Campaign Management Implementation Guide

Salesforce, Spring '17

CONTENTS

ABOUT THIS GUIDE

This guide outlines the necessary steps to set up and use campaign management. The guide is divided into the following major sections:

- Preparing Campaigns—Review the marketing business review questions to ensure you have the information you need to set up and use campaign management.
- Setting Up Campaigns—Configure Salesforce to begin using campaign management.
- Managing Campaign Workflow—Review the recommended steps to plan, execute, and analyze your campaigns.

PREPARING CAMPAIGNS

Before implementing campaign management, we recommend that you review the marketing business review questions in this section to ensure that you have all of the information you need to set up and use campaigns.

The business review questions are divided into the following sections:

- Defining Campaign Goals—Analyze your campaign goals.
- Determining How to Target Campaigns—Analyze who you want to target with your campaigns.
- Categorizing Campaigns— Categorize your campaigns so that you will have the relevant data for future campaign analysis.
- Tracking Campaign Responses—Determine the different channels by which prospects will respond to your campaigns.
- Defining Campaign Access—Decide who in your organization should have access to campaigns.

Defining Campaign Goals

What are your campaign goals?

Campaigns usually have one of the following primary goals:

- Lead generation

    Lead generation campaigns include direct mail, email blasts, web seminars, conferences, and trade shows. These types of campaigns directly generate new prospects. In Salesforce, you can easily track the effectiveness of each campaign in terms of the amount of new business generated.

- Brand building

    Brand-building campaigns include print advertisements, billboards, and radio advertisements. These types of campaigns may not generate direct responses, so the calculation of campaign ROI may not be as straightforward.

If you want to analyze your marketing budget by campaign goal, we recommend that you add a custom campaign picklist called `Campaign Goal` to track the primary goal of each campaign. This picklist should include values such as Brand building, Lead generation, and any other campaign goals your organization might have.

Determining How to Target Campaigns

To whom do you typically market your products and services?

In general, there are two main groups to whom you can market:

- Existing customers

    You can use Salesforce contact reports to create target lists of customers for direct mail, email blasts, or other types of campaigns.

- Prospects, including:

    - Existing leads. These are individuals that have already been entered as leads in Salesforce. You can use Salesforce lead reports and list views to create target lists of existing leads for a campaign.

– New leads. New leads can include anything from names on business cards that you acquired at a conference or a list of names that your organization has purchased or rented. You can add leads individually to Salesforce or use the Data Import Wizard to import a list of names as leads and directly associate them with a particular campaign.

What information do you use for creating target lists?

When marketing to existing contacts or leads, you can use Salesforce reports to create your target lists. You should determine what criteria you typically use to segment your target lists. Common criteria include:

- Geography
- Title (for example, CFO, Director of Sales)
- Industry
- Company size
- Installed products/services
- Previous campaign and response history

If the lead or contact pages don't currently include the type of information you need to create targeted lists, you can create custom lead or contact fields to record this information. You should also be familiar with how to create lead or contact reports that segment names according to your criteria.

Categorizing Campaigns

As you plan how to categorize campaigns, consider how you want to analyze and report on your campaigns. One of the key benefits of campaign management is that you can use reports to analyze statistics based on the types of campaigns you run. For example, you can analyze whether web seminars or trade shows are a better use of your marketing dollars. Using custom campaign fields, you can categorize your campaigns so that you can easily compare and report on which types of campaigns are the most effective.

Campaign hierarchies provide a powerful categorization tool. A campaign hierarchy, which is a group of related campaigns associated with one another via the `Parent Campaign` field, includes aggregate statistics that you can use to analyze the health of your marketing programs or initiatives.

📝 Note: Many of the recommended custom fields don't apply to all types of campaigns; therefore, you would not want to make them required fields within the campaign page layouts.

What specific types of campaigns do you run?

The `Type` field on campaigns defines the general types of campaigns you might run. Standard values include Advertising, Direct Mail, Email, Telemarketing, Banner Ads, Seminar/Conference, Public Relations, Partners, Referral Program, and Other. Make a list of the types of campaigns your organization runs and modify the `Type` picklist to include only the values you need. It is a good idea to keep the total number of `Type` values to no more than ten and include general types of campaigns rather than specific types. For example, use "Advertising" rather than "Print Advertisement" or "Billboard Advertisement." You can then create campaign reports and calculate a subtotal based on "Advertising" to determine the overall effectiveness of all advertisements rather than one particular sub-category. To report on specific campaign types, create subcategories using dependent picklists.

Are you using campaign hierarchies?

If your organization is using campaign hierarchies, consider creating a `Hierarchy Level` custom picklist that includes all hierarchy levels, such as Tactic, Program, and Initiative. If each campaign is assigned to the appropriate hierarchy level, you can use

campaign-hierarchy statistic fields to report on all the campaigns at any level. Each campaign in a hierarchy can have one parent and a parent can have an unlimited number of children. A maximum of five hierarchy levels are allowed in a campaign hierarchy. You can add campaign members to any level in the hierarchy.

Do you want to see how campaigns are influencing your opportunities?

If you want to see how your campaigns are influencing opportunities, consider setting up campaign influence. Campaign influence tracks pipeline and revenue for multiple campaigns, and ties all campaigns of a contact role to that opportunity for pipeline and ROI reporting. This is especially helpful for longer deal cycles when more than one campaign contributes to a closed deal or a converted lead.

Do some campaigns target a specific product or service?

If some campaigns focus on different aspects of your business, you can create a custom campaign picklist called `Product or Focus Area` to categorize your campaigns based on their focus. This allows you to track the marketing programs for a particular product or service.

What types of advertisements do you run?

If your organization runs different types of advertisements, you can track which types are the most effective. You can create a custom campaign picklist called `Ad Type` with values such as Magazine, Newspaper, Online, and Billboard. Tracking this information for all advertising campaigns enables you to compare the effectiveness of different advertising channels. For example, you could create a campaign report subtotaled by `Type` and then further subtotaled by `Ad Type` to analyze the effectiveness of different advertising campaigns by channel.

What publications or media do you use for ads?

A key component of tracking the effectiveness of your campaigns is knowing which types of publications and which specific publications generate the most prospects and the most business. We recommend you create two custom campaign picklists for advertisement campaigns:

- Publication Type — Include values such as Magazine, Newspaper, and Online News.
- Specific Publication — Include the names of the publications your organization uses, for example, Fortune, USA Today, and Business Week.

Do you use multiple agencies to create marketing materials?

If your organization uses different agencies to create advertisements, graphics, or other creative material, you can track which agency was used for each campaign. You can create a custom campaign picklist called `Creative Source` to track which agency created the campaign materials. Be sure to include a value of "In-house" to mark campaigns that were designed by your Marketing team.

What creative pieces do you use in your campaigns?

You might want to track which graphic or image was used in a particular advertisement or mailing. This can help you determine which images are the most effective marketing tools. You can create a custom campaign picklist called `Creative Piece` to track the different creative pieces that your organization uses. Add every major image your organization uses to this picklist.

What offers do you use?

Determine what types of high-level offers your organization uses, such as whitepapers, demos, webinars, and live events, then create a custom campaign picklist that includes these offers. You can also create dependent picklists that include the titles of specific offers so you can track which offers were used in each campaign as well as their overall effectiveness.

Do you do any partner marketing?

If your organization runs marketing campaigns with your partners, you can track which partner was involved in a particular campaign. We recommend you create two custom campaign picklists for partners:

- Partner Type — Include values for the types of partners your organization has; for example, Service Partner and Technology Partner.
- Partner Name — Include the names of all of your partners.

Tracking Campaign Responses

What channels do customers and prospects use to respond to a campaign?

Some common response channels include:

- Web form
- Phone
- Personal email
- Registration/attendance for a conference, trade show, or Web seminar

What are your campaign Member Status values?

Every campaign has a specific outcome. In Salesforce, the values in the `Member Status` picklist capture campaign outcomes. Customize your member status values to represent the possible outcomes for your campaigns. For example, for an event campaign, your member status values may include Sent, No Response, Registered, Registered - Attended, Registered - No Show, and Registered - Canceled.

What types of responses do your campaigns elicit?

Every campaign normally includes a "call to action" for the customer or prospect; for example, "Call our sales team at 1-800-DIAL-US." The type of call to action determines how customers and prospects respond, and in addition, it determines how you track those responses.

The types of responses can be divided into the following groups based on the response tracking mechanism:

- Website Response. Customers and prospects respond by filling in a form on your website. Campaigns that might elicit this type of response include:
  - Conference or Web seminar with online registration
  - Any campaign that directs individuals to a form on your website

  To track these types of responses, you can use Salesforce Web-to-Lead functionality to create a form for your landing page. You will want to include the `Campaign ID` and `Member Status` fields in the Web-to-Lead setup and have your webmaster hide these fields so that you can track the values but prospects are not aware of them.

- Individual Manual Update. Customers and prospects respond via phone or mail. Typically, responses come in one-by-one rather than in bulk. Common responses of this type include:
  - A call to your sales team or other department
  - A card that customers and prospects mail to your office

  To track these types of non-automated responses, a sales or marketing team member can manually update the Campaign History for the lead or contact in Salesforce.

- Mass Update. Another type of response is any response that you track in an offline list. Common examples include:
  - Trade show attendance tracked in an Excel spreadsheet
  - Email responses that have been collated into a list by your email agency

  The names contained in these offline lists can be imported into Salesforce as new campaign members. With the campaign import wizards, you can directly associate a lead or a contact with a particular campaign, and specify their individual responses to each campaign. You can also mass update the status of campaign members using the campaign update wizard.

Defining Campaign Access

Which groups of users should have access to campaigns?

Before setting up campaign management, you need to determine who should have access to campaigns. By default, all users have read access to campaigns, while only users with the `Marketing User` checkbox selected on their user record can create, edit, or delete campaigns. Consider the following information when determining campaign access:

- Marketing Users can view, create, edit, and delete campaigns as long as they have the "Read," "Create," "Edit," and "Delete" permissions for campaigns.
- Marketing Users can run campaign reports and configure advanced campaign setup, which includes managing letterheads, HTML email templates, and public documents.
- Users with the `Marketing User` checkbox selected can mass manage campaign membership.
- To use the campaign import wizards, users must have the `Marketing User` checkbox selected on the user detail page for Professional, Enterprise, Unlimited, Performance, and Developer Editions. They must also have the "Import Leads" permission in Enterprise, Unlimited, Performance, and Developer Editions.
- Users that don't have the `Marketing User` checkbox selected only have access to view campaigns and advanced campaign setup, edit the Campaign History for a single lead or contact, and run campaign reports if they have the "Read" permission for campaigns.
- You can segment campaign visibility between organizational units by customizing the campaign sharing model. For instance, if you only want non-marketing users to view campaigns in their region, campaign sharing can be used to meet this need.

What access should your marketing team have to leads, accounts, contacts, and opportunities?

At a minimum, your marketing team should have read access to all leads, contacts, and opportunities that could be associated with campaigns. See Setting Up Campaign Sharing for more information about campaign access.

SETTING UP CAMPAIGNS

Follow the steps below to set up and configure campaign management for your organization. Your answers to the business review questions in Preparing Campaigns should guide your setup choices.

📝 **Note:** If you don't have access to perform this setup, ask your administrator to make these changes.

Campaign management setup involves the following steps:

- Add or delete values from the standard campaign picklists
- Create custom fields
- Modify field-level security to show or hide campaign fields (Enterprise, Unlimited, and Performance Editions)
- Modify page layouts to organize campaign fields and related lists on detail and edit pages
- Modify user profiles to control user access to campaigns (Enterprise, Unlimited, and Performance Editions)
- Set the organization-wide sharing default for campaigns and create any necessary sharing rules
- Modify the campaign list views to show any custom information you need to access
- Optionally, set up campaign influence to see how your campaigns influence opportunities.

📝 **Note:** If you have Enterprise, Unlimited, or Performance Edition, you can create a copy of your organization in a separate environment to test your customizations before implementing them in your Salesforce organization.

Modifying Campaign Picklists

If necessary, you can modify the values in standard campaign picklists. In particular, you should modify the `Type` and `Member Status` picklists to include only the values your organization needs (see Categorizing Campaigns on page 3). To modify campaign picklists:

1. From the object management settings for campaigns, find the fields area.
   - If you're using Salesforce Classic, from Setup, enter `Campaigns` in the `Quick Find` box, then select **Fields**.
   - If you're using Lightning Experience, from Setup, enter `Object Manager` in the `Quick Find` box, then select **Object Manager**. Next, click **Campaigns**, and then scroll down to the Fields & Relationships area.

2. Click **Edit** next to the picklist that you want to modify.

3. Modify the values as needed.

Creating Custom Fields

Based on your answers to the questions in Defining Campaign Goals, create custom fields for your campaigns.

1. From the object management settings for campaigns, find the fields area.
2. Click **New** in the Custom Fields section of the page.
3. Follow the wizard to create custom fields.

Setting Up Field-Level Security (Enterprise, Unlimited, and Performance Editions)

Based on your answers to the questions in Defining Campaign Access, you can set field-level security to restrict a user's ability to view and edit specific fields on detail and edit pages and in list views, reports, Connect Offline, search results, and when synchronizing data. Field-level security is set separately for each profile or permission set. Field-level security is available in Enterprise, Unlimited, Performance, and Developer Editions only.

To set field-level security:

1. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles** or enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.

2. Select a profile or permission set to change the field access for users assigned to that profile or permission set. For example, select the Standard User profile to hide sensitive campaign information from non-marketing users. Users who don't have the `Marketing User` checkbox selected on their personal information page have access to view, but not edit, campaigns, so you may want to hide any sensitive fields.

3. Depending on which user interface you're using, do one of the following:

   - Permission sets or enhanced profile user interface—In the **Find Settings...** box, enter the name of the object you want and select it from the list. Click **Edit**, then scroll to the Field Permissions section.

   - Original user interface—In the Field-Level Security section, click **View** next to the tab you want to modify, and then click **Edit**.

4. Specify the field's access level. The setting labels differ depending on which user interface you're using.

Access Level	Enabled Settings in Permission Sets and Enhanced Profile User Interface	Enabled Settings in Original Profile Interface
Users can read and edit the field.	`Read and Edit`	`Visible`
Users can read but not edit the field.	`Read`	`Visible` and `Read-Only`
Users can't read or edit the field.	None	None

> Note: The field access settings apply throughout Salesforce. The settings also override any less-restrictive field settings on the page layouts.

5. Click **Save**.

To use campaign hierarchy fields, you must enable them using field-level security. The fields include:

- `Total Num Sent in Hierarchy`
- `Total Expected Revenue in Hierarchy`
- `Total Budgeted Cost in Hierarchy`
- `Total Actual Cost in Hierarchy`
- `Total Leads in Hierarchy`
- `Total Converted Leads in Hierarchy`
- `Total Contacts in Hierarchy`
- `Total Opportunities in Hierarchy`
- `Total Won Opportunities in Hierarchy`

- `Total Value Won Opportunities in Hierarchy`
- `Total Value Opportunities in Hierarchy`
- `Total Responses in Hierarchy`

If you're a Professional Edition user, you can access these fields by adding them to the campaign page layout.

Modifying Page Layouts

Based on your answers to the questions in Defining Campaign Access, you can modify page layouts to organize the fields and related lists on the page and control which fields users see on detail and edit pages. For example, you can modify the contact and lead page layouts to display the Campaign History related list and campaign fields, and modify the opportunity page layouts to display the Campaign Influence related list and campaign fields.

Professional Edition organizations have only one page layout for each object, so any modifications will affect all users. Enterprise, Unlimited, Performance, and Developer Edition organizations can have a different campaign page layout for each type of user (for example, for each profile).

To modify page layouts:

1. From the object management settings for campaigns, contacts, leads, or opportunities, go to Page Layouts.

2. Modify the page layout as needed.

   💡 Tip: Consider adding the `Member First Associated` and `Member First Responded` fields to the Campaign History related list. These fields allow you to see the date that a member was added to the campaign and the date a member initially responded to the campaign.

Creating and Modifying Profiles

Based on your answers to the questions in Defining Campaign Access, you can modify which page layouts apply to users with the Marketing User profile. You can also modify other profiles to restrict campaign access. The ability to modify and create profiles is available in Professional, Enterprise, Performance, Unlimited, and Developer Editions.

To create and modify profiles:

1. From Setup, enter *Profiles* in the `Quick Find` box, then select **Profiles**.

2. Click the name of an existing profile to modify it, or click **New Profile**.

3. For each profile, select a campaigns page layout to determine how the campaign pages will display for users with that profile.

4. For each custom profile, determine whether to show or hide the Campaigns tab. The tab settings for the standard profiles cannot be changed.

5. For each custom profile, select which permissions to enable. The permission settings for the standard profiles cannot be changed.

For more information on editing profiles, see Profiles.

Setting Up Campaign Sharing

Customize your campaign sharing model to fit the level of visibility your users should have. You must have the `Marketing User` checkbox selected to create, edit, delete, transfer, or share campaigns. In addition, only Marketing Users can mass manage campaign membership. Review the following information before setting up campaign sharing:

- If campaign hierarchy statistics are enabled, a user can see aggregate data for a parent campaign and all the campaigns below it in the hierarchy regardless of whether that user has sharing rights to a particular campaign within the hierarchy. Therefore, when creating your organization's campaign sharing strategy, consider whether you want users to see aggregate hierarchy data. If not, you can choose to omit any or all of the campaign hierarchy statistics fields from the Campaign Hierarchy related list

- In Performance, Enterprise, Performance, Unlimited, and Developer Editions, designate all users as `Marketing Users` when enabling campaign sharing. This simplifies administration and troubleshooting because access can be controlled using sharing, profiles, and permission sets.

- When a single user, such as a regional marketing manager, owns multiple campaigns and needs to segment visibility between business units, share campaigns manually instead of using sharing rules. Sharing rules apply to all campaigns owned by a user and don't allow segmenting visibility.

- Create all campaign sharing rules prior to changing your organization-wide default to reduce the affect the change has on your users.

- To share all campaigns in your organization with a group of users or a specific role, create a sharing rule that applies to campaigns owned by members of the Entire Organization public group.

- Minimize the number of sharing rules you need to create by using the Roles and Subordinates option instead of choosing a specific role.

Define the Campaign Sharing Model

To set your campaign sharing model:

1. From Setup, enter `Sharing Settings` in the `Quick Find` box, then select **Sharing Settings**.

2. Click **Edit** next to **Organization Wide Defaults**.

3. Choose a sharing model for **Default Campaign Access**. The options are:

    - Full Access—All users can view, edit, transfer, delete, and report on all records.

    - Public Read/Write—All users can view, edit, and report on all records.

    - Public Read Only—All users can view and report on records but not edit them.

    - Private—Only campaign owners, their managers, and administrators have access to view, edit, and report on their campaigns.

4. Click **Save**.

Create Campaign Sharing Rules

If you have chosen a Public Read Only or Private sharing model for campaigns, create sharing rules to further extend campaign access to the users who need it.

1. From Setup, enter `Sharing Settings` in the `Quick Find` box, then select **Sharing Settings**.

2. Click **New** in the Campaign Sharing Rules related list.

3. Enter the **Label Name** and **Rule Name**. The Label is the sharing rule label as it appears on the user interface. The Rule Name is a unique name used by the API and managed packages.

4. Select a rule type.

5. Depending on the rule type you selected, do the following:

    - `Based on record owner`—In the `owned by members of` line, specify the users whose records will be shared: select a category from the first drop-down list and a set of users from the second drop-down list (or lookup field, if your organization has over 200 queues, groups, roles, or territories).

- `Based on criteria`—Specify the Field, Operator, and Value criteria that records must match to be included in the sharing rule. The fields available depend on the object selected, and the value is always a literal number or string. Click **Add Filter Logic...** to change the default AND relationship between each filter.

  > **Note:** To use a field that's not supported by criteria-based sharing rules, you can create a workflow rule or Apex trigger to copy the value of the field into a text or numeric field, and use that field as the criterion.

6. In the `Share with` line, specify the users who get access to the data: select a category from the first drop-down list and a set of users from the second drop-down list or lookup field.

7. Select the sharing access setting for users.

Access Setting	Description
Read Only	Users can view, but not update, records.
Read/Write	Users can view and update records.
Full Access	Any user in the selected group, role, or territory can view, edit, transfer, delete, and share the record, just like the record's owner.
	With a Full Access sharing rule, users can also view, edit, delete, and close activities associated with the record if the organization-wide sharing setting for activities is Controlled by Parent.

8. Click **Save**.

Customizing Campaign List Views

You can create customized list views to provide quick access to campaigns based on specific criteria. For example, you might create a list view to show all direct mail campaigns. You might also modify the standard list views to include some of your custom fields. To customize campaign list views:

1. Navigate to the Campaigns tab.

2. To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.

3. Give the list view a name.

4. Select `All campaigns` or `My campaigns` to restrict the list to campaigns owned by the user viewing the list.

5. Set the criteria for the list view. For example, set `Type equals Direct Mail` to create a list view of all direct mail campaigns.

6. Select the fields to display in the list view. You can choose any standard or custom campaign fields.

7. Set the visibility to `Visible to all users` to make the list view public.

8. Click **Save** to finish.

Setting Up Campaign Influence

Because opportunities are usually influenced by more than one campaign, you have the option to automatically associate multiple influential campaigns to a single opportunity. If you don't enable automatic association, users must manually add, edit, or delete influential campaigns in the Campaign Influence related list.

To set up automatic association for campaign influence:

1. From Setup, enter `Campaign Influence` in the `Quick Find` box, then select **Campaign Influence**.

2. Select `Enabled`.

3. In the `Campaign Influence Time Frame` field, optionally specify the maximum number of days between the campaign first associated date and the opportunity created date.

    > Note: Campaigns associated to a contact prior to this time frame will not be considered influential. The maximum campaign influence time frame is 9,999 days. If you do not want to specify a campaign influence time frame, leave the `Campaign Influence Time Frame` field blank.

4. Optionally, define additional filter criteria that must be met in order for a campaign to be automatically associated.

5. Click **Save**.

Campaigns will be automatically added to the Campaign Influence related list on opportunities when they meet the criteria you specified.

MANAGING CAMPAIGN WORKFLOW

Managing campaigns involves the five major steps listed in this section. For each campaign, we recommend that you follow these steps to make your marketing programs and post-campaign analysis more effective.

1. Create a campaign in Salesforce
2. Create a list of individuals you'll target with the campaign
3. Run the campaign either online or offline
4. Track responses to the campaign
5. Create reports to analyze campaign effectiveness

Creating a Campaign (Strategy & Planning)

After determining your marketing strategy, the first step is to create a campaign in Salesforce. Select **Campaign** from the Create New drop-down list in the sidebar.

Within the campaign record, make sure to select or enter values for all of the standard and custom fields that apply to the type of campaign you are creating. The information you record is vital for post-campaign analysis of which types of campaigns are the most effective.

Creating Target Lists

The next step is to define who you want to target with the campaign. Some campaigns don't target individuals; for example, a banner posted on a third-party website is a campaign without members. If your campaign is targeting individuals, it is important to create a focused target list that has been segmented according to criteria that will yield the most high-quality prospects. The method used to create a target list depends on who the campaign will be targeting:

- Rented or Purchased Names. We recommend that you don't import these names into Salesforce at this time. You can simply use the list of names as your target list.
- Existing contacts or leads. To target existing leads or contacts, you can use the **Add to Campaign** button on Salesforce reports and list views to add campaign members and specify their statuses.

To target existing leads or contacts:

1. Create a custom lead or contact report.
2. In the "Select Criteria" step, enter up to three criteria to segment the report data. For example, to target all CFOs at Healthcare and Insurance companies with an annual revenue greater than $1 billion, you would enter this criteria:
    - "Title equals CFO"
    - "Industry equals Healthcare, Insurance" [Comma indicates OR]
    - "Annual Revenue greater than 1B" ['B' indicates billion]
3. Run the report and click **Add to Campaign**.

Executing a Campaign

The majority of campaign execution occurs outside of Salesforce. Campaign execution can be online or offline, for example:

- Online
  - Send email using an email execution vendor

    📝 Note: Salesforce has partnered with a number of email execution vendors that can link directly with campaign management. Contact Salesforce for more information.

  - Web banners
  - Search Engine Marketing such as Google Adwords
  - Event registration

- Offline
  - Plan and host a conference or trade show
  - Run print or radio advertisements
  - Send direct mail pieces

Tracking Responses

After execution, you need to track the responses to the campaign. The types of responses can be divided into the following groups based on the response tracking mechanism:

- Online Responses

  Customers and prospects respond by filling in a form on your website, such as a web seminar registration or a special promotion jump page.

  To track these types of responses, use a Web-to-Lead form to create a landing page for the campaign. Make sure to include the `Campaign ID` field when generating the HTML for the Web-to-Lead form. All responses are created as leads in Salesforce, and if the form includes the `Campaign ID` field value, the leads are directly associated to the campaign. To find your campaign ID, click on the campaign you have created. The last 15 digits in the URL represent the campaign ID. You can also include the `Member Status` field in the Web-to-Lead form. This field is "hidden" in the form (that is, it is not visible to campaign respondents), and it specifies the member status value to apply to all leads that respond via the web form. If you don't include this field in the web form, all new leads are assigned to the "default" member status specified in the campaign setup.

- Individual Manual Update

  Customers and prospects respond via phone or mail, for example, a call to the sales team or a mail response card. To track these types of non-automated responses, a sales or marketing team member can manually update the Campaign History for the lead or contact in Salesforce.

- Mass Update

  If the person executing the campaign has sufficient privileges in Salesforce, he or she can use reports and list views to quickly update the statuses of multiple campaign participants at one time. To track these types of responses, a sales or marketing team member can run a custom contact or lead report and click **Add to Campaign** to select a new status for those campaign members. Alternatively, a sales or marketing team member can display a lead or contact list view, select the appropriate leads or contacts, and click **Add to Campaign** to select the new status for those campaign members.

- Offline Response

Another type of response is any response that you track in an offline list, for example, trade show attendance or email responses from your email vendor. Import the offline list into Salesforce via the campaign **Member Import** option. Using the campaign import wizards, you can directly associate a lead or a contact with the campaign.

📝 Note: To use the campaign import wizards, users must have the `Marketing User` checkbox selected on the user detail page for Professional, Enterprise, Unlimited, Performance, and Developer Editions. They must also have the "Import Leads" permission in Enterprise, Unlimited, Performance, and Developer Editions.

Analyzing Campaign Effectiveness

The final step is to analyze the effectiveness of the campaign using reports and campaign statistics. You can track information such as the number of leads generated, the amount of opportunities tied to the campaign, the amount of business generated from the campaign, and more. In addition, you can track campaign statistics over time, for example, the number of times a particular contact has responded to campaigns or the ROI for all types of advertisements. If you're using campaign influence, you can also see how your campaigns are contributing to opportunities.

- Review Campaign Statistics

  Campaign statistics on the campaign detail are automatically recalculated every time a campaign is saved. Some campaign statistics include `Responses`, `Number of Opportunities`, and `Amount of Won Opportunities`. Campaign hierarchy statistic fields, such as `Total Responses in Hierarchy`, `Total Opportunities in Hierarchy`, and `Total Value Won Opportunities in Hierarchy`, provide aggregate data for a parent campaign and all the campaigns below it in the campaign hierarchy.

- Run Campaign Reports

  From the Reports tab, you can run several types of custom campaign reports as well as the following standard campaign reports:

  - Use the Campaign Leads or Campaign Contacts reports to list the leads or the contacts associated with your campaigns.
  - Use the Campaign Call Down report (single campaign) or the Campaigns with Campaign Members report (multiple campaigns) to show information about leads and contacts.
  - Run the Campaign Member Analysis report to summarize information about who has responded to campaigns.
  - Use the Campaign Revenue Report to analyze which opportunities have resulted from your campaigns. You can also analyze products and revenue schedules in this report.
  - The Campaign ROI Analysis Report calculates the ROI and average costs for your campaigns. The ROI is calculated as the net gain (**Total Value Opps** - **Actual Cost**) divided by the `Actual Cost`. The ROI result is expressed as a percentage.
  - Use the Campaigns with Influenced Opportunities report to view opportunities that are influenced by each of your campaigns.
  - Use the Campaign Member report to view the members of campaigns.

INDEX