**So What Is a Salesforce Campaign?**

Jamie discovers that campaigns can help them track each of their marketing initiatives in detail. These can include typical advertisements and solicitations, emails, or more specialized marketing events like demos and conferences. By tracking leads and contacts targeted by each initiative, as well as their responses, Margaret, the marketing manager, can tailor each campaign to the type of marketing effort it represents.

Marketers use campaigns to analyze how many leads they’re generating, how much pipeline they’re building, and how many deals they’re closing as a result of marketing efforts.

With campaigns, you can group your marketing programs together into hierarchies for greater visibility into the results of a large group of campaigns.

Jamie sees a chance to wean Margaret off her spreadsheets with Campaign Path, an optional component that shows how a campaign is moving through the pipeline. With the Calendar object, for example, Margaret can see all her current and planned campaigns by month, day, or year.

## Let’s Create a Campaign

Jamie thinks Salesforce campaigns can help All Seasons Outdoor Cooking with its multiple campaigns, but the proof is in the pudding. She needs to use it. She starts by creating a simple campaign record.

Note: Select the **Marketing User** checkbox in your user profile and make sure you have permission to create campaigns. Your admin can give you that permission if you don’t already have it.

To check whether you have the Marketing User option in your user profile, go to Setup and enter Users in the Quick Find box. Click Users and then your username. Then look for the Marketing User checkbox on the user detail page. If the box isn’t checked, edit the record and select the checkbox.

Now let’s see how Jamie creates that first campaign.

1. From the Campaigns tab, click **New**.
2. Enter a name for the campaign.
3. Select a campaign type, such as advertisement, email, webinar, conference, and so forth.
4. Select a status for the campaign.
5. For now, enter an estimate for **Budgeted Cost** and **Expected Revenue**.
6. Enter a description.
7. Click **Save**.

## Hierarchies to the Rescue

With Salesforce campaigns, organization is built-in.

There are a few different ways hierarchies can be applied to a business’s marketing practices. A common approach is to use the hierarchy to group campaigns by marketing strategy. The hierarchy can have as many levels as she wants, but three levels works well for many companies. The top level can represent an overall strategic focus, such as selling a new product in a company’s lineup, or building brand awareness.

The second level can be for the different aspects of that focus, like the product launch, getting feedback from purchasers, or upselling previous customers. Finally, the third level can represent individual marketing efforts, like an email, an online ad, invitations to demos, or the demo itself.

Another way of using hierarchies is to group campaigns by time period. In this approach, the top level can be for the marketing efforts for the entire year, the second level can be for each fiscal quarter, and the third level for individual campaigns in each quarter.

A third way of using hierarchies is to use the first level for a large event, such as an annual conference. The second level can then be for supporting marketing efforts like the registration and emails, and the third level can be for individual sessions at the conference.

## Add Prospects to Your Campaigns

With each campaign she creates, she can then add leads, contacts, and person accounts as campaign members. There are a lot of options for adding members to her campaigns.

* Add a lead, contact, or person account individually from their record detail page.
* Add one or more members by clicking **Manage Campaign Members** from the dropdown menu on the Campaign Members related list.
* Add one or more leads by clicking **Add Leads** from a campaign’s Campaign Member related list.
* Add contacts from an account by clicking **Add Contacts** in the Campaign Members related list on a campaign and searching for the account name.
* Add members from the Contacts related list on an account detail page.
* Add members from a lead, contact, or person account list view.
* Add members from lead or contact report results.
* Import or add existing leads, contacts, and person accounts to a campaign with the Data Import Wizard.

*When adding contacts from the Campaign Members related list, Margaret can search for contacts by account.*

After adding members, Margaret can track how each member is progressing through the campaign. For each type of campaign, she creates an appropriate set of statuses to show how many of campaign members have responded and in which way.

For her email campaigns, Margaret uses statuses like “Sent,” “Responded,” “Purchased,” and “Did Not Purchase.” For her product demos, she uses statuses like “Invited,” “Accepted,” “Declined,” and “Attended.”

Note: It’s important to remember to limit yourself and your org to one set of campaign member statuses for each type of campaign that you run. Member statuses are very useful for reporting on the response rate of your campaigns. But if different email campaigns use different statuses to indicate that the email was sent, it’s not easy to get a single report of how many emails have been sent for all your campaigns.

When you have decided on a set of member statuses that works for each kind of campaign you run, add those values when you create each campaign. To have Salesforce automatically track the number of members who have responded to your campaigns, note which of your statuses you’d like to count as responses. You do this by checking the **Responded** box next to the value in the Campaign Member Statuses related list. If you don’t see the Campaign Member Statuses related list, ask your admin to add it to campaign detail pages.

To add campaign member statuses to a campaign,

1. On the campaign detail page, click **New** in the Campaign Member Statuses related list.
2. Enter a name for the status.
3. If you’d like the status to show that your prospect has replied to the campaign, click the Responded option and then click **Save**

T*he Campaign Member Statuses related list with statuses for a marketing event.*

Margaret can really see how campaigns can help her organize her marketing and make it more effective. She can create parent campaigns for her high-level strategic initiatives, with child campaigns for each individual marketing effort. She can use different record types and campaign member statuses for her email, demo, and customer feedback campaigns.

## What Else Can You Learn About Your Campaigns?

With built-in campaign reports, Margaret can easily see who her campaigns are targeting, who has responded to each campaign, and how much revenue they’re generating.

You can find the built-in campaign reports by clicking the Reports tab, then New Report, and then Campaigns from the list of report types. The Campaigns report folder contains several reports.

The Campaigns with Contacts report lists each of your campaigns and all of the contacts associated with them.

The Campaigns with Campaign Members report shows how many campaign members—including any combination of leads, contacts, and person accounts that you added to your campaigns—have responded to each campaign.

The Campaign with Opportunities report shows all the opportunities generated by your campaigns. Add the Amount field to see the revenue from each opportunity. You can filter the report to show only closed deals to focus on revenue generated, or show all deals to focus on pipeline built from your marketing efforts.

With built-in reports, it’s easy for Margaret to understand the results of her team’s efforts, so she can see what’s working and what isn’t.

You can group report results by campaign type to see how your email campaigns or events are performing. The custom fields you add to your campaign greatly affect the level of detail you get with reports. For example, capturing fields like campaign focus or product let you report on the success of marketing efforts in those specific areas.

Margaret feels relieved. Now she can clearly see how Salesforce campaigns can solve some of her problems and take her marketing department to the next level.

With campaigns, you too can organize, streamline, and add power to your marketing efforts.