



FIVE STEPS FOR MANAGING CAMPAIGNS

Summary

With campaigns in Salesforce, you can manage and track your marketing initiatives, analyze the effectiveness of your campaigns, and measure your marketing return on investment.

Capturing Data

- Recording detailed information is vital for post-campaign analysis.
- Your administrator can create custom fields to facilitate recording the correct information.

Create the Campaign

The first step after determining your marketing strategy is to create a campaign. To create a campaign, you must have the "Create" permission on campaigns and the `Marketing User` checkbox selected in your personal information. To create a campaign:

- Select **Campaign** from the Create New drop-down list in the sidebar, or click **New** on the Campaigns tab.
- Enter values for the fields that apply to the campaign.

Create your Target List

The second step is to define who you want to target with your campaign. You can target:

- Rented or purchased names.
- Existing contacts or leads. From contact or lead reports, click **Add to Campaign** to add members to the campaign. You can also add existing contacts or leads by selecting **Add Members - Import File** from the **Manage Members** drop-down button on a campaign detail page.

Execute the Campaign

The third step is to execute your campaign. Campaign execution occurs outside of Salesforce in one of the following manners:

- Online, using an email execution partner to send mass marketing emails. Contact Salesforce to learn about using an email execution partner for mass email.
- Offline, for example, hosting a conference, running advertisements, sending direct mail, or other methods.

Campaign Import Wizard

- Use the Data Import Wizard to upload a list of new names and create leads for the campaign.
- Use the Campaign Update Wizard to import responses for existing contacts and leads.
- Include the Contact ID or Lead ID in your exported report.
- Use Contact or Lead IDs to track responses.

Track Responses

After you have executed your campaign, you need to track the responses. Responses can include:

- Website response using a form on your website. Your administrator can set up Web-to-Lead to create a jump page with a response form, and all responses are created as leads and linked to the campaign.
- Manual response, for example, when prospects and customers respond by phone or email, you can manually record their responses on the Campaign History related list on the lead or contact detail page.
- Mass update or offline response using the Campaign member import wizards to import a list of leads or contacts and their responses. You need the `Marketing User` profile or the "Import Leads" permission to use these wizards.

Analyze Campaign Effectiveness

The final step is to analyze the effectiveness of the campaign using Salesforce reports and campaign statistics. You can analyze campaign effectiveness using:

- The statistics on the campaign to see the total number of responses, the amount of business generated from the campaign, and more. Campaign statistics are automatically recalculated every time a campaign is saved.
- Campaign reports, for example, the Campaign ROI Analysis Report, which helps you measure the return on your investment.
- Campaign Influence report, which shows how your campaigns are influencing opportunities.
- The Campaign Hierarchies statistics to see how campaigns are performing in relation to parent or sibling campaigns. These statistics only appear if you set up Campaign Hierarchies.