

360 SMS Drip Campaigns Explained

As a value-add from the Bolder CRM + 360 SMS partnership, Bolder CRM has utilized the unique ability of the 360 SMS platform to programmatically Scheduled SMS with Process Builders or Flows, to create the **Drip Campaign** infrastructure which is sold as a separate module. Watch short video.

Drip Campaigns allow end-users (rather than Process Builder developers) to define a series of SMS Templates, SMS Surveys (aka iText or intelligent ChatBots) and Ringless Voicemails to be scheduled at various intervals defined by a **Days Offset** and/or **Minutes Offset** field. One can also optionally define a specific time of day that a message goes out.

Drip Campaigns can be assigned or stopped manually using the **Drip Campaign Applied** related list or programmatically with a <u>single</u> process builder command that we provide. Drip Campaigns can also be stopped with a single process builder command. More on those techniques below.

The major value proposition is that no longer do you need Process Builder developers to string these messages together in a hard-coded fashion only to later need to modify the messages or cadence when the business users change their minds. Additionally, you're out of the business of using the primitive Salesforce "Scheduled Actions" which cannot be seen and cannot be programmatically stopped/deleted once they've been assigned.

Drip Campaigns support Leads, Contacts and Opportunities right out of the box but are fully customizable to support any custom objects.

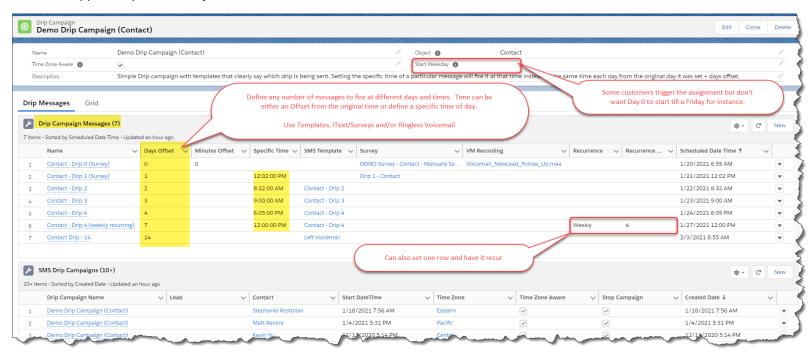


Figure 1 - Drip Campaigns are defined as a series of SMS Templates or Surveys or Ringless Voicemails to fire at different Days and Times using the 360SMS "Scheduled SMS" object structure.



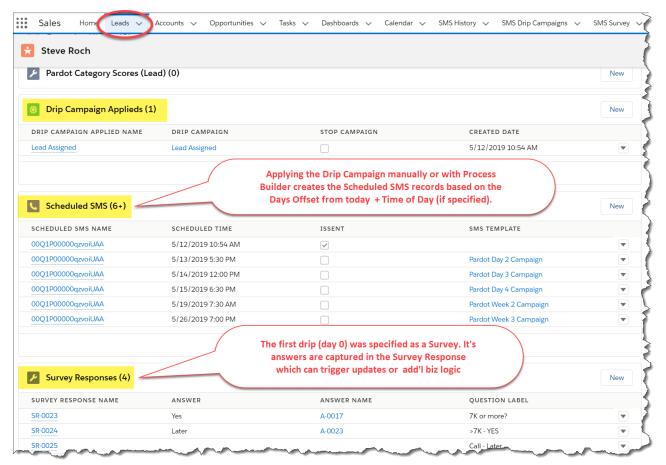


Figure 2 - Drip Campaign Applied creates Scheduled SMS records at the given Days Offset + Time of Day (if specified)

The key to the Drip Campaign value is two Salesforce Flows which are supplied by Bolder CRM. These flows can be easily called from any Process Builder or Flow. The flows are named <u>Drip Campaign Applied</u> and <u>Drip Campaign Stop</u>. As shown in **Figure 3**, one can call either Flow from any business logic such as when a Lead is created, a field changes or when it is assigned to a specific Owner. Similarly, the **Drip Campaign Stop** can be called from any process builder or flow such as:

- 1. When the Lead. Status changes or Lead is converted
- 2. When a SF Task (Call) is logged as successful (not Voicemail)
- 3. If using the 360CTI (click-to-dial) stop the drip when an incoming call arrives (they are calling you usually in response to your Ringless Voicemail that was delivered via your Drip)
- 4. A checkbox field is marked true, e.g. Contacted = True, Engaged = True
- 5. When an SMS History incoming reply arrives, i.e. they are replying to you, so stop the rest of the drips
- 6. When a certain survey response is obtained (process builder on the Survey Response object or use the Stop Drip checkbox of the Survey Action Handler module)
- 7. When a hyperlink in an SMS is clicked (process builder on the Message URL object)



When the Drip Campaign **Stop** flow is called from a Process Builder it simply DELETES any unsent Scheduled SMS messages for the given Lead/Contact or custom object.

Assigning a Drip by either creating the Related List record "Drip Campaign Applied" or call the "Drip campaign Applied" flow directly. The creation of the Drip Campaign Applied related list actually calls the "Drip Campaign Applied" flow which does the heavy lifting of creating the Scheduled SMS records.

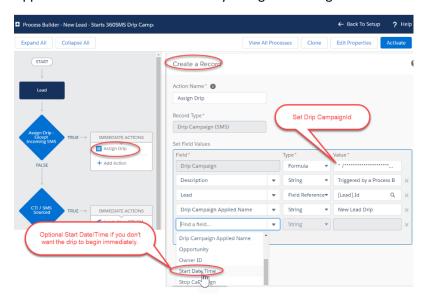
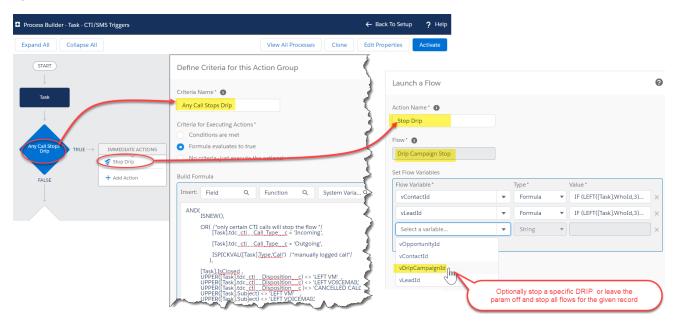


Figure 3 -





Ringless Voicemail

In January 2020, 360SMS introduced the Ringless Voicemail module (purchased separately). Although the feature does not yet allow a scheduling feature on its own, the Drip Campaigns can facilitate scheduling a ringless voicemail when combined with a regularly scheduled SMS Template or Survey within the Drip Campaign. Basically, you define the template/survey that should fire at its allotted date/time <u>PLUS</u> a Ringless Voicemail Recording.

Since RVM doesn't currently support Scheduled SMS on its own, we must always schedule an SMS Template or Survey to go out along with the RVM. The SMS will fire at its allotted date/time and a new Process Builder on the Schedule SMS IsSent field looks to see if it had an accompanying RVM in the Scheduled SMS row, then sends the voicemail recording. There is a natural delay to the RVM's so they are offset from 1 minute to sometimes 5 or even 10 minutes.

Extras

The flows are part of an unmanaged package and therefore easily modified to accommodate additional custom objects or business logic. You modify the flows at your own risk and expense. Neither BolderCRM nor 360SMS supports modifications or offers consulting for the modification of the core flows without a pre-arranged consulting agreement.

StartDateTime - Drip Campaigns have an optional StartDateTime field which is useful for situations when you want the Days Offset "clock" to start from a given date/time. Normally the clock starts from the moment the drip is assigned. **Example**: Trigger a Drip on the Event (Appointment) creation but since the appointment is in the future you don't want its first message to fire until Event.EndDate + DaysOffset.

Start Weekday – Often business logic triggers the Drip to be assigned but the Drip Campaign designer wants the "Clock" to start on a specific weekday. Example: In retail Real Estate and Mortgage a Stage might change such that a drip is assigned on any day of the week but they want the first message (DaysOffset = 0) to not fire till the next upcoming Friday, like "Are you house hunting this weekend? Ping me if you find something that you want me to work the numbers on." They'll often have a DaysOffset = 3 (Monday in this case) that says "Checking in to see if you found any houses this weekend."



About the Author

Steve Roch, CEO of Bolder CRM is an SMS Industry expert having worked or consulted with the top three SMS Apps on the Salesforce AppExchange while seeking to make an equity investment in one of them. Steve is also the inventor of the popular Salesforce app <u>ActionGrid™</u>, acquired by Conga in April-2016 and renamed **Conga Grid™**. Bolder CRM is the exclusive distributor of 360 SMS in the United States, Canada and the United Kingdom.

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