



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 or SMS Surveys (aka iText or intelligent ChatBots) to be scheduled at various intervals defined by a **Days Offset** field. One can also optionally define the 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.

DRIP CAMPAIGN MESSAGE NAME	DAYS OFFSET	TIME	SMS TEMPLATE
Day 1	0		
Day 2	1	5:30:00 PM	Pardot Day 2 Campaign
Day 3	2	12:00:00 PM	Pardot Day 3 Campaign
Day 4	3	6:30:00 PM	Pardot Day 4 Campaign
Week 2	7	7:30:00 AM	Pardot Week 2 Campaign
Week 3	14	7:00:00 PM	Pardot Week 3 Campaign

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



Edit Day 1

* Drip Campaign Message Name

Owner
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Days Offset

SMS Drip Campaign

Time ⓘ

Schedule Date Time ⓘ
 5/12/2019 9:48 AM

Template or Survey

SMS Template

Survey ⓘ

Question ⓘ

Figure 2 – Define each days Template or Survey by defining the **days offset** from the day it is applied and an optional time of day

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

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Pardot Category Scores (Lead) (0) [New](#)

Drip Campaign Applieds (1) [New](#)

DRIP CAMPAIGN APPLIED NAME	DRIP CAMPAIGN	STOP CAMPAIGN	CREATED DATE
Lead Assigned	Lead Assigned	☐	5/12/2019 10:54 AM

Scheduled SMS (6+) [New](#)

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).

SCHEDULED SMS NAME	SCHEDULED TIME	ISSENT	SMS TEMPLATE
00Q1P00000qzvouiUAA	5/12/2019 10:54 AM	☒	
00Q1P00000qzvouiUAA	5/13/2019 5:30 PM	☐	Pardot Day 2 Campaign
00Q1P00000qzvouiUAA	5/14/2019 12:00 PM	☐	Pardot Day 3 Campaign
00Q1P00000qzvouiUAA	5/15/2019 6:30 PM	☐	Pardot Day 4 Campaign
00Q1P00000qzvouiUAA	5/19/2019 7:30 AM	☐	Pardot Week 2 Campaign
00Q1P00000qzvouiUAA	5/26/2019 7:00 PM	☐	Pardot Week 3 Campaign

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

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

Figure 3 - 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 4**, 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 5** below shows the Drip Campaign Applied flow, the Drip Campaign Stop is very similar.



Process Builder - Lead- Trigger

Expand All Collapse All View All Processes Clone Edit Properties Activate

Flowchart:

- Decision: Drip Campaign Set
 - TRUE: IMMEDIATE ACTIONS: Drip Campaign → STOP
 - FALSE: Decision: Lead Is Assigned - No Drip
- Decision: Lead Is Assigned - No Drip
 - TRUE: IMMEDIATE ACTIONS: Send Survey → STOP
 - FALSE: Decision: Lead Is Assigned - Put On Drip
- Decision: Lead Is Assigned - Put On Drip
 - TRUE: IMMEDIATE ACTIONS: Assign Drip → STOP
 - FALSE: Decision: Drip Campaign - STOP
- Decision: Drip Campaign - STOP
 - TRUE: IMMEDIATE ACTIONS: Stop Drip → STOP
 - FALSE: (End)

Launch a Flow - Assign Drip

Action Name*: Assign Drip

Flow*: Drip Campaign Applied

Set Flow Variables

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

Launch a Flow - Stop Drip

Action Name*: Stop Drip

Flow*: Drip Campaign Stop

Set Flow Variables

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

You can also leave this parameter blank and it will delete any unsent Scheduled SMS from any Drip

Figure 4 - Assigning a Drip and Stopping a Drip

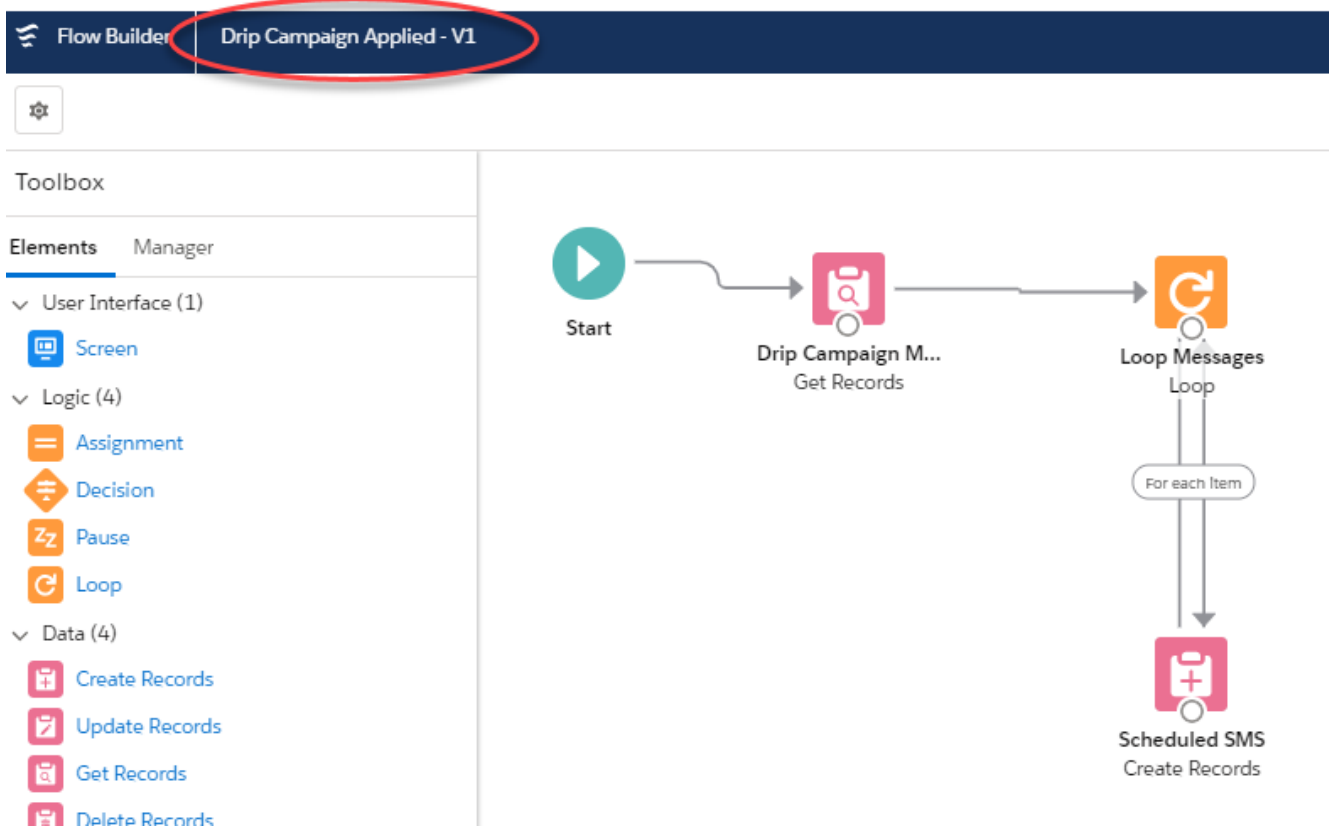


Figure 5 - Drip Campaign Applied flow which is called from any Process Builder

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.

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