



# Customize & Automate Your Lead Lifecycle in Salesforce

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**Mike Morris**  
Sercante, Sr. Engagement  
Manager

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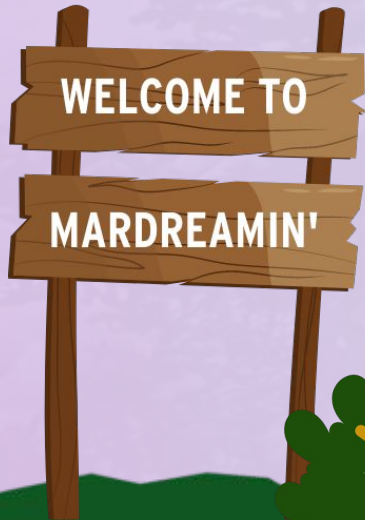
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# Agenda

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



# 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

S  
C  
O  
R  
E

	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





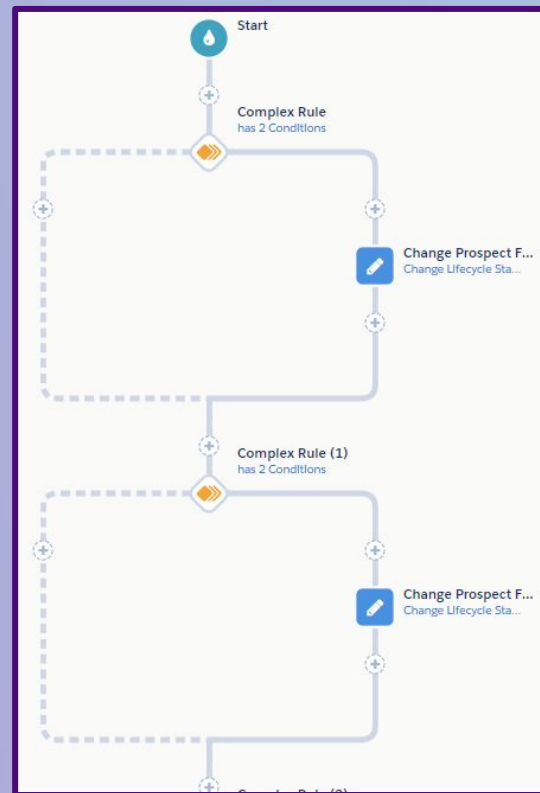
# Update Options



# 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 too complex 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.



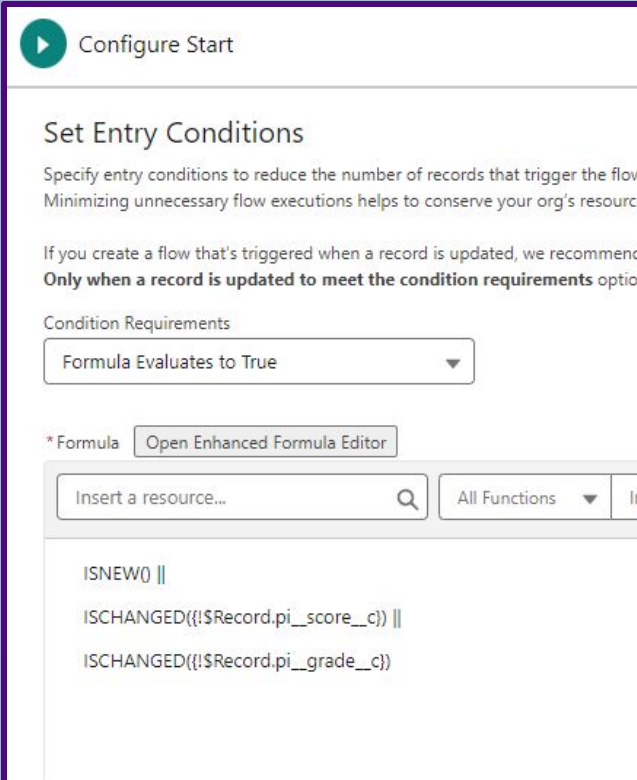
# Flow Design



# 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!



**Configure Start**

### Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend **Only when a record is updated to meet the condition requirements** option.

Condition Requirements

Formula Evaluates to True

\*Formula [Open Enhanced Formula Editor](#)


Insert a resource... [All Functions](#) [In](#)

```
ISNEW() ||  
ISCHANGED(!$Record.pi_score__c) ||  
ISCHANGED(!$Record.pi_grade__c)
```

# 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

 Decision

\* Label

\* API Name <sup>1</sup>

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take

OUTCOME ORDER	OUTCOME DETAILS		
1	Is Hot MQL	* Label	* Outcome API Name <sup>1</sup>
2	Is MQL	Is Inquiry	Is_Inquiry
3	Is Inquiry	Condition Requirements to Execute Outcome	
		Custom Condition Logic Is Met <span style="font-size: small;">▼</span>	
4	Is Suspect	* Condition Logic <sup>1</sup>	
		(1 AND 2 AND (3 OR 4 OR 5 OR 8)) OR (6 AND (7 OR 8))	
		Resource	Operator
1	# ...> Account Engagement Score X	Less Than or Equal <span style="font-size: x-small;">▼</span>	74
		Resource	Operator
2	# ...> Account Engagement Score X	Greater Than or Equal <span style="font-size: x-small;">▼</span>	50
		Resource	Operator
3	A <sub>a</sub> ...> Account Engagement Grade X	Contains <span style="font-size: x-small;">▼</span>	B
		Resource	Operator
4	A <sub>a</sub> ...> Account Engagement Grade X	Contains <span style="font-size: x-small;">▼</span>	C
		Resource	Operator
5	A <sub>a</sub> ...> Account Engagement Grade X	Contains <span style="font-size: x-small;">▼</span>	D
		Resource	Operator
6	# ...> Account Engagement Score X	Less Than or Equal <span style="font-size: x-small;">▼</span>	49



# 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 first 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... ▼

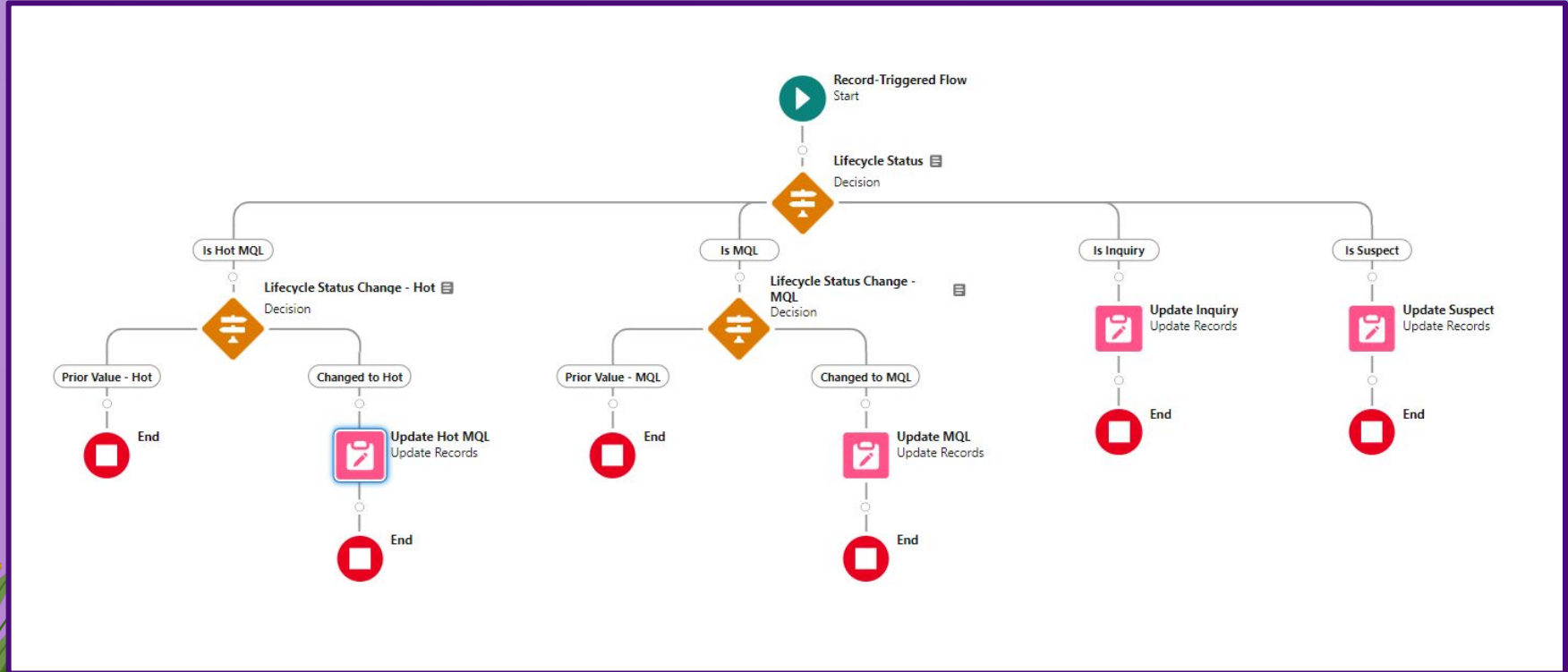
IF(ISBLANK({!\$Record.First\_MQL\_Date\_\_c}), TODAY(), {!\$Record.First\_MQL\_Date\_\_c})

[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*

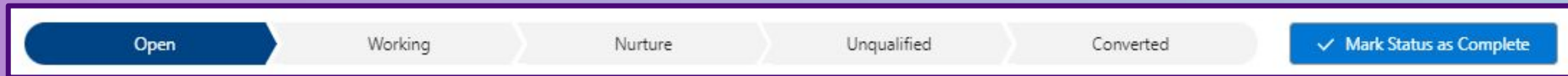
## **In the real world...**

- 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



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

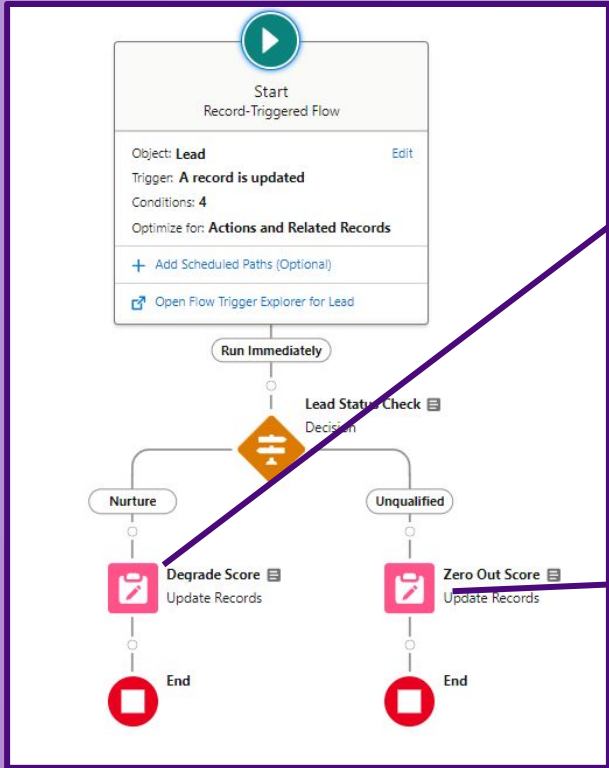
Updating Account Engagement Scores based on changes in Salesforce requires custom fields (checkbox), flow, and automation rules in Account Engagement.



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





### Rules

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

+ 🗑️	Prospect custom field	Trigger Score Decay	is	true
------	-----------------------	---------------------	----	------

+ Add new rule   + Add new rule group

### Actions

+ 🗑️	Adjust prospect score	to	49
+ 🗑️	Change prospect custom fie	Trigger Score Decay	to false

+ Add new action

### Rules

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

+ 🗑️	Prospect custom field	Trigger Score Zero Out	is	true
------	-----------------------	------------------------	----	------

+ Add new rule   + Add new rule group

### Actions

+ 🗑️	Adjust prospect score	to	0
+ 🗑️	Change prospect custom fie	Trigger Score Zero Out	to false

+ Add new action



# 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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**Thank You!**

