

Outbound Campaigns Best Practices Draft.1

Executive Summary

The purpose of this document is to highlight the best practices that occur to create an effective campaign based around outbound cadences and scripts to make the outbound process as effective as possible.

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Prepare for the Campaign

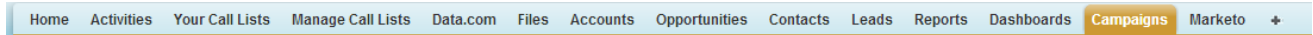
The BDM, SDR, etc. should schedule a time to meet and draft the following:

1. Outline Goal
 - a. What do we want out of this campaign?
 - b. What we offering prospects?
 - c. Additional Logistics
 - i. Need/Pain
 - ii. Number of Accounts
 - iii. Number of Contacts per Account
 - iv. Titles to target
2. List Research
 - a. How to find companies that fit the ideal client profile and goal of this outreach
 - b. See full documentation on List Research for more information on this topic
3. Cadence
 - a. Touch Definitions (Call, Email, LinkedIn Connection, etc.)
 - b. Touch Quantity
 - c. Touch Frequency
 - d. See full documentation on Cadences for more information on this topic
4. Create Scripts
 - a. Emails
 - b. Phone (Talking Points)
 - c. Voicemail Messages
 - d. See full documentation on Script Creation for more information on this topic

We recommend you create a campaign brief with the above outline in MS Word. This document can then be uploaded to the campaign record in Salesforce for collaboration and reference.

Create the Campaign

1. Click on the Campaigns Tab



2. Click on 'New'



3. Populate Mandatory Fields:
 - a. Campaign Name
 - i. In the format of:
 - (Initials)-(YEAR.MONTH.DAY)-(NAME OF CAMPAIGN)
 - Example: JM-2013.10.27-SDR Day
 - b. Click the check box for 'Active'
 - c. Type
 - i. Use the dropdown box to choose the most accurate description of the outreach
 - ii. If one does not exist, reach out to Joe for its creation.
 - d. Start Date
 - i. The day you plan to kick off the campaign
 - e. End Date
 - i. The day you project to exhaust your outreach
 - f. Optional Fields
 - i. Costs
 - ii. Expected Revenue
 - g. Click 'Save'

Campaign Edit
New Campaign

Campaign Edit Save Save & New Cancel

Campaign Information

Campaign Owner: Paul Regallis Num Sent: 0

Campaign Name:

Active:

Type: Advertisement

Status: Planned

Start Date: [10/22/2013]

End Date: [10/22/2013]

Expected Revenue:

Budgeted Cost:

Actual Cost:

Expected Response (%): 0.00

Description Information

Description:

Save Save & New Cancel

4. Upload the Campaign Brief to the Attachments section of the Campaign (Note: This step is subject to update depending on the Box.com implementation.)

Attachments Attach File Attachments Help ?

No records to display

5. Add Contacts and/or Leads to the Campaign
a. In bulk by clicking manage members on the campaign page:

Campaign
General Nurturing Customize Page | Edit Layout | Printable View | Help for this Page ?

« Back to List: Leads

[Opportunities \[14\]](#) | [Attachments \[0\]](#) | [Campaign Members \[35\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#)

Campaign Detail Edit Delete Clone **Manage Members** Advanced Setup

Or

By running a report and adding them into the campaign:

Technology Activation

Report Generation Status: Complete

Report Options:

Summarize information by: Show:

Lead Owner: All leads:

Time Frame

Date Field: Range:

Created Date: Custom:

From: 11/19/2012 To:

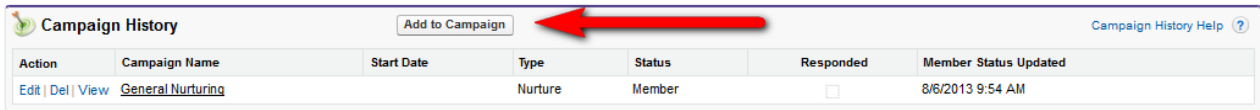
Run Report Hide Details Customize Save Save As Delete Printable View Export Details Add to Campaign

Filtered By: [Edit](#)

Lead Source contains Technology Vertical Activation [Clear](#)

First Name	Last Name	Company / Account	Lead Source	Created Date	Last Modified Date	Converted Date
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b. On an individual basis by clicking Add to Campaign on the contact/lead records



The screenshot shows a web interface for 'Campaign History'. At the top left is a green leaf icon and the text 'Campaign History'. To the right is a button labeled 'Add to Campaign' with a red arrow pointing to it. Further right is a link 'Campaign History Help (?)'. Below this is a table with the following columns: Action, Campaign Name, Start Date, Type, Status, Responded, and Member Status Updated. The first row of data shows 'General Nurturing' as the Campaign Name, 'Nurture' as the Type, 'Member' as the Status, an empty checkbox for Responded, and '8/6/2013 9:54 AM' for Member Status Updated. There are also links for 'Edit', 'Del', and 'View' next to the Campaign Name.

Action	Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
Edit Del View	General Nurturing		Nurture	Member	<input type="checkbox"/>	8/6/2013 9:54 AM

- c. In either case, you will need to choose a status for the contact/lead
- For our initial roll out of outbound campaigns, this is not important.
 - Use the default status, in most cases it will be Sent.

iii. If you would like to experiment with customizing these, click the

Launch the Campaign

1. Change the Status of the Campaign to In Progress

Campaign Detail		Save	Cancel
Campaign Owner	Joe Moran [Change]	Num Sent	0
Campaign Name	Test	Total Leads	0
Active	<input checked="" type="checkbox"/>	Converted Leads	0
Type	Outbound	Total Contacts	2
Status	In Progress	Total Responses	1
Start Date	--None--	Num Total Opportunities	0
End Date	In Progress	Num Won Opportunities	0
Expected Revenue	Completed	Total Value Opportunities	\$0
Budgeted Cost	Aborted	Total Value Won Opportunities	\$0
Actual Cost	Planned		
Expected Response (%)			
Created By	Joe Moran , 10/1/2013 10:29 AM	Last Modified By	Joe Moran , 10/28/2013 8:54 AM
Description			
Custom Links	View All Campaign Members		

2. Begin your outreach!
3. Use Contact Roles on Opportunities to relate Campaign Influence to the Campaign
 - a. Campaign Influence is automatically associated up to 180 days after a contact is added to the campaign. (Note: This will be subject to change.)
 - b. Influential campaigns are added to opportunities when a campaign is related to a contact that is assigned a contact role on an opportunity prior to the close date of the opportunity.


Contact Roles	New	Contact Roles Help ?
No records to display		

Contact Roles for Test123

Contact Roles for Test123		Save	Cancel
Primary	Contact	Role	
<input type="radio"/>	No Primary Contact		
<input checked="" type="radio"/>	<input type="text" value="Don Duck"/>	<input type="text" value="Decision Maker"/>	

Track the Results!

As opportunities are created (and contact roles are used), you will begin to see opportunities associated with the campaign.

Campaign Detail		Edit	Delete	Clone	Manage Members	Advanced Setup	
Campaign Owner	 Marketo Dedicated [Change]					Num Sent	0
Campaign Name	General Nurturing					Total Leads	803
Active	<input checked="" type="checkbox"/>					Converted Leads	12
Type	Nurture					Total Contacts	767
Status	In Progress					Total Responses	1
Start Date						Num Total Opportunities	14
End Date						Num Won Opportunities	1
Expected Revenue						Total Value Opportunities	\$77,650
Budgeted Cost						Total Value Won Opportunities	\$4,000
Actual Cost							