

salesforce admins



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

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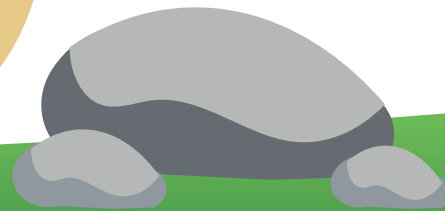
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Salesforce Technical Strategist



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#AWESOMEADMIN



# Let's do This!

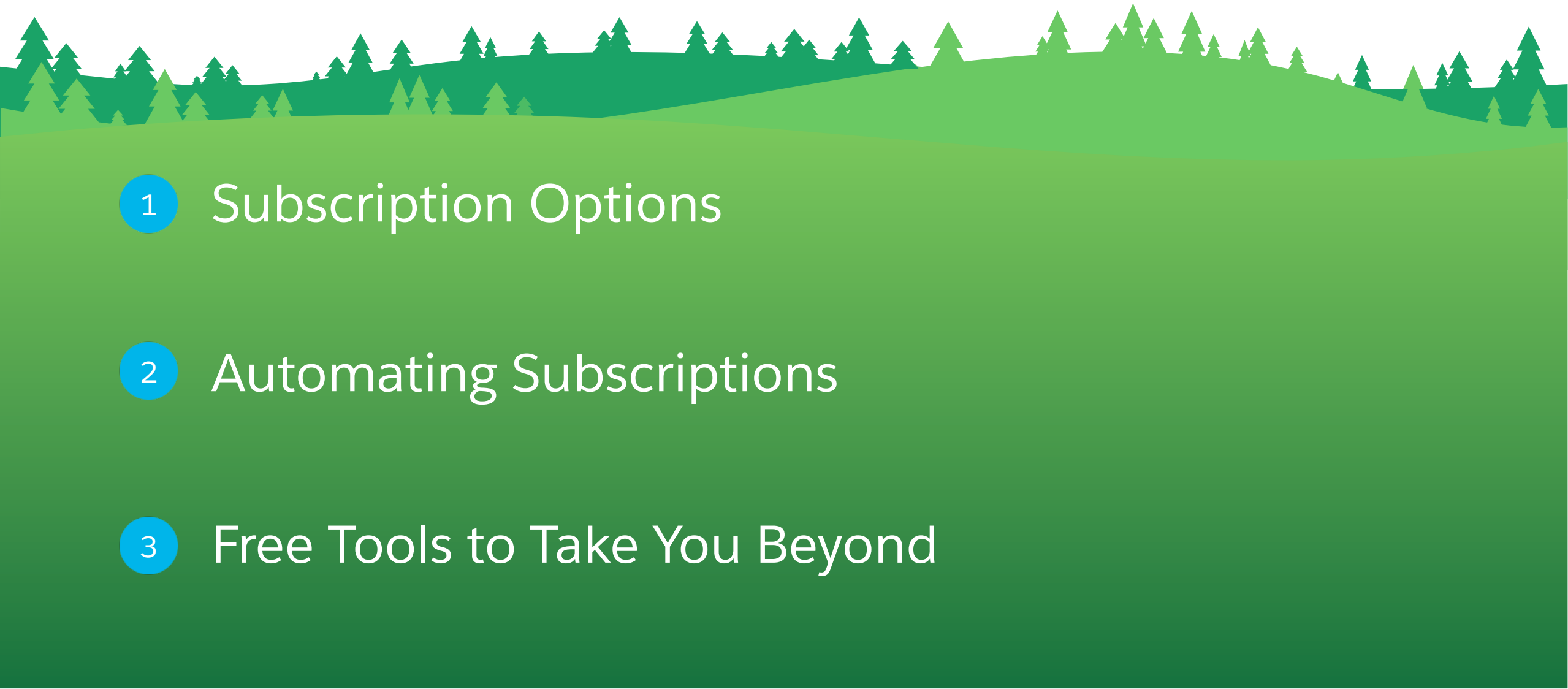
How would we build this scenario?

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

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

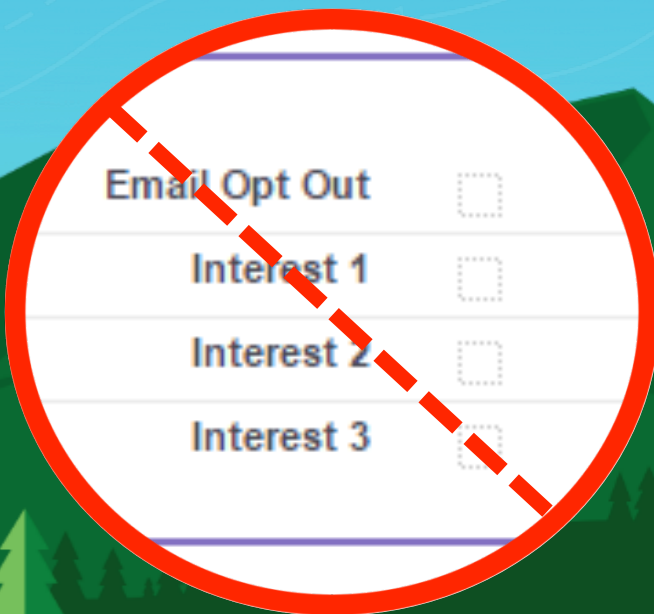
However, if that same contact subsequently has an opportunity over \$10K that is lost, remove from the big fish list. They would really love a way to test different versions of content to see if they can get better click-through rates on the next round of newsletters.

# Email Subscription Management in 25 Minutes!!

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



## Checkboxes




Email Opt Out	<input type="checkbox"/>
Interest 1	<input type="checkbox"/>
Interest 2	<input type="checkbox"/>
Interest 3	<input type="checkbox"/>

## Picklists

Interest 1	<div><div>—None—</div><div>—None—</div><div>Subscribe</div><div>Send Me Less</div><div>Unsubscribe</div></div>
Interest 2	
Interest 3	

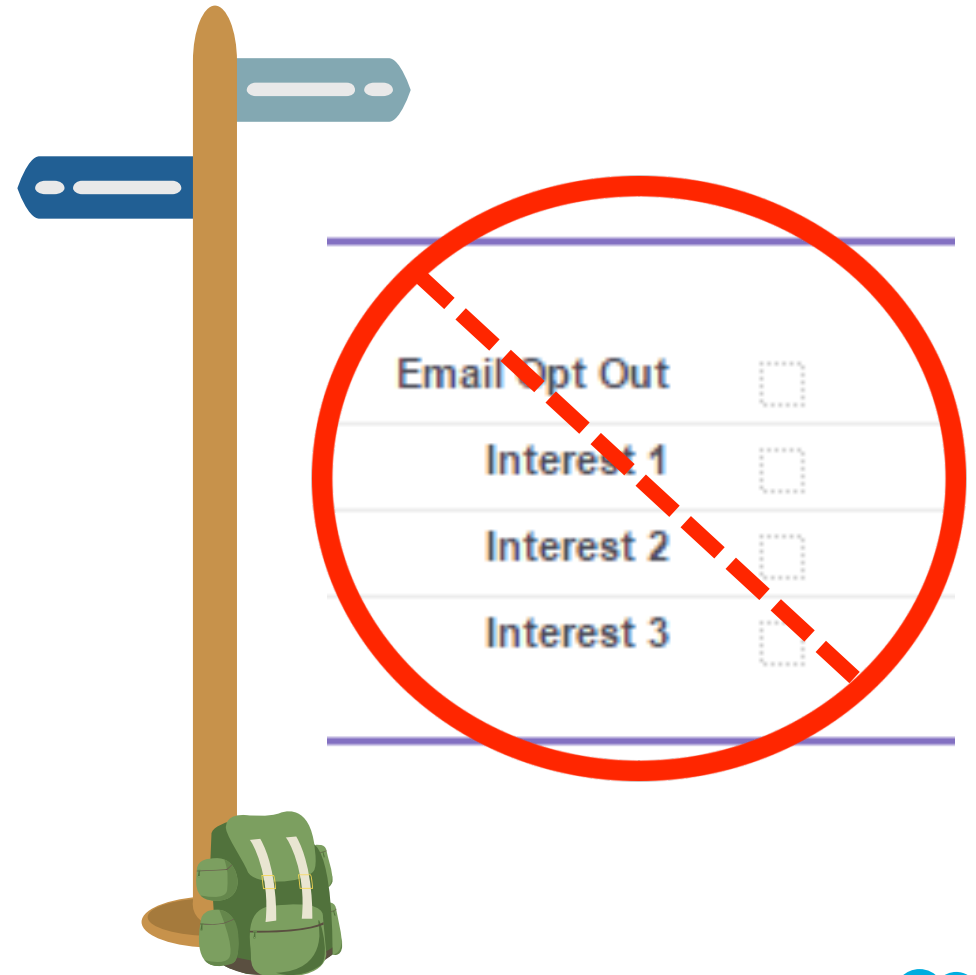
## Campaigns

 <b>Campaign History</b>	
Action	Campaign Name
Edit   Del   View	<u>Interest 3</u>
Edit   Del   View	<u>Interest 2</u>
Edit   Del   View	<u>Interest 1</u>

# Checkboxes

Not good for scalable communication preferences

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

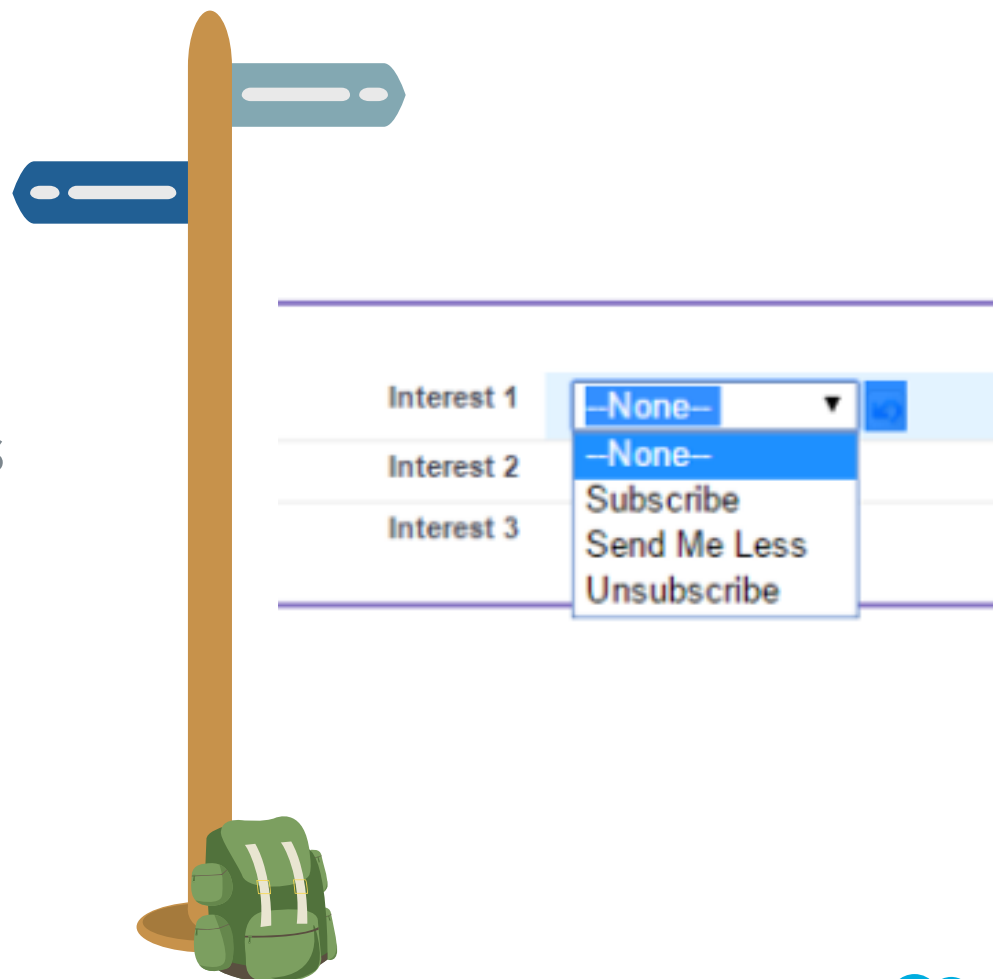




# Picklists

Scalable, and easily reportable

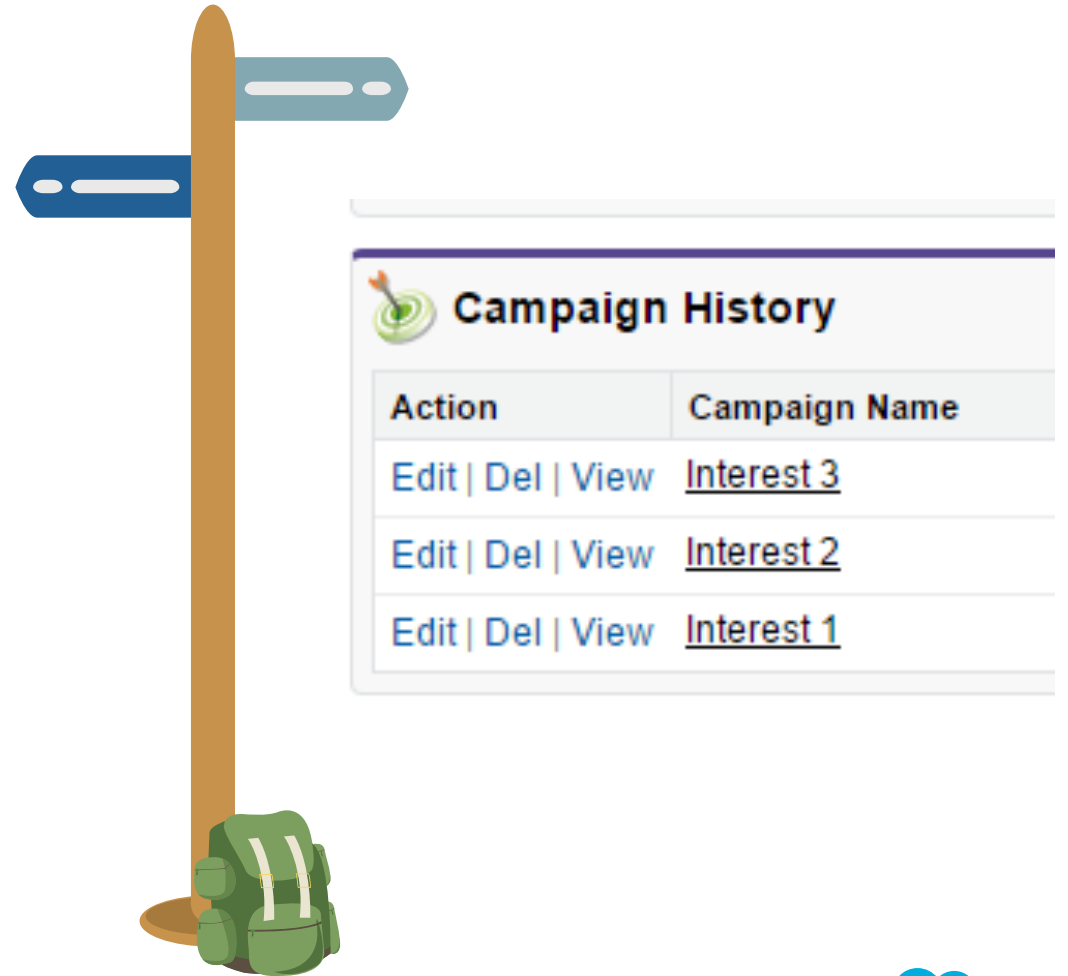
- Easily reportable – groups, matrix
- Scalable
- Easy to automate
- Can still use to create campaign members



# Campaigns

Scalable and used by email platforms

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



# 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

- 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



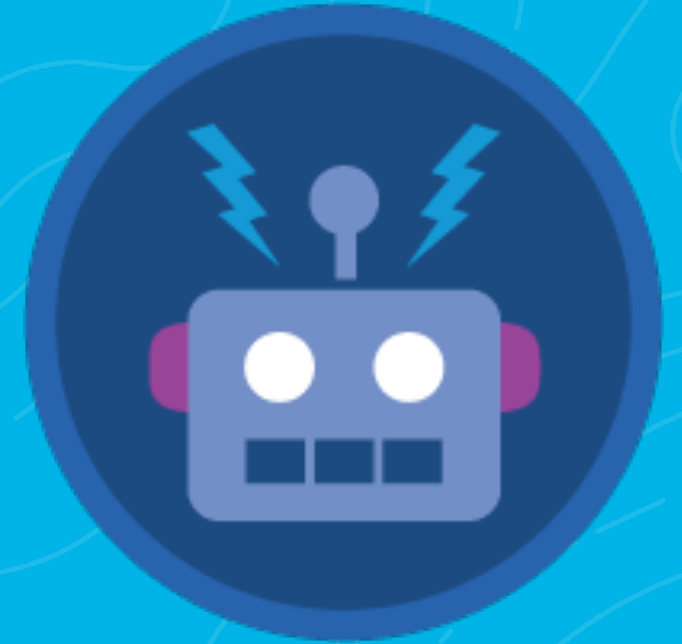
# Process Builder + Campaign Members

There are limitations, but just 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!

<http://sforce.co/2dporHJ>



# Automation Considerations

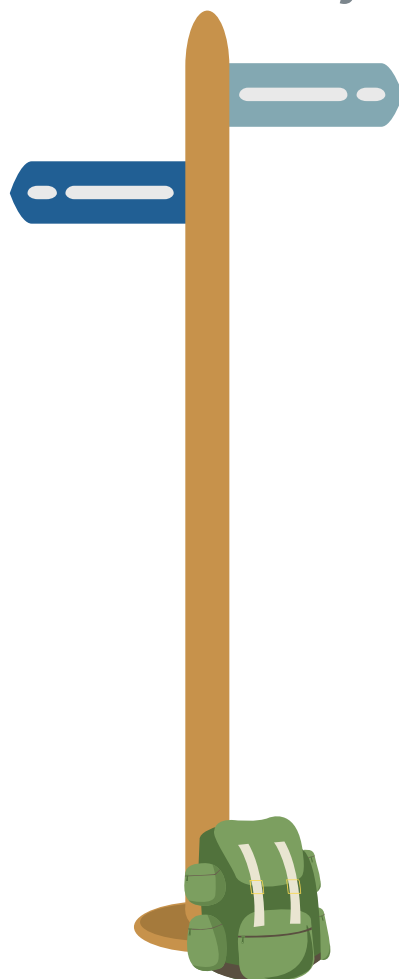
- Email Changes
- Activity Changes
- New Purchases
- Auto Unsubscribes



# Campaign Tools to Take You Beyond

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

- Segmentation
- A/B Testing
- Link to blog post





# Your Turn!

How would we build this scenario?



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.



# make Trailhead your next step

## Earn the Process Automation badge

[trailhead.salesforce.com](https://trailhead.salesforce.com)



Thank You

