



## 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 single 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.

**Drip Campaign**  
Demo Drip Campaign (Contact)

Name: Demo Drip Campaign (Contact) | Object: Contact  
 Time Zone Aware:  | Start Weekday:   
 Description: Simple Drip campaign with templates that clearly say which drip is being sent. Setting the specific time of a particular message will fire it at that time instead of the same time each day from the original day it was set + days offset.

**Drip Messages** Grid

Drip Campaign Messages (7)  
 7 Items - Sorted by Scheduled Date Time - Updated an hour ago

Name	Days Offset	Minutes Offset	Specific Time	SMS Template	Survey	VM Recording	Recurrence	Recurrence ...	Scheduled Date Time
Contact - Drip 0 (Survey)	0	0			DEMO Survey - Contact - Manually Se...	Voicemail_NewLead_Follow_Up.m4a			1/20/2021 6:55 AM
Contact - Drip 1 (Survey)	1		12:02:00 PM		Drip 1 - Contact				1/21/2021 12:02 PM
Contact - Drip 2	2		8:32:00 AM	Contact - Drip 2					1/22/2021 8:32 AM
Contact - Drip 3	3		9:00:00 AM	Contact - Drip 3					1/23/2021 9:00 AM
Contact - Drip 4	4		6:05:00 PM	Contact - Drip 4					1/24/2021 6:05 PM
Contact - Drip 4 (weekly recurring)	7		12:00:00 PM	Contact - Drip 4			Weekly	4	1/27/2021 12:00 PM
Contact Drip - 14	14			Left Voicemail					2/3/2021 6:55 AM

**SMS Drip Campaigns (10+)**  
 10+ Items - Sorted by Created Date - Updated an hour ago

Drip Campaign Name	Lead	Contact	Start DateTime	Time Zone	Time Zone Aware	Stop Campaign	Created Date
Demo Drip Campaign (Contact)		Stephanie Rostolian	1/18/2021 7:56 AM	Eastern	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/18/2021 7:56 AM
Demo Drip Campaign (Contact)		Matt Recore	1/4/2021 5:31 PM	Pacific	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/4/2021 5:31 PM
Demo Drip Campaign (Contact)		Kevin Yi	12/11/2020 5:14 PM	Central	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12/11/2020 5:14 PM

Callouts:  
 - Define any number of messages to fire at different days and times. Time can be either an Offset from the original time or define a specific time of day.  
 - Use Templates, iText/Surveys and/or Ringless Voicemail  
 - Some customers trigger the assignment but don't want Day 0 to start till a Friday for instance.  
 - Can also set one row and have it recur

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.



Sales Home **Leads** Accounts Opportunities Tasks Dashboards Calendar SMS History SMS Drip Campaigns SMS Survey

**Steve Roch**

**Pardot Category Scores (Lead) (0)** New

**Drip Campaign Applied (1)** New

DRIP CAMPAIGN APPLIED NAME	DRIP CAMPAIGN	STOP CAMPAIGN	CREATED DATE
<a href="#">Lead Assigned</a>	Lead Assigned	<input type="checkbox"/>	5/12/2019 10:54 AM

**Scheduled SMS (6+)** New

SCHEDULED SMS NAME	SCHEDULED TIME	ISSENT	SMS TEMPLATE
<a href="#">00Q1P00000qzvoiUAA</a>	5/12/2019 10:54 AM	<input checked="" type="checkbox"/>	
<a href="#">00Q1P00000qzvoiUAA</a>	5/13/2019 5:30 PM	<input type="checkbox"/>	Pardot Day 2 Campaign
<a href="#">00Q1P00000qzvoiUAA</a>	5/14/2019 12:00 PM	<input type="checkbox"/>	Pardot Day 3 Campaign
<a href="#">00Q1P00000qzvoiUAA</a>	5/15/2019 6:30 PM	<input type="checkbox"/>	Pardot Day 4 Campaign
<a href="#">00Q1P00000qzvoiUAA</a>	5/19/2019 7:30 AM	<input type="checkbox"/>	Pardot Week 2 Campaign
<a href="#">00Q1P00000qzvoiUAA</a>	5/26/2019 7:00 PM	<input type="checkbox"/>	Pardot Week 3 Campaign

**Survey Responses (4)** New

SURVEY RESPONSE NAME	ANSWER	ANSWER NAME	QUESTION LABEL
<a href="#">SR-0023</a>	Yes	A-0017	7K or more?
<a href="#">SR-0024</a>	Later	A-0023	>7K - YES
<a href="#">SR-0025</a>			Call - Later

*Applying the Drip Campaign manually or with Process Builder creates the Scheduled SMS records based on the Days Offset from today + Time of Day (if specified).*

*The first drip (day 0) was specified as a Survey. It's answers are captured in the Survey Response which can trigger updates or add'l biz logic*

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 **Drip Campaign Applied** and **Drip Campaign Stop**. 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.

Process Builder - New Lead - Starts 360SMS Drip Camp.

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Lead

Assign Drip Expires Incoming SMS

TRUE → IMMEDIATE ACTIONS

Assign Drip

FALSE

CTI / SMS Sourced

TRUE → IMMEDIATE ACTIONS

Optional Start Date/Time if you don't want the drip to begin immediately.

Create a Record

Action Name \* Assign Drip

Record Type \* Drip Campaign (SMS)

Set Field Values

Field *	Type *	Value *
Drip Campaign	Formula	" / *****
Description	String	Triggered by a Process B
Lead	Field Reference	[Lead].Id
Drip Campaign Applied Name	String	New Lead Drip
Find a field...	String	

Drip Campaign Applied Name

Opportunity

Owner ID

Start Date/Time

Stop Campaign

Figure 3 -

Process Builder - Task - CTI/SMS Triggers

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Task

Any Call Stops Drip

TRUE → IMMEDIATE ACTIONS

Stop Drip

FALSE

Define Criteria for this Action Group

Criteria Name \* Any Call Stops Drip

Criteria for Executing Actions \*

Conditions are met

Formula evaluates to true

No criteria - just execute the actions!

Build Formula

```

AND(
  ISNEW(),
  OR( /*only certain CTI calls will stop the flow*/
    [Task].tdc_cti_Call_Type__c = 'Incoming',
    [Task].tdc_cti_Call_Type__c = 'Outgoing',
    ISPICKVAL([Task].Type, 'Call') /*manually logged call*/
  ),
  [Task].IsClosed,
  UPPER([Task].tdc_cti_Disposition__c) <> 'LEFT VM',
  UPPER([Task].tdc_cti_Disposition__c) <> 'LEFT VOICEMAIL',
  UPPER([Task].Subject) <> 'LEFT VM',
  UPPER([Task].Subject) <> 'LEFT VOICEMAIL'
)

```

Launch a Flow

Action Name \* Stop Drip

Flow \* Drip Campaign Stop

Set Flow Variables

Flow Variable *	Type *	Value *
vContactId	Formula	IF (LEFT([Task].Whold,3)...
vLeadId	Formula	IF (LEFT([Task].Whold,3)...
Select a variable...	String	Outgoing
vOpportunityId		
vContactId		
vDripCampaignId		
vLeadId		

Optionally stop a specific DRIP or leave the param off and stop all flows for the given record



## 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 **PLUS** 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  $\text{Event.EndDate} + \text{DaysOffset}$ .

**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 ( $\text{DaysOffset} = 0$ ) 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  $\text{DaysOffset} = 3$  (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 **ActionGrid™**, 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.

Learn more about Steve and Bolder CRM at <https://www.BolderCRM.com> and [LinkedIn](#).

Call/Text: 720.605.0632

WhatsApp: +1 303.800.3258 or [click here](#) to initiate a WhatsApp convo w/ Steve

Email: [steve@boldercrm.com](mailto:steve@boldercrm.com)

Last Updated: 02.25.2021