



Unlocking The Power of Salesforce Campaigns

Luisa Rueda

Share. Learn. Grow.



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- Framework #2: Parent-Child Campaign Hierarchies
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The Role of Campaigns in Salesforce Success





Salesforce Campaigns are the connective tissue between
planning, execution, and measurement.

When thoughtfully structured (with clear hierarchies, consistent statuses, defined members, and tight integration across platforms like MCAE) campaigns unlock full-funnel visibility, power accurate attribution, and drive smarter marketing decisions.



So What's a Campaign?

A campaign is a narrative arc supported by coordinated assets (emails, ads, social, etc.) meant to drive audience behavior toward a business goal.

- General Industry Definition

A marketing campaign is a planned sequence of activities and communications designed to achieve specific business goals like generating leads, increasing engagement, or driving conversions.

- Salesforce

High-performing marketing campaigns are orchestrated programs that engage consumers across journeys with personalized content, optimized for performance and conversion.

- McKinsey on Marketing & Sales

A marketing campaign is a time-bound marketing initiative aimed at influencing behavior and achieving measurable outcomes, often part of a broader strategy.

- Gartner

A campaign is a series of coordinated marketing efforts that use different channels to reinforce a single message or goal to a defined audience.

- AMA

Marketing campaigns are organized, strategized efforts to promote a specific company goal, such as raising awareness of a new product or capturing customer feedback.

- Adobe Experience Cloud

A campaign is a set of ad groups (ads, keywords, and bids) that share a budget, location targeting, and other settings to show relevant ads to the right people.

- Google Ads Help

Marketing campaigns are orchestrated efforts across channels that deliver personalized, timely, and contextually relevant experiences to engage customers and drive measurable outcomes..

- Forrester Research



Ultimately a campaign is what you define
for your organization and teams.
When aligned to your goals, systems, and
teams, it becomes a powerful driver of
impact.



As we transition into the Salesforce Marketing ecosystem...

A campaign can be a specific Marketing activity, or a series of activities that seeks to promote a product or service.

It is also a great way to track prospects engagement.





Campaigns in the Salesforce Ecosystem



Salesforce Campaign

The anchor for tracking influence and performance and is the most strategic from a CRM/reporting standpoint



MCAE Campaign

Focuses on Lead Generation and nurturing using Marketing assets housed in MCAE campaigns






MC Engagement Campaigns

Are used as organizational tags, not functional campaign records



Campaigns in the Salesforce Ecosystem

PLATFORM	PURPOSE	PROPERTIES
 SF (CRM)	Campaigns in Salesforce serve as the <u>central hub for tracking campaign performance</u> , measuring influence on pipeline, ROI, and member engagement across the full buyer journey.	<ul style="list-style-type: none">• Tracks Member Status• Connects to Opportunities for Influence Reporting• Used across MCAE and MC as the anchor for attribution• Drives reporting and campaign hierarchy
 MCAE	Tracks <u>prospect engagement</u> with specific assets or programs (emails, forms, pages). Supports <u>first-touch attribution</u> and segmentation.	<ul style="list-style-type: none">• Every prospect belongs to <u>one</u> MCAE campaign• Used for campaign attribution, not multiple touches• Syncs to Salesforce Campaign to align engagement and pipeline influence
 MCE	Used for <u>organization, searchability, and reporting</u> across marketing activities. Does not track attribution directly.	<ul style="list-style-type: none">• Optional metadata, not required• Can associate emails, SMS, push, automations• Doesn't have native pipeline/influence reporting• Doesn't sync directly with Salesforce Campaigns



Operational Frameworks for Campaign Success in Salesforce



Smart Naming Conventions

Consistent naming improves organization.

1



Campaign Hierarchies

Parent-child structure for campaign management.

2



Member Status Design

Define member statuses for segmentation.

3



Attribution Reporting

Track attribution and influence effectively.

4

Framework #1: Smart Naming Conventions

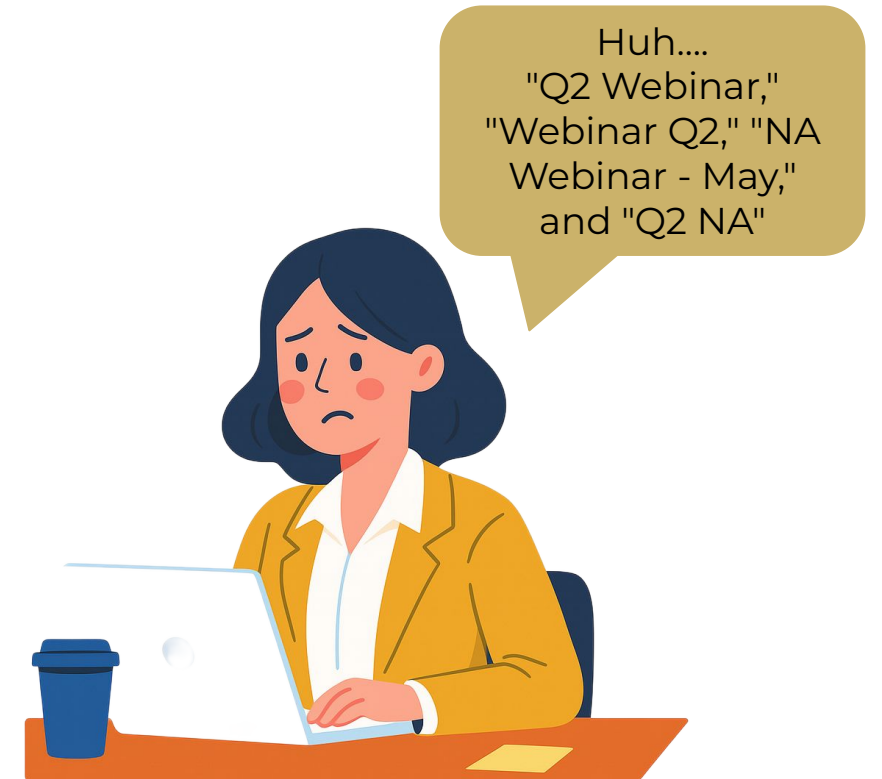




Naming Conventions

A consistent naming convention is the ***foundation of campaign scalability***. Without it, reporting, automation, and cross-team collaboration become chaotic and error-prone.

- Ensures consistency across campaigns, regions, and users
- Makes searching and filtering easier across Salesforce, MCAE, or MC
- Enables automation (i.e - routing logic in Flows or Engagement Programs/Journey Builder)
- Reduces human error and duplicated efforts





Key Components of a Naming Convention

Components to Consider:

- **Region or Business Unit:** NA, EMEA, APAC
- **Channel or Tactic:** Email, Webinar, Tradeshow
- **Campaign Type:** Nurture, Event, Launch, ABM
- **Date:** 2024Q3, 2025-08, or Aug25
- **Short Description:** AI-Launch, NewFeatureDemo

Examples:

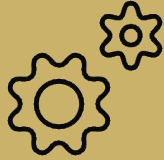
- NA_Webinar_Launch_2024Q3_AI-Launch
- 2024Q3-NA-Webinar-AI_Launch

1. Build naming conventions from left to right using consistent delimiters (underscore _, dash -, or pipe |)
2. Use leading zeros for better sort logic: 2024Q03
3. Avoid special characters (/ , & , #) to ensure compatibility
4. Document your schema in a living wiki or governance doc





Key Benefits



Automations

Use Flow to route based on naming patterns

In MCAE, dynamic lists and automation rules can reference naming logic

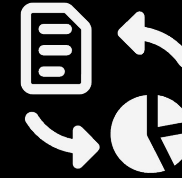


Usability

Easier campaign selection for marketers across Business Units

Faster onboarding for new team members

Simplifies campaign cloning, filtering, and roll-up reporting



Reporting

Enables grouped reporting (e.g. all Q3 Webinars by region)

Supports campaign hierarchy standardization

Helps link naming to UTMs, member status mapping, and dashboards



Best Practices and Other Tips

- **Document** and enforce conventions via **templates and training**
- Use **picklists or predefined values** where possible (e.g., Record Types or Custom Metadata)
- Conduct **regular audits**. Clean up old or non-compliant campaign names quarterly
- Leverage naming to support rollups. Use similar strings for parent-child campaigns

Framework #2: Parent-Child Campaign Hierarchies





Campaign Hierarchies

Campaign Hierarchies in Salesforce allow you to group related campaigns under a single parent. This structure enables program-level rollups, multi-touch visibility, and scalable reporting.

- Connects multiple touchpoints to a single initiative (a product launch or regional program)
- Enables performance tracking at both granular and aggregated levels
- Drives clarity across global teams, agencies, and systems

Campaign > 2025Q3-NA-Product_Launch

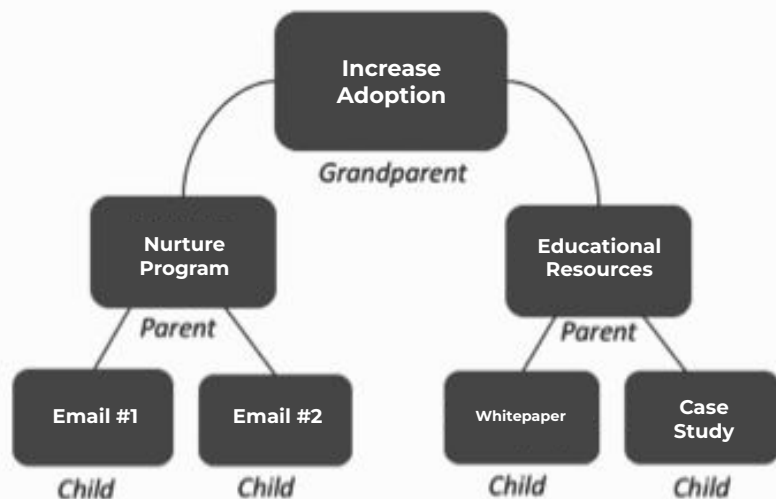
Campaign Hierarchy

CAMPAIGN NAME	TYPE	STATUS
✓ 2025Q3-NA-Product_Launch current	Program	In Progress
2025Q3-NA-Product_Launch-EMAIL	Email	In Progress
2025Q3-NA-Product_Launch-LINKEDIN_ADS	Banner Ads	In Progress
✓ 2025Q3-NA-Product_Launch-NURTURE_STREAM	Nurturing Effort	In Progress
2025Q3-NA-Product_Launch-NURTURE_STREAM-Email1	Nurturing Effort	In Progress
2025Q3-NA-Product_Launch-NURTURE_STREAM-Email2	Nurturing Effort	In Progress
2025Q3-NA-Product_Launch-NURTURE_STREAM-Email3	Nurturing Effort	In Progress
2025Q3-NA-Product_Launch-WEBINAR	Webinar	In Progress

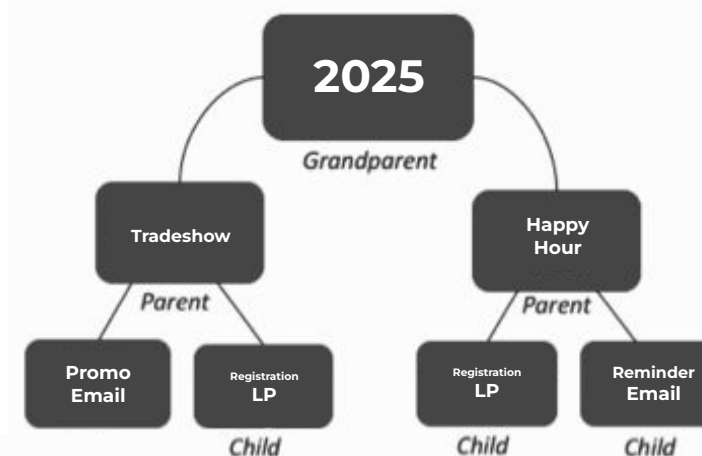


Different Approaches to Hierarchies

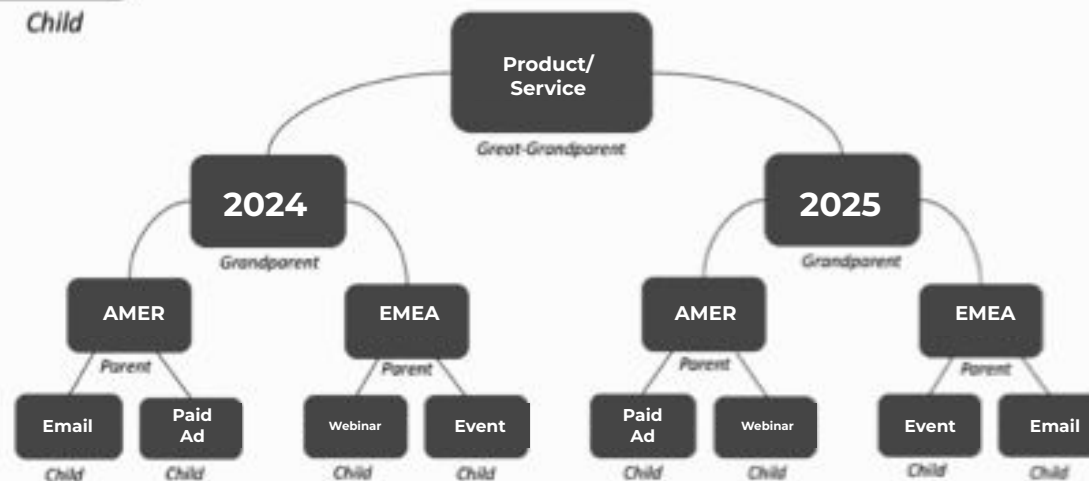
Group by Goal



Group by Event



Group by Product/Service





Hierarchy by Goal

Campaign > 2025Q3-NA-Product_Launch

Campaign Hierarchy

CAMPAIGN NAME	TYPE	STATUS	OPPORTUNITIES I...	VALUE WON OPPORT...	VALUE OPPORTUNITIES IN...	OPPORTUNITIES IN HIERARCHY	WON OPPORTUNITIES IN HI...	VALUE WON OPPORTU...	VALUE OPPORTUNITIES...
✓ 2025Q3-NA-Product_Launch current	Program	In Progress	0	USD 0.00	USD 0.00	33	27	USD 1,032,737.41	USD 1,182,937.41
2025Q3-NA-Product_Launch-EMAIL	Email	In Progress	4	USD 98,647.41	USD 98,647.41	4	4	USD 98,647.41	USD 98,647.41
2025Q3-NA-Product_Launch-LINKEDIN_ADS	Banner Ads	In Progress	4	USD 198,700.00	USD 198,700.00	4	4	USD 198,700.00	USD 198,700.00
✓ 2025Q3-NA-Product_Launch-NURTURE_STREAM	Nurturing Effort	In Progress	8	USD 326,500.00	USD 424,200.00	15	12	USD 496,500.00	USD 599,200.00
2025Q3-NA-Product_Launch-NURTURE_STREAM-Email1	Nurturing Effort	In Progress	4	USD 90,000.00	USD 90,000.00	4	4	USD 90,000.00	USD 90,000.00
2025Q3-NA-Product_Launch-NURTURE_STREAM-Email2	Nurturing Effort	In Progress	2	USD 27,000.00	USD 32,000.00	2	1	USD 27,000.00	USD 32,000.00
2025Q3-NA-Product_Launch-NURTURE_STREAM-Email3	Nurturing Effort	In Progress	1	USD 53,000.00	USD 53,000.00	1	1	USD 53,000.00	USD 53,000.00
2025Q3-NA-Product_Launch-WEBINAR	Webinar	In Progress	10	USD 238,890.00	USD 286,390.00	10	7	USD 238,890.00	USD 286,390.00



Best Practices and Other Tips

- Use ***consistent campaign types and member status*** values across child campaigns
- Limit hierarchy depth. ***Salesforce supports up to 5 levels, but 2–3 is best for clarity***
- Add ***custom fields on parent campaigns*** (Initiative Owner, Budget, Region)
- Use ***dashboards and report types*** built around Campaign Hierarchy Fields
- If using MCAE Connected Campaigns, ***sync only child*** campaigns with assets
- Ensure ***Sales and Marketing alignment*** on which campaigns are ***parents vs. tactical executions***



Best Practices and Other Tips



In your hierarchy,
use:
Parent = Strategy
Child = Tactics



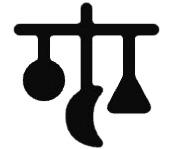
Use hierarchy rollup
fields for metrics like
total responses,
influenced
opportunities



Keep child
campaigns
asset-specific: one
for each email/
webinar/ event for
granular data



Avoid skipping
hierarchy levels or
duplicating
campaign types
across unrelated
initiatives



Consider
automating child
campaign creation
using Flows or
Campaign
Templates



Best Practices and Other Tips



Flows or Campaign Templates examples

Clone from Templates

Campaign

YYYYQX-Region-ProgramDescription_TEMPLATE

Edit

Clone

Delete

Type	Status	Start Date	End Date
Program	In Progress		

Details

Related

Messages

Campaign Name

YYYYQX-Region-ProgramDescription_TEMPLATE

Description

Campaign Details

Type

Program

Status

In Progress

Active

✓

Campaign Owner

Luisa Rueda

Start Date

End Date

Hierarchy Planning

Leads in Hierarchy

0

Budgeted Cost in Hierarchy

Contacts in Hierarchy

0

Actual Cost in Hierarchy

Hierarchy Results

Responses in Hierarchy

0

Value Opportunities in Hierarchy

USD 0.00

Activity

Einstein Insights

Only show activities with insights

Filters: Within 2 months • All activities • Logged calls, Email, Events, List email, Tasks, and SMS

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

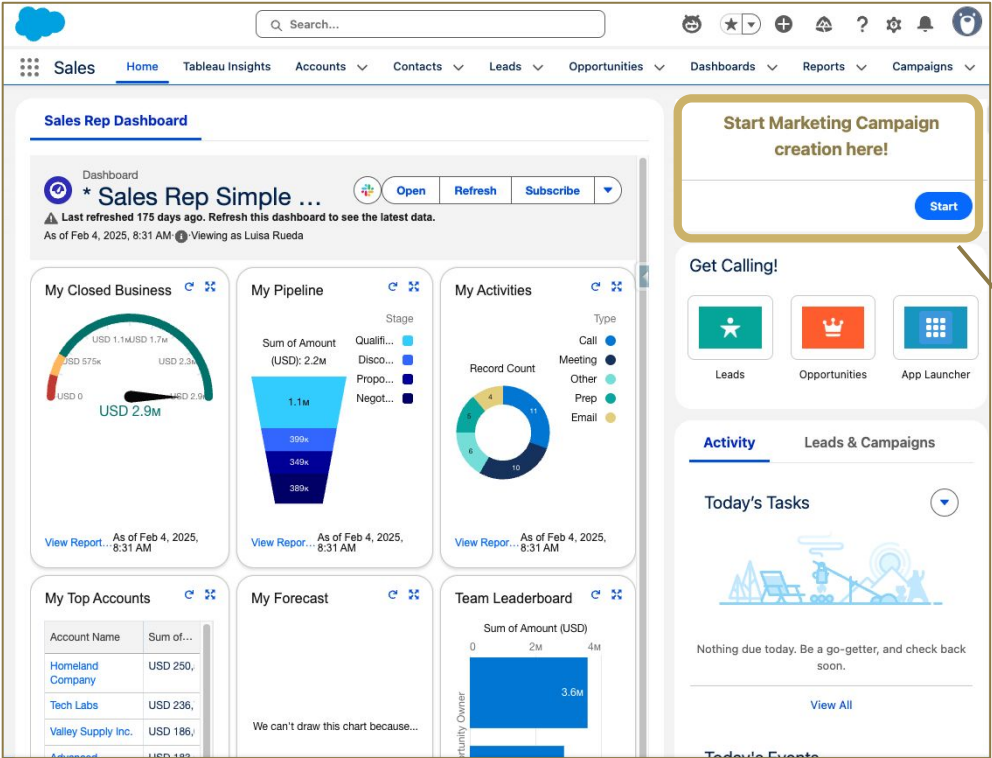
To change what's shown, try changing your filters.

Show All Activities




Best Practices and Other Tips

Automate with FLOW



Provide details below to create your campaign:

* What's the Campaign Name? 

* Campaign Lead?

* What type of campaign is this?

* Campaign Start Date


* What's the estimated cost of the campaign?

* Provide a short description of what this campaign is about

Validate all information is accurate before submitting campaign for creation.

Submit for Campaign Creation

* What's the Campaign Name?  * Campaign Lead?

Complete 

Please make sure to follow this naming convention, see example:
NA_Webinar_Launch_2024Q3_AI-Launch

* What



You can control visibility of the component on Lightning pages, so only people that will create campaigns have access to it.

Framework #3: Member Status Design





Campaign Member Statuses

Campaign Member Statuses track *how individuals engage with a campaign*. They reflect the journey stage, signal performance, and are foundational for reporting and automation.

- Tracks who did what (Sent, Invited, Opened, Attended)
- Enables segmentation and lead nurturing logic
- Drives accurate reporting on engagement and ROI
- Affects Influence Attribution and lead scoring in MCAE

The screenshot shows the 'Campaign Member Statuses' interface for the campaign '2025Q3-NA-Product_Launch-EMAIL'. It includes a table for 'Campaign Members (2)' and a table for 'Campaign Member Statuses (3)'. The 'Status' column in the first table and the 'Member Status' column in the second table are highlighted with yellow boxes.

Type	First Name	Last Name	Status
Lead	Jane	Doe	Clicked
Lead	Luisa	Rueda	Opened

Member Status	Is Default	Responded	Last Modified Date
Clicked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/27/2025, 11:01 AM
Opened	<input type="checkbox"/>	<input type="checkbox"/>	7/27/2025, 11:01 AM
Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7/27/2025, 10:18 AM



Common Member Status Frameworks

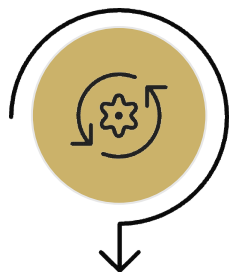
Campaign Type	Example Statuses
Webinar	Invited, Registered, Attended, No Show, Followed Up
Email	Sent, Opened, Clicked, Bounced, Unsubscribed
Tradeshow	Invited, Attended, Engaged, Qualified
Nurture	Engaged, MQL, Recycled, Unresponsive
Ad/ABM	Targeted, Engaged, Converted



Always define one **default** and one **responded** status per campaign.

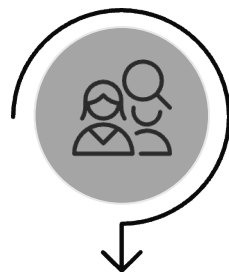


Statuses in Automation & Segmentation Impact



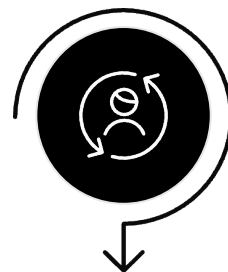
MCAE & Flows

Status triggers scoring, MQL routing, and sales tasks.



Dynamic Lists

Use status values for inclusion or suppression



Follow Up Campaigns

Trigger new campaign based on status logic (No Show → Invite to Replay)



Attribution Accuracy

Proper responded status ensures campaign influence reporting is valid



Best Practices and Other Tips

- Standardize Status Sets by campaign type → ***use templates***
- Avoid free form statuses (“Showed Up”, “Was Interested”) → ***hard to report***
- Mark “Responded” carefully → ***this status drives campaign influence***
- ***Keep status values consistent across regions*** to ensure global rollups work
- ***Train teams*** on when/how to update statuses (after a webinar via integration or Flow)



Best Practices and Other Tips

Clone from Templates - with “Related”

Campaign

2025Q3-NA-Product_Launch-EMAIL

Type

Email

Status

In Progress

Start Date

End Date

Details

Related

Messages

Campaign Members (2)

Add Leads

Add Contacts

Type	First Name	Last Name	Status
Lead	Jane	Doe	Clicked
Lead	Luisa	Rueda	Opened

View All

Campaign Member Statuses (3)

New

Change Default Status

Member Status	Is Default	Responded	Last Modified Date
Clicked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/27/2025, 11:01 AM
Opened	<input type="checkbox"/>	<input type="checkbox"/>	7/27/2025, 11:01 AM
Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7/27/2025, 10:18 AM

View All

Edit

Clone with Related

Clone

Clone with related records

Select records to clone with this campaign.

☒

Campaign Member Status

Cancel

Next

No activities to show.

Get started by sending an email, scheduling a task, and more.

To change what's shown, try changing your filters.

Show All Activities



Best Practices and Other Tips



Campaign Member Layouts

Surface status and key activity fields using Campaign Member Layouts.



Status Audit

Audit your Campaign Member Status values quarterly for accuracy.



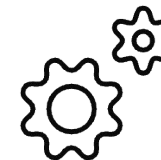
Custom Fields

Use custom fields to supplement status with additional information.



Prospect Activity Alignment

Ensure prospect activity aligns with Salesforce status updates.



Automation

Use integration or Flow automation to auto-update statuses.

Framework #4: Attribution & Influence Reporting





Marketing Attribution in Salesforce

Marketing attribution in Salesforce connects campaign activity to pipeline and revenue. Influence reporting shows how campaigns contribute to opportunity development and helps justify marketing ROI.

- Helps prove marketing's impact on revenue
- Guides budget decisions and campaign prioritization
- Helps align sales and marketing goals
- Essential for Connected Campaigns + MCAE reporting

Model Settings

Campaign Influence Model Setup [Help for this Page](#)

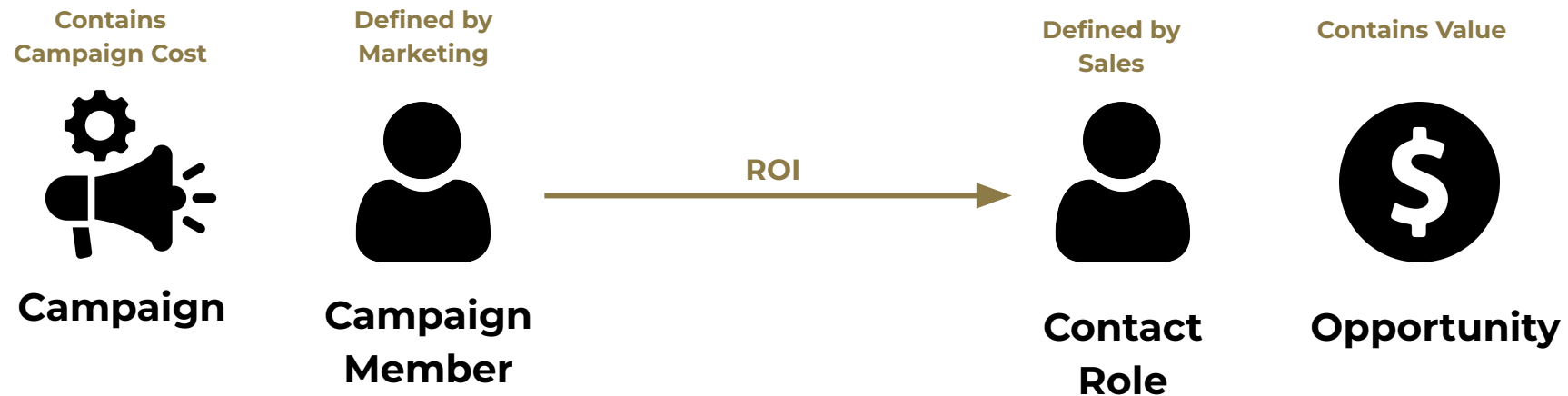
[New Attribution Model](#)

Action	Name	Default Model	Locked	Active	Record Preference	Last Modified By	Last Modified On
Edit	Primary Campaign Source Model	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Records	OLD User	2/4/2025
Edit	First Touch Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Records with >0% Attribution	Luisa Rueda	2/4/2025
Edit	Last Touch Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Records with >0% Attribution	Luisa Rueda	2/4/2025
Edit	Even Distribution Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Records with >0% Attribution	Luisa Rueda	2/4/2025



Marketing Attribution in Salesforce

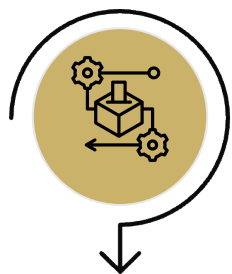
By using campaigns and campaign members, Marketing will be tracking engagement. In addition to engagement, there may be a need to understand how that engagement impacts purchasing decision. To that end, campaign members have to become contact roles on opportunities in order to track campaign influence.





Salesforce Campaign Influence Models

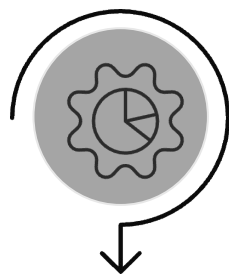
Salesforce uses Campaign Influence to tie Opportunities to Campaigns via campaign members.



Primary Campaign Source

One campaign per opportunity (manually or auto-assigned)

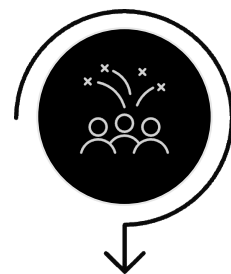
Good for first-touch attribution



Custom Influence Models

Assign weighted impact to multiple campaigns

Great for multi-touch attribution (40/30/30 model)



Campaign Influence 2.0 (Standard)

Auto-associates campaigns based on contact/opportunity relationships

Supports multiple campaigns per opp

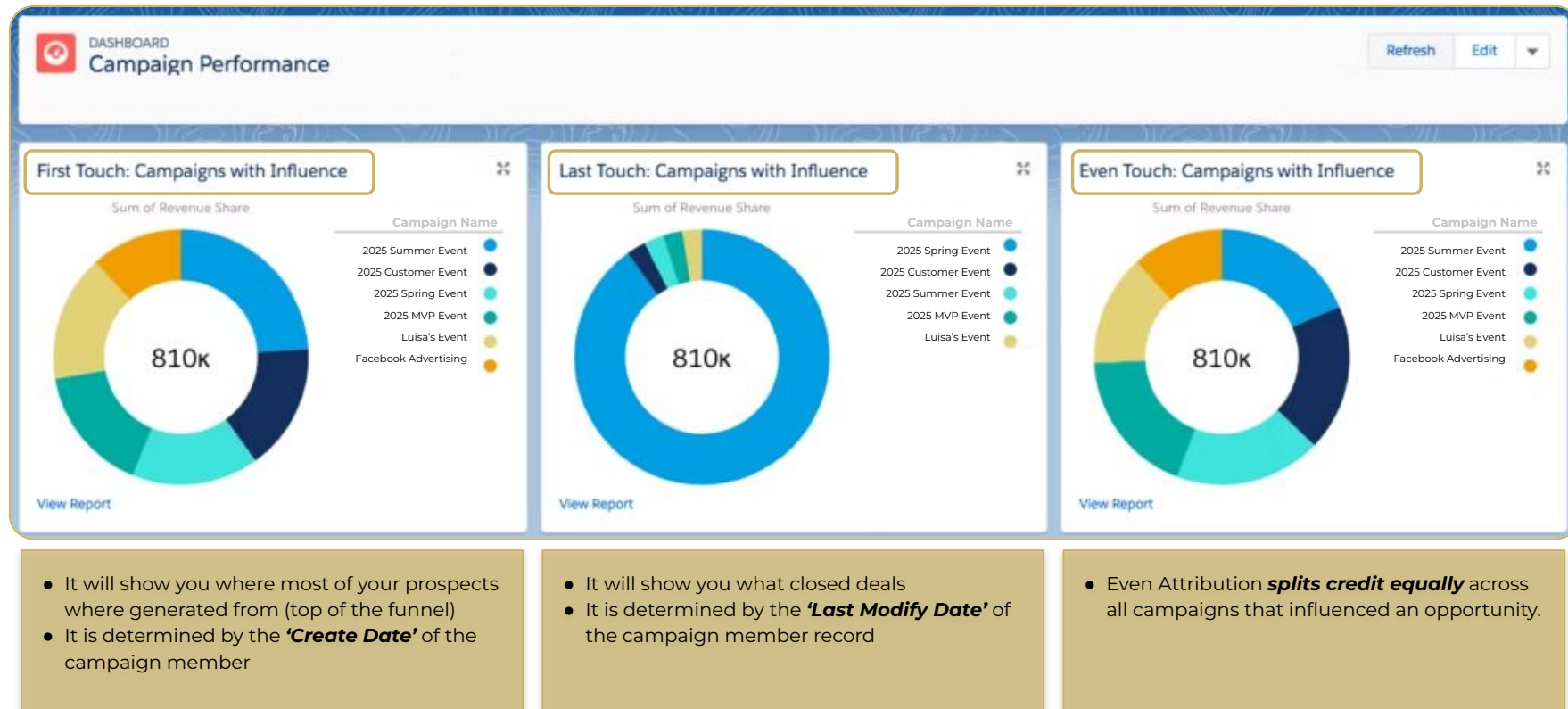


Influence only works if:

- 1) The **contact is a campaign member**
- 2) The **contact is linked to the opportunity**
- 3) The **campaign has a "Responded" status**



Salesforce Campaign Influence Models





In Summary...

Campaign Influence



Method

Attribution



Outcome



You need clean **campaign data**, complete **member statuses**, and **linked contacts to opportunities** to get accurate attribution.



Best Practices and Other Tips

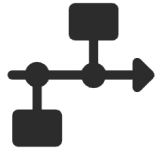
- Use Connected Campaigns in MCAE to sync assets + statuses to Salesforce Campaigns (**Completion Actions, Automation Rules, Engagement Studio**)
- Train teams to **link opportunities to primary contacts** and update campaign statuses (or use automations)
- Create reports using **Campaign Influence Report Types**
- Align on which **campaigns are influence-eligible** (exclude transactional or operational campaigns)
- Limit automation that adds every contact to every campaign. This can dilute attribution and clutter reports
- Use UTM tracking for digital campaigns and match those to campaigns in Salesforce via lead sources or campaign fields



Best Practices and Other Tips



Use custom campaign influence models for ABM, partner attribution, or specific funnel stages



Set up automation in Flow to associate campaigns to opportunities if rules are met



Validate data hygiene quarterly: opportunity-contact roles, campaign member completeness, status accuracy



Use a campaign cost field to track ROI at the campaign or program level

Resources





Naming Conventions

Resource Title	Type	Example Statuses
Sales-and-Pardot Naming Best Practices (Invado)	Article	Includes naming format with date, type, topic, audience (Invado Solutions)
Naming Conventions 2025 (Improvado)	Article	Updated best practices; includes platform-agnostic tips (Improvado)
Naming Framework (Align.ly)	Article	UTM-driven naming framework (align.ly)



Campaign Hierarchies

Resource Title	Type	Example Statuses
Campaign Hierarchy Overview (Salesforce Help)	Doc	Official setup guide and hierarchy concepts (Salesforce)
Tips for Organizing Hierarchy (Salesforce Ben)	Article	Real-world tips, use cases, rollout strategies (Salesforce Ben)
Trailhead: Organize Campaigns	Module	Interactive module on record types and hierarchy (Trailhead)



Member Status Frameworks

Resource Title	Type	Example Statuses
8 Tips for Campaign Member Status (Salesforce Ben)	Article	Includes planning, cloning, and “Responded” statuses (Salesforce Ben)
Automate Member Status via Flow (Salesforce Ben)	Article + Flow Template	Flow example with decision logic by campaign type (Salesforce Ben)
Campaign Status Framework AppExchange	User Guide (PDF)	Metadata-based template & flow configuration (Salesforce AppExchange)
Campaign-Member-Status GitHub (Sercante)	GitHub	Open-source Flow solution for enforcing statuses (GitHub)



Attribution & Influence

Resource Title	Type	Example Statuses
Complete Guide to Campaign Influence (Salesforce Ben)	Article	Covers 1.0 vs customizable models, reporting tips (Salesforce Ben)
Campaign Influence Implementation Guide	PDF	Detailed setup, model switching, reporting steps (Salesforce Documentation)
Campaign Influence Implementation (Medium)	Article	First-hand implementation insights and pitfalls (Medium)



General Campaign Resources

Resource Title	Type	Example Statuses
Salesforce Campaigns Best-Practice Overview	Article	General campaign architecture, naming, hierarchy (Salesforce Ben)
Campaign Member Status Chart Setup	Article	Add dynamic status charts on campaign pages (Soliant)
Campaign Hierarchy for Fundraising	Article	Example of tiered hierarchy for multi-event campaigns (The Spot)



Resources

Resources – Luisa Rueda

luisaruedahere.com/resources/

1

Luisa Rueda

Insights News Resources Home


2

Free Resources

Welcome! The resources page, your hub for AI, Salesforce, and Marketing Automation insights. Dive into study guides, eBooks, videos and how-to guides to boost your skills, efficiency, and growth to stay ahead of tech trends.

AI Salesforce Videos


3



Salesforce AI Specialist Certification Focus Areas

Date: February, 2025

See Resource



Unlocking The Power of Salesforce Campaigns

Date: August, 2025

See Resource

4



Thank You.



www.luisaruedahere.com

Lets connect!



<https://www.linkedin.com/in/luisarueda/>