The SalesLoft Guide to Automation Rules

Table of Contents

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 for more information, or visit SalesLoft University.

Let's get started.

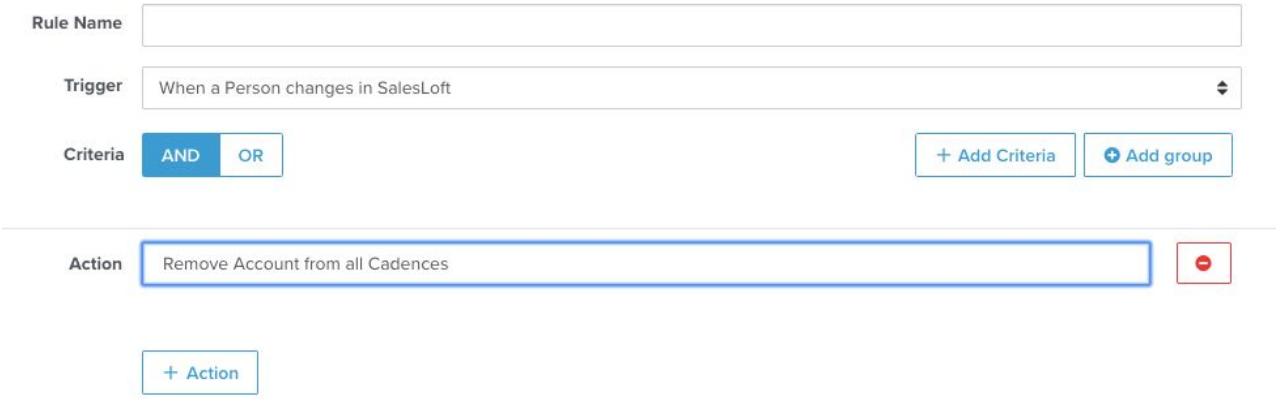
The Basics of SalesLoft Automation Rules

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.

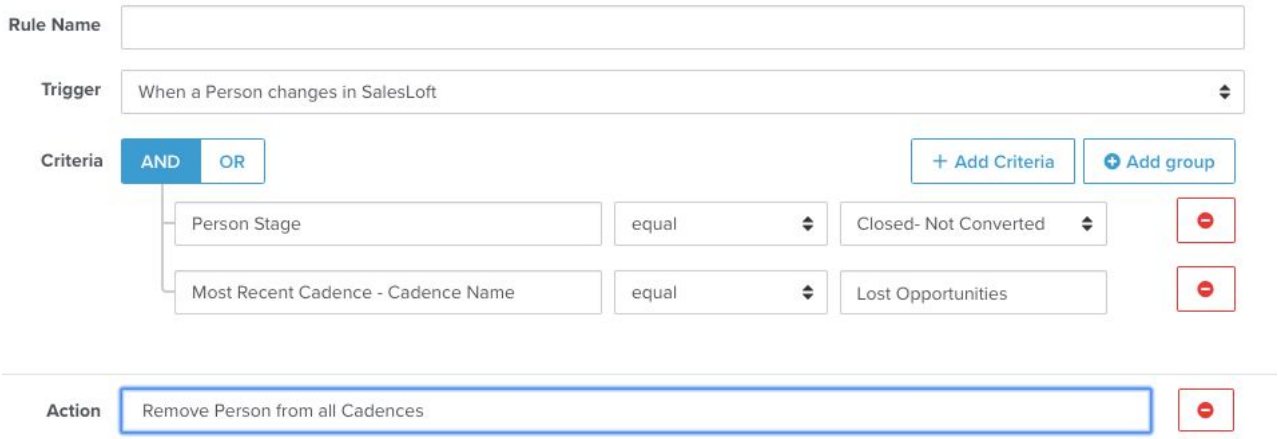
Read on to learn how to leverage automation rules in your organization.

SalesLoft Automation Rules consist of triggers and subsequent actions, which follow "if, then" logic.



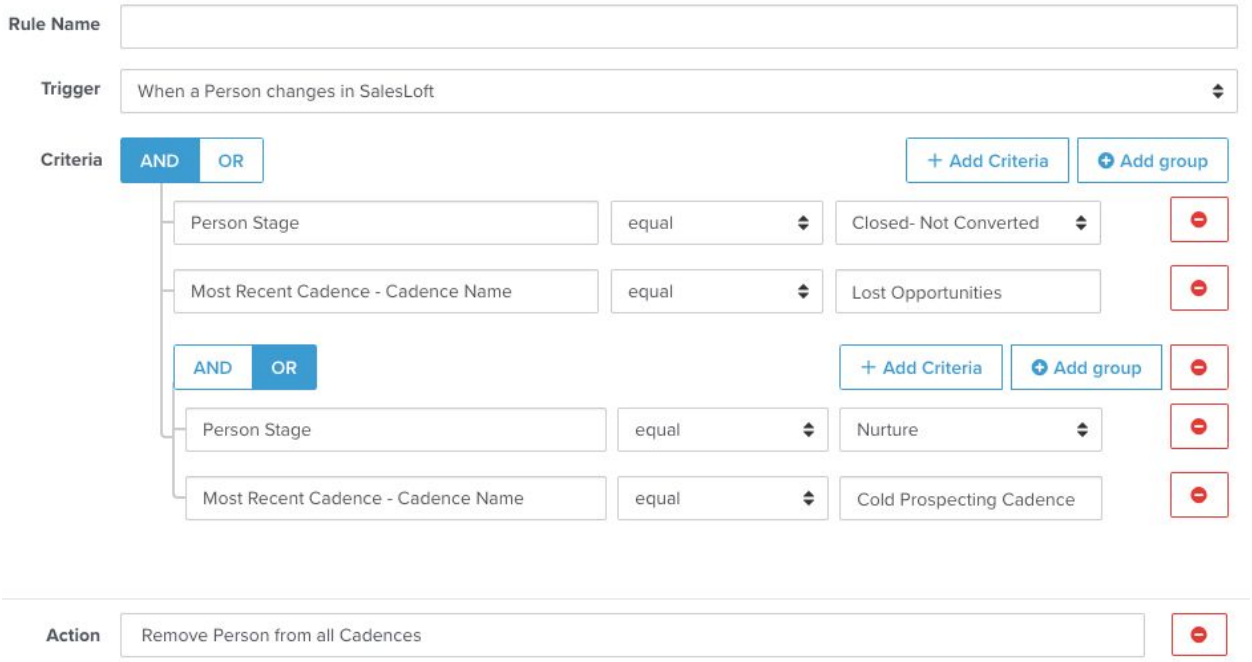
Basically, you are telling SalesLoft, "If [Event X] occurs, then make [Y action] happen." Within those confines, your job is to establish narrow criteria so that the rule will behave exactly how it should. Below are a few considerations and specifics on how automation rules work.

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.



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/and," "and/or," and "or/or" options exist with groups.



Pro Tip :

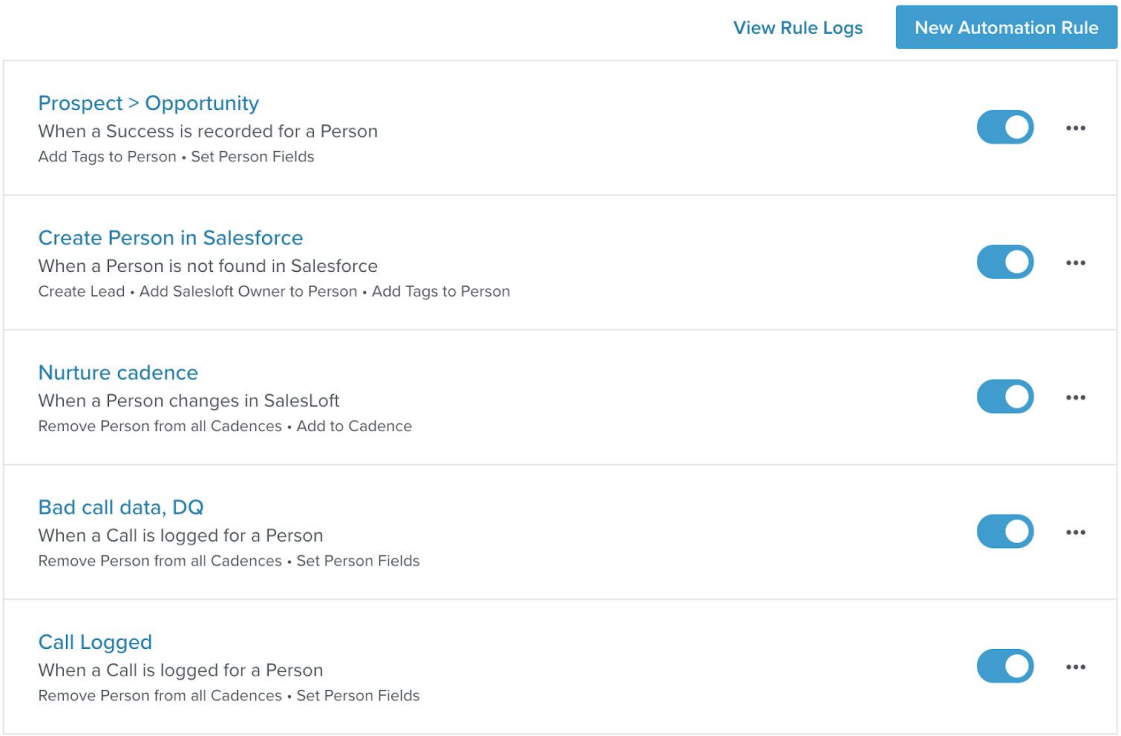
Include the action "Add Tags to a Person" to every rule that you build. This will serve as an audit trail if you need to troubleshoot your automation rule.

More Pro Tips:

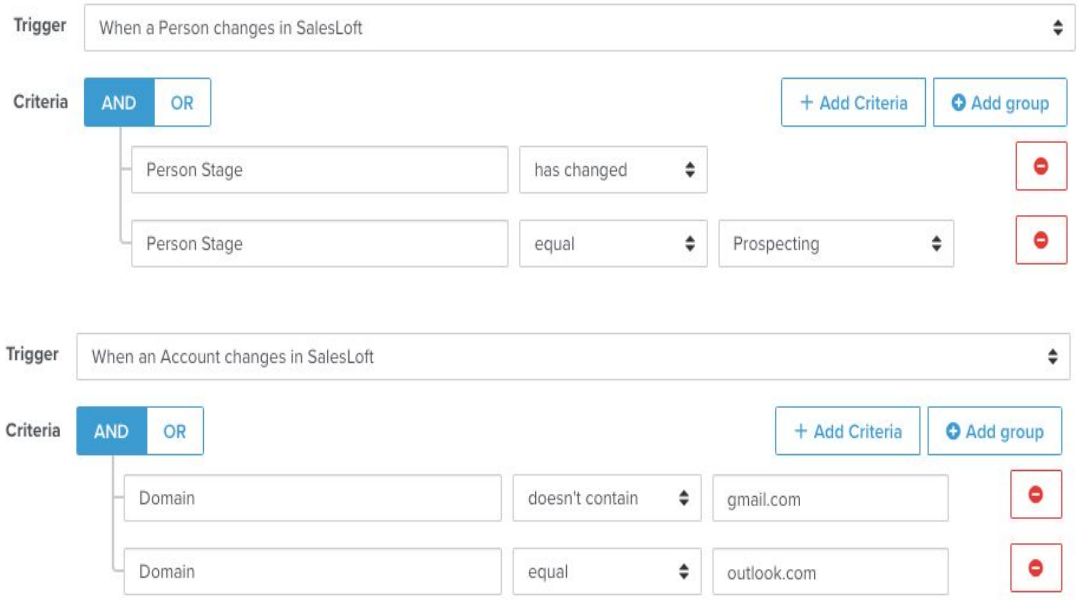
The Rule	The Explanation
Use Salesforce? Map all criteria fields.	Assuming that your team uses Salesforce, any field that you want to use as automation rule criteria needs to be mapped between Salesforce and SalesLoft.

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 ✱							•••

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.



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."



The T-Rex Rule	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.
Troubleshooting	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 troubleshooting automation rules.

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.

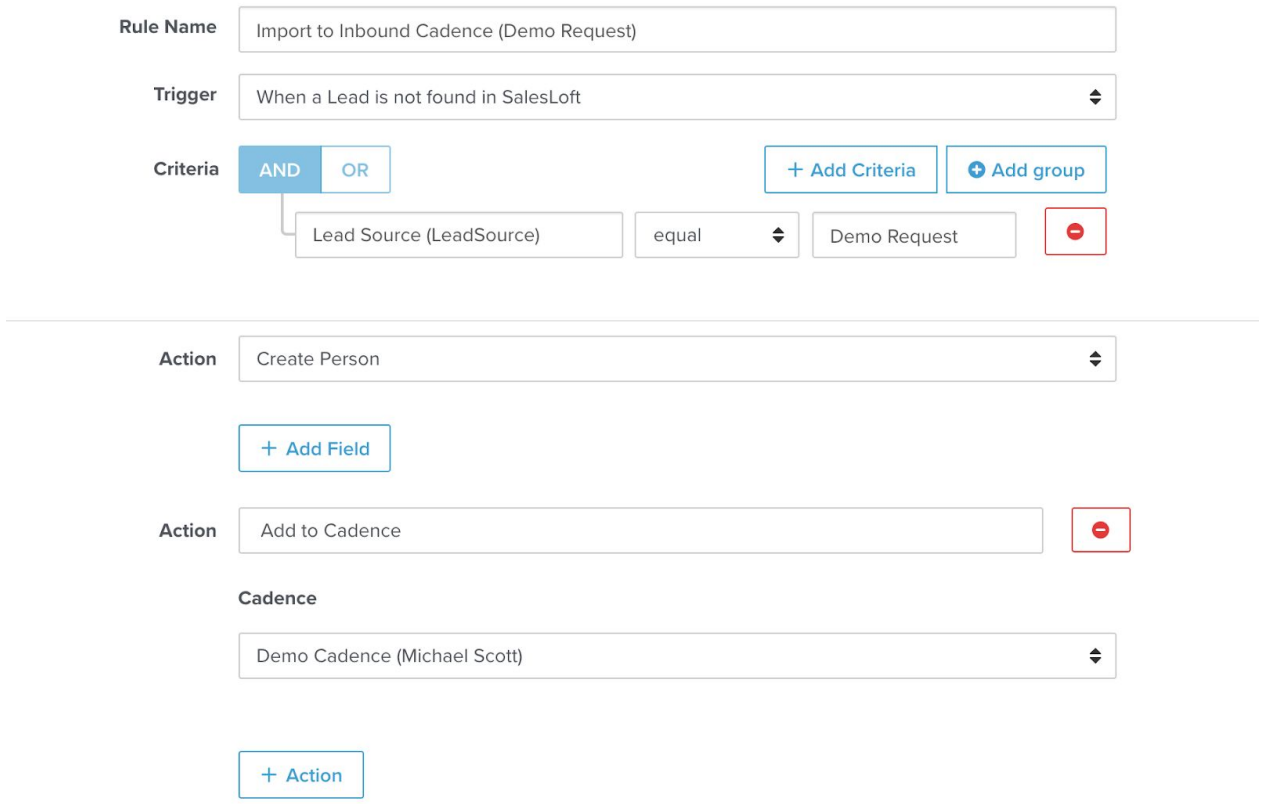
I'm trying to import leads automatically

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.

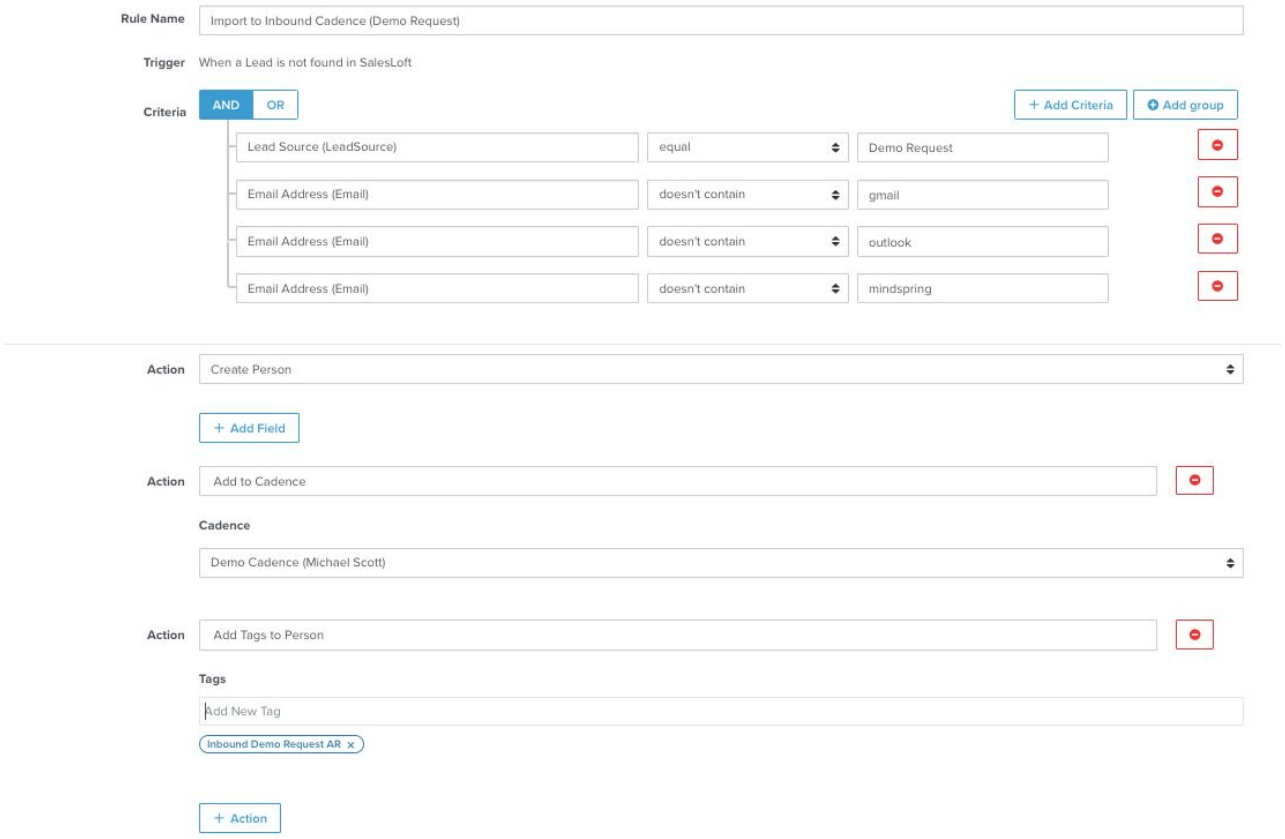
The Basics:

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.



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.



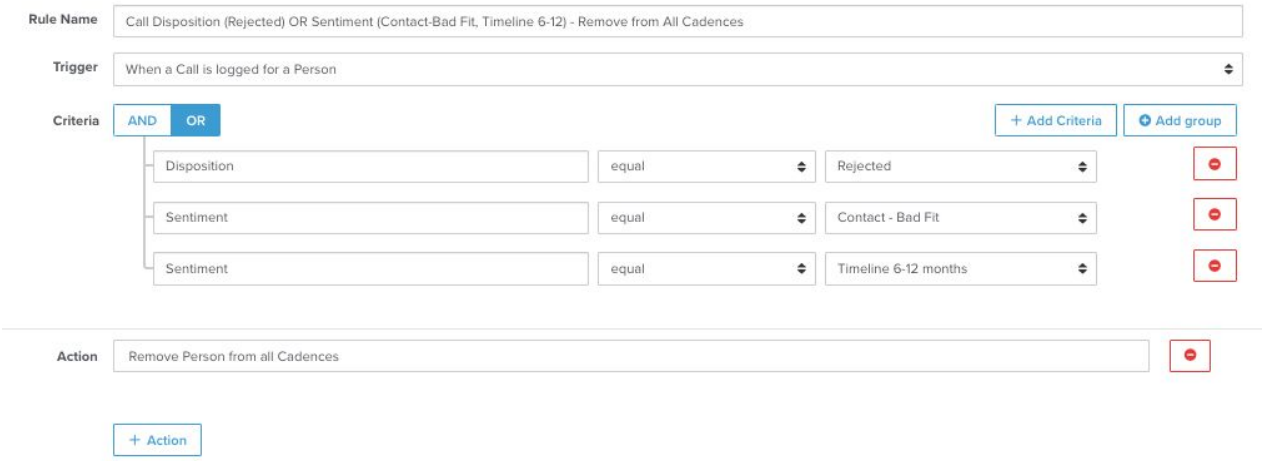
I'm Trying to Move or Remove Prospects Based Upon Call Outcome

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:

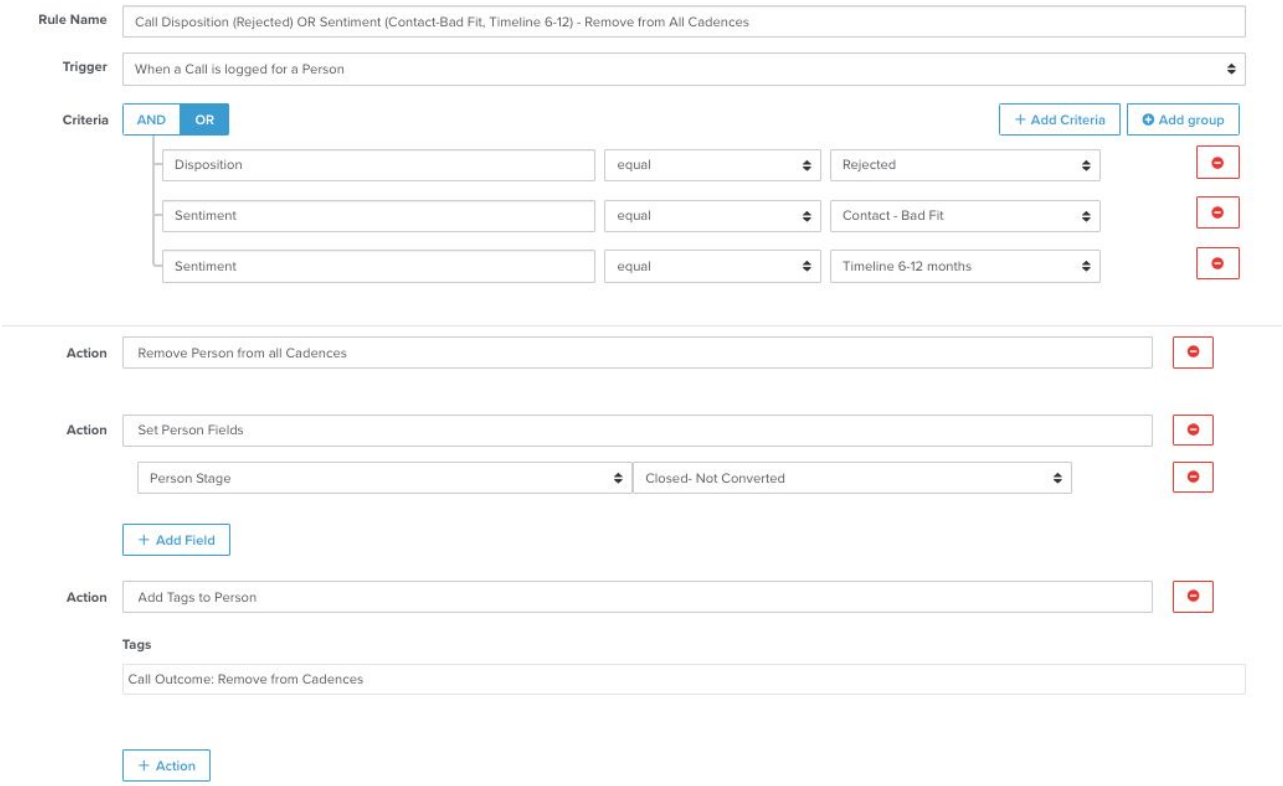
Removing Prospect from All Cadences When Call Disposition Indicates DQ

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.



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.

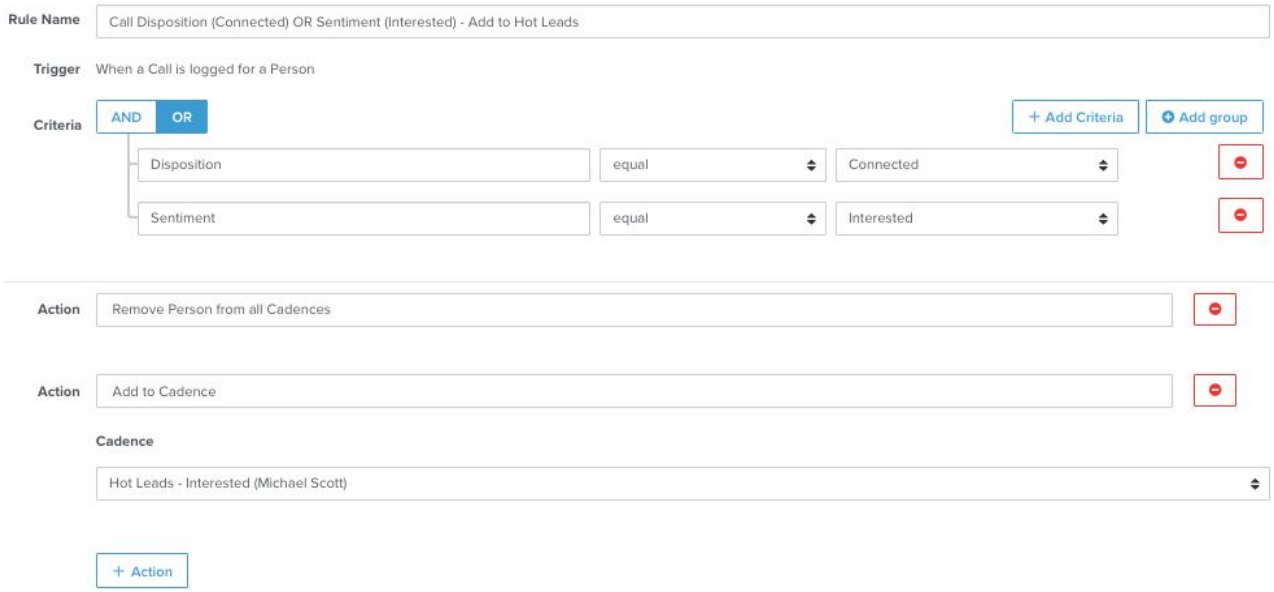


The Basics:

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.

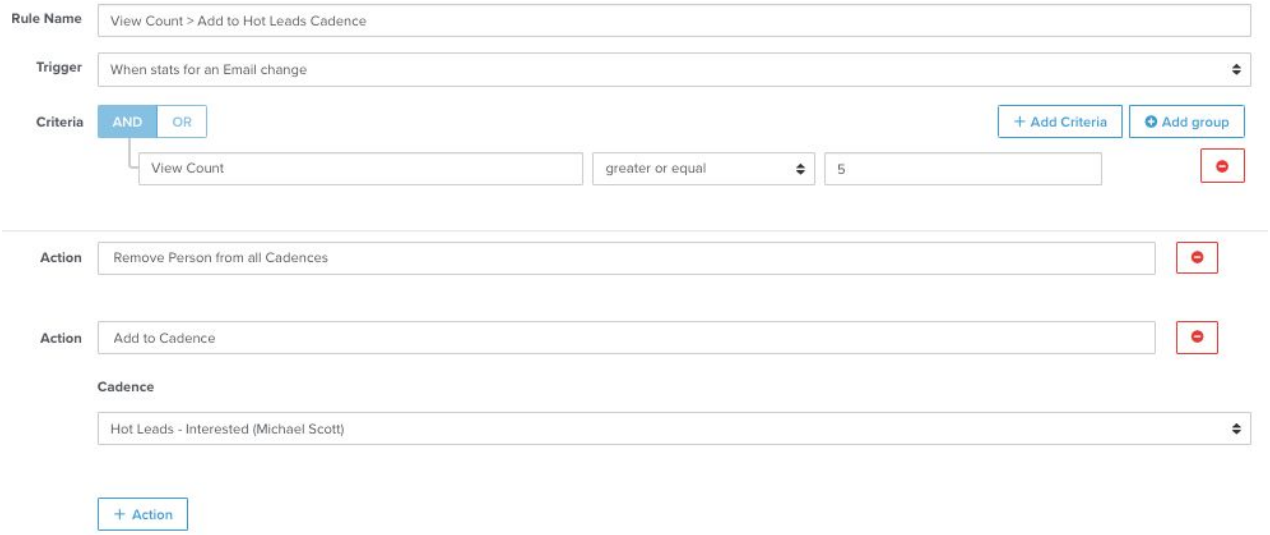


I'm Trying to Move or Remove Prospects Based Upon Email Engagement

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.

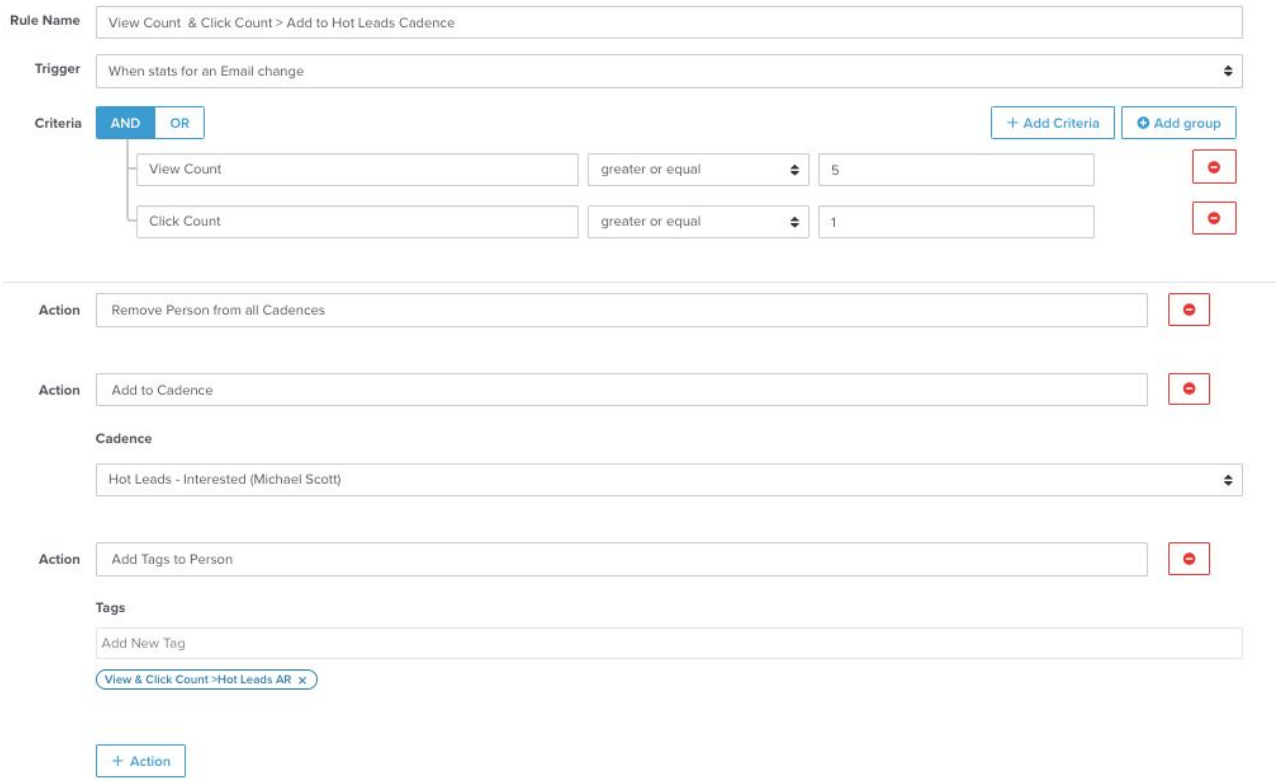
The Basics:

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.



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.

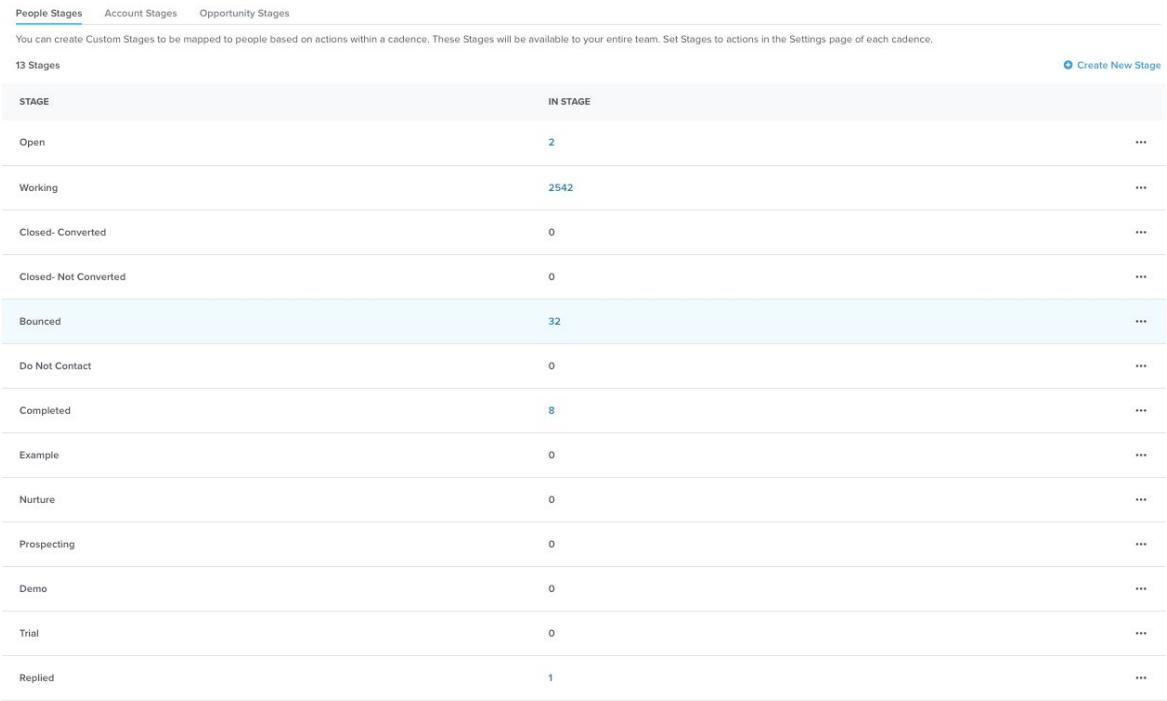


I'm Trying to Move or Remove Prospects to a Nurture Cadence If They Don't Engage

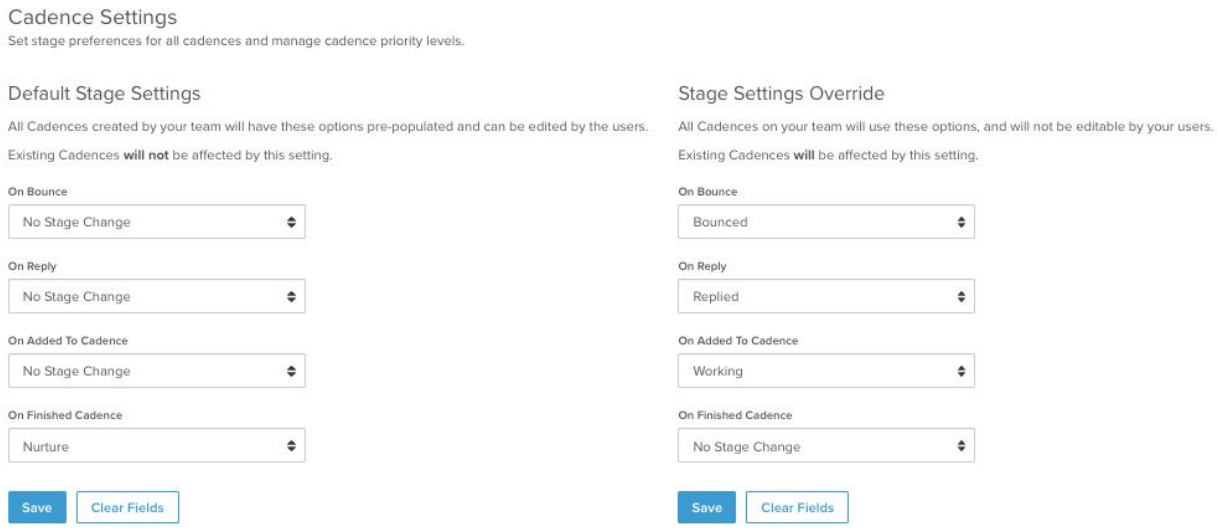
In contrast to a scenario where you move prospects from one cadence to another based upon engagement, you might find it useful to move a prospect to cadences based upon lack of engagement. Imagine a scenario where your prospect completes a cold outreach cadence without engaging and is then placed into 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.

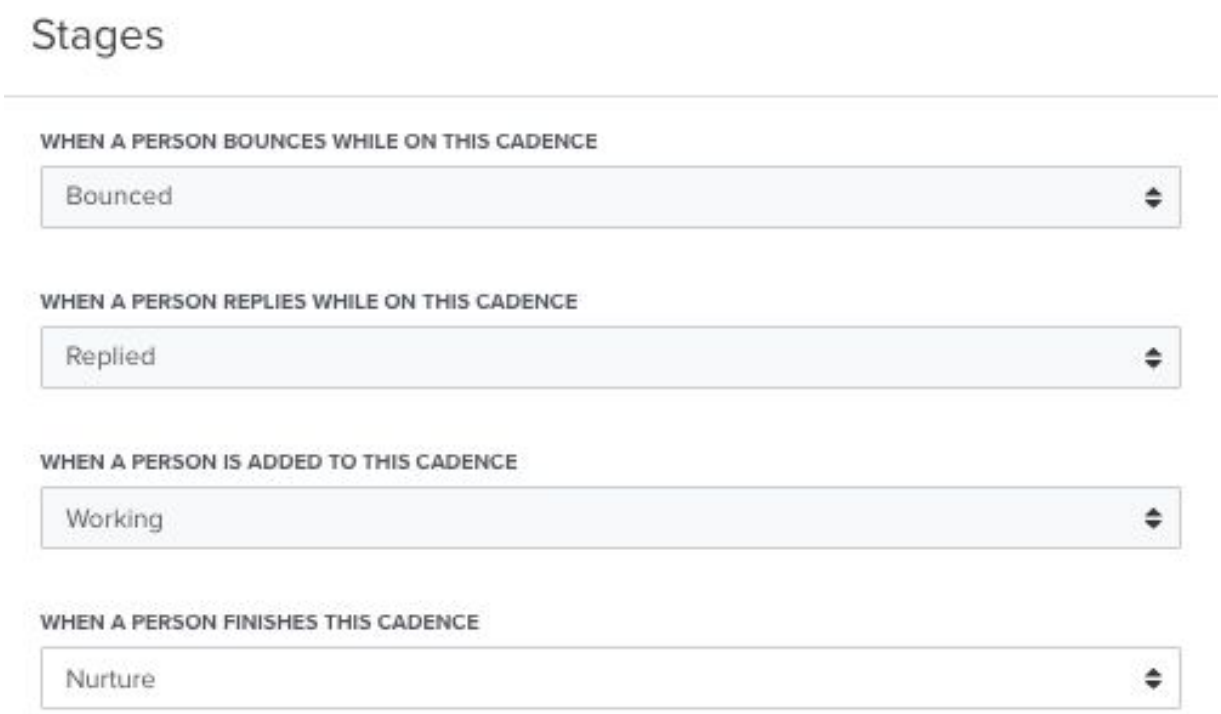
The Basics:

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.

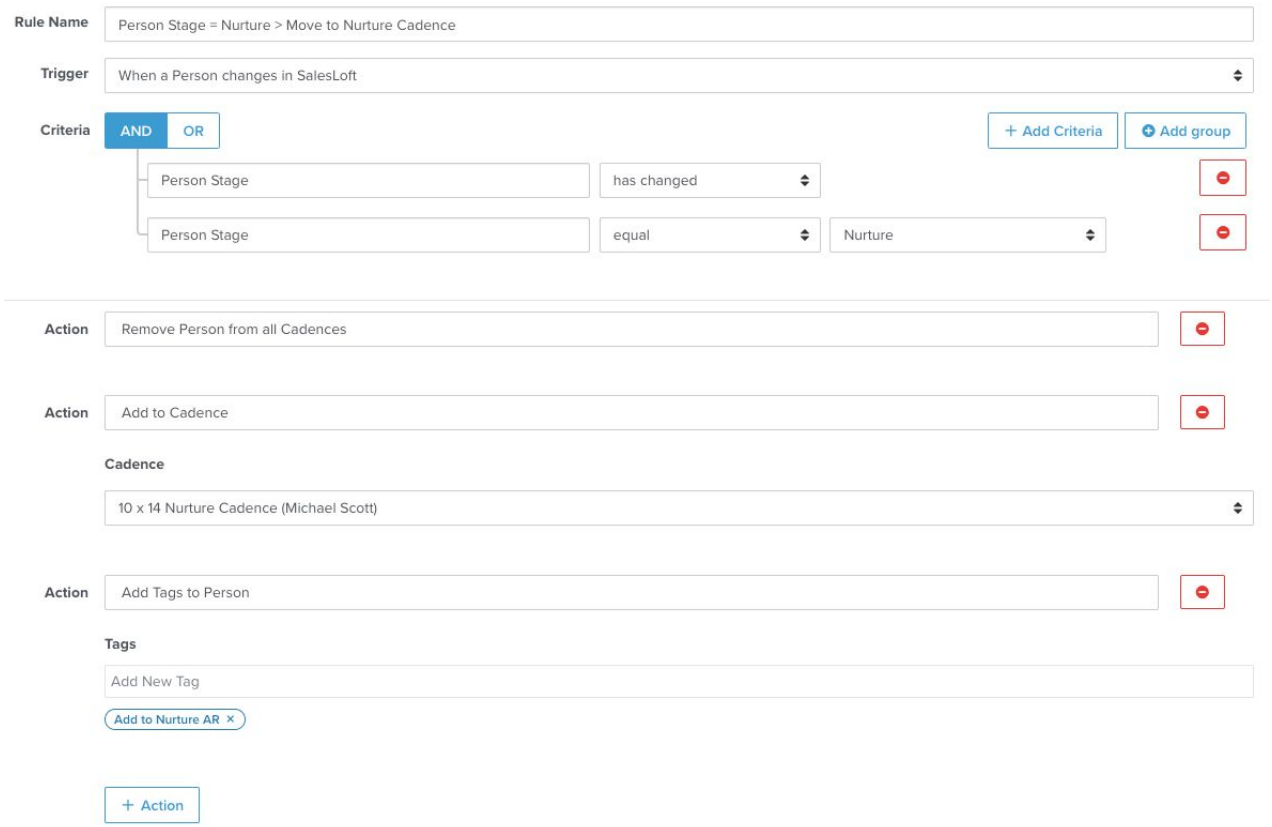


Second, Cadence Settings (adjustable in team admin settings and visible within Cadence Settings within any cadence) establish circumstantial changes to Person Stage when cadence-specific activity occurs. These settings need to be standardized to tee up the automated movement of prospects to a nurture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





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.

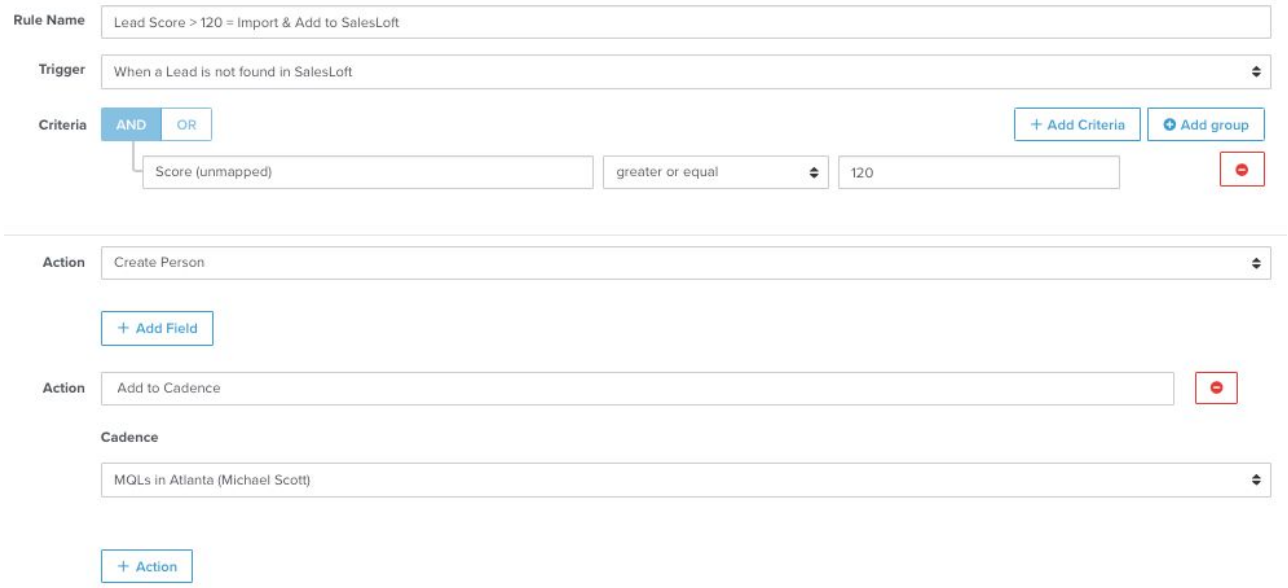


I'm Trying to Import Prospects to SalesLoft Based Upon Lead Score

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.

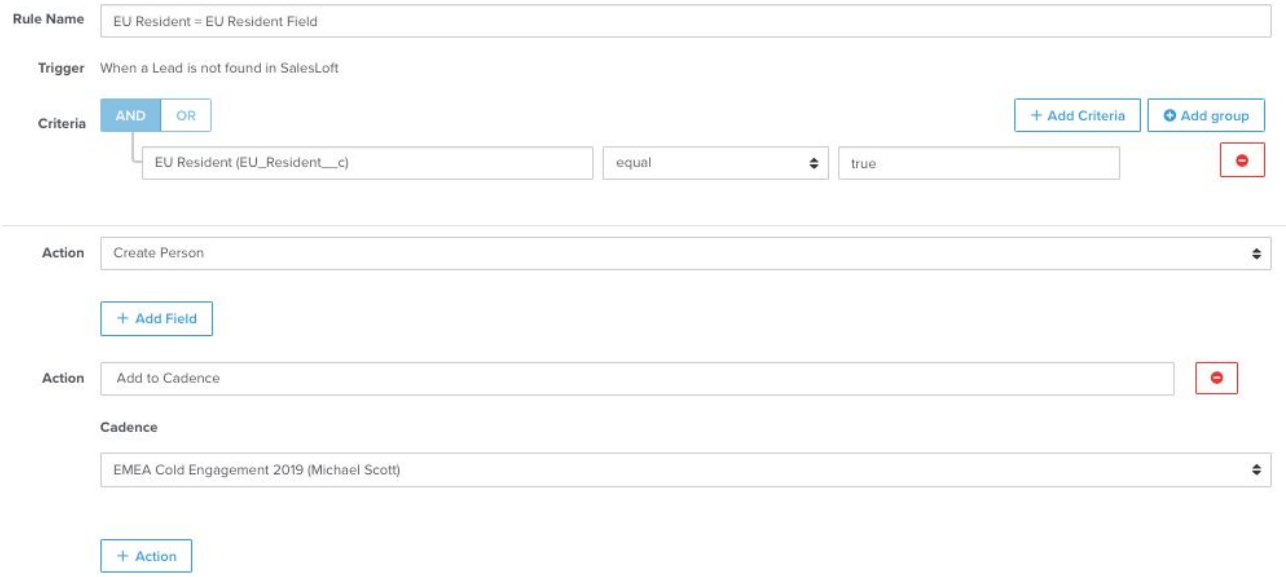


I'm Trying to Ensure GDPR Compliance with EU Prospects

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.

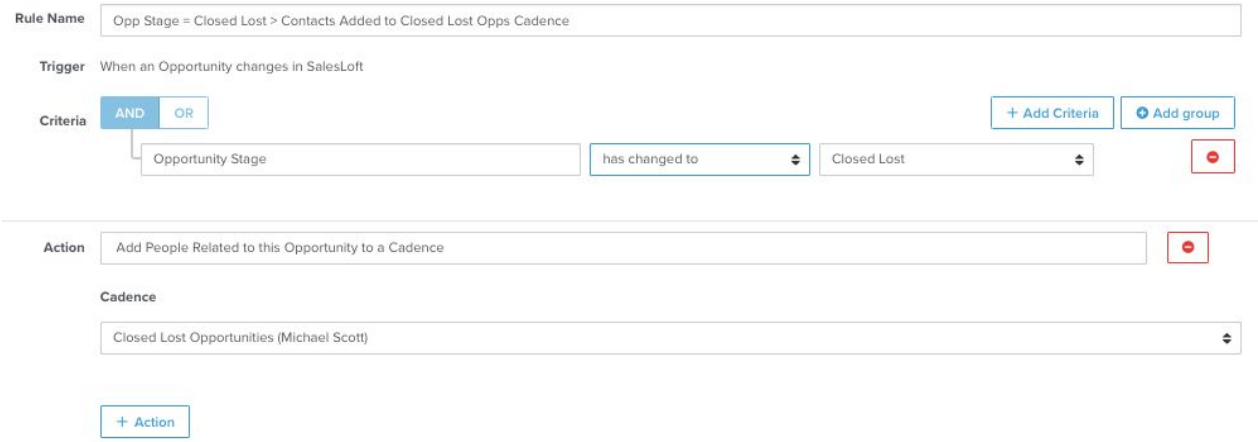


I'm Trying To Make Changes to All Prospects on an Account or Opportunity

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.

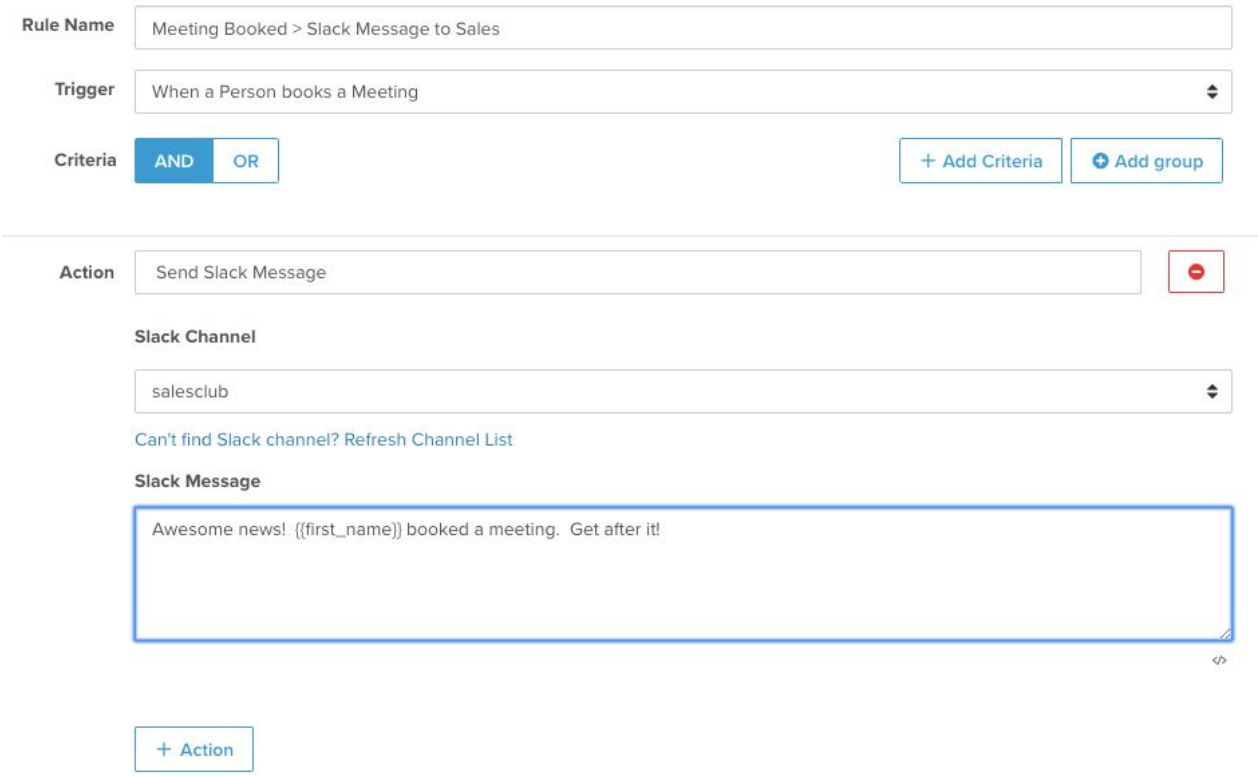


I'm Trying to Send Automated Slack Message Based Upon Prospect Engagement Outcomes

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.



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:

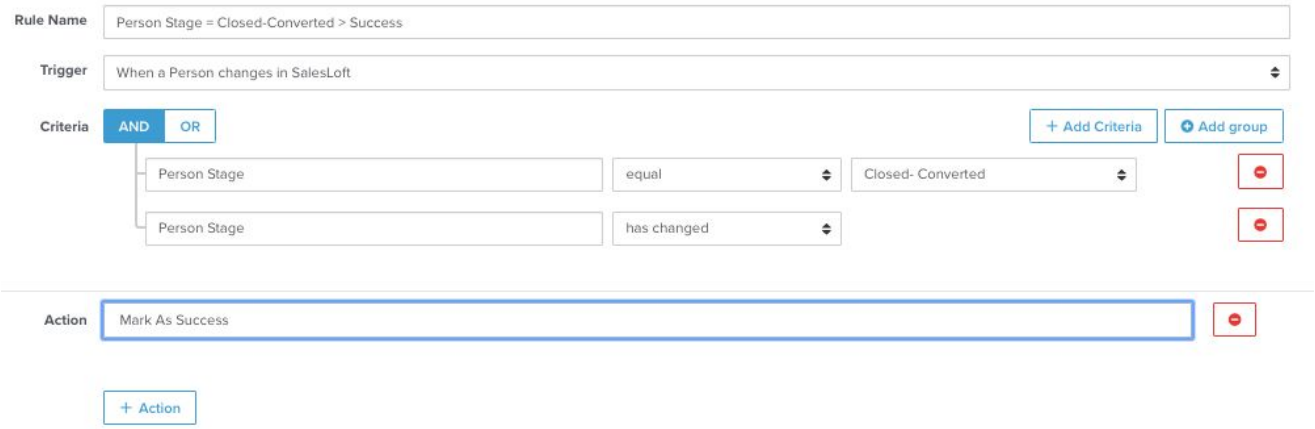
I'm Trying to Standardize the Use of the Success Metric

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.

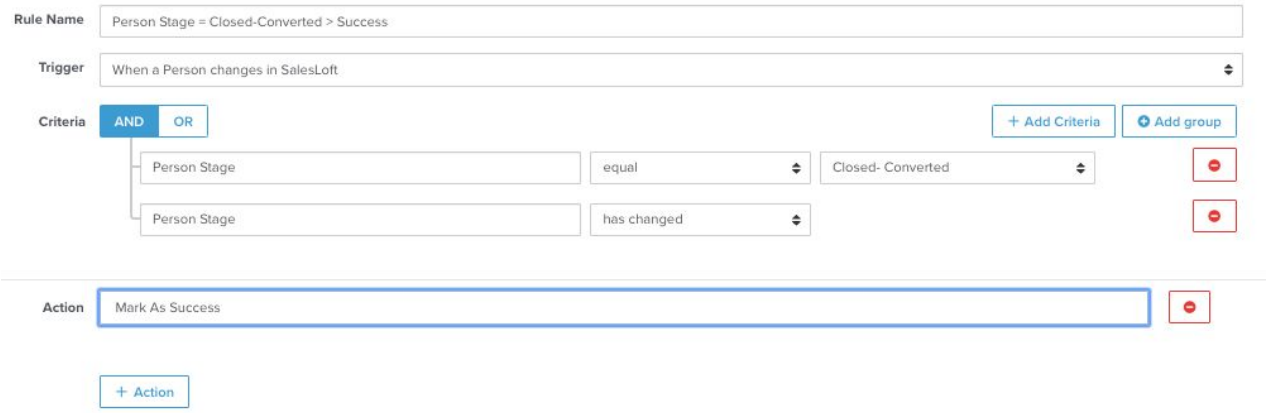
The Basics:

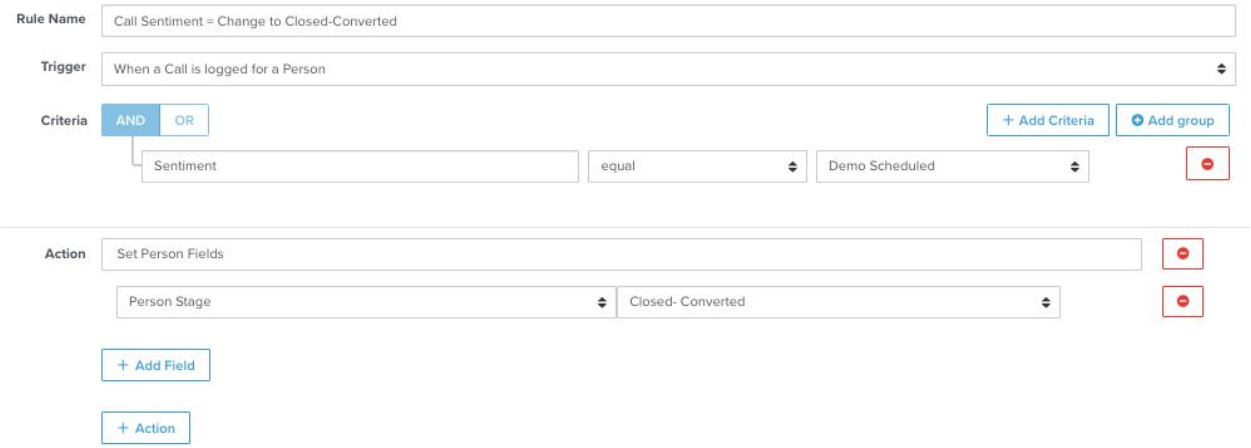
Changes in Person Stage can trigger Success.



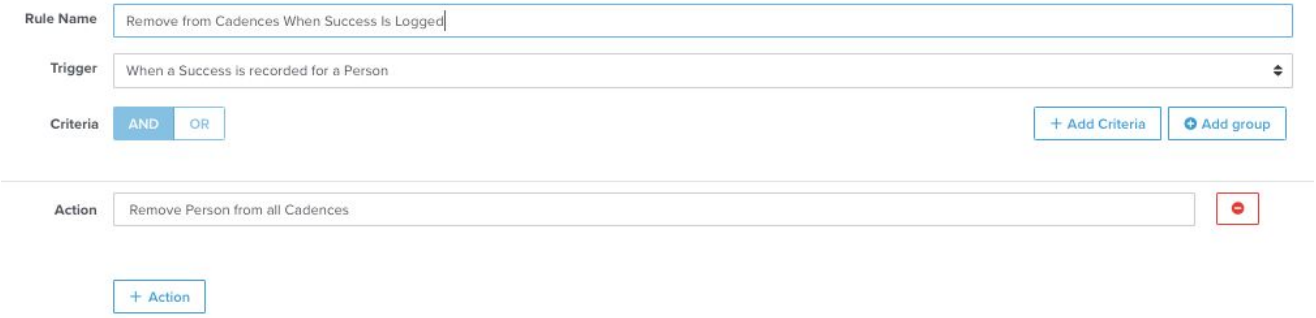
Refine It:

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





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

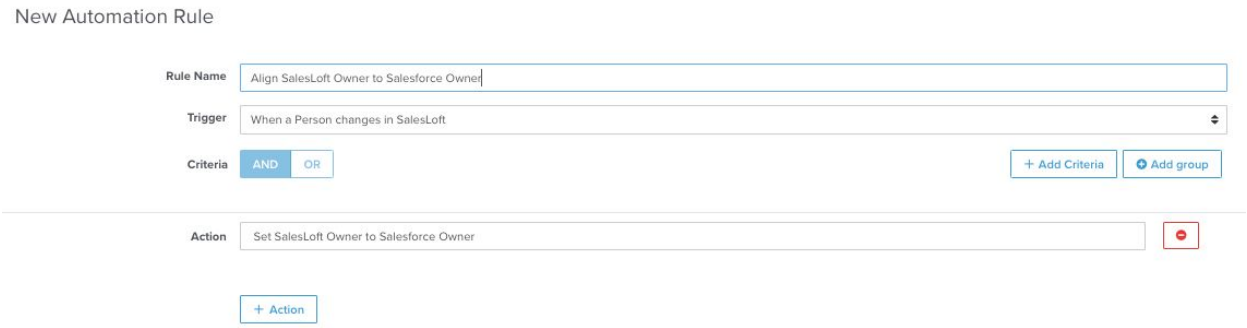


I'm Trying to Align SalesLoft Owner to Salesforce Owner

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.



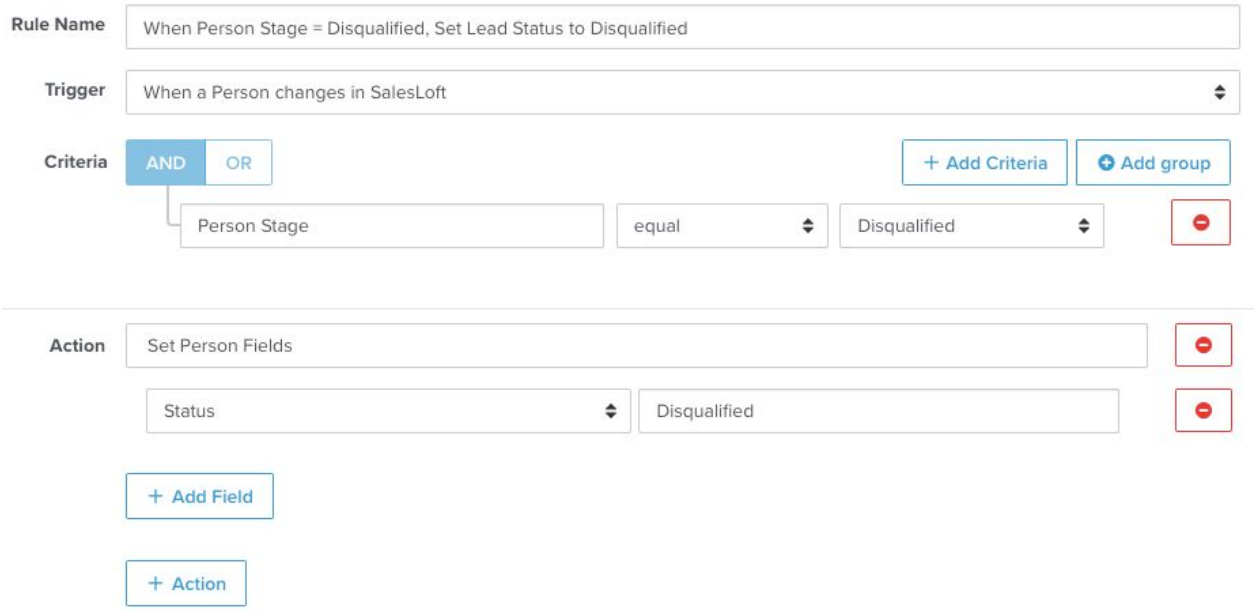
I'm Trying to Align SalesLoft and Salesforce Field Values

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.

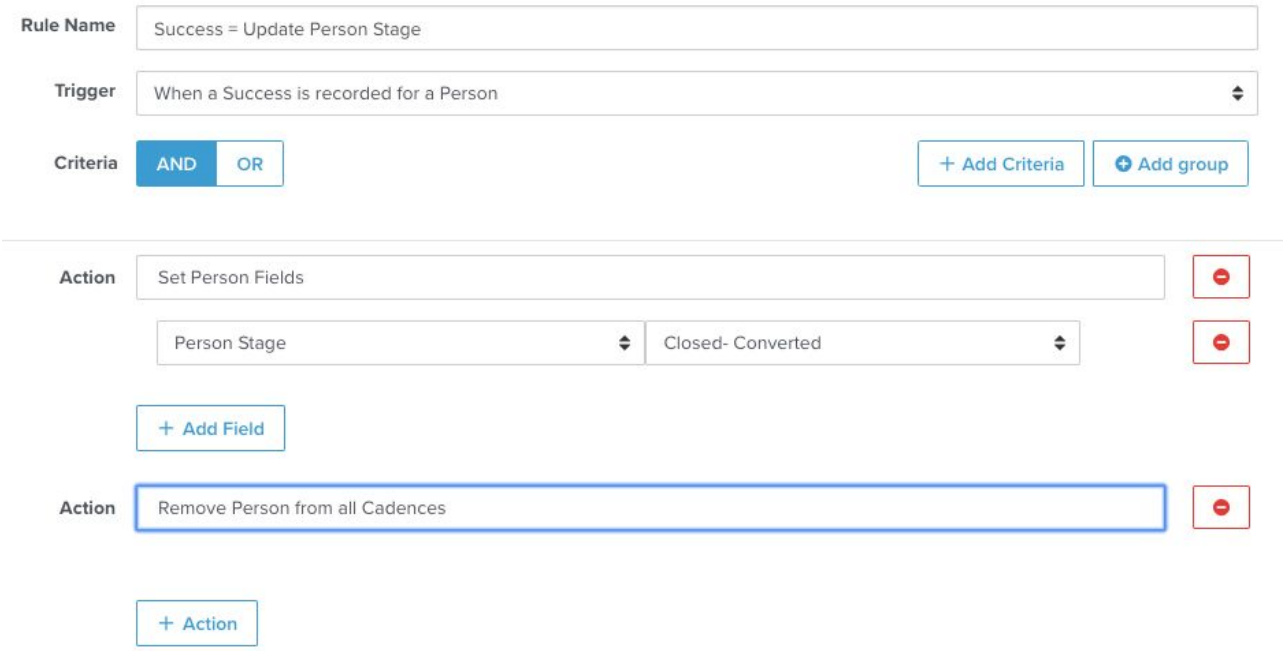


I'm Trying to Update SalesLoft Fields (Person, Stage, etc.)

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.



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 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 Add Tags to Person

Tags

Add New Tag

Removed w/ Success ×

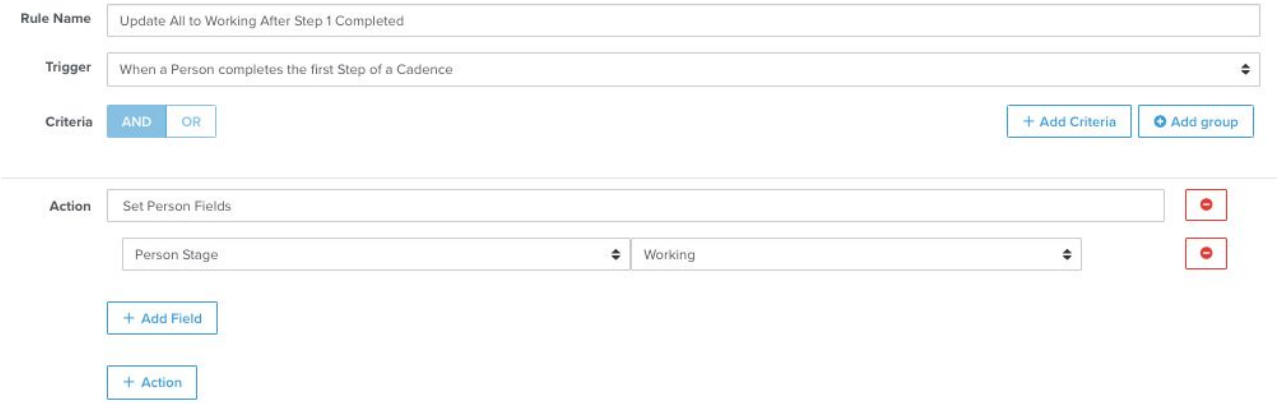
+ Action

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.



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.

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.