Salesforce Campaign Hierarchy Suggestions

Please use these parent campaigns to help organize and track campaigns. If you click on a parent/ grandparent, it will tally the data for all campaigns under it.

- Global Campaigns 2011
  - Global Events 2011
    - Americas Events 2011
      - Road Shows 2011
        - Special Event May 12, 2011
      - Trade Shows 2011
        - Amazing Trade Show Leads 2011
  - Global Webinars 2011
  - Prospect Emails 2011
  - Nurturing Emails
- Newsletters 2011
  - Newsletter May 14, 2011

Campaign Setup Options

Your setup may differ significantly, but I like to use these options in my SFDC Campaigns.

Parent Campaign: use Clone to bring this in automatically. Or use the search.

Campaign Name: use Naming Scheme.

Advanced Setup: definitely use this with automation to ensure you can track how things are proceeding

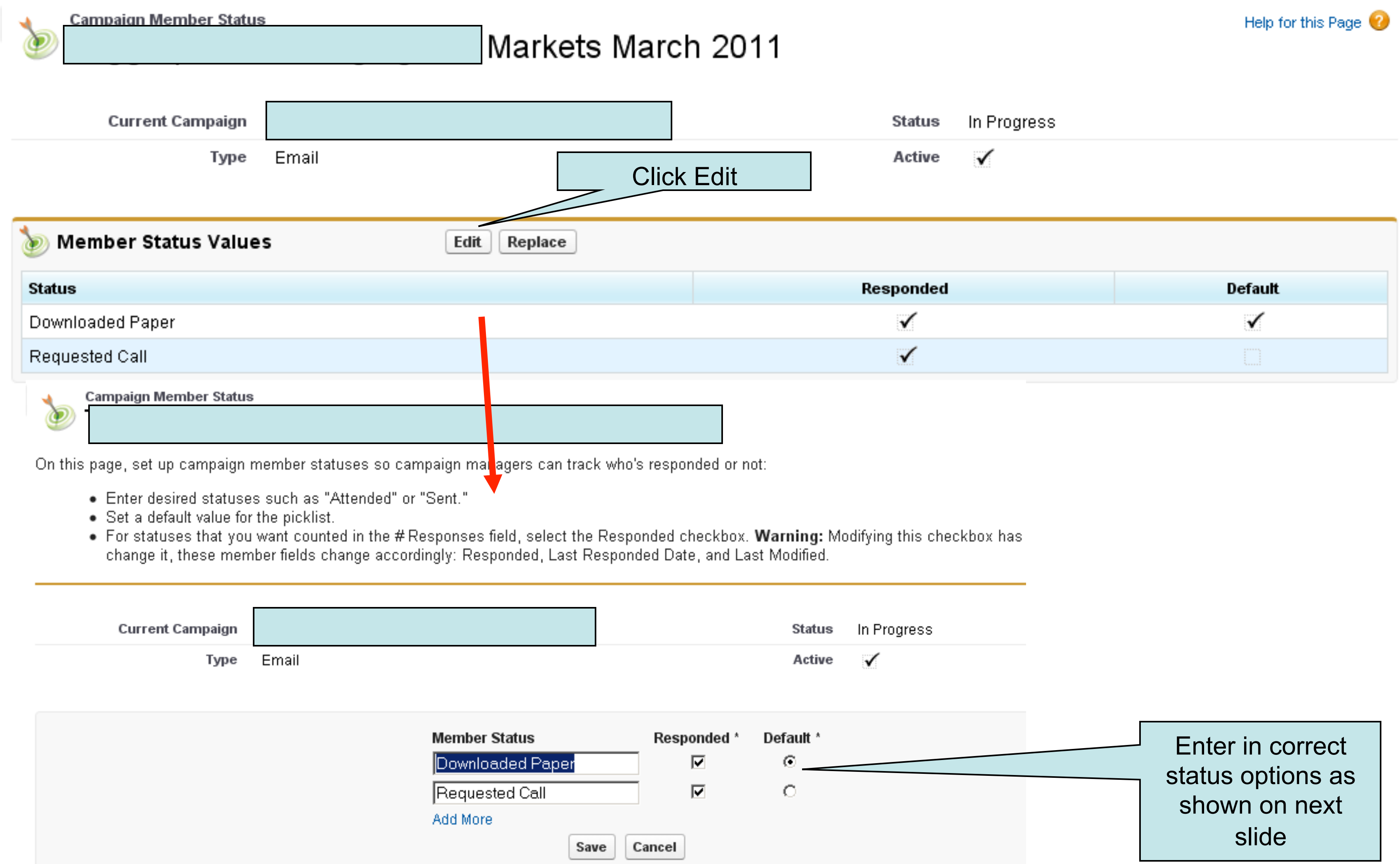
Metrics: your SFDC Admin can setup your campaign and Parent campaigns to tally various lead and ROI metrics. Know what you want and work with your Admin on what is possible in the current setup as well as future roll outs.

W2L Form Code: any unique code which is required for Yoursite.com webforms connected to SFDC Forms.

Promo Opt In requested: this should be “Yes” if you asked for an Opt In field on the registration Form.

Using Advanced Setup

On creating a new campaign, please click Advanced Setup to edit the Member Status options for that campaign. This is *critical* to using Automation effectively and to providing Sales better “Reason to Call” data.



SFDC Campaign Member Status: Advanced Setup Options

Please use this standard list for each Campaign Type so everyone understands what you did and what the Lead did. Remember if you plan to connect this campaign to a Marketo Program, this step is unnecessary. The Marketo Channel Progression Statuses will be inserted automatically.

Campaign Type	Responded Status	Not Responded	Default
Event (Event, Trade show, webinar)	• Attended • Missed • Registration	• Registration List • Sent Invitation	Sent Invitation
White Paper Download	• Downloaded Paper • Requested Call	• Sent Invitation	Sent Invitation
Website registration	• Registered Web • Responded Email		Registered
Newsletter or Email Status Channel	• Opted In • Opted Out		Opted In
Email Nurturing/ Store (any email which does not require registration)	• Clicked on Link • Requested Call	• Opened Email • Email Was Sent	Email Was Sent

Use Web 2 Lead Codes For Form and Campaign Routing

- Create a unique W2L code and place it in the campaign
- Send this to the right people
- Add to SFDC AutoAssignment rule
- Add it to the Smart Lists:
  - SFDC W2L Code Members (example)