MARDREAMIN'

So You Want to Revamp Your Campaign Setup

Pam Carey
Sercante, Engagement Manager

MARDREAMIN'

Thanks To Our Incredible Sponsors

SERCÂNTE
A Trilliad Company

salesforce

TRILLIAD
A Growth Services Provider

stensul

storylane

Trailblazer
COMMUNITY

AuctusIQ™

JUST

SANDLER®

- You’ve been working in an org set up by a team that is no longer there and the structure doesn’t make sense to anyone currently using it.
- You created a structure that made sense at the time, but now that you are down the road, you realize it is too complex.
- Your reporting isn’t clear - or you can’t get to the desired details.
- You’re unable to clearly show car  nce and ROI.

Sound familiar?

It feels so daunting …

but there IS hope and it IS possible!

Let’s Explore

- Where to start + what to evaluate
- Decisions needed
- Gotchas that might arise
- How to make this shiny new plan a reality

KIS (Keep it Simple)

Look for ways to KIS items the project.

It’s too easy for things to get over-complicated and out of control!

Review and develop the plan.

Evaluate current state

Evaluate current hierarchy structure

How complex is the current hierarchy?

Biggest considerations:

- Does the current structure complicate reporting?
- Do you have the data needed for reporting?
- Is the roll-up reporting successful?
- What is the level of effort to set up and manage campaigns?

How many hierarchy levels is “right”

“It depends …”

The basics:

- Recommended: 2 to 4 levels
    - Often: 3
    - Salesforce supports up to 5
- The lowest level of campaign should be the **initiative** (i.e., individual ad or email)
- The rest of the structure depends on your business needs

🔥 **Hot Tip:** If a report/dashboard FILTER can be used, a separate hierarchy level may not be needed (i.e., date, field value).

Current Structure

Clarify your current pain points.

How can you KIS the structure and make it less complicated / more streamlined?

- Unnecessary hierarchy levels
- Overly detailed field picklists
- Fields that are never used
- Multiple campaign member statuses that mean the same thing

But don’t oversimplify … it’s a balance for sure!

Work backwards from your reporting

Begin at the end:

- What do you need to track and report
- What data is needed in your reports
- What is important to your business

Reporting needs - and abilities - are the best criteria to start building your hierarchy structure!

Every criteria does not need its own level

- Report/dashboard filter on field data vs. a hierarchy level?
  - Date, type, channel, etc.
- To slice and dice data in reports and dashboards:
  - Are fields in place to house this data?
  - Are the field picklists set up with the correct supporting values?

Field considerations

Fields + field values

Review current campaign fields:

- Are you getting the necessary reporting information from the fields that are already in place?
- Can users easily find and select the best value (field type, picklist options, etc.)?
- Are users confused by any of the fields?
- Do you find frequent erroneous data in any of the fields (lack of clarity of expected input, confusion over picklist selection, etc.)?
- Are the correct fields marked as required?
- Are there fields that are never used? (Remove them!)

Field dependencies

Are current field dependencies effective?

- Note that these may be impacted by the projects field or field value changes.

Are new field dependencies needed?

Record types

Do you need record types

Campaign record types add a level of complexity, but may be needed if:

- You have non-marketing campaigns that don't need to sync elsewhere (i.e., Account Engagement)
- Campaign requirements vary greatly by type
- Only specific users should be able to create/edit campaigns of specific types (i.e., sales vs. marketing)
- You have multiple Account Engagement business units

Record types allow for different campaign processes, fields, and page layouts for different types of campaigns.

Campaign members + statuses

Campaign members

Without campaign members, your data doesn't tell the right story.

- Are solid processes in place to add campaign members to campaigns?
- More importantly, **are** campaign members being added to campaigns?
    - If not, this is the time to define and develop processes to make it happen.

🔥 **Hot Tip:** Campaign members should only be added to the lowest level of campaign (i.e., your initiative such as individual email or ad). Adding members to higher parent or grandparent levels creates duplicates in reporting data.

Campaign member statuses

Look for areas to simplify the amount of campaign member statuses in use.

- Overlapping versions (Attended, Attended webinar, Attended session)
- Seldom-used (or never used)
- Niche statuses that can be combined

🔥 **Hot Tip #1:** Campaign member statuses cannot be renamed (Attended Event > Attended) if campaign members are already assigned to it. Create ‘Attended’ as a new status and change members to this new status (date field changes will occur - such as member status update date).

🔥 **Hot Tip #2:** Automate adding campaign member statuses to new campaigns to ensure adherence to the new plan.

Standardize names

Naming convention

If you don't already use a naming convention, this is the perfect time to start!

A standardized format ...

- Helps everyone find what they need
- Makes report information more clear

KIS the campaign names and keep them as brief as possible.

🔥 **Hot Tip:** Salesforce has an *80-character limit* for the campaign name field.

KIS the campaign name

If your naming convention is too complex or cannot fulfill a reporting need (i.e., campaign name contains X), consider using a field that can be used in a report filter.

- Embrace new custom fields to capture additional criteria.

🔥 **Hot Tip:** Automate your campaign names to take the guesswork out of the format/content for users (and ensure consistency).

What data to update

Does existing campaign info need to change

- Do you need to update existing campaign / campaign member data?
  - If yes, how far back?

OR

- Are you setting this up only for new campaigns moving forward?

Timing

Scheduling considerations

Planning, execution, and training will take some time.

- Are there internal dates to work around (financial reporting, product launch)?
- Are there team vacation dates or holidays to avoid?
- A blackout period should be put into effect while the project updates are happening (no changes or additions to anything campaign-related).

Other systems

Does campaign data sync to other systems

- Does campaign / campaign member data sync to another tool?
- What impact will this project have on other systems?
- What follow-up actions are needed in these other areas?
    - Be sure to add these to your action plan.

Review and test what will happen.

Review and test … review and test … review and test!

Align with sales

Positive communication

Connect with the sales team to review the project.

- Why it’s happening
- Changes that will impact them / their process
- Improvements to come

It’s also a good time to discuss contact role usage.

- Contact roles are the key to campaign influence reporting
- Cooperation from the sales team is essential

Gotchas

Reporting impact

Reporting **will be impacted** while campaign data updates are in progress.

- Be sure to advise those involved in creating or reviewing reports.
- Plan for a blackout period during execution of this project.

Include IDs in all reports

This is not only important for this project, but a good habit to get into.

When running a report in Salesforce - especially to export, update date, import - be sure to **include IDs** in the report.

It's frustrating to run a report, make updates to the spreadsheet, then realize that you cannot import because the ID is missing.

Are IDs the same between Sandbox and Production environments? Evaluate this before exporting any data to ensure that Production IDs are used during execution.

Campaign member status updates

1. The campaign member status cannot be renamed (Attended Event > Attended) if campaign members **are already assigned** to that particular status.

2. Date fields **will be impacted** (may affect reporting, automations).
   - Member Status Update Date: Changes to [today]
   - Member First Associated Date: No change
   - Member First Responded Date: May change
     - If original status is responded AND new status is responded: No change
     - If original status is not responded and new status IS responded: Changes to [today]
     - If original status is responded and new status is NOT responded: Date is removed

Retired campaign member status

Campaign member statuses that will no longer be used cannot be deleted if campaign members **are already assigned** to that particular status.

Suggestion:

- Rename to add "X-" to be beginning of the status label.
  (Attended webinar > X-Attended webinar)
- Visual cue to team to not use this status moving forward.

Campaign member status did not change

After importing, if the campaign member status did not change as expected:

- There may be a flow or other automation that has not been paused.
- Import error was not resolved.
- The new status may not have been imported into the campaign.

Required field importing error

If you receive an error during importing that a field is required (and that column **was** in the import file but with blank fields/no data):

- Required fields must be in the import file.
- The field **cannot be imported as null** (with no data). 😕

Solution

- Edit the corresponding page layout.
- Remove the requirement on the field + save.
- Re-import (no need to include the field now that it is not required if you have no data to import).
- Reinstate the requirement on the field in the page layout.

Org environment

Some changes cannot be pushed from sandbox to production, so working in production is best.

Caution: Be sure to use data exported from the environment you will work within (preferably production) to ensure that IDs are the same.

Your new best friends

Data loader

Data Loader will be the hero during this project. Note that unless your company pays for a higher level of dataloader.io, there is a limit to the number of records that can be processed (10k) - and you will most likely go beyond that limit.

Make friends with the downloaded Data Loader app. Practice with test data in a sandbox org to get used to the actions, process, and results.

Vlookup

This Excel function helps compare or find data in exported reports and prepare for data updates.

It's not super intuitive, but with a bit of practice, it can be a powerhouse during the planning and data setup phases.

Make it visual

Get the plan ‘on paper’

Getting everything into a visual format can help surface holes in the process and make sure steps aren’t skipped during execution.

Create very clear mappings in a spreadsheet to show how the current state will update to your shiny new plan. It’s also helpful to create a wireframe/flowchart of automated processes - current and new.

- Litmus-test your plan with others familiar with the data/systems
- Easiest way to review with stakeholders and get approvals
- Clearly show how current field data values will change to new values and how processes will change
- Becomes THE resource during execution

Detail the steps

Order of operations

Consider if one change is dependent on another to help prioritize the task list order.

- To update campaign members to a new status, you first need to import the new statuses to the campaigns.
- To update a campaign member status name, you need the unique ID from the Data Loader export.
    - Reminder that you cannot rename if members are assigned to the status.
- To assign campaigns to a new type, you must first add the new value to the type field (campaign object).
- To create a field dependency and display specific secondary values based on a primary value (such as to show subtypes based on type), you must ensure that all values have been created in the campaign object fields first.

List of tasks

By now, you should have a very clear plan of what will change - and how.

Build a detailed task list and put it in order start-to-finish (keep the order of operations in mind!).

Back up and test

Back. Up. The. Data.

This cannot be stressed enough. **Back. Up. The Data.**

Export ALL current data (**with all IDs**) before starting any changes. Hopefully everything goes smoothly, but if something does not, you can revert with backup data!

- Campaign member statuses with IDs (from Data Loader)
- Campaign report with ALL columns (from Salesforce)
- Campaign members with ALL columns (from Salesforce)
- Other data that will be impacted

🔥 **Hot Tip:** Do not alter these backup reports! If you need a working file, save a new version and keep the original backup files pristine.

Testing

Before jumping in, set items up in a sandbox. It may seem like an unnecessary use of time, but will be valuable to make sure everything works as planned and as expected.

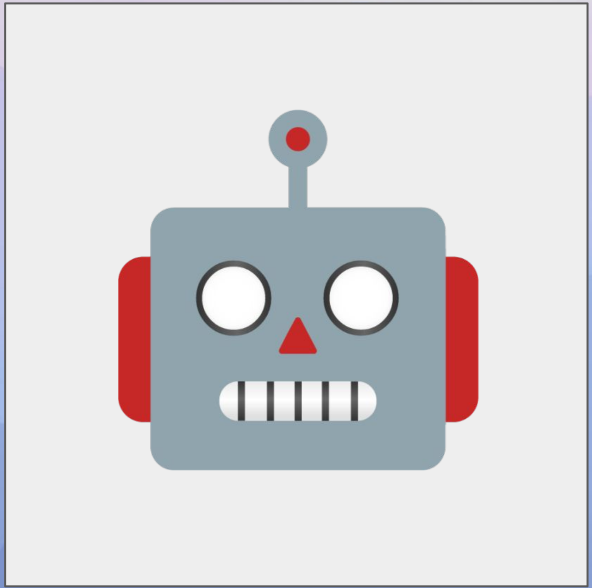
Once built in sandbox, test, test, test! Test all steps to make sure the process works as expected.

Practice using Data Loader to make updates and to make sure that the expected results happen.

Do a run-through with your task list to confirm the order, steps needed, etc.

Remember: Practice makes perfect!

Automation

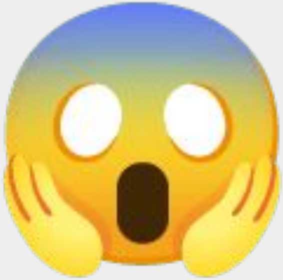


Automate to simplify and standardize

Some ways to simplify campaign processes:

- Build a standardized campaign name based on field information (flow or apex).
- Add campaign member statuses to new campaigns.
- Check/uncheck the active box (flow).
- Change campaign status to completed based on end date (flow).

It's time to execute!



Turn off automations

Automations that impact the campaign and campaign member objects must be paused to avoid conflicts.

Make field updates

Create new or update existing:

- Fields (object manager)
- Picklist values (object manager)
- Campaign member statuses (likely via import vs. manual per campaign)
- Any other net-new structural items

Items to delete/remove? Hold for the end.

Import

Import files must be in .csv format

Select the right tool: Salesforce Data Import Wizard, Data Loader, dataloader.io

- **Import Wizard** is quite easy to master, but has limitations on objects, actions, and batch size.
- **Data Loader** allows larger batch size, a wider range of operations, and connection to all objects.
- **dataloader.io** also provides larger batch size, a wider range of operations, and connection to more objects - but may have a limit on how many records you can process.

💻 **Resource:** Learn more about the import tool options here.

Import order of operations

Utilize the order of operations defined during the planning steps.

Examples:

- New campaign member statuses imported before adjusting campaign members to a new status.
- New field / picklist values added before importing data.

New campaign member statuses

MARDREAMIN'

Use Data Loader's *Insert* action to create new campaign member statuses in the corresponding object.

- Import file columns: **CampaignId** (exported from Salesforce), **Label** (this is the name of the new campaign member status), **HasResponded** ('true' if the new status is a responded status - 'false' if not), **IsDefault** ('true' if the new status should be set as the default value, 'false' if not).
- There is no CampaignMemberStatus Id to import as these are NEW values.

Once the new status import is complete, re-export campaign member statuses from Data Loader/dataloader.io to get their IDs.

💻 **Resource: How To Bulk Create Campaign Member Statuses in Salesforce**

Update existing campaign member statuses

1. Perform an *Export* from Data Loader (easiest from dataloader.io!) of all campaign member statuses.
   - This will provide unique IDs for each campaign member status on **each** associated campaign (CampaignMemberStatus Id).

2. Use Data Loader's *Update* action to change current campaign member status values in the corresponding object (Attended webinar > Attended).
   - Import file columns: **CampaignMemberStatus Id** (exported from Data Loader above), **Label** (the new name of the Status).

💻 **Resource: Mass update or delete Campaign Member Status with Data Loader**

Change campaign members’ assigned status

Once campaign member statuses have been imported (create or update), campaign members can be assigned to the new values. (Or you may need to assign campaign members to a different status temporarily while renaming an existing one.)

- Use Data Loader’s *Update* action on the campaign member object.
- Import file columns: **MemberId** (campaign member ID - exported from Salesforce), **CampaignId** (exported from Salesforce), **Member Status** (name of the campaign member status you are assigning to the campaign member).

Review errors + spot-check

- Review each import's success and error results file from Data Loader.
- Adjustments and re-imports may be needed.
- Spot-check the live data after each import.

✅

Importing

✅

Errors Resolved

✅

Data Changes Confirmed

Retire picklist values

- Deactivate picklist values in the campaign object fields that will no longer be used.

Field dependencies

- Update existing field dependencies to incorporate new or changed fields or field values.
- Create new field dependencies.

Update + unpause existing automations

Evaluate if paused automations should be turned back on.

- If no, consider renaming them to make it clear that they were retired.
- If yes, carefully review and adjust as needed.
- Unpause / turn back on.
- Review and test … review and test … review and test!

Create new automations

- Build the new automations in your plan.
- Review and test … review and test … review and test!

Train the team

Training

Once the hard work and testing is done, be sure to train everyone that will work with campaigns.

- New processes
- Automations that will make their job easier
- New + retired campaign member statuses
- Adding campaign members to campaigns
- Anything else pertaining to your project

CELEBRATE

Celebrate + share

This was a monumental project - be sure to celebrate when it is done!

- Shout it out from the internal rooftops and share a “What and Why” briefing about the project.
- Remember to add it to your personal list of professional accomplishments.

A ton of steps, but ...

It's not impossible

Careful planning is key

You're a hero

What’s next?

Next steps

- Level up your campaign influence reporting with Sercante's **Campaign Influence Starter Pack**.
- Add the campaign influence module to page layouts.
    - Account, Opportunity, Contact, Campaign
- Embrace your Data Loader skills to bulk-import new campaigns for the next quarter, year, etc.
- Build (more) automations to simplify, streamline, and standardize.

Need help? Contact Sercante!

Thank You!