



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

The screenshot shows the Salesforce CRM interface for a Drip Campaign. The navigation menu includes Sales, Home, Accounts, Contacts, Leads, Opportunities, Campaigns, Drip Campaigns (highlighted), Cases, CTI Dialer, Reports, SMS From Reports, SMS History, SMS Template, iText, SMS Setup, CTI Setup, Conga Grid Explorer, Caller Lists, Conversation Mng, and SMS. The main content area shows the details for a 'Demo Drip Campaign (Contact)' owned by Steve Roch. The description reads: '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.'

The 'Drip Messages' section is a table with 5 items, sorted by Days Offset. The table columns are Name, Days Offset, Minutes Offset, Specific Time, SMS Template, Survey, VM Recording, and Schedule Date Time.

Name	Days Offset	Minutes Offset	Specific Time	SMS Template	Survey	VM Recording	Schedule Date Time
Contact - Drip 0 (Survey)	0	5			Drip 0 - Contact	Voicemail_NewLead_Follow_Up.m4a	3/8/2020 9:46 AM
Contact - Drip 1 (Survey)	1		12:00:00 PM		Drip 1 - Contact		3/9/2020 1:00 PM
Contact - Drip 2	2		8:32:00 AM	Contact - Drip 2			3/10/2020 9:32 AM
Contact - Drip 3	3		9:00:00 AM	Contact - Drip 3			3/11/2020 10:00 AM
Contact - Drip 4	4		6:00:00 PM	Contact - Drip 4			3/12/2020 7:00 PM

Callout 1: Define any number of messages to fire at different days and times. Use Templates or Surveys.

Callout 2: A Ringless Voicemail can be defined at the same time but currently must be attached to an outgoing SMS (either Template or Survey)

Figure 1 - Drip Campaign are defined by a series of SMS Templates or Surveys to fire at different Days and Times.



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
Lead Assigned	Lead Assigned	<input type="checkbox"/>	5/12/2019 10:54 AM

Scheduled SMS (6+) New

SCHEDULED SMS NAME	SCHEDULED TIME	ISSENT	SMS TEMPLATE
00Q1P00000qzvoiUAA	5/12/2019 10:54 AM	<input checked="" type="checkbox"/>	
00Q1P00000qzvoiUAA	5/13/2019 5:30 PM	<input type="checkbox"/>	Pardot Day 2 Campaign
00Q1P00000qzvoiUAA	5/14/2019 12:00 PM	<input type="checkbox"/>	Pardot Day 3 Campaign
00Q1P00000qzvoiUAA	5/15/2019 6:30 PM	<input type="checkbox"/>	Pardot Day 4 Campaign
00Q1P00000qzvoiUAA	5/19/2019 7:30 AM	<input type="checkbox"/>	Pardot Week 2 Campaign
00Q1P00000qzvoiUAA	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
SR-0023	Yes	A-0017	7K or more?
SR-0024	Later	A-0023	>7K - YES
SR-0025			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 is two Salesforce Flows which are supplied by Bolder CRM. These flows can be easily called from any process builder. 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 or when it is assigned to a specific Owner. Similarly, the Drip Campaign Stop can be called from any process builder such as:

1. When the Lead.Status changes
2. When the Lead is converted
3. When an SMS History incoming reply arrives, i.e. they reply to message so stop the rest of the drips.
4. When a certain survey response is obtained (process builder on the Survey Response object)
5. 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.



Important: The flows are not part of a managed package and therefore are easily modified to accommodate additional custom objects or business logic. **Figure 4** below shows the Drip Campaign Applied flow, the Drip Campaign Stop is very similar.

The screenshot displays the Process Builder interface for a 'Lead-Trigger' process. The flowchart includes several decision diamonds and action boxes. Two specific actions are highlighted with red circles and arrows pointing to their configuration panels:

- Assign Drip:** The configuration panel shows:
 - Action Name: Assign Drip
 - Flow: Drip Campaign Applied
 - Set Flow Variables:

Flow Variable*	Type*	Value*
vLeadId	Field Reference	[Lead].Id
vDripCampaignId	String	a2g1P000000DxtjQAC
- Stop Drip:** The configuration panel shows:
 - Action Name: Stop Drip
 - Flow: Drip Campaign Stop
 - Set Flow Variables:

Flow Variable*	Type*	Value*
vLeadId	Field Reference	[Lead].Id
vDripCampaignId	String	a2g1P000000DxtjQAC

A red callout bubble points to the 'vDripCampaignId' field in the 'Stop Drip' configuration, containing the text: "You can also leave this parameter blank and it will delete any unsend Scheduled SMS from any Drip".

Figure 3 - Assigning a Drip and Stopping a Drip

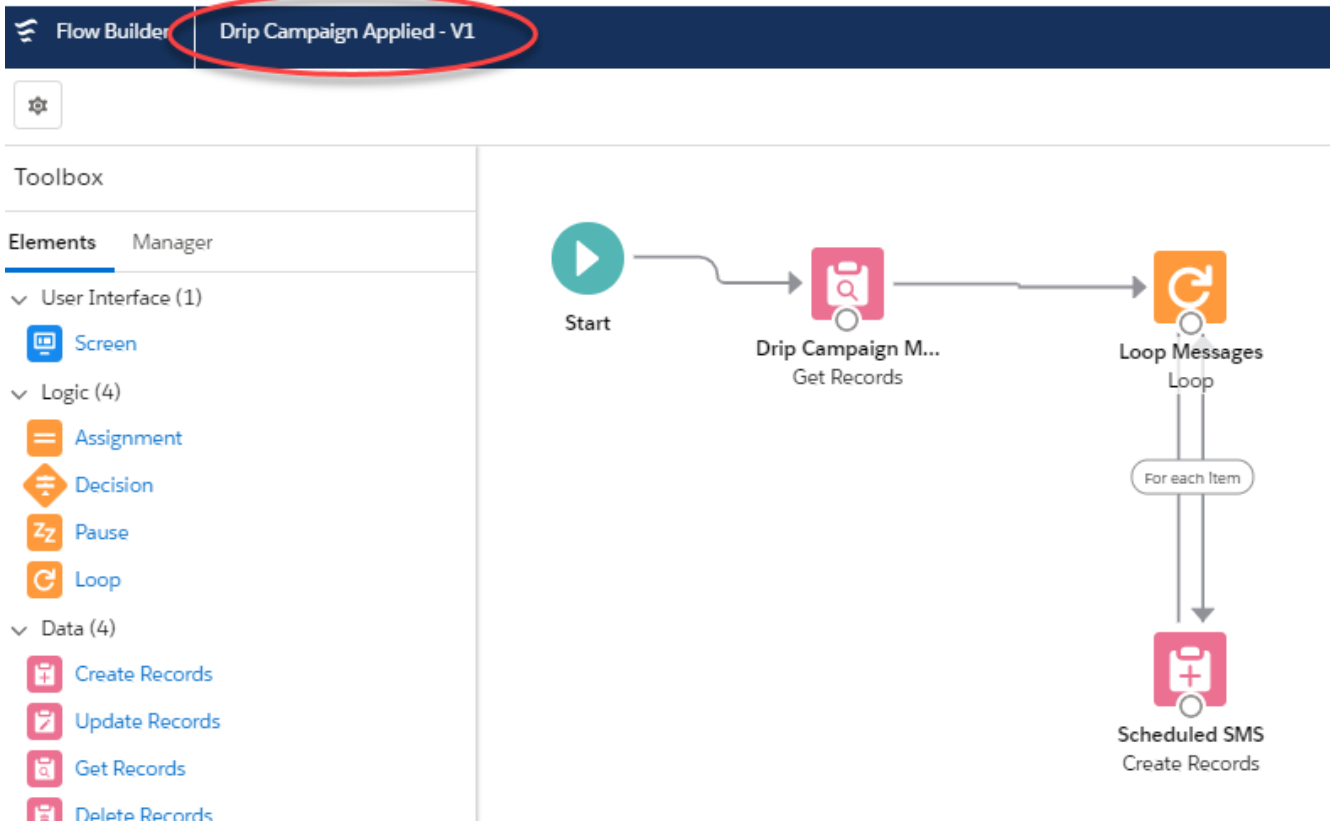


Figure 4 - Drip Campaign Applied flow which is called from any Process Builder

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.



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 and also having built the popular Salesforce app [ActionGrid™](#), acquired by Conga in April-2016. Bolder CRM is the exclusive distributor of 360 SMS in the United States, Canada and the United Kingdom.

Steve personally invented the SMS Drip Campaigns feature. The Drip Campaign Process Builders, Flows and table structure are the exclusive intellectual property of Bolder CRM. Steve also personally developed the Survey Action Handler business logic to provide a dynamic (non-programming) solution to define actions to take on Survey Question answers such as updating fields, creating tasks, adding contacts/leads to Campaigns, etc.

Learn more about Steve and Bolder CRM at <https://boldercrm.com/360SMS> and <https://www.linkedin.com/in/steveroch/>

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