



# The SalesLoft Guide to Automation Rules

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# Summary

How many automation rules do you have running within your SalesLoft instance?

Go count them. We'll wait!

If the answer is zero, you're missing huge opportunities for growth and adoption. At SalesLoft, we take this metric seriously. Our Data Science team has identified a strong correlation between the use of automation rules and a healthy pipeline.

Why? Put simply, automation rules make the lives of salespeople easier. With their versatility, the use cases are virtually endless.

We've collected the questions we're most frequently asked about automation rules and answered them here. You'll see the basics, ways to refine the basics, and some pro tips. *The SalesLoft Guide to Automation Rules* will introduce you to the most often utilized rules that, when implemented, will yield tangible productivity gains for your teams.

Still have questions? Reach out to your Customer Success Manager or [success@salesloft.com](mailto:success@salesloft.com) for more information, or visit [SalesLoft University](#).

Let's get started.

# The Basics of SalesLoft Automation Rules

Automation rules can be used to execute any repetitive process that you'd normally have to do manually, and can include multiple actions built on a set of criteria. This function gives you more control over the flow of data, both in and out of the system.

Simply put, automation rules allow your reps and SDRs to focus more on execution, and less on process management.

Read on to learn how to leverage automation rules in your organization.

SalesLoft Automation Rules consist of [triggers](#) and [subsequent actions](#), which follow “if, then” logic.

The screenshot shows the 'Rule Name' field at the top. Below it is the 'Trigger' dropdown menu, which is set to 'When a Person changes in SalesLoft'. Under the 'Criteria' section, there are two buttons: 'AND' (highlighted in blue) and 'OR'. To the right of these buttons are two more buttons: '+ Add Criteria' and '+ Add group'. Below the criteria section is the 'Action' section, which contains a text box with the text 'Remove Account from all Cadences' and a red minus button to its right. At the bottom left of the action section is a '+ Action' button.

Basically, you are telling SalesLoft, “If [Event X] occurs, then make [Y action] happen.” Within those confines, your job is to establish narrow [criteria](#) so that the rule will behave exactly how it should. Below are a few considerations and specifics on how automation rules work.

When you add criteria to automation rules you are narrowing down which prospects, opportunities, or accounts are affected by the rule. Beyond the trigger being “true,” the additional criteria have to be met in order for the rule to fire. Multiple criteria can be organized with “and/and,” “and/or,” and “or/or” logic.

This screenshot shows a more complex rule configuration. The 'Rule Name' field is empty. The 'Trigger' dropdown is set to 'When a Person changes in SalesLoft'. In the 'Criteria' section, the 'AND' button is selected. There are two criteria rows. The first row has 'Person Stage' in the first field, 'equal' in the second, and 'Closed- Not Converted' in the third, with a red minus button to the right. The second row has 'Most Recent Cadence - Cadence Name' in the first field, 'equal' in the second, and 'Lost Opportunities' in the third, also with a red minus button to the right. To the right of the criteria section are '+ Add Criteria' and '+ Add group' buttons. Below the criteria is the 'Action' section, which contains a text box with the text 'Remove Person from all Cadences' and a red minus button to its right.

You can take things even further. Group criteria goes a step beyond single criteria by allowing you to create more complex logic. If you have a set of criteria that you would like to occur, then grouping the criteria makes that process simple.

When you add a group of criteria you are adding another layer of criteria that must be satisfied in order for the rule to fire. The same “and/or,” “and/or,” and “or/or” options exist with groups.

Rule Name			
Trigger	When a Person changes in SalesLoft		
Criteria	<b>AND</b> <b>OR</b>		<a href="#">+ Add Criteria</a> <a href="#">+ Add group</a>
	Person Stage	equal	Closed- Not Converted
	Most Recent Cadence - Cadence Name	equal	Lost Opportunities
	<b>AND</b> <b>OR</b>		<a href="#">+ Add Criteria</a> <a href="#">+ Add group</a>
	Person Stage	equal	Nurture
	Most Recent Cadence - Cadence Name	equal	Cold Prospecting Cadence
Action	Remove Person from all Cadences		

## Pro Tip :

Include the action “Add Tags to a Person” to every rule that you build. This will serve as an audit trail if you need to troubleshoot your automation rule.

## More Pro Tips:

The Rule	The Explanation																																																																					
Use Salesforce? Map all criteria fields.	Assuming that your team uses Salesforce, any field that you want to use as automation rule criteria needs to be mapped between Salesforce and SalesLoft.																																																																					
<table><tr><th colspan="2">SALESLOFT PERSON</th><th colspan="2">SALESFORCE LEAD</th><th colspan="2">SALESFORCE CONTACT</th><th></th></tr><tr><th>FIELD NAME</th><th>FIELD NAME</th><th>TYPE</th><th>SL ↔ SF</th><th>FIELD NAME</th><th>TYPE</th><th>SL ↔ SF</th><th></th></tr><tr><td>Account Crm Id</td><td></td><td></td><td></td><td>AccountId</td><td>reference</td><td>←</td><td>...</td></tr><tr><td>City</td><td>City</td><td>string</td><td>↔</td><td>MailingCity</td><td>string</td><td>↔</td><td>...</td></tr><tr><td>Company Industry</td><td></td><td></td><td></td><td></td><td></td><td></td><td>...</td></tr><tr><td>Company Name</td><td>Company</td><td>string</td><td>↔</td><td></td><td></td><td></td><td>...</td></tr><tr><td>Company Website</td><td>Website</td><td>url</td><td>↔</td><td></td><td></td><td></td><td>...</td></tr><tr><td>Conference Name *</td><td></td><td></td><td></td><td></td><td></td><td></td><td>...</td></tr></table>								SALESLOFT PERSON		SALESFORCE LEAD		SALESFORCE CONTACT			FIELD NAME	FIELD NAME	TYPE	SL ↔ SF	FIELD NAME	TYPE	SL ↔ SF		Account Crm Id				AccountId	reference	←	...	City	City	string	↔	MailingCity	string	↔	...	Company Industry							...	Company Name	Company	string	↔				...	Company Website	Website	url	↔				...	Conference Name *							...
SALESLOFT PERSON		SALESFORCE LEAD		SALESFORCE CONTACT																																																																		
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Account Crm Id				AccountId	reference	←	...																																																															
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Company Website	Website	url	↔				...																																																															
Conference Name *							...																																																															
Order from specific to general from top to bottom.	Automation rules fire from top to bottom on the Automation Rules page. Therefore, you need to order your rules from the most specific to most general to avoid hang-ups with your broadest rules. Otherwise, subsequent rules won't fire.																																																																					

View Rule Logs		New Automation Rule
Prospect > Opportunity	When a Success is recorded for a Person Add Tags to Person • Set Person Fields	<input checked="" type="checkbox"/> ...
Create Person in Salesforce	When a Person is not found in Salesforce Create Lead • Add Salesloft Owner to Person • Add Tags to Person	<input checked="" type="checkbox"/> ...
Nurture cadence	When a Person changes in SalesLoft Remove Person from all Cadences • Add to Cadence	<input checked="" type="checkbox"/> ...
Bad call data, DQ	When a Call is logged for a Person Remove Person from all Cadences • Set Person Fields	<input checked="" type="checkbox"/> ...
Call Logged	When a Call is logged for a Person Remove Person from all Cadences • Set Person Fields	<input checked="" type="checkbox"/> ...

**Caution!**  
**Narrow Criteria Ahead.**

Automation rules do exactly what you tell them to, and can fire an unlimited number of times on a single prospect.

Two functions exist within the automation rule framework that serve to guard against the unwanted repetition of actions: [“has changed”](#) and [“doesn’t contain.”](#)

Trigger: When a Person changes in SalesLoft

Criteria: **AND** **OR** + Add Criteria + Add group

- Person Stage has changed ⊖
- Person Stage equal Prospecting ⊖

Trigger: When an Account changes in SalesLoft

Criteria: **AND** **OR** + Add Criteria + Add group

- Domain doesn't contain gmail.com ⊖
- Domain equal outlook.com ⊖



<b>The T-Rex Rule</b>	Automation rules only see prospects when they move; in other words, a data change has to occur in order for rules to fire. Any time the “Last Modified” date is updated, automation rules scan the related data for a match to rule criteria.
<b>Troubleshooting</b>	Is your rule not firing how you expected, or is it not firing at all? Automation rule logs prove valuable when trying to troubleshoot existing rules. If you need more help, take a look at our Knowledge Base article on <a href="#">troubleshooting automation rules</a> .

Automation Rule Logs

FILTER

ID	TIMESTAMP	AUTOMATION RULE	ACTION	EVENT GROUP	EVENT	LOG
197693628	May 9, 2018 3:40:34 PM	Create Person in Salesforce	Add tags	9bd0b3be1705	✓ Success	
197693627	May 9, 2018 3:40:33 PM	Create Person in Salesforce	Add salesloft owner to person	9bd0b3be1705	✓ Success	
197693625	May 9, 2018 3:40:33 PM	Create Person in Salesforce	Create contact	9bd0b3be1705	✓ Success	
197691249	May 9, 2018 3:38:25 PM	Create Person in Salesforce	Add tags	cef5c5d0922b	✓ Success	
197691248	May 9, 2018 3:38:25 PM	Create Person in Salesforce	Add tags	a5ad39c50b71	✓ Success	

With practicalities out of the way, let’s dive into specific use cases.

# Streamlining Go to Market Process

How much time is your team currently spending on manual tasks? According to a recent Forbes publication, "Sales reps spend less than 36% of their time selling and less than 18% of their time in their CRM."

How long does it take for your salespeople to follow up on inbound leads, and how are they prioritizing outbound tasks? Automation rules are the antidote to time management and prioritization pain points. By mapping out your SalesLoft process and thinking through what pieces of the puzzle can be automated, you have the power to standardize your strategy while taking manual tasks off of your reps' plates. This will eliminate human error while leaving your team open to prioritize revenue generating activity.

# I'm trying to import leads automatically

SalesLoft's Data Science team found that companies are currently responding to [inbound inquiries](#) within five minutes only 40% of the time, and are averaging an 18 minute SLA. What is this doing to companies' bottom lines? Dr. James Oldroyd (The Lead Response Management Study) cites that the odds of making contact with a prospect are 100 times greater if you reach out within five minutes.

Inbound automation rules can up your game by guaranteeing a standardized, lightning-fast first engagement. Take a look.

## The Basics:

This automation rule uses the trigger, "When a Lead Is Not Found in SalesLoft" and points to the Lead Source "Demo Requested" to narrow down which prospects are imported and into what cadence.

The screenshot shows the configuration for an automation rule. The **Rule Name** is "Import to Inbound Cadence (Demo Request)". The **Trigger** is "When a Lead is not found in SalesLoft". The **Criteria** section shows a logical connector between "Lead Source (LeadSource)" and "Demo Request", both set to "equal". Below this, the **Action** is "Create Person". A second action, "Add to Cadence", is shown with a red minus sign, indicating it is to be removed. The **Cadence** is set to "Demo Cadence (Michael Scott)".

**Rule Name** Import to Inbound Cadence (Demo Request)

**Trigger** When a Lead is not found in SalesLoft

**Criteria** AND OR + Add Criteria + Add group

Lead Source (LeadSource) equal Demo Request -

---

**Action** Create Person

+ Add Field

**Action** Add to Cadence -

**Cadence** Demo Cadence (Michael Scott)

+ Action

## Refine It:

This version of the same automation rule eliminates prospects whose email addresses contain Gmail, Outlook, or Mindspring domains in addition to pinpointing Lead Source. This is an example of how you can use criteria to narrow the scope of an automation rule.

Rule Name

Import to Inbound Cadence (Demo Request)

Trigger

When a Lead is not found in SalesLoft

Criteria

ANDOR

+ Add Criteria

+ Add group

Lead Source (LeadSource)	equal	Demo Request	
Email Address (Email)	doesn't contain	gmail	
Email Address (Email)	doesn't contain	outlook	
Email Address (Email)	doesn't contain	mindspring	

Action

Create Person

+ Add Field

Action

Add to Cadence

Cadence

Demo Cadence (Michael Scott)

Action

Add Tags to Person

Tags

Add New Tag

Inbound Demo Request AR x

+ Action

# I'm Trying to Move or Remove Prospects

## Based Upon Call Outcome

Using Call Sentiment and Disposition in conjunction with automation rules means that you can remove prospects from cadences when the call outcome indicates that they have either been disqualified, converted, or a deal has been closed. You can, in addition, move prospects from one cadence to another based upon Sentiment and Disposition. Take a look below.

### The Basics:

Removing Prospect from All Cadences When Call Disposition Indicates DQ

Note that this example uses “or” with criteria instead of “and.” In this context, prospects must meet one of the listed criteria to trigger the rule.

**Rule Name** Call Disposition (Rejected) OR Sentiment (Contact-Bad Fit, Timeline 6-12) - Remove from All Cadences

**Trigger** When a Call is logged for a Person

**Criteria** **AND** **OR** [+ Add Criteria](#) [+ Add group](#)

Disposition	equal	Rejected	
Sentiment	equal	Contact - Bad Fit	
Sentiment	equal	Timeline 6-12 months	

**Action** Remove Person from all Cadences

[+ Action](#)

## Refine It:

In this version of the same automation rule, Person Stage (SalesLoft status) is updated in a second action based upon call outcome, and a tag is added to provide an audit trail.

**Rule Name**

**Trigger**

**Criteria**

AND OR

+ Add Criteria

+ Add group

Disposition	equal	Rejected	<div></div>
Sentiment	equal	Contact - Bad Fit	<div></div>
Sentiment	equal	Timeline 6-12 months	<div></div>

**Action**

**Action** 

Person Stage	Closed- Not Converted	<div></div>
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+ Add Field

**Action**

**Tags**

+ Action

## The Basics:

Moving Prospect to Alternative Cadence When Call Disposition Indicates a Need for Change.

There are several options for funneling interested prospects to a secondary, more manual cadence. Establishing this flow means that your reps can focus their attention on perfecting and personalizing engagement with this smaller but more promising secondary prospect pool.

In this example, call outcome fields indicate that no commitment has been made to sit a demo but the prospect has displayed interest, which triggers a move to a Hot Leads Cadence.

**Rule Name** Call Disposition (Connected) OR Sentiment (Interested) - Add to Hot Leads

**Trigger** When a Call is logged for a Person

**Criteria** **AND** **OR** [+ Add Criteria](#) [+ Add group](#)

Disposition	equal	Connected	
Sentiment	equal	Interested	

**Action** Remove Person from all Cadences

**Action** Add to Cadence

**Cadence** Hot Leads - Interested (Michael Scott)

[+ Action](#)

# I'm Trying to Move or Remove Prospects Based Upon Email Engagement

We all know the value of workload prioritization. In many instances, you may want your team to spend the bulk of their time and attention personalizing communications with prospects who have already demonstrated interest. By incorporating metrics such as click count, view count, and reply count into automation rules designed to move prospects between cadences, you can funnel engaged leads and contacts to a more manual, personalized cadence while removing them from your initial cold prospecting cadences. Here's how.

## The Basics:

SalesLoft tracks email engagement metrics (views, clicks on links, and replies) that you can leverage to trigger the automated movement to, from, or between cadences. As with call outcome, this means that you can design a process to funnel those prospects who display interest into a higher priority cadence.

The screenshot displays the 'Automation Rules' configuration page in SalesLoft. The rule is named 'View Count > Add to Hot Leads Cadence'. The trigger is set to 'When stats for an Email change'. The criteria are configured with 'AND' logic, requiring 'View Count' to be 'greater or equal' to '5'. There are two actions: 'Remove Person from all Cadences' and 'Add to Cadence'. The 'Add to Cadence' action is selected, and the target cadence is 'Hot Leads - Interested (Michael Scott)'. A '+ Action' button is visible at the bottom.

**Rule Name** View Count > Add to Hot Leads Cadence

**Trigger** When stats for an Email change

**Criteria** AND OR + Add Criteria + Add group

View Count greater or equal 5

**Action** Remove Person from all Cadences

**Action** Add to Cadence

**Cadence** Hot Leads - Interested (Michael Scott)

+ Action



## Refine It:

Remember that narrowing automation rule criteria improves your ability to target exactly who you need to. Consider adding both view count and click count when using the trigger “When Stats for an Email Change.” This example also includes the “Add Tags to a Person” action to provide an audit trail.

**Rule Name** View Count & Click Count > Add to Hot Leads Cadence

**Trigger** When stats for an Email change

**Criteria**

AND OR

+ Add Criteria + Add group

View Count

greater or equal

5

Click Count

greater or equal

1

**Action** Remove Person from all Cadences

**Action** Add to Cadence

**Cadence** Hot Leads - Interested (Michael Scott)

**Action** Add Tags to Person

**Tags**

Add New Tag

View & Click Count > Hot Leads AR x

+ Action

# I'm Trying to Move or Remove Prospects to a Nurture Cadence If They Don't Engage

In contrast to a scenario where you move prospects from one cadence to another based upon engagement, you might find it useful to move a prospect to cadences based upon lack of engagement. Imagine a scenario where your prospect completes a cold outreach cadence without engaging and is then placed into an automated nurture cadence. The argument for keeping prospects in SalesLoft for nurture activity rather than sending them back to Marketing is that with SalesLoft cadences, the opportunity exists for sales reps to continue to build rapport through nurture activity.

## The Basics:

In this scenario, the correct firing of automation rules rely upon two other settings. First, Person Stage needs to be configured. Person Stage is a lead and contact field that provides a bird's eye view of where prospects are in your sales pipeline. Person Stage picklist values can be customized on the "Stages" tab within team admin settings.

People Stages Account Stages Opportunity Stages		
You can create Custom Stages to be mapped to people based on actions within a cadence. These Stages will be available to your entire team. Set Stages to actions in the Settings page of each cadence.		
13 Stages <a href="#">Create New Stage</a>		
STAGE	IN STAGE	
Open	2	...
Working	2542	...
Closed- Converted	0	...
Closed- Not Converted	0	...
Bounced	32	...
Do Not Contact	0	...
Completed	8	...
Example	0	...
Nurture	0	...
Prospecting	0	...
Demo	0	...
Trial	0	...
Replied	1	...

Second, Cadence Settings (adjustable in team admin settings and visible within Cadence Settings within any cadence) establish circumstantial changes to Person Stage when cadence-specific activity occurs. These settings need to be standardized to tee up the automated movement of prospects to a nurture cadence.

### Cadence Settings

Set stage preferences for all cadences and manage cadence priority levels.

#### Default Stage Settings

All Cadences created by your team will have these options pre-populated and can be edited by the users. Existing Cadences **will not** be affected by this setting.

On Bounce  
No Stage Change

On Reply  
No Stage Change

On Added To Cadence  
No Stage Change

On Finished Cadence  
Nurture

Save Clear Fields

#### Stage Settings Override

All Cadences on your team will use these options, and will not be editable by your users. Existing Cadences **will** be affected by this setting.

On Bounce  
Bounced

On Reply  
Replied

On Added To Cadence  
Working

On Finished Cadence  
No Stage Change

Save Clear Fields

## Stages

#### WHEN A PERSON BOUNCES WHILE ON THIS CADENCE

Bounced

#### WHEN A PERSON REPLIES WHILE ON THIS CADENCE

Replied

#### WHEN A PERSON IS ADDED TO THIS CADENCE

Working

#### WHEN A PERSON FINISHES THIS CADENCE

Nurture

Since every prospect who finishes a cadence without engaging is updated to a Person Stage of “Nurture,” we can use this update as the trigger for an automation rule. The trigger, “When a Person changes in SalesLoft” is extremely broad, referring to every change that takes place on a person’s record in SalesLoft. Pay attention to the second criterium here, “Person Stage-Has Changed.” This is an example of narrowing the scope of your criteria to control when the rule fires: adjusting from every time any change takes place to only circumstances where Person Stage accounts for the change.

**Rule Name**

**Trigger**

**Criteria**

AND OR

+ Add Criteria + Add group

Person Stage

has changed

Person Stage

equal

Nurture

**Action**

**Action** 

**Cadence**

**Action** 

**Tags**  

Add to Nurture AR x

+ Action

# I'm Trying to Import Prospects to SalesLoft

## Based Upon Lead Score

Does your organization use a scoring system to prioritize engagement with leads? Imagine an automation rule that imports prospects and adds them to an MQL cadence when the lead score hits a predetermined threshold. Take a look.

### The Basics:

This automation rule looks a bit like the automated import of inbound leads. The additional criteria of lead score isolates MQLs who are ready for sales engagement based upon your company's standards and process.

The screenshot shows an automation rule configuration interface. At the top, the 'Rule Name' is 'Lead Score > 120 = Import & Add to SalesLoft'. Below this, the 'Trigger' is 'When a Lead is not found in SalesLoft'. The 'Criteria' section shows a single condition: 'Score (unmapped)' is 'greater or equal' to '120'. There are buttons for '+ Add Criteria' and '+ Add group'. Below the criteria, there are two 'Action' steps. The first action is 'Create Person', with a '+ Add Field' button below it. The second action is 'Add to Cadence', with a red minus button to its right. Below the second action, the 'Cadence' is set to 'MQLs in Atlanta (Michael Scott)', with a '+ Action' button below it.

**Rule Name** Lead Score > 120 = Import & Add to SalesLoft

**Trigger** When a Lead is not found in SalesLoft

**Criteria** **AND** **OR** [+ Add Criteria](#) [+ Add group](#)

Score (unmapped) greater or equal 120 [-](#)

**Action** Create Person [+ Add Field](#)

**Action** Add to Cadence [-](#)

**Cadence** MQLs in Atlanta (Michael Scott) [+](#)

[+ Action](#)

# I'm Trying to Ensure GDPR Compliance with EU Prospects

GDPR compliance requires a significant investment in thought and planning from your company. If your team prospects into the European Union, consider using automation rules to push EU residents to GDPR compliant cadences within your SalesLoft org.

## The Basics:

SalesLoft's EU Resident field facilitates the easy identification of prospects who should be added to GDPR-compliant cadences. An automation rule like the one below demonstrates how, with the help of a Salesforce process builder to notate EU residents, you can take the guesswork out of legal compliance.

The screenshot displays the configuration for an automation rule in SalesLoft. The rule is named "EU Resident = EU Resident Field". The trigger is set to "When a Lead is not found in SalesLoft". The criteria section shows a single condition: "EU Resident (EU\_Resident\_\_c)" is equal to "true". Below the criteria, there are two actions. The first action is "Create Person", and the second action is "Add to Cadence". The cadence selected for the second action is "EMEA Cold Engagement 2019 (Michael Scott)".

**Rule Name** EU Resident = EU Resident Field

**Trigger** When a Lead is not found in SalesLoft

**Criteria** AND OR + Add Criteria + Add group

EU Resident (EU\_Resident\_\_c) equal true

**Action** Create Person

+ Add Field

**Action** Add to Cadence

**Cadence** EMEA Cold Engagement 2019 (Michael Scott)

+ Action

# I'm Trying To Make Changes to All Prospects on an Account or Opportunity

Two triggers, "When an Account Changes in SalesLoft" and "When an Opportunity Changes in SalesLoft," allow you to take bulk action on all contacts associated with a given account or opportunity. Possible actions include removing contacts from all cadences.

## The Basics:

At SalesLoft, our bottom-of-the-funnel reps love cadences, too. In the example below all contacts associated with an opportunity are added to a Closed Lost Opportunities nurture cadence when the Opportunity Stage is updated to Closed Lost.

The screenshot displays the configuration for an automation rule in SalesLoft. The rule is named "Opp Stage = Closed Lost > Contacts Added to Closed Lost Opps Cadence". The trigger is set to "When an Opportunity changes in SalesLoft". The criteria section shows a single condition: "Opportunity Stage" has changed to "Closed Lost". The action is "Add People Related to this Opportunity to a Cadence", and the selected cadence is "Closed Lost Opportunities (Michael Scott)".

**Rule Name** Opp Stage = Closed Lost > Contacts Added to Closed Lost Opps Cadence

**Trigger** When an Opportunity changes in SalesLoft

**Criteria** **AND** **OR** [+ Add Criteria](#) [+ Add group](#)

Opportunity Stage has changed to Closed Lost

**Action** Add People Related to this Opportunity to a Cadence

**Cadence** Closed Lost Opportunities (Michael Scott)

[+ Action](#)

# I'm Trying to Send Automated Slack Message

## Based Upon Prospect Engagement

### Outcomes

Want to share and celebrate wins across your team? Queue automation rules. Sending an automated, standardized message to a pre-selected Slack channel can increase transparency across your team while boosting morale.

#### The Basics:

Several triggers can yield the generation of an automated Slack message, including when reps log a call, when a lead or contact is imported to SalesLoft via automation rule, when a prospect books a meeting, or upon the recording of Success. The example below outlines one of these options.

Rule Name

Meeting Booked > Slack Message to Sales

Trigger

When a Person books a Meeting

Criteria

AND

OR

+ Add Criteria

+ Add group

Action

Send Slack Message

Slack Channel

salesclub

Can't find Slack channel? Refresh Channel List

Slack Message

Awesome news! {{first\_name}} booked a meeting. Get after it!

+ Action



# Ensure Data Integrity

Regardless of your industry, size, or location, data is one of the most valuable currencies of your organization. Everyone from the individual contributor to C Suite relies upon accurate metrics to solve existing problems, make predictions, and plan growth.

What happens, though, when your organization has tens, hundreds, or thousands of employees entering data into your system of record? What happens when several API integrations also push data to a central repository? Is this data reliable?

Automation rules can help alleviate pains related to data integrity. From ensuring accurate data transfer across platforms to standardizing data input across your team, SalesLoft is doing our part to clean up your numbers game.

## What we Suggest:

# I'm Trying to Standardize the Use of the Success Metric

The SalesLoft Success metric is one that is defined by your team. Some teams opt to use Success to indicate a demo or meeting booked, while others use Success to indicate a deal won. Others (those with segmented, top-of-the-funnel and bottom-of-the-funnel roles) use Success to indicate two different, role-specific circumstances.

Whatever your definition of success, the SalesLoft Success metric is an excellent source of insight when standardized. The trick is standardization. How is this possible to standardize the use of the Success metric when reps are responsible for indicating prospect successes? What happens when the margin of error is human error? Enter automation rules. Certain automation rules like those outlined below can mark prospects as a Success when your predetermined criteria are met.

## The Basics:

Changes in Person Stage can trigger Success.

The screenshot shows the configuration for an automation rule in SalesLoft. The rule is named "Person Stage = Closed-Converted > Success". The trigger is set to "When a Person changes in SalesLoft". The criteria are configured with two conditions: "Person Stage" equal to "Closed- Converted" and "Person Stage" has changed. The action is set to "Mark As Success".

Section	Field	Value	Action
Rule Name	Rule Name	Person Stage = Closed-Converted > Success	
Trigger	Trigger	When a Person changes in SalesLoft	
Criteria	Criteria	AND	
	Criteria	OR	
	Criteria	+ Add Criteria	
	Criteria	+ Add group	
Criteria	Person Stage	equal	Closed- Converted
	Person Stage	has changed	
Action	Action	Mark As Success	
		+ Action	

## Refine It:

You can layer automation rules to mark prospects as successes based upon Call Disposition.

Rule Name

Person Stage = Closed-Converted > Success

Trigger

When a Person changes in SalesLoft

Criteria

AND

OR

+ Add Criteria

+ Add group

Person Stage

equal

Closed- Converted

Person Stage

has changed

Action

Mark As Success

+ Action

Rule Name

Call Sentiment = Change to Closed-Converted

Trigger

When a Call is logged for a Person

Criteria

AND

OR

+ Add Criteria

+ Add group

Sentiment

equal

Demo Scheduled

Action

Set Person Fields

Person Stage

Closed- Converted

+ Add Field

+ Action

Success also serves as a trigger. In this example, you can remove a prospect from all cadences once Success is recorded for a person.

Rule Name

Remove from Cadences When Success Is Logged

Trigger

When a Success is recorded for a Person

Criteria

AND

OR

+ Add Criteria

+ Add group

Action

Remove Person from all Cadences

+ Action

# I'm Trying to Align SalesLoft Owner to Salesforce Owner

Did you know that SalesLoft and Salesforce ownership aren't necessarily the same person? Salesforce ownership is established within your Salesforce instance. SalesLoft ownership, in almost all cases, is contingent upon who imports a given prospect to SalesLoft. However, there are reasons why (including the maintenance of Rules of Engagement and visibility across your organization as your team works in SalesLoft) that your organization may want to align SalesLoft ownership to Salesforce ownership or vice versa.

## The Basics:

In this example, SalesLoft ownership is checked and updated on every person update. This is an example of the versatility of "When a Person Changes In SalesLoft" and how you can use it to perform ongoing, regular sweeps and subsequent updates.

New Automation Rule

Rule Name	Align SalesLoft Owner to Salesforce Owner		
Trigger	When a Person changes in SalesLoft		
Criteria	AND OR	+ Add Criteria	+ Add group
Action	Set SalesLoft Owner to Salesforce Owner		
	+ Action		

# I'm Trying to Align SalesLoft and Salesforce

## Field Values

In certain circumstances, a company may choose to maintain unique Salesforce Lead Status and SalesLoft Person Stage fields, for example, for the sake of preserving an existing Salesforce process. That said, there may be one or two circumstances within the team's process where this data does need to overlap, and one field should update the other.

Field mapping is all or nothing. If you map a picklist field, updates will universally push for that field, some teams choose to use automation rules to align one or two picklist values between SalesLoft and Salesforce fields.

### The Basics:

You can use automation rules in instances like this to push updates to a picklist field only when certain values are selected.

The screenshot shows the Salesforce Automation Rule configuration interface. It is divided into two main sections: Criteria and Action.

**Rule Name:** When Person Stage = Disqualified, Set Lead Status to Disqualified

**Trigger:** When a Person changes in SalesLoft

**Criteria:**

- Logic: AND (selected) OR
- Criteria 1: Person Stage equal Disqualified
- Buttons: + Add Criteria, + Add group
- Remove button: -

**Action:**

- Action Name: Set Person Fields
- Field: Status Disqualified
- Buttons: + Add Field, + Action
- Remove buttons: -

# I'm Trying to Update SalesLoft Fields

## (Person, Stage, etc.)

Updating SalesLoft fields is a given for data alignment in the world of automation rules, and is often coupled with an additional action to add or remove prospects from cadences.

### The Basics:

The possibilities with field updates are virtually endless; updates frequently reflect changes to Person Stage or Status when certain criteria are met.

Rule Name

Success = Update Person Stage

Trigger

When a Success is recorded for a Person

Criteria

AND

OR

+ Add Criteria

+ Add group

Action

Set Person Fields

Person Stage

Closed- Converted

+ Add Field

Action

Remove Person from all Cadences

+ Action

# I'm Trying To Add Tags to a Person

Tagging is a means of organizing prospects within your SalesLoft instance. People tags are commonly used to correlate people and industries, verticals, roles, event attendance or interest, or region. From several locations in SalesLoft, you can sort and filter by one or more tags to isolate a subgroup of people.

Furthermore, tags can be added to any automation rule to identify its output and which prospects have been “touched” by that automation rule. This creates an audit trail of how the automation rule has behaved, and on whom it has acted, in case you need to troubleshoot.

## **The Basics:**

As noted with several examples, adding tags to people via automation rule can provide an audit trail if you need to troubleshoot automation rule functionality at a later date.

Building tags into your automation rules also ensures a standardized tagging convention across your company, which in turn provides team members with the sorting and filtering capability of people across the organization.

**Rule Name**

**Trigger**

**Criteria** AND OR + Add Criteria + Add group

---

**Action**  ✖

+ Add Field

**Action**  ✖

**Action**  ✖

**Tags**

Removed w/ Success ✕

+ Action



# I'm Trying to Set Person Stage After the First Step of a Cadence

Do you need to be able to differentiate between prospects who are being actively engaged versus those who have been imported to SalesLoft and perhaps added to a cadence but not engaged? Automation rules can update Person Stage to “Working” after the completion of the first step of a cadence. As SalesLoft admins, you then have reportability on engagement metrics and account penetration.

## The Basics:

In this example, prospects are updated with a “Working” Person Stage universally, across cadence in the SalesLoft org.

The screenshot shows the 'Automation Rules' configuration page in SalesLoft. The 'Rule Name' field is 'Update All to Working After Step 1 Completed'. The 'Trigger' is 'When a Person completes the first Step of a Cadence'. The 'Criteria' section shows 'AND' selected. The 'Action' section is titled 'Set Person Fields' and contains a single rule: 'Person Stage' set to 'Working'. There are buttons for '+ Add Criteria', '+ Add group', '+ Add Field', and '+ Action'.

Rule Name	Update All to Working After Step 1 Completed	
Trigger	When a Person completes the first Step of a Cadence	
Criteria	AND OR	+ Add Criteria + Add group
Action	Set Person Fields	
	Person Stage	Working
	+ Add Field	
	+ Action	

## Refine It:

In this example, only prospects on the “Atlanta Cold Prospecting” cadence are updated with a “Working” Person Stage.

New Automation Rule

Rule Name

Update "ATL Cold Prospecting" to Working After Step 1 Completed

Trigger

When a Person completes the first Step of a Cadence

Criteria

AND

OR

+ Add Criteria

+ Add group

Person - Most Recent Cadence - Cadence Name

equal

Atlanta Cold Prospecting

Action

Set Person Fields

Person Stage

Working

+ Add Field

+ Action

# Additional Resources

We have many more resources to help you learn how to leverage automation rules within SalesLoft, which you can find below. Don't forget you can always ask for additional help by reaching out to your Customer Success Manager or [success@salesloft.com](mailto:success@salesloft.com).

## Knowledge Base

- [Automation Rules](#)
- [Manage Automation Rules](#)
- [Common Automation Rules](#)
- [Parts of an Automation Rule](#)
- [Automation Rule Troubleshooting](#)

## SalesLoft University

- [Automation Rules Starter Kit](#)
- [Webinar- 4 Top Priorities in Implementing Sales Engagement Software](#)
- [Webinar- Increasing Sales Efficiency with Automation Rules](#)
- [Webinar- Artful Automation](#)
- [Webinar- Automation Rules](#)

# About SalesLoft

*SalesLoft is the provider of the #1 sales engagement platform, helping sales organizations deliver a better sales experience for their customers. More than 2,000 customers, including IBM, MuleSoft, Square, WeWork, and Zoom, use the company's category-leading sales engagement platform to engage in more relevant, authentic and sincere ways.*

*Headquartered in Atlanta, SalesLoft has additional offices in San Francisco, New York, London, and Guadalajara, Mexico. SalesLoft has more than 400 employees and was recognized as the #1 best place to work in Atlanta for the second year in a row. The company was also named the 7th Fastest-Growing Technology Company in North America by Deloitte and recently hailed by The New York Times as a start-up that 'may be the next unicorn... on a path to a \$1B valuation. For more information on SalesLoft and how to deliver a better sales experience, visit [salesloft.com](https://salesloft.com).*