Maximizing booking rates in Salesforce Campaigns [Legacy]

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.

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.

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).

All V Q Search Campaigns and more	3.865 342.87 KB ★ 🗸 🚦 ? 🌣 🌲 🐻
Sales Home Opportunities V Leads V Tasks V Files V Accounts V Co	ontacts V Campaigns V Dashboards V More V
Campaigns Recently Viewed 0 items - Updated a few seconds ago	Q. Search this list Q - III - C - C - C - C
CAMPAIGN N V PARENT CA V TYPE V STATUS V START DAT	TE \vee END DATE \vee RESPONSES \vee OWNER ALIAS \vee

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).

Recently Viewe	d 🗶 🔳				New Impo	rt Ad	d to Campaign
ems · Updated a few second				Q Search this list.	🕸 🕶		C 🖌 🔮
NAME	✓ TITLE ✓ CC	ompany 🗸	PHONE V MOBILE V	EMAIL	LIST VIEW CONTROLS	· ·	OWNE V
Ed Bolton	Exa	ample inc	789789789	edboltonsales@gmail.co	New	эd	DFish
Mark Jones	Exa	ample Inc	78789789	markj@example.com	Clone	ted	DFish
Mike Johnson	M	Johnson	657567576	mjohnson@example.cor		erted	DFish
John Smith	JS	imith	(547) 839-5743	jsmith@example.com		ted	DFish
Helen Jones	Exa	ample Inc	(489) 305-4839	hjones@example.com		∍d	DFish

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).

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	
Share list view with groups of users 1	
	Cancel Save

Figure 3: New List View pop-up

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

\star	Lead: Boc	。 oked Leads ¬	*									New Import	Add to Campaign 🔻
2 iter	ns • Soi	rted by Name • Filte	ered by my leads • U	pdated a minute a	go				Q Se	arch this l	ist	tột •	
		NAME 🕇 🗸 🗸	EMAIL V	COMPANY V	st ∨	LEAD STA 🗸	U ∨	CREATED	~	0 ∨		Filters	×
1		Andy Young	a_young@di	Dickenson plc	KS	Closed - Con	 Image: A start of the start of	8/20/201	9	DFish		A	
2		Bertha Boxer	bertha@fcof	Farmers Coo	FL	Working - Co	 Image: A start of the start of	8/20/201	9	DFish		Filter by Owner	
3		Betty Bair	bblair@aban	American Ba	PA	Working - Co	 Image: A start of the start of	8/20/201	9	DFish	•	My leads	
4		Bill Dadio Jr	bill_dadio@z	Zenith Indus	ОН	Closed - Not	 Image: A start of the start of	8/20/201	9	DFish	•	Add Filter	Remove
5		Bolton	ebolton@ex	Example Inc		Open - Not	 Image: A start of the start of	8/21/201	9	DFish			
6		Brenda Mccl	brenda@car	Cadinal Inc.	IL	Working - Co	 Image: A start of the start of	8/20/201	9	DFish	•		
7		Carolyn Cren	carolync@ac	Ace Iron an	AL	Closed - Not	~	8/20/201	9	DFish	•		
8		David Monaco	david@blues	Blues Entert		Working - Co	 Image: A start of the start of	8/20/201	9	DFish			
9		Ed Bolton	edboltonsale	Example inc		Working - Co		8/21/201	9	DFish			

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.

\checkmark UN \checkmark CREATED DATE \checkmark OW \checkmark	Filters	×
Field Event Status	Filter by Owner All leads	
Operator	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.

	Boo	ked Leads	* *								New	Import	Add to	o Campaig	ın '
ems	select	ed						Q Sear	ch this list			\$ • I	•	×	C
	•	NAME 🕇 🗸	EMAIL \checkmark	COMP ∨ ST ∨	LEAD ST 🗸	U ~	CREA	TE 🗸	0 ∨		Filters				
		Ed Bolton	edboltonsal	Example inc	Working - C		8/21/	2019	DFish						
	~	Helen Jones	hjones@exa	Example Inc	Working - C		8/21/	2019	DFish	•	Filter	by Owner			
	•	John Smith	jsmith@exa	J Smith	Working - C		8/21/	2019	DFish		All lea	ads			
		Mark Jones	markj@exa	Example Inc	Working - C		8/21/	2019	DFish		Matchir	ng these filters			
	•	Mike Johnson	mjohnson@	M Johnson	Working - C		8/21/	2019	DFish						
												ent Status ntains Sched	uled		×
												ent Status ntains Resche	eduled		×
											Add Filt	er		Rei	nove

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).

* List Name
Missed Bookings
List API Name (1)
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 1
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	ר	Add Filter	Remove All
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.

1 item	is sele	cted						Q s	earch this l	ist	\$\$ • III • C' 💉 🕼	
		NAME 🕇 🗸	$_{\rm EMAIL}$ \sim	сомр ∨	st ∨	LEAD S 🗸	U ∨	CREATE 🗸	0 ∨		Filters	
	~	Andy Young	a_young@	Dickenson	KS	Closed - Co	Image: A start and a start	8/20/2019	DFish		A	
	•	Bertha Boxer	bertha@fco	Farmers C	FL	Working - C	~	8/20/2019	DFish		Filter by Owner	
3	•	Betty Bair	bblair@aba	American	PA	Working - C		8/20/2019	DFish		All leads	
•	•	Bill Dadio Jr	bill_dadio	Zenith Ind	ОН	Closed - No		8/20/2019	DFish		Matching these filters	
5	•	Bolton	ebolton@e	Example Inc		Open - Not	Image: A start of the start	8/21/2019	DFish			
ò	•	Brenda Mc	brenda@ca	Cadinal Inc.	IL	Working - C	Image: A start of the start	8/20/2019	DFish		Event Status > 1. does not contain Scheduled	
7	•	Carolyn Cre	carolync@a	Ace Iron a	AL	Closed - No		8/20/2019	DFish			
3	<	David Mon	david@blu	Blues Ente		Working - C	Image: A start of the start	8/20/2019	DFish		Event Status	
)	•	Ed Bolton	edboltonsa	Example inc		Working - C		8/21/2019	DFish		2. does not contain Rescheduled	
.0	✓	Eugena Luce	eluce@paci	Pacific Ret	MA	Closed - No		8/20/2019	DFish		Add Filter Remove	
		Helen Jones	hjones@ex	Example Inc		Working - C		8/21/2019	DFish		, add inter	

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.