



Unleash the Power of UTMs & Flow for Flawless Campaign Reporting



Michelle Cornely
Sercante, Solution Engineer

Thanks To Our Incredible Sponsors

SERCANTE
A Trilliad Company



TRILLIAD
A Growth Services Provider

stensul

storylane

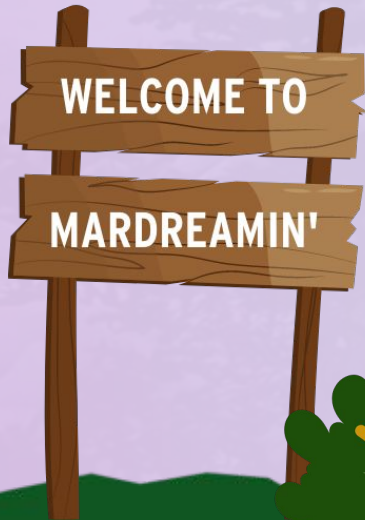

Trailblazer
COMMUNITY

 **AuctusIQ**

**JU
ST**

SANDLER

Agenda



- **Why OOTB ways of capturing campaign membership can be inefficient.**
- **How to simplify our processes, without sacrificing details.**
- **Step by step directions on how to build this solution with Salesforce Flow.**

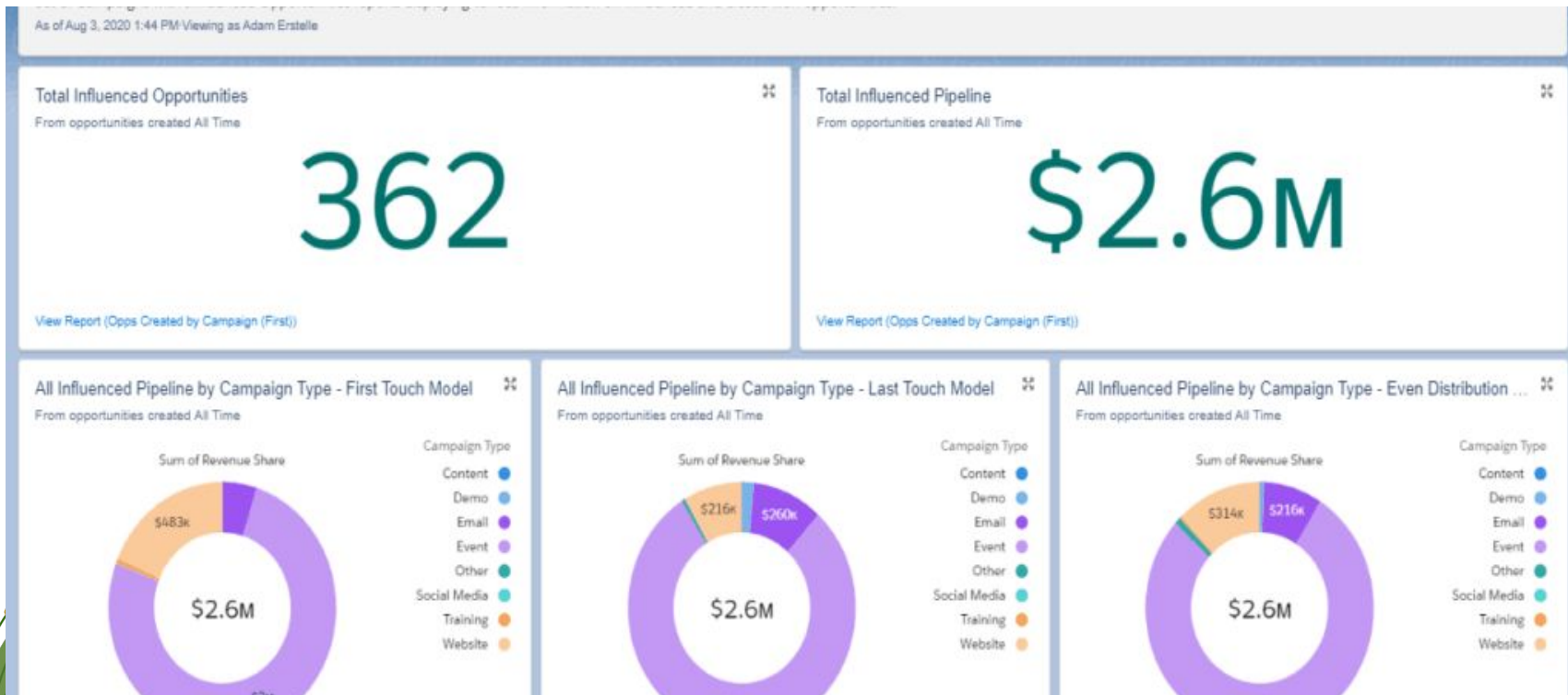


**What do all
marketers want?**

What do all marketers want?

The best, most accurate reporting that
proves our campaigns are working!

Campaign Influence does this for us!



Requirements

While campaign influence does most of the magic for us, we still have some requirements for campaign influence to work properly.

One of them being, we need to add prospects to a campaign for **every initiative** they engage with.



[POLL]

How do you add campaign membership today?



How do you add campaign membership today?

1. You have completion actions on your forms that add to generic campaigns.
2. You create a whole lot of forms & landing pages to isolate different initiatives.
3. You use conditional completion actions or and engagement studio program to add membership.
4. We don't add campaign membership!
5. We do it some other way.



How can we improve?

Scalability

Campaign Details

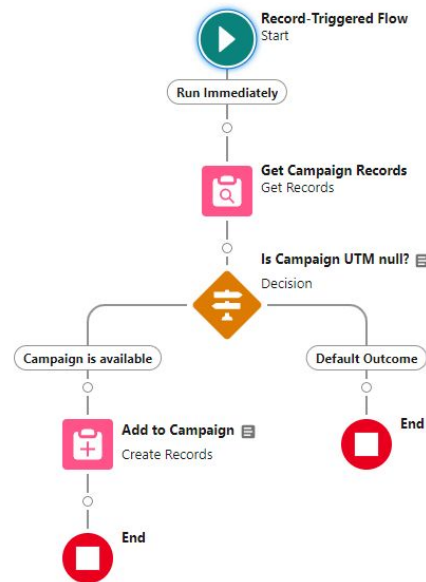
Low Maintenance

Less Human Error



Enter Salesforce Flow

With Salesforce Flow, we can use the utm values we are already capturing, find a matching campaign, and then add campaign membership.



Let's see an example...



Black Friday Example

I am running campaigns for Black Friday and sending leads directly to my website.

I want to make sure everyone who filled out a website form after engaging with a Black Friday Promotion is tracked to the Black Friday Salesforce Campaign.

Here's an example of the setup ...



UTM Campaign Links

First, I am going to set up my utm links.

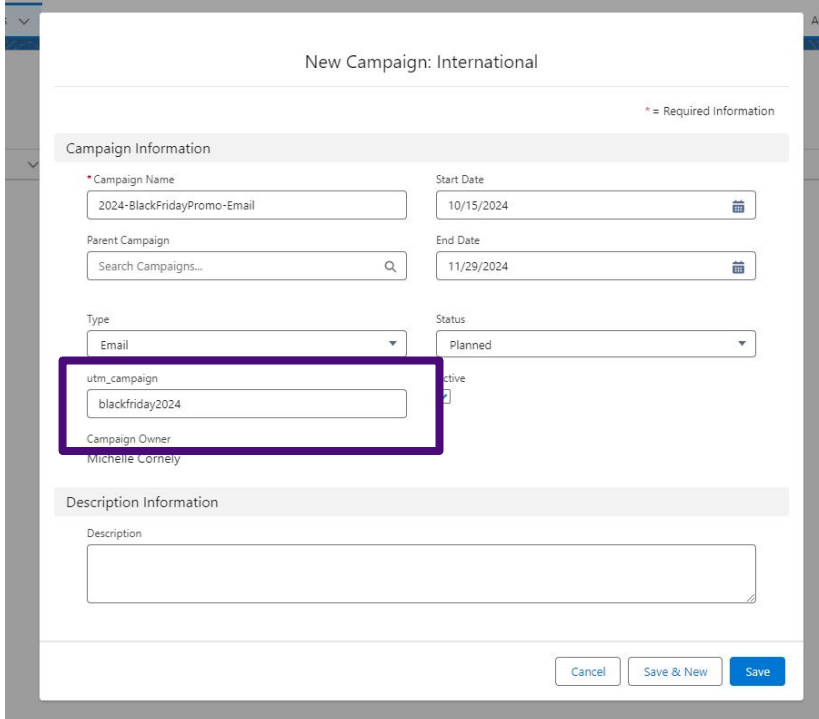
https://michellestco.com/?utm_source=pardot&utm_medium=email&utm_campaign=blackfriday2024



Campaign Object Updates

We are going to create a new field on the campaign object. This field should be called **utm_campaign**.

Everytime we create a new campaign, we will fill in this value.



New Campaign: International

* = Required Information

Campaign Information

* Campaign Name: 2024-BlackFridayPromo-Email

Start Date: 10/15/2024

Parent Campaign: Search Campaigns...

End Date: 11/29/2024

Type: Email

Status: Planned

utm_campaign: blackfriday2024

Campaign Owner: Michelle Corneley

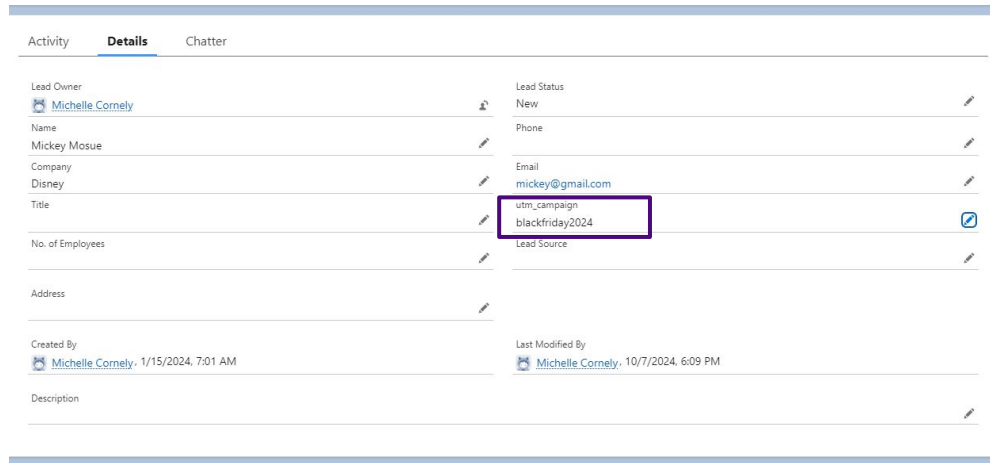
Description Information

Description:

Cancel Save & New Save

Form Fill Occurs..

When the form is filled out, the UTM values are captured in Marketing Cloud Account Engagement and then synced over to Salesforce.



The screenshot shows a Salesforce lead record in the 'Details' tab. The lead owner is Michelle Cornely. The name is Mickey Mosue, company is Disney, and email is mickey@gmail.com. The title field contains 'utm_campaign=blackfriday2024', which is highlighted with a purple box. The lead source is also visible.

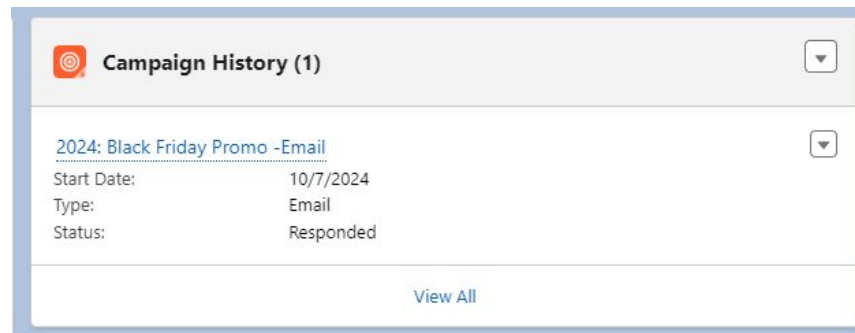
Field	Value
Lead Owner	Michelle Cornely
Name	Mickey Mosue
Company	Disney
Title	utm_campaign=blackfriday2024
No. of Employees	
Address	
Created By	Michelle Cornely, 1/15/2024, 7:01 AM
Last Modified By	Michelle Cornely, 10/7/2024, 6:09 PM
Description	
Lead Status	New
Phone	
Email	mickey@gmail.com
Lead Source	

Not sure how to do this? [The Ultimate Guide to Capturing UTMs in Pardot](#) will help.

The Flow is Triggered

When a lead or contact has the **utm_campaign** field updated, it will trigger the Flow in Salesforce.

The flow will look for a campaign with the same value, and will add the lead/contact to that campaign.



The screenshot shows a 'Campaign History (1)' section with a dropdown arrow. Below it is a table with one entry: '2024: Black Friday Promo - Email' with a dropdown arrow. The table details are: Start Date: 10/7/2024, Type: Email, Status: Responded. At the bottom right is a 'View All' link.

Campaign History (1)	
2024: Black Friday Promo - Email	
Start Date:	10/7/2024
Type:	Email
Status:	Responded

[View All](#)

Not sure how to do this? [The Ultimate Guide to Capturing UTMs in Pardot](#) will help.



Let's Test it Out

https://www3.lenoxsoft.com/l/259162/2024-11-01/7wmlyf/?utm_source=pardot&utm_medium=email&utm_campaign=blackfriday2024



Behind the Curtain



Build a Record Triggered Flow

1. Setup > Flows > New Flow
2. Select: Record Triggered Flow
3. Under **Configure Start** Select:
 - a. Lead Object
 - b. A record is created or updated

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object

Lead

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Build a Record Triggered Flow

- Set Entry Conditions: Formula Evaluates to True
- This formula checks two conditions:
 - If the `utm_campaign__c` field has changed from its prior value.
 - If the record is new and the `utm_campaign__c` field is not null.

```
OR(  
  {!$Record__Prior.utm_campaign__c} <> {!$Record.utm_campaign__c},  
  AND(  
    ISNEW(),  
    {!$Record.utm_campaign__c} <> Null  
  )  
)
```



Build a Record Triggered Flow

- Add Element: Get Records
- Object: Campaign
- Conditional Requirements: All Conditions are Met

Field	Operator	Value
utm_campaign__c	Equals	{!\$Record.utm_campaign__c}

What This Means: Show me a campaign that has the same value in the “utm_campaign” field that this lead has in the “utm_campaign field”





Get Records



*Label

Get Campaign Records

*API Name ⓘ

Get_Campaign_Records

Description

Get the campaign record that matches the leads most recent utm_campaign value.

Get Records of This Object

*Object

Campaign

Filter Campaign Records

Condition Requirements

All Conditions Are Met (AND) ▼

Field

utm_campaign_c

Operator

Equals ▼

Value

Aa \$Record > utm_campaign X



+ Add Condition



Build a Record Triggered Flow

- Next we are going to store the Campaign ID in a variable.

What's a Variable?

A variable is like a container that holds a piece of information or data. You can create a variable to store a value that you want to use or update later in the flow, such as a text, number, date, or a specific record.

How Many Records to Store

- Only the first record
- All records

How to Store Record Data

- Automatically store all fields
- Choose fields and let Salesforce do the rest
- Choose fields and assign variables (advanced)

To use the returned **Campaign** records in the flow, store their fields in variables.

Where to Store Field Values

- Together in a record variable
- In separate variables

Select Variables to Store Campaign Fields

Field

Id

Variable

→

+ Add Field

Build a Record Triggered Flow

- Add Element: Decision
- Two Outcomes: Campaign is Found & Default

Resource	Operator	Value
Campaign ID	Is Null	False

What This Means: This will create two different pathways, one for those that have a matching campaign and one for those that don't.





Decision



*Label

Is Campaign UTM null?

*API Name

Is_varCampaignId_null

Description

Checking to make sure we have a value for utm_campaign

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 that path.

OUTCOME ORDER



OUTCOME DETAILS



Campaign is available

*Label

Campaign is available

*Outcome API Name

Campaign_is_available

Default Outcome

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource

CampaignID

Operator

Is Null

Value

False



[+ Add Condition](#)

When to Execute Outcome

- If the condition requirements are met
- Only if the record that triggered the flow to run is updated to meet the condition requirements



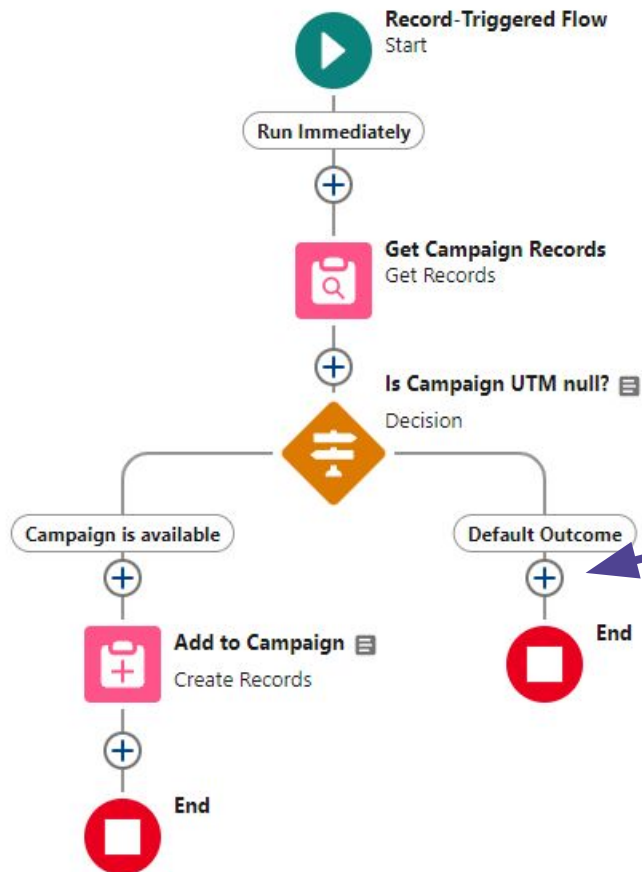
Build a Record Triggered Flow

- Add Element: Create Records
- Object: Campaign Member
- How to set Record field Values: Manually

Resource	Operator	Value
Campaign ID	Equals	Campaign ID
Lead ID	Equals	{!\$Record.Id}
Status	Equals	Responded

What This Means: We are adding the lead to the correct campaign. In order to do this, we need the Campaign ID and the Lead ID to identify them.

Final Flow



Optional: Add to a default campaign if no matching campaign was found.

Questions?



Thank You!

Download the slides.



Formula

OR(

{!\$Record__Prior.utm_campaign__c}<>{!\$Record.utm_campaign__c},

AND(

ISNEW(),

{!\$Record.utm_campaign__c}<> Null

)

)