

# Getting the most out of Salesforce

How to track your leads and use Salesforce to understand which campaigns and channels are working to bring in revenue





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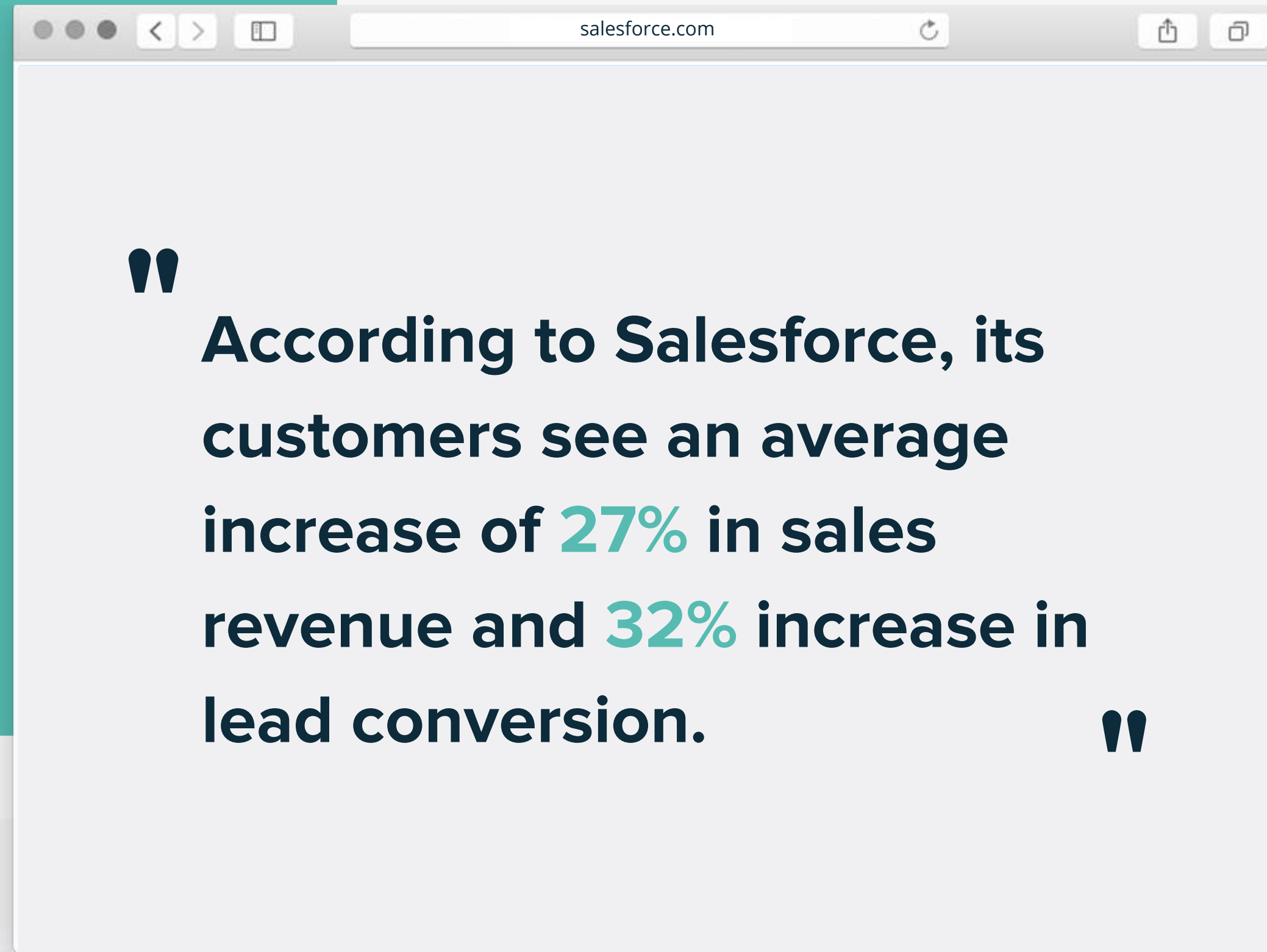


# What is Salesforce?

Salesforce is a customer relationship management solution that brings customers and companies together. It's one integrated CRM platform that gives all your departments — including marketing, sales, commerce, and service — a single, shared view of every customer.

Salesforce is used by a wide range of companies, from Amazon and Adidas to American Express.

The cloud-based software allows its customers to track customer activity, market to them as well as support with issues like customer complaints and customer success processes.



“

**According to Salesforce, its customers see an average increase of 27% in sales revenue and 32% increase in lead conversion.**

”

# The limitations of Salesforce as a marketer

Salesforce benefits sales teams by helping them organise their leads and manage their pipeline.

While Salesforce does provide a marketing cloud, there are some limitations to the functionality and data it can provide depending on your business type and sales model.

The out-of-the-box data Salesforce does provide doesn't satisfy sales reps' requirement to identify the quality of their leads.

These problems are:

- Unreliable Data
- Missing Data
- Longer Customer Journeys
- Indirect Marketing Impact on Lead Generation

“  
**54%** of sales  
reps claim they  
don't have data  
insights on  
customers'  
propensity to  
buy  
”

Source: Salesforce

# The limitations of Salesforce as a marketer



## Unreliable data

Your sales team works hard to convert a lead to a sale. But as a marketer, you want to know the lead's source.

If you're relying on your sales team to ask the lead directly, you need to ask yourself: 'how reliable is that data?'

## Indirect marketing impact on lead generation

Every stage of the buyer's journey has a vital role to play in converting website visitors into customers.

But how do you work out, not only which channels have supported the sale, but also how much credit each channel should be assigned?

While lead source is a great starter to attribution, it only tells you so much. Attribution models allow you to define set rules to ensure every channel gets the credit it deserves.

## Long customer journeys

Customer journeys are getting longer and longer. According to Google, low-cost products like a chocolate bar could take as many as 20 touchpoints to convert a prospect into a customer.

With all of these touchpoints including emails, phone calls, live chat sessions, web visits, and more, how do you possibly begin to track those and understand how they influence your customers? Understanding the full customer journey is data you can't readily find in Salesforce.

## Missing data

If a lead in Salesforce is listed as originating from a direct search your marketing team will be left scratching their heads.

What exactly does a conversion via direct search mean? To your marketing team, very little. Where has that lead heard of your business? It could have been the PPC ad you set live. Or the email campaigns you've been working on.

The truth is, you'll never know with such limited data.



# Why reporting on leads isn't enough

Marketing attribution, or more specifically, revenue attribution, is how marketers understand the role each channel and campaign plays in pushing a website visitor down the marketing funnel.

**Nurturing new leads can take a village**  
(and a whole load of content).

Whether that's PPC ads, social content, email campaigns, SEO blogs, as a marketer, you've got your work cut out to try and understand how each piece of content works to stimulate a conversion.

Have a think about what you currently report on...

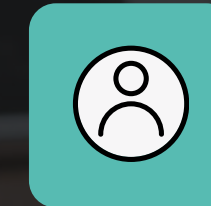
## Current vanity metrics:



Clicks



Impressions

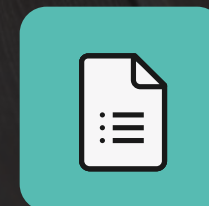


Follower numbers



Open rates

## Lead Generation metrics:



Volume of form submissions



Clicks to call

When reporting, vanity metrics and lead gen metrics are a great start, but they only tell you so much.

Whether you're analysing campaign performance, looking at ad set performance, or comparing marketing teams, there's only one metric that matters...

**REVENUE**

# Why is revenue the best metric?

Revenue is measurable and actionable.

It's the only metric to use when looking at your marketing's impact on your bottom line.

Take your sales team. They won't be reporting back on the number of calls they fielded alone. They'll be reporting on how many calls they had, how many converted into sales, and how much revenue that equates to.



**“ Inbound marketing budgets are cut 12% more for companies that don't calculate ROI ”**

Source: Marketo

# Why marketing should report on revenue

Marketing and sales are two cogs in a machine. They don't have an easy way to bridge the data gap.

You know that marketing impacts sales, but you can't prove it. And even worse, you can't see which channels and campaigns are working best.

**Revenue attribution is the missing piece.**

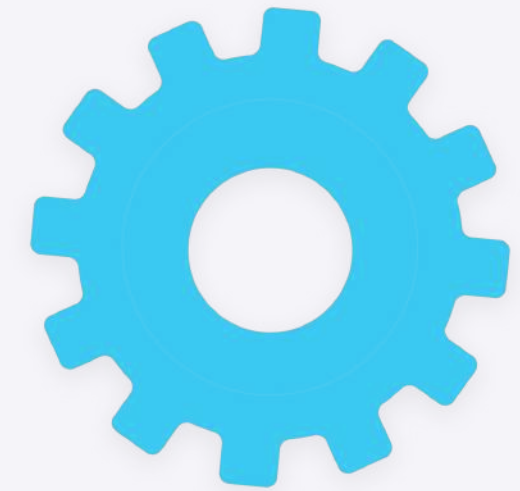
By having revenue data assigned to each and every lead in Salesforce, and all of that data being sent to your GA dashboard, you can start to understand what's working.

From there, the gears start turning. Revenue attribution provides you key data to grow and optimise your marketing, which in turn affects sales.

## Without Revenue



Marketing

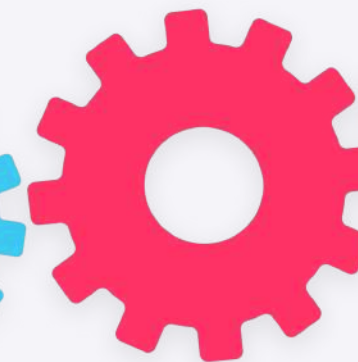


Sales

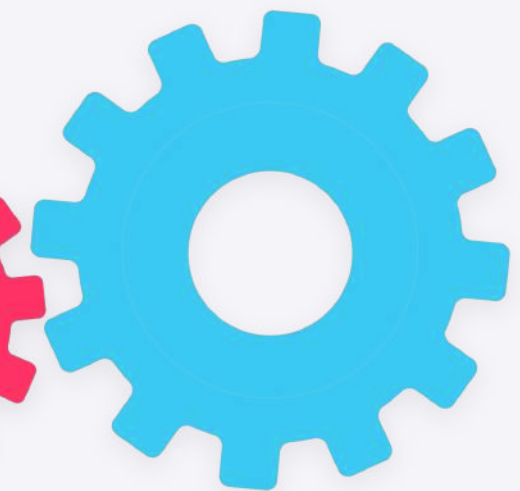
## With Revenue



Marketing



Revenue



Sales



”

**87%** of sales and marketing leaders say collaboration between sales and marketing enables critical business growth.

Source: LinkedIn 2020

”



## Why marketers struggle to measure by revenue

A lot of marketers miss out measuring with revenue because they:

- Generate leads that sit in Salesforce for sales to pick up
- Operate with a long sales cycle with many touch-points

And so, these marketers can't measure all of their marketing efforts with one metric. Instead, reports become fragmented. Reports segment into channels with their own individual metrics.

Or reports highlight the potential of marketing alone.

For those who don't have the luxury of a purely eCommerce website, data is lost at the point a user becomes a lead. The data is passed over to the CRM and the marketer loses all sight of it.

Marketing attribution allows you to rectify that.

# What can marketers track with Salesforce?

## Capturing leads with web-to-lead forms

Salesforce offers web-to-lead forms for marketing teams. This is a great way to generate leads directly from your website, and automatically send new leads into Salesforce.

Leads can then be analysed, qualified and sent to your sales team.

You can also redirect these prospects to landing pages critical to campaign success.

### Web-to-lead form

salesforce

**First name:** Tom **Second name:** Jones

**Email:**  
tomjones@business.com



**Number:**  
0777777777

Submit





## Lead source value data

Details

Company or Call Tracking

Source: Inbound

Campaign: Google Paid

Keyword: Flights to Paris

Payment: Stripe

Priority: High

Conversion type: Phone

## Adding source data to your leads

Lead source is how a potential buyer found your business and allows marketers to record and track where their leads originated.

While lead source in Salesforce is a useful feature there are limitations.

We'll talk you through each and how you can combat them.

These limitations include:

- Leads source fields are too granular
- Lead source can be edited
- Each lead can only have one lead source value
- Lack of multi-channel data

# Limitations of Salesforce source data

01

## Lead Source Fields are too granular

By default, the lead source list in Salesforce displays all the channels we use throughout our customer journey. Although, that said, it will merge all digital channel activity into one category labelled “Web”.

This makes it difficult for the marketing and sales team to pinpoint which specific digital channels are driving leads into the CRM system.

02

## Lead source can be edited

There’s always the chance that sales will exaggerate their impact on a sale by changing the source as they believe they deserve the credit for getting the sale across the line.

Although, in reality, your sales team would never have made that sales if it wasn’t for the efforts of marketing.

03

## Each lead can only have one Lead Source value

In addition to the point above, each lead in Salesforce can only have one lead source value, which is very restricting for marketing teams that use both online and offline channels to convert leads into sales.

04

## Lack of multi-channel data

Salesforce does have “attribution” of Campaign within Opportunities and can support first and last-click touch. That said, the default setup only allows a single “Primary Campaign” to be attributed to an opportunity, which can cause a lot of complications for businesses that experience long and complicated sales cycles and convert many leads offline.



## Attributing campaign influence to your leads

Salesforce has a built-in feature called 'Campaign Influence'. This allows you to measure and report on how campaigns have influenced a lead.

Not only can you identify how many leads a campaign has influenced, but you can see how much revenue it has added to the pipeline.

Salesforce Campaign Influence is an out-of-the-box solution that allows you to leverage CRM data so you can connect the dots between revenue and campaign data. As impressive as this all sounds, Campaign Influence does come with its limitations...



# Limitations of Campaign Influence

01

## Campaign tracking only available ‘after’ a lead is created

As Campaign Influence is a built-in feature, tracking the customer journey in Salesforce can only start once a lead has been created.

02

## Lack of multi-channel reporting

Campaign Influence doesn’t provide insight into multi-channel data. As marketers, we want to see how our efforts influence the pipeline.

Unfortunately, Salesforce was designed specifically for sales teams, so doesn’t have this level of data.

03

## Only effective with gated content

Typically, Salesforce campaigns are associated with gated content.

This is to ensure that the lead consuming your content is an existing contact in your CRM system. Otherwise, it won’t work.

04

## Time consuming and inconsistent

Setting up Campaign Influence is time-consuming.

There’s a lot of configuring and testing involved, and even then it’s never perfect.

Not only that but it’s impossible to drill down to your daily marketing tasks, and it’s usually these initiatives that have the biggest impact on your performance.

05

## Opportunities can only have one "Primary Campaign"

As it stands, Campaign Influence in Salesforce doesn’t allow you to associate one opportunity with multiple campaigns.

Not very useful if you attract your customers through multi-channel campaigns.





# How can marketers supercharge their Salesforce?

So we know what we can do in Salesforce. We also know what data we can't access. Don't worry. There are workarounds.

By using marketing attribution tools like Ruler, you can make the most out of Salesforce, as a marketer.

Unlock more data from your marketing and justify the effectiveness of your work with Ruler, which can:

1. Capture all interactions throughout an individual customer journey.
2. Integrate with Salesforce along with other data sources, such as Google Analytics and Google Ads to gain complete visibility of the conversion path.

We can track each and every lead and store every touchpoint they have. That means, even if a lead comes in via an offline channel, it'll still be fired over to Salesforce.



## Enrich your Salesforce leads with marketing source variables

When a website visitor converts into a lead, you're used to just getting a new prospect in Salesforce, right? Well, with Ruler, we can enrich that data.

You'll be able to see the lead source, their other session data, and if they came through paid we'll even be able to highlight the keyword searched that led to them clicking on your ad.

Not only that, you'll be able to see:

- Landing page they converted on
- Sessions
- Pages viewed
- Touchpoints and data e.g. recorded inbound calls

## Get even more leads in Salesforce

Not only can you enrich the data of your current leads, but you can also increase the number of leads.

Sounds too good to be true, right?

Think about the leads that come from phone calls, email and live chat. While Ruler can monitor and update every form to integrate into Salesforce (whether that's a web-to-lead form or not), it can also add new leads for every other touchpoint too.

Now, every time you get an inbound call, you'll be able to see it in Salesforce. And, even better, we'll tell you where that call came from, alongside any other touchpoints that user had with your website/content before they called!





Try searching “Top countries by users”

Secondary dimension

Sort Type: Default

advanced

Goal 9: Webchat transcripts

Default Channel Grouping	Acquisition			Behaviour			Conversions		
	Users ? ↓	New Users ?	Sessions ?	Bounce Rate ?	Pages/Session ?	Avg. Session Duration ?	Webchat transcripts (Goal 9 Conversion Rate) ?	Webchat transcripts (Goal 9 Completions) ?	Webchat transcripts (Goal 9 Value) ?
	10,372,668 % of Total: 100.00% (10,372,668)	10,216,635 % of Total: 100.01% (10,215,779)	14,863,661 % of Total: 100.00% (14,863,661)	69.80% Avg for View: 69.80% (0.00%)	1.24 Avg for View: 1.24 (0.00%)	00:00:41 Avg for View: 00:00:41 (0.00%)	0.07% Avg for View: 0.07% (0.00%)	9,806 % of Total: 100.00% (9,806)	£9,806.00 % of Total: 100.00% (£9,806.00)
Display	7,924,011 (75.23%)	7,724,907 (75.61%)	11,578,023 (77.89%)	75.20%	1.15	00:00:32	<0.01%	569 (5.80%)	£569.00 (5.80%)
Organic Search	1,072,878 (10.19%)	1,032,642 (10.11%)	1,326,803 (8.93%)	31.50%	1.60	00:01:17	0.38%	5,016 (51.15%)	£5,016.00 (51.15%)
Paid Search	848,005 (8.05%)	800,823 (7.84%)	1,118,323 (7.52%)	60.90%	1.66	00:01:16	0.25%	2,805 (28.60%)	£2,805.00 (28.60%)
Direct	470,494 (4.47%)	474,797 (4.65%)	568,747 (3.83%)	69.70%	1.35	00:00:43	0.10%	586 (5.98%)	£586.00 (5.98%)
Referral	79,845 (0.76%)	54,662 (0.54%)	99,368 (0.67%)	52.43%	1.78	00:01:17	0.47%	466 (4.75%)	£466.00 (4.75%)
Paid Social - Non RT	61,666 (0.59%)	58,023 (0.57%)	72,219 (0.49%)	81.99%	1.23	00:00:45	0.20%	148 (1.51%)	£148.00 (1.51%)
Social	54,751 (0.52%)	52,692 (0.52%)	60,629 (0.41%)	74.41%	1.20	00:00:27	0.23%	142 (1.45%)	£142.00 (1.45%)
Paid Social - RT	7,495 (0.07%)	6,670 (0.07%)	9,222 (0.06%)	82.39%	1.33	00:00:35	0.00%	0 (0.00%)	£0.00 (0.00%)
Affiliates	4,956 (0.05%)	4,152 (0.04%)	6,468 (0.04%)	52.10%	1.81	00:01:46	0.63%	41 (0.42%)	£41.00 (0.42%)
(Other)	4,554 (0.04%)	3,938 (0.04%)	7,561 (0.05%)	36.91%	1.83	00:02:19	0.16%	12 (0.12%)	£12.00 (0.12%)

Show rows: 10

Go to: 1

1-10 of 15

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This report was generated on 06/11/2020 at 09:50:17 - Refresh Report

## Send revenue to your chosen apps

When an opportunity in Salesforce is marked as closed or won, Ruler can automatically send the revenue back into your Google Analytics account (or your Facebook Business Manager, Google Adwords, basically any app you need!).

This allows you to view your marketing data by revenue. And you know what that means? You can confidently say which channels and campaigns are driving the most leads, and the most revenue.

This data visibility allows you to measure ROI and optimise your campaigns based on revenue, and not goals.



## Filter your opportunities by channel

Ever wondered if certain channels work better to drive users from awareness to consideration, or from consideration to decision?

Revenue data often remains stuck in CRM pipelines and may not close for months or years, at which point any insight on marketing impact is lost in the disconnect between sales tools and marketing platforms.

Ruler's Opportunity stage report allows you to analyse how many potential deals and what potential revenue you have generated at each stage of your pipeline funnel, whilst breaking them down by campaign source or keyword.

## Close the gap between your sales and marketing data

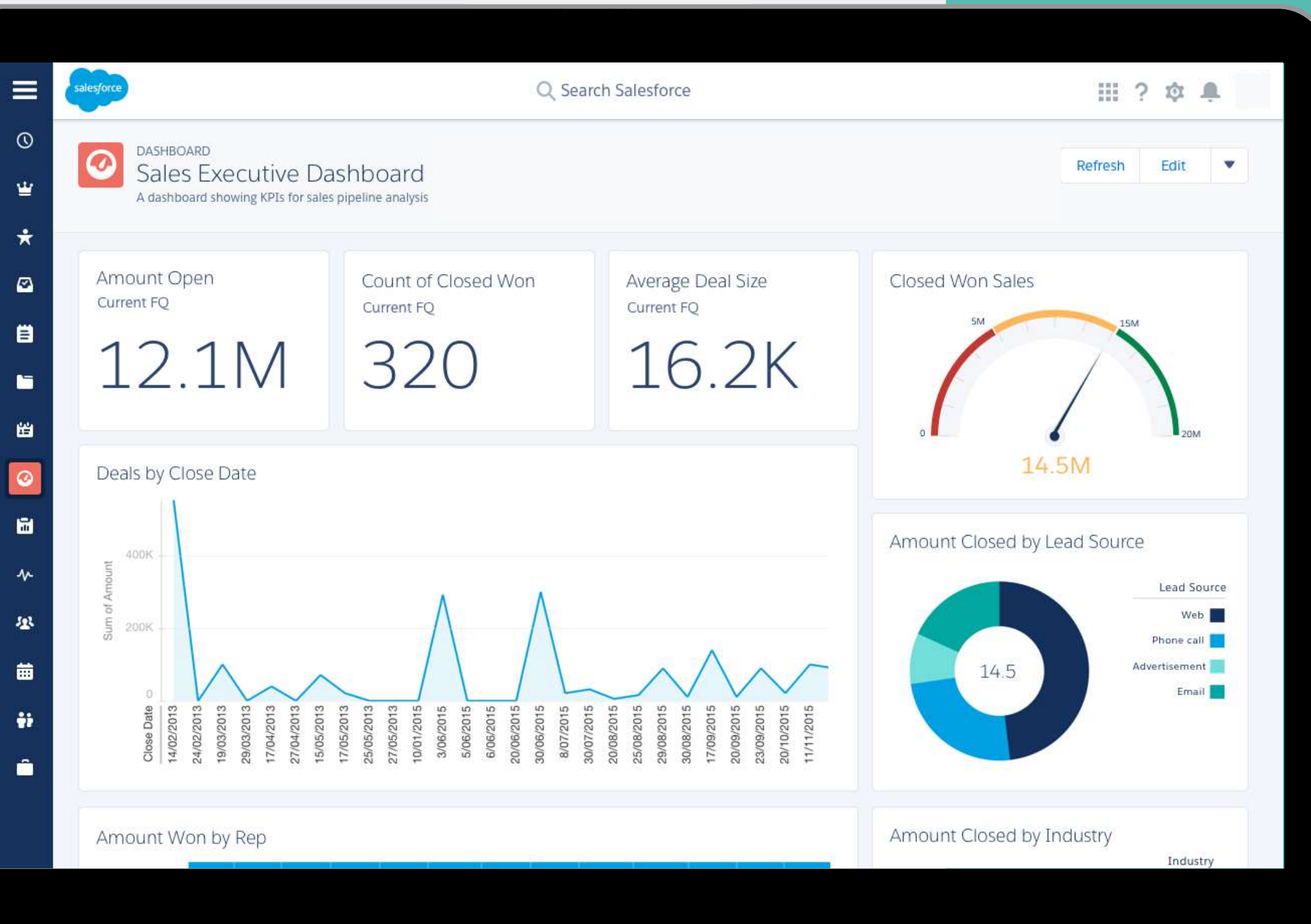
Salesforce is an integrated CRM platform that gives all your departments — including marketing, sales, commerce, and service — a single, shared view of every customer.

In reality however, Salesforce is weighted heavily towards providing solutions for company sales and services teams. Marketing doesn't tend to get much of a look in.

By integrating it with Ruler Analytics, you'll be able to get more out of your business. Wave goodbye to complicated marketing reports and trying to understand which leads where generated by which channel.

You'll have true visibility on each and every lead and be able to provide your sales team with more data to help them convert even more sales.





## Go beyond campaign influence

Campaign Influence is a powerful tool for marketers that experience short sales cycles and run a limited number of campaigns. But, what about the rest of us marketers trying to connect the dots between multi-channel customer journeys and sales revenue?

Believe it or not, most modern marketers do have the data they need to track the effectiveness of their marketing across the entire conversion path. The problem is that it's disconnected and stored in various data points.

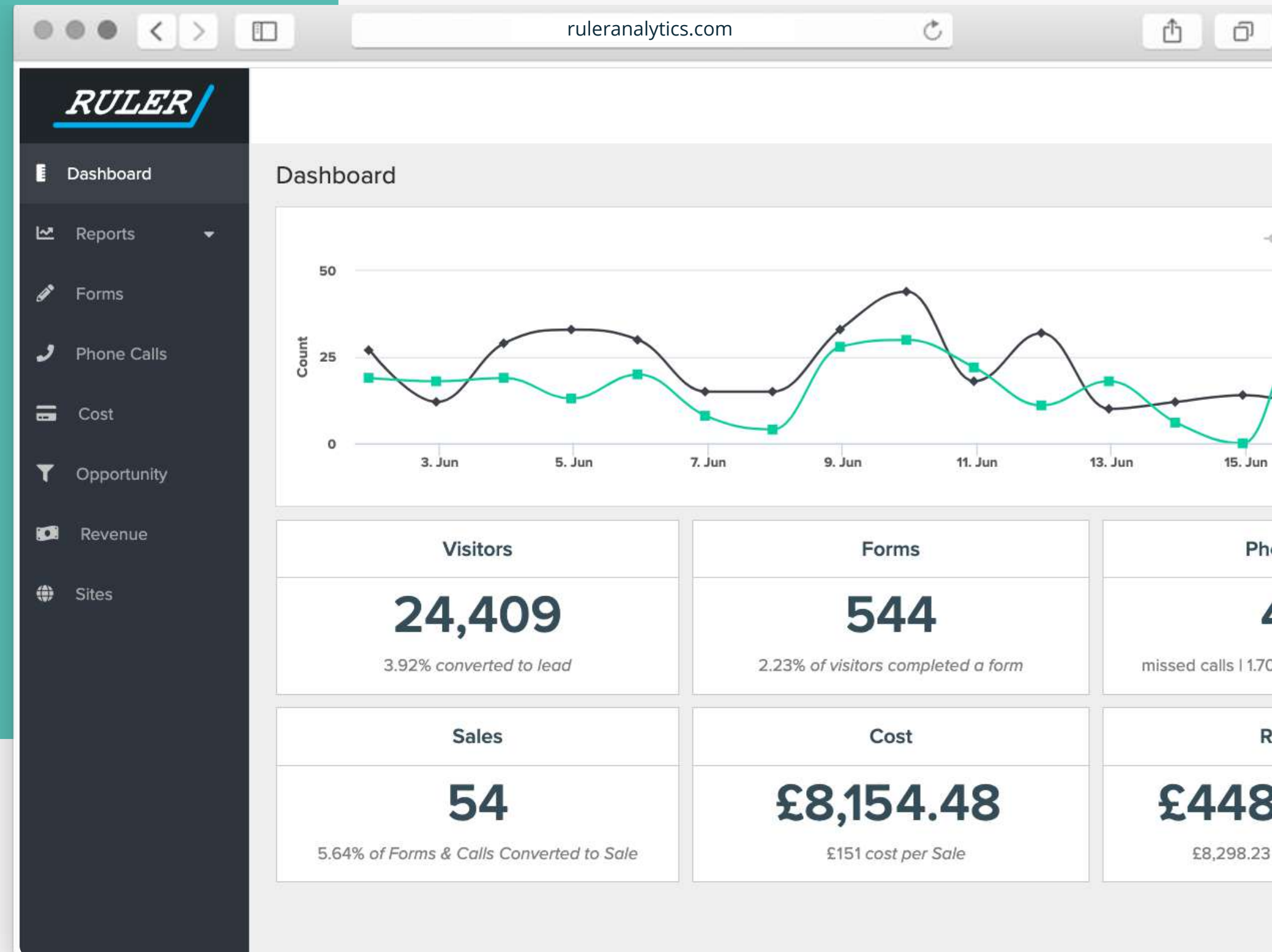


# How does Ruler actually work?

Ruler Analytics is a marketing attribution solution which tracks your visitors' multiple touch-points and customer journeys to attribute revenue in Salesforce accurately across the entire sales cycle.

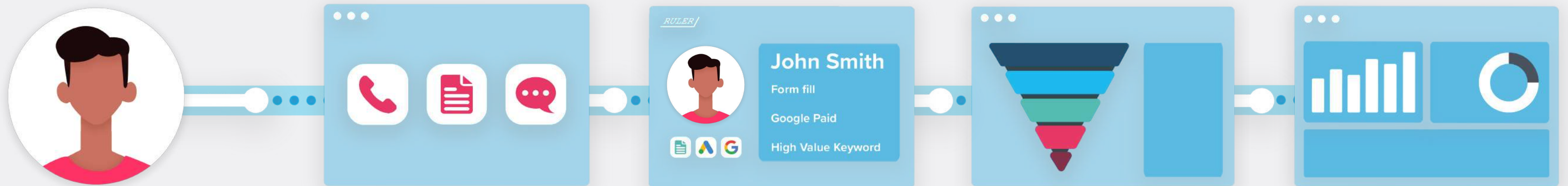
Connecting Ruler Analytics with your Salesforce CRM allows you to sync data captured from web forms, phone calls or live chat to enrich your sales pipeline.

Let's see how it works...





# How Ruler's closed loop works



01

## Traffic

Ruler tracks each anonymous visitor to the website over multiple sessions, traffic sources and keywords.

02

## Website

When a visitor converts via form, call tracking or live chat on your website, their data is captured.

03

## Matching

Ruler matches the real user's details with their marketing touchpoints.

04

## Integration

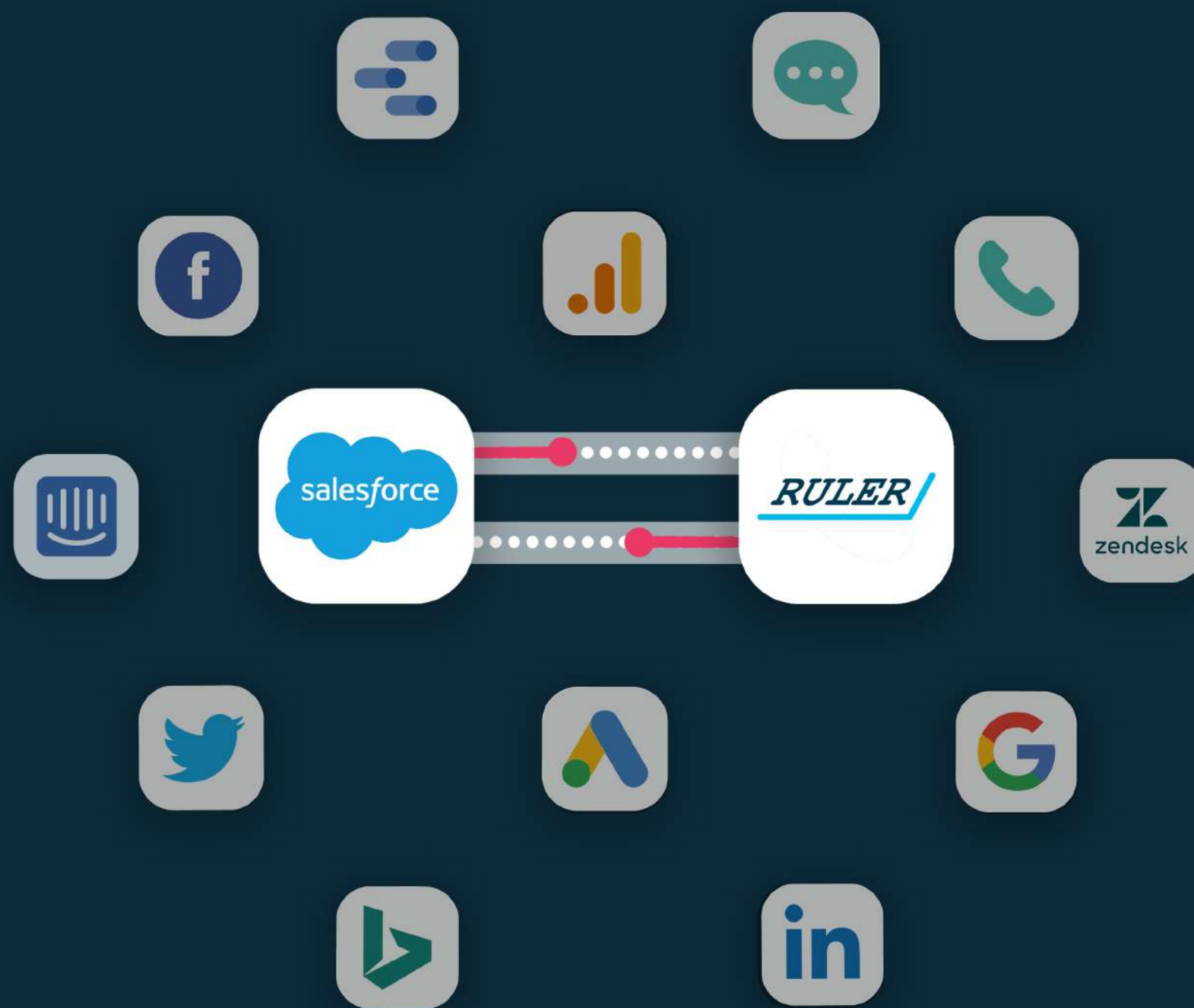
The marketing and conversion data is sent to your Salesforce CRM. Marketing data includes channel, source, campaign, keyword and/or landing page.

05

## Close the Loop

Upon conversion, revenue is attributed to the channels, campaigns and keywords that influenced it and can be fired into the marketing apps you choose.





# What Ruler can do

Ruler can help solve the data gap between your sales and marketing. We can:

## Track

Track form submissions, phone calls and live chat, match them to the marketing channel, campaign and keywords which drove the lead.

## Enrich your Salesforce CRM

Enrich your Salesforce CRM with first-click and last-click marketing source variables tracked to individual visitors interaction

## Pass through additional variables

Pass through additional variables including marketing source, keyword, campaign, UTMs, GCLID

## Integrate with over 1000+ platforms

Ruler can also integrate with over 1000+ other platforms including Google Ads, Google Analytics, Facebook Business Manager and more.

Ruler can also integrate marketing data with your products via native integrations, Webhook or SQL.



# Optionis - Finding a universal truth



Optionis Group provides accountancy, tax and umbrella employment solutions to contractors and small businesses across multiple brands.

We spoke to Chris Shepherd, Ecommerce Manager, who manages a wide range of digital channels to deliver campaigns, with leads pulling into his Salesforce CRM.

Chris said, “A high proportion of our leads like to engage with us through telephone numbers. They prefer to speak to a human rather than communicate and transact digitally.”

This posed a challenge as the team couldn’t prove which campaigns were driving offline leads for the business. And even more so, they couldn’t prove which of those leads went on to convert into to a sale.

With Ruler’s marketing attribution solution in place, Chris was able to evidence how the team had exceeded targets including the number of leads generated, call volume, paid and direct traffic volume and brand awareness mentions via referral sites and social channels.

Chris continued, “Ruler’s tracking allows us to monitor if campaigns are driving sufficient call volumes and help better understand which sources have the strongest conversion metrics for both conversion to lead and conversion to sale.”

“We’ve also identified areas where we can focus our efforts. For example, Ruler’s data highlighted inefficient spend in a campaign, resulting in our cost per lead coming in over budget. With access to this data we were quickly able to realign messaging and improve conversion rates across all channels.”



# How can Ruler Analytics help you?

Marketers can attribute closed revenue in Salesforce back to their marketing activity thanks to Ruler's Closed Loop Framework.

Ruler tracks website visitors over multiple touch points and connects the dots once a visitor converts to a lead via form completion, call or live chat conversation.

Whether you report via Google Data Studio, Analytics or Facebook Advertising, Ruler's flexible integration options can push data to where you need it most, helping you analyse data cross-channel to get a true understanding of your most valuable customers and optimise campaigns to drive even more return.

## Want to find out more?

Book a demo with Ruler's attribution experts today at

[www.ruleranalytics.com](http://www.ruleranalytics.com)