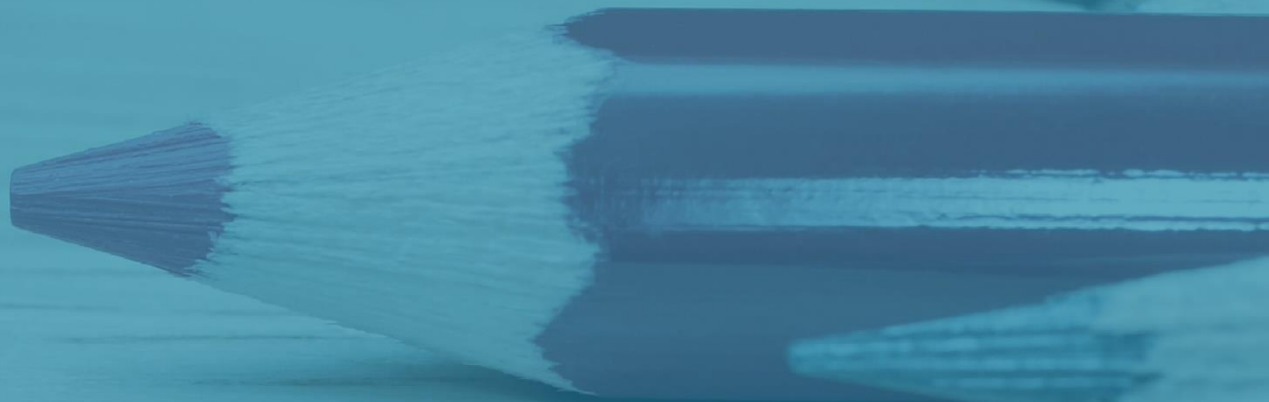


The Getting Started Guide to  
**Contact Changed**



**BNS AiO**

Communication automation

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# Introduction

The Contact Changed element is a powerful new tool that you are able to use via the Contact Relationship Manager section in the BNS AiO 360 Editor, which you can use while building your automated marketing campaign. This element gives you more options in regard to putting your contacts through various campaigns depending on any actions they have taken and decreases the amount of manual maintenance required when your contacts' profile information gets updated.

In this document we will go over the basics of how to begin using the Contact Changed element in your campaigns, as well as an example of a real life situation where you could implement it.

# First things first

To begin using the Contact Changed element in your automated campaign, you first need to know where it can be found.

If you go into your campaign dashboard, you will find the Contact Changed element in the Contact Relationship Manager tab at the top of your workspace. You will only have access to this element if you have at least a Basic BNS AiO 360 account.

The Contact Changed element can only be used as a starting point at the beginning of your campaign. It functions as a trigger to allow contacts to be added to different campaigns, whenever any data in their profile is altered, such as their contact information, or tags and scores.

## How it works

After you insert the Contact Changed element into the beginning of your campaign, enter the Setup Wizard to edit the parameters for the element. In order to access the Wizard, the element must be connected to another element in your campaign.

The element can be set to be trigger a campaign depending on whether a column in the contact's CRM profile has been updated with new information, whether the contact's metadata has been changed, or whether the contact has been added, moved, or removed from any of the lists the element is associated with. You can choose any or all of the aforementioned options and set the parameters for each in the corresponding sections below in the Setup Wizard. The Contact Changed element is limited to the lists that you select to be affected by the element. The element will only trigger whenever the profile information of a contact in one of the associated lists has been altered.

**Column Updated:** When you select to have the Contact Changed element trigger when a column in the customer's CRM profile is updated with new information, you can select which column you wish the element to look at, and to be triggered by. You can select multiple columns from the dropdown menu, such as name, company, country, email, and phone number, and they will be added to the list of columns that will trigger the Contact Changed element. If you do not select which columns you would like to trigger the element, every update to every column will trigger the element.

**Metadata Updated:** When you select the Metadata Updated option in the Setup Wizard, you can choose to have the Contact Changed element triggered whenever any metadata fields are changed in the contact's CRM profile. These fields include any tags or scores given to the contact that are updated automatically as the contact moves through a separate 360 flow. Metadata updates also include email link clicks, email opens, potential value as well as many more options in the drop down list.

## Continued...

You are able to select as many as you like by continuing to choose from the drop down. If you do not select the type of metadata update you would like to trigger the Contact Changed element, every change made to any of the metadata fields will trigger the element.

**Lists Updated:** When you select the Lists Changed option in the Setup Wizard, this means that the Contact Changed element will be triggered anytime a contact on one of its associated lists has either been added to a new list, or when a new contact is added to one of the lists associated with the Contact Changed element. The element will also be triggered when a contact is removed from an associated list, however this only happens if that contact remains on another list that is connected to the element. If the contact is removed from every list that is affected by the Contact Changed element, then they will not be triggered to go through your campaign

Before you exit the Setup Wizard, you must always select at least one list that will be affected by the Contact Changed element. You can do this by selecting from the drop down menu in the Select Lists field at the bottom of the Wizard.

# Narrow your campaigns

If you choose to use the Contact Changed element with just the settings you've chosen in the Setup Wizard, any time the selected column or data field is changed for a particular contact, the trigger will be set off. By adding a Decision element and/or a Duplicate Filter element into your campaign following the Contact Change element, you can make the triggers more specific and succinct.

Adding the Decision element to your campaign allows you to decide the exact change to the contact information will trigger the Contact Changed element. For example, you can use the Decision element, found in the Decisions and Delays tab at the top of your workspace, to trigger the Contact Changed element whenever the contact is tagged with a specific keyword. This is useful because rather than having the element triggered any time a contact is tagged with anything, you are able to use the decision to narrow it down to cut back on the total number of triggers enabled.

The Duplicate Filter element, also found in the Decisions and Delays tab, allows you to prevent the same contact from being sent into the campaign more than once if the Contact Changed element keeps being triggered after multiple updates to their profile. Chances are you only want your contact to be sent through this campaign once, and not every time a change is made to their profile. The Duplicate Filter element allows you to prevent this from happening by recognizing the same contact information from the CRM and not allowing the trigger to be activated again.

## Works with Sonar

One of the many neat things about the Contact Changed element is the fact that you can set it to react to Sonar metadata updates automatically (within the Decision element), so you don't have to manually trigger the element each time Sonar updates the contact's profile with tags, scores, email opens and other information, or whenever the software creates a new profile. However, the Contact Changed element only works with known contacts in your CRM and will not be triggered by contacts only known by their unique IP address. Once the contact becomes known through the use of a signup form, for example, and the collected Sonar information is merged with the contact, then the contact will be able to be triggered to enter a campaign by the Contact Changed element (provided they are on the corresponding list).

To use Sonar data as a means to trigger the Contact Changed element, you first need to insert either a tracking link or a tracking pixel onto the webpage or into the email you would like to track information for. The link or pixel can be set to add a tag or score to the contact whenever they land on the page or open the link in the email. Then, you need to set up the limits for the Contact Changed element for when you want the element to be triggered.

## Continued...

To do this, since most Sonar information collected is metadata-related, you must choose the appropriate metadata option in the dropdown in that field in the Setup Wizard, for example, Tags or Scoring. To make sure your contacts are not being sent through your campaign every time they visit the page or open a link, you will need to add the Decision element to specify the metadata option you want to trigger the campaign – for example the score or tag that you used while creating your tracking link or pixel.

Finally, you will need to add a Duplicate Filter element to make sure the contact is only sent through the campaign once and not every time they are tagged with that word or phrase.

# When to use

So, how do you put the Contact Changed element into practice?

Say you are part of a company who moves furniture for your clients. The Contact Changed element could be a useful tool for you to use in order to determine potential clients from your lists of contacts.

For example, you could create a campaign to send an email whenever a contact changes his or her address, offering your services to them at a discounted rate.

To do this, you would begin your campaign with the Contact Changed element. Then drag in your next element, which will most likely be a Duplicate Filter. Once you have connected the two, go into the Setup Wizard for the Contact Changed element and check off that you wish the element to be triggered whenever a column updates in the client's CRM profile. Then you will want to select the column in the Column Updated field that you would like the element to look at in order to trigger your email campaign. For instance, you may want to select the City column, or Address columns so that the element will know to trigger the campaign whenever a contact's residence changes. After that, you must select the lists of contact that you want to be affected by this campaign. Only the contacts in the lists you select will be triggered to go through the campaign if their address changes.

When you have set up these parameters, you can return to your workspace and proceed with creating your campaign. Following the Contact Changed element, depending on whether you would like to offer your contact the same offer or promotion whenever these fields in their profile is changed, you may want to insert a Duplicate Filter element to make sure that the contact only gets sent through the campaign once. Then, following this element, you can insert an email campaign element where you can go in and create the email you would like to send to your clients once they have been triggered to enter into the campaign be the Contact Changed element.

Following this, once the campaign is activated, any time a contact in one of the lists you have selected updates their residence columns in the CRM (either via a signup form or other means), the Contact Changed element will be triggered to send this contact through the campaign to receive the email with the discounted moving offer.



# Conclusion

The potential use for the Contact Changed element is almost unlimited. You can use it to easily enter contacts into the appropriate flows depending on the information found in their CRM profiles, without having to manually update which campaigns each contact belongs in following changes to their information. This way, you can manage all the contact profile updates automatically and don't have to worry about list maintenance or upkeep.

If you would like to see how the Contact changed element can help improve the efficiency of your marketing automation campaigns, upgrade your BNS AiO account to the Basic level or above.

# Thanks!

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