and Q&A

Summary

- Sales NEEDS context to understand what leads should be prioritized
- Salesforce flow is a fast and flexible way to provide this context (using lifecycle status values)
- Engagement Studio is another option for updating, but lacks the functionality of flow
- Incorporating feedback from sales is critical and should not be ignored

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