

CHEATSHEET

Marketing drives pipeline, but Salesforce shows \$0 in influenced revenue. The culprit? Broken Campaign Member structures. Here is the blueprint to fix it.

Salesforce Campaigns: Reporting and Influence Basics for Teams

Stop losing marketing attribution. Learn how to configure Campaign Members, hierarchies, and response statuses.

Think of a Salesforce Campaign as a folder containing everything related to a specific marketing initiative.

- ✦ Campaign Fields: Track Name, Type, Status, Budgeted Cost, and Actual Cost out-of-the-box
- ✦ Hierarchy: Build parent-child relationships (e.g., regional events rolling up to a yearly event)
- ✦ Automatic Stats: Native rolling up of Leads, Contacts, Opportunities, and total revenue won

Campaigns can't attribute revenue without people. Campaign Members act as the junction record connecting Leads and Contacts to your Campaign.

- ✦ Junction Linkage: Bridges Lead or Contact records directly to a specific Campaign
- ✦ Bulk Load Options: Add members directly from List Views, Reports, Data Import Wizard, or Flows
- ✦ Marketing Sync: Account Engagement (Pardot) syncs member responses automatically
- ✦ Targeting History: View every touchpoint across the entire customer journey in one place

Raw membership isn't enough; you must track active engagement. Custom statuses tell the story of customer interactions.

- ✦ Custom Statuses: Match the specific initiative (e.g., 'Registered', 'Attended' for Webinars)
- ✦ The 'Responded' Flag: Crucial checkbox that tells Salesforce the contact actually engaged
- ✦ Standardization: Align statuses uniformly across Campaigns of the same Type for clear reports
- ✦ Automation Rules: Trigger member status updates via Salesforce Flow when forms are completed

THAT'S A WRAP

Stop Guessing Your ROI

Ready to unlock clean campaign reporting and prove your team's direct pipeline contribution? Read our complete campaign guide on SalesforceLWC.

- ✦ Read the full campaign reporting guide at salesforcelwc.com
- ✦ Discover LWC development tips, tricks, and architectures
- ✦ Level up your Salesforce CRM marketing attribution strategy

→ salesforcelwc.com

5 slides

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