OnceHub Support

How to maximise booking rates in Salesforce Campaigns

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When booking appointments is part of your email marketing campaigns, optimizing your booking rates becomes critical. In this article, you'll learn how to configure Salesforce Campaigns so that you track both bookings made, and more importantly, booking invitations that were missed or ignored. By tracking missed bookings, you'll be able to retarget them and increase the overall booking rates for your campaign.

i Note:

For security and privacy reasons, using CRM record IDs to skip or pre-populate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

In this article:

- Requirements
- Setting up Salesforce Campaigns to retarget missed bookings
 - Tag leads that DID make a Booking
 - Retarget leads that DID NOT make a Booking

Requirements

To update Salesforce fields when the Customer schedules or reschedules an event, you must:

- Be a OnceHub administrator.
- Be a Salesforce Administrator for your organization.
- Have an active connection to your Salesforce API User.

Let's assume that the Lead Status field includes the **Working – Contacted** and the **Open – Not contacted** options. To configure Salesforce Campaigns so that you can track both bookings made and booking invitations that were missed or ignored, you will also need to do the following:

- Create an Event Status text Custom field for the Lead object and add it to the Lead Page Layout.
- Map the OnceHub Status field to the Lead Event Status field.

The **Event Status** Custom field is used as a criteria to manage your campaign's Lead members.

i Note :

When multiple events are booked for the same Lead, the **Event Status** custom field represents the last event status update.

Setting up Salesforce Campaigns to retarget missed bookings

Salesforce Campaigns enables you to automatically trigger the missed bookings campaign. For this example, let's look at a lead qualification use case, whereby you want to send an email broadcast to a List of unqualified leads, inviting them to book a discovery call.

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Tag leads that DID make a Booking

- 1. Sign in to Salesforce.
- 2. Go to the **Sales** app.
- 3. Click the **Campaign** tab and click **New** (Figure 1).

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Figure 1: Create a new Campaign

- 4. Enter "Booked" as the name for the campaign.
- 5. In the **Type** drop-down menu, select **Email**.
- 6. Check the **Active** checkbox.
- 7. Click Save.
- 8. Click the **Leads** tab.
- 9. Click the gear icon and select New from the List View Controls drop-down menu (Figure 2).

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Figure 2: List View Controls

10. In the New List View pop-up, give the list a name and select who can view this list (Figure 3).

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New List View	
*List Name	
Booked Leads	
*List API Name 🚯	
Booked_Leads	
Who sees this list view?	
 Only I can see this list view 	
All users can see this list view 1	
Share list view with groups of users 🔹	
	Cancel Save

Figure 3: New List View pop-up

11. In the **Filters** sidebar, click **Add Filter** (Figure 4).

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6		Brenda Mccl	brenda@car	Cadinal Inc.	IL	Working - Co		8/20/20	19	DFish							
7		Carolyn Cren	carolync@ac	Ace Iron an	AL	Closed - Not	~	8/20/20	19	DFish	•						
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9		Ed Bolton	edboltonsale	Example inc		Working - Co	\square	8/21/20	19	DFish	T						

Figure 4: Add Filter

- 12. From the **Field** drop-down menu, select **Event Status**.
- 13. From the **Operator** drop-down menu, select **Contains**.
- 14. In the Value field, add "Scheduled" (Figure 5). Click Done.

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\checkmark UN \checkmark CREATED DATE \checkmark OW \checkmark	Filters	×
Field Event Status	Filter by Owner All leads Matching all of these filters	
contains	Event Status contains Scheduled	×
Value	Add Filter	Remove All
Done	Add Filter Logic	

Figure 5: Event Status contains Scheduled

- 15. Add another filter and select **contains** from the **Operator** drop-down menu. This time, in the **Value** field add **"Rescheduled"** and click **Done**.
- 16. Click Add Filter Logic.
- 17. Change the Filter Logic to **1 OR 2** (Figure 6).



Figure 6: Edit Filter Logic

- 18. Click **Save**. You will now see a list of any Leads that match the criteria.
- 19. Click the checkbox at the top of the list to select all of the Members in this Filter View (Figure 7). Click the **Add to Campaign** button.



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2	•	Helen Jones	hjones@exa	Example Inc	Working - C		8/21/	/2019	DFish		Filter by Owner	
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Figure 7: Select Members

20. In the Add to Campaign pop-up, select the campaign you created (Figure 8).

Add to Campaign		
32 leads selected		
*Campaign		
Booked		×
* Member Status		
Sent		•
Existing campaign member Keep existing Member Status Update to the selected Member Status		
	Cancel	Submit

Figure 7: Add to Campaign pop-up

21. Click Submit.

Retarget leads that DID NOT make a Booking

- 1. Go to the Sales app.
- 2. Click the **Campaign** tab and click **New**.
- 3. Enter "Retarget Missed Bookings" as the name for the campaign. This campaign will target those who did not make a booking from the first campaign.
- 4. Check the **Active** checkbox.
- 5. In the Type drop-down menu, select Email.
- 6. Set the **Start Date** to start automatically several days after the initial marketing campaign was run.
- 7. Click Save.
- 8. Click the **Leads** tab. We will create a list of the members that do NOT belong to the **Booked Leads** group. This group will contain all those who have received the initial email and didn't open, click or made a booking.
- 9. Click the gear icon and select New from the List View Controls drop-down menu.
- 10. In the New List View pop-up, give the list a name and select who can view this list (Figure 8).

New List View	
* List Name	
Missed Bookings	
* List API Name 🚯	
Missed_Bookings	
Who sees this list view? Only I can see this list view All users can see this list view Share list view with groups of users 	
	Cancel Save

Figure 8: New List View pop-up

- 11. In the **Filters** sidebar, click **Add Filter**.
- 12. From the **Field** drop-down menu, select **Event Status**.
- 13. From the **Operator** drop-down menu, select **does not contain**.
- 14. In the Value field, add "Scheduled" (Figure 9). Click Done.

✓ LEAD S ✓ U ✓ CREATE ✓ O ✓	Cancel	Save 🔻
Field Event Status	Filter by Owner All leads	
Operator	Matching all of these filters	
does not contain	New Filter*	×
Value	Add Filter	Remove Al
Done	Add Filter Logic	
Closed - Co 🔽 8/20/2019 DFish 🔻		

Figure 9: Event Status does not contain Scheduled

- 15. Add another filter and select **Does not contain** from the **Operator** drop-down menu. This time, in the **Value** field add **"Rescheduled"** and click **Done**.
- 16. Click Add Filter Logic.
- 17. Change the Filter Logic to **1 OR 2**.
- 18. Click **Save**. You will now see a list of any Leads that match the criteria.
- 19. Click the checkbox at the top of the list to select all of the Members in this Filter View (Figure 10). Click the **Add to Campaign** button.

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Figure 10: Select Members

20. In the Add to Campaign pop-up, select the campaign you created (Figure 11).

Add to Campaign
31 leads selected
* Campaign
Retarget Missed Bookings ×
* Member Status
Sent 🔹
Existing campaign member Keep existing Member Status Update to the selected Member Status
Cancel Submit

Figure 11: Add to Campaign pop-up

21. Click Submit.

22. Run your initial marketing campaign and make sure to monitor your **Retarget Missed Bookings** campaign.

i Note:

You should retarget leads that didn't make a booking multiple times to continuously maximize your booking rates.