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System Specs: MQL Creation, Field Mapping, and Automation

Documentation for the new MQL System in Sandbox.

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What triggers MQL creation?

The following scenarios may trigger MQL creation:

- When **Set to MQL** is changed to True on a Contact.

- Scenarios where systems would normally create a **Lead Opportunity,** such as form submits through Navigator/Insider and information requests through the Events Portal.

MQLs will only be created for qualified Private Sector contacts from qualified Client/Agency accounts:

- **Contact**: Private Sector Non-Qual | API: Private_Sector_Non_Qual__c
- **Account**: Private Sector Non-Qual | API: Private_Sector_Non_Qual__c

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When to create: MQL, Opportunity, or both:

Create Both - MQL & Opportunity

The Contact is Qualified and not on an active opportunity.

- **Contact**: Private_Sector_Non_Qual__c = False
  AND
- **Account**: Private_Sector_Non_Qual__c = False
  AND
- **Contact** is not on an **OpportunityContactRole** for any open opportunities

Create MQL Only

When "Set to MQL" is changed to True:

- **Contact**: Set_to_MQL__c is changed to True

When the Contact is Qualified but is already on an active opportunity.

- **Contact**: Private_Sector_Non_Qual__c = False
  AND
- **Account**: Private_Sector_Non_Qual__c = False
  AND
- **Contact** is on an **OpportunityContactRole** for at least one open opportunity

Create Opportunity Only

Either the Contact or the Contact's Account is not qualified:

- **Contact**: Private_Sector_Non_Qual__c = True
  OR
- **Account**: Private_Sector_Non_Qual__c = True

Lead Opportunity → MQL Field API Map:

- Name → **MQL_Name__c**
- CampaignId → **Campaign__c**
- OwnerId → **OwnerId**
- LeadSource → **Lead_Source__c**
- Lead_Source_Detail__c → **Lead_Source_Detail__c**
- Lead_Detail_1__c → **Lead_Detail_1__c**
- Lead_Detail_2__c → **Lead_Detail_2__c**

- Lead_Detail_3__c → **Lead_Detail_3__c**
- Lead_Detail_4__c → **Lead_Detail_4__c**
- Lead_Notes__c → **Lead_Notes__c**

Other MQL Fields to set:

- **MQL Date** | API: MQL_Date__c
  - The Date the MQL record was triggered -- **Today**

- **MQL Status** | API: MQL_Status__c
  - If no opportunity was created at the same time, set to "**New**" on creation
  - If an opportunity was also created, set to "**Converted**" on creation

- **Contact** | API: Contact__c | Field Type: Lookup(Contact) | *Required*
  - Direct lookup to triggering Contact, which replaces Lead First Name, Lead Last Name, Account, etc.

- **Product** | API: Product__c | Field Type: Lookup(Product)
  - Link the product here in place of creating an Opp Product.
    - For hand raisers, continue to use Lead Opportunity - Default Product

- *If an MQL is triggered by "Set to MQL":*

  - **Product** | API: Product__c | Field Type: Lookup(Product)
    - Use MQL Threshold Product (*TBD Naming*): Lead Opportunity - MQL Threshold

  - **Engagement AI Summary** | Engagement_AI_Summary__c | Field Type: Rich Text Area(32768)
    - Map Contact's Engagement AI Engagement Summary from when "Set to MQL" is triggered.

  - **Lead Source** | Lead_Source__c | Field Type: Picklist
    - Fit and Behavior Threshold Reached

- *If an MQL is also Converted to an Opportunity on creation:*

  - **MQL Status** | API: MQL_Status__c | Field Type: Picklist
    - Set to "**Converted**"

  - **Conversion Date** | API: Conversion_Date__c | Field Type: Date
    - Set to **Today**

  - **Conversion Type** | API: Conversion_Type__c | Field Type: Picklist
    - Set to **Created Opportunity**

  - **Opportunity** | API: Opportunity__c | Field Type: Lookup(Opportunity)
    - Link the newly created opportunity here

  - **Converted By** | API: Converted_By__c | Field Type: Picklist
    - Set to **Automation**

Salesforce Automation:

Record-Triggered Flows:

- **Set to MQL**: When a qualified contact's HubSpot Private Sector Behavior Score, Contact Fit Threshold, and/or Company Fit Threshold meet criteria to become an MQL.
    - Flows will check if the contact is qualified, is not in any open opportunities, has recent behavior, and hasn't been an MQL or Recycled recently.
        - If so, check "Set to MQL" on Contact.
    - Flow: Contact - RT AS - Set to MQL
    - Flow: Account - RT AS - Set Contacts to MQL

- **MQL Name**: On creation, if MQL Name is null, a flow will set the MQL Name after save.
    - Flow: MQL - RT AS - Assign MQL Name
    - MQL Name = Account Name - Lead Source – Product - Contact Name - Date
        - Product displayed differently depending on Product Type
            - Example: for Events, display "Sponsorship Level - Event Nickname".
        - If MQL Name is over 120 characters, each value may be truncated, and date may be removed until the MQL Name is less than or equal to 120 characters in length.

- **MQL Owner**: On creation, the MQL owner will be set if:
    - The MQL owner <> Account Owner OR the Account Name contains "e.Republic". AND
    - The MQL owner or running User is not someone from the Salesforce Ops team.
        - Named Accounts & Marketing Owned Accounts: Owner set to **Account Owner**
        - Unnamed Accounts & Internal Accounts: Owner set to **Sheryl Winter**
    - Flow: MQL - RT BS - Owner Changes to Account Owner

- **New MQL Alert**: On creation of any MQL, update the related contact's MQL Date and MQL Lifecycle Stage.
    - Always update the MQL Date.
    - If contact's MQL Lifecycle Stage <> Active Opportunity, set MQL Lifecycle Stage to Qualified Lead.
    - Flow: MQL - RT AS - New MQL Alert / Update Contact MQL Date (In Progress)

- **Contact MQL Date & MQL Lifecycle Stage**: On creation of an MQL with MQL Status = New, send a New MQL email alert.
    - Flow: MQL - RT AS - New MQL Alert / Update Contact MQL Date (In Progress)

- **Opportunity Stage Change**: When an Opportunity Stage is changed:
    - If now an Open Stage and contact MQL Lifecycle Stage wasn't Active Opportunity
        - Set Contact's MQL Lifecycle Stage to Active Opportunity
    - If now a Closed Stage and contact is not in any other open opportunities
        - Update Contact:
            - Set MQL Lifecycle Stage to Recycled
            - Set Last Date Recycled to Today
            - Set HubSpot Private Sector Behavior Score to 0
    - Flow: Opportunity - RT AS - Update MQL Lifecycle on Stage Change

- **Opportunity Contact Role (New/Deleted)**: When a new Opportunity Contact Role is created or when an Opportunity Contact Role is deleted, update the contact's MQL Lifecycle Stage:
    - **On Creation**: If the Contact's MQL Lifecycle Stage <> Active Opportunity
        - Set Contact's MQL Lifecycle Stage to Active Opportunity
    - **On Deletion**: If the Contact is not on any other open opportunity.
        - Set Contact's MQL Lifecycle Stage to Recycled
        - Set Contact's Last Date Recycled to Today
        - Set Contact's HubSpot Private Sector Behavior Score to 0
    - Flow: Opportunity Contact Role - RT AS - Update Inactive/Non Consent Contact/MQL Lifecycle
    - Flow: Opportunity Contact Role - BD - Recycle Contact

Screen Flows (Buttons):

- Global:
    - **Quick Lead**: Replaces CMS Quick Lead Opp
        - **Create Contact** if no contact is found
        - **MQL or Opportunity**: Suggests creating MQL or Opportunity based on contact qualifications/opportunity status. User can override.
        - **Add Multiple Products**: Option to add a single product or multiple products.

- MQL:
    - **Convert**: Converts each selected MQL to an Opportunity (1-to-1)
    - **Reject**: Rejects all selected MQLs with the same rejection type/reason.
    - **Add to Opportunity**: For each MQL selected, displays a screen to select the Opportunity to add the MQL's product and contact to.

- Contact Us:
    - **Convert to MQL**: Converts the Contact Us form to MQL, Opp, or Both, depending on Contact Qualifications and if they are in an Opportunity already.

MQL Field Details:

Fillable Fields:
- MQL Name | API: MQL_Name__c | Field Type: Text(120)
- MQL Date | API: MQL_Date__c | Field Type: Date
- Owner | API: OwnerId | Field Type: Lookup(User)
- MQL Status | API: MQL_Status__c | Field Type: Picklist
    - Values:
        - New
        - Converted
        - Rejected
- Contact | API: Contact__c | Field Type: Lookup(Contact) | **Required**
- Opportunity | API: Opportunity__c | Field Type: Lookup(Opportunity)

- Product | API: Product__c | Field Type: Lookup(Product)
- Campaign | API: Campaign__c | Field Type: Lookup(Campaign)
- Rejection Type | API: Rejection_Type__c | Field Type: Picklist
  - Recycle
  - Disqualify
- Rejection Reason | API: Rejection_Reason__c | Field Type: Picklist
  - ***Required*** *when Rejection Type is filled*.
  - Values Dependent on Rejection Type:
    - Recycle:
      - Product in Active Opportunity
      - Product in recent Closed Opportunity
      - Not ready for Sales Engagement
    - Disqualify
      - Competitor
      - Not a customer
      - Spam
- Conversion Date | API: Conversion_Date__c | Field Type: Date
- Conversion Type | API: Conversion_Type__c | Field Type: Picklist
  - Values:
    - Created Opportunity
    - Updated Active Opportunity
- Lead Source | Lead_Source__c | Field Type: Picklist
  - Submitted a Form
  - Events Portal
  - Email
  - Registered for a Webinar
  - Registered for an Event
  - Manual Marketing Review
  - Fit and Behavior Threshold Reached
- Lead Source Detail | API: Lead_Source_Detail__c | Field Type: Text(255)
- Lead Detail 1 | API: Lead_Detail_1__c | Field Type: Text(255)
- Lead Detail 2 | API: Lead_Detail_2__c | Field Type: Text(255)
- Lead Detail 3 | API: Lead_Detail_3__c | Field Type: Text(255)
- Lead Detail 4 | API: Lead_Detail_4__c | Field Type: Text(255)
- Lead Notes | API: Lead_Notes__c | Field Type: Text(255)
- Contact Us | API: Contact_Us__c | Field Type: Lookup(Contact Us)
- Engagement AI Summary | Engagement_AI_Summary__c | Field Type: Rich Text Area(32768)

Helpful Resources:

- **Example MQL Record**: MQL-0000006

- **List View:** All MQLs

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- **Default Threshold Product (*TBD Naming*)**: [Lead Opportunity - MQL Threshold](#)

- **Testing "Set to MQL"**: To test the "Set to MQL" automation and ensure salesforce and CMS are running properly together, open one of the contacts in this report, [Qualified Contacts - Ready for MQL](#), and make two field updates:

  - **HubSpot Private Sector Behavior Score** > 30
  - **HubSpot Private Sector Behavior Date** = Within the last 7 days
    - This should trigger "**Set to MQL**" true