

Point-and-Click Your Way to Automated Marketing Subscription Management and Beyond

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How Would We Build This Scenario?

Your Communications Director comes to you and asks for a way to automatically track two subscriptions:

- 1) A newsletter that every new email gets
- 2) A big fish list that only get subscribed to when an opportunity over \$10K is won

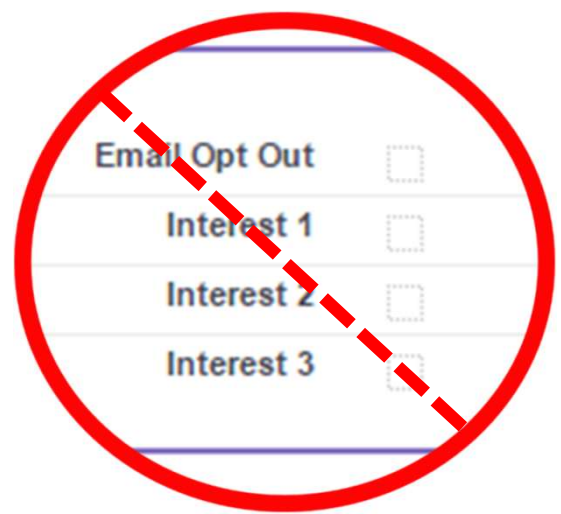
However, if that same contact subsequently has an opportunity over \$10K that is lost, remove from the big fish list. Oh, and by the way, it would really be great to have a way to test different versions of content to see if they can get better click-through rates on the next round of newsletters.

Email Subscription Management in 20 Minutes!!

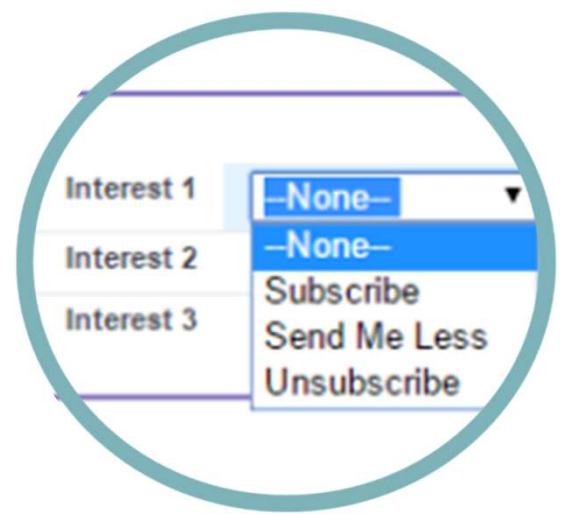
- 1 Subscription Options
- 2 Automating Subscriptions
- 3 Free Tools to Take You Beyond

What are the options?

Checkboxes



Picklists



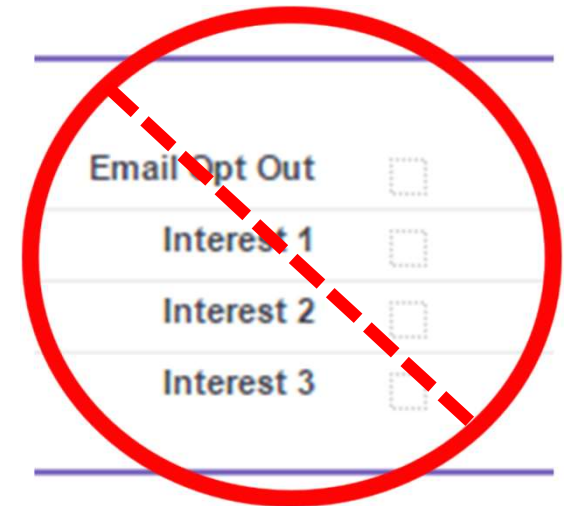
Campaigns



Checkboxes

Not good for scalable communication preferences

- Email Opt Out is FOREVER
- Not scalable
- Unchecked = unsubscribe or don't know?



Picklists

Scalable, and easily reportable

- Easily reportable – groups, matrix
- Scalable
- Easy to automate
- Can still use to create campaign members



Campaigns

Scalable and used by email platforms

- Scalable
- Lots of email tools use Campaigns for email lists and sends



The screenshot shows a table titled "Campaign History" with a target icon. The table has two columns: "Action" and "Campaign Name". There are three rows of data, each with "Edit | Del | View" in the Action column and "Interest 3", "Interest 2", and "Interest 1" in the Campaign Name column.

Action	Campaign Name
Edit Del View	Interest 3
Edit Del View	Interest 2
Edit Del View	Interest 1

Automate It!

Process Builder is the way to go

Workflow Rules

- Easy to set up
- Can't set order of firing multiple related workflows
- Have to update multiple Rules when making changes to subscription process
- Can't create/delete campaign member records

Process Builder / Flow

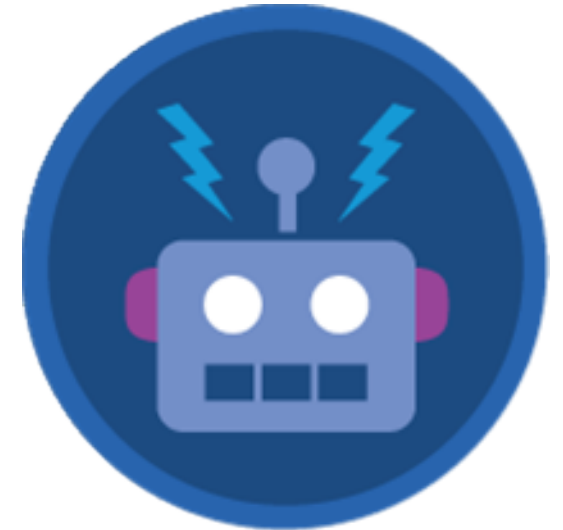
- More involved setup
- Can set order of operation within single Process
- One Process Builder for subscription process
- Call a Flow to create/update or delete Campaign Member Records



Process Builder + Campaign Members

Go with the Flow

- You can't update what doesn't exist
- You can't create what already exists
- Call a flow when you need to create/update/delete a Campaign Member record



Install prebuilt, reusable flows!

<https://goo.gl/Zhk5Pk>

Automation Considerations

Have you planned for all the possible scenarios?

- Email Changes
- Activity Changes
- New Opportunities
- Auto Unsubscribes
- Email Tool Itself



Campaign Tools to Take You Beyond

Three free campaign tools to take your subscription lists to the next level

- Standardize



- Segmentation



- A/B Testing



- Blog Post on these tools - <https://goo.gl/EwgY4p>



Your Turn!

How would we build this scenario in your organization?

- Your communications team wants to create two subscriptions, a newsletter that every new email gets and a big fish list that contacts only get subscribed to when an opportunity over \$10K is won.
- If that same contact subsequently has an opportunity over \$10K that is lost, remove from the big fish list.
- The newsletters should be easily managed by the contact via a manage preference page.

Resources

Where to go for more information on this

- Blog Post: [Automating Campaign Management: Use The Flow, Luke](https://goo.gl/CjAqN2)
- TrailHead: [Quick Start: Process Builder](#)
- Video: [Process Builder And Flow: An Admin's Trigger](#)



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- To empower Community Based Organizations
- To empower the Tech Community
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