

Audience and Governance

Risk without governance

Without eligibility controls, active customers and partners risk entering the outreach funnel — creating brand damage, compliance exposure, and misalignment with GBU preferences.

Cold Lead Definition

A Cold Lead is a Salesforce Lead record where Cold_Lead__c = TRUE. Eligibility is determined automatically by Salesforce automation based on the criteria below. All conditions must be satisfied simultaneously.

Criteria	Rule	SFDC Field / Check
Not a customer	No active commercial relationship	Absence of Lead Related contacts
Not a partner	Excluded from all outreach	Absence of Lead Related contacts
No recent engagement	No meaningful touchpoint in agreed window (per GBU)	Last Activity > 365 days
Not hard bounced	Email address must be deliverable	overall_hard_bounced__c = FALSE
Not unsubscribed	Opted in to email — mandatory for GDPR	HasOptedOutOfEmail = FALSE

Eligibility Decision Tree

Apply each check in order. If any exclusion criterion is TRUE, the Lead is ineligible (Cold_Lead__c = FALSE). All exclusions must pass before positive rules are evaluated.

#	Check	If TRUE	If FALSE
1	Lead exists in Salesforce	Proceed to next check	—
2	HasOptedOutOfEmail = TRUE?	Exclude (Cold_Lead__c = FALSE)	Continue to step 3
3	OverallHardBounce__c = TRUE?	Exclude (Cold_Lead__c = FALSE)	Continue to step 4
4	Lead email domain matches a known Customer contact domain?	Exclude (Cold_Lead__c = FALSE)	Continue to step 5
5	Status = 'Unqualified'?	Cold_Lead__c = TRUE	Continue to step 6
6	Last_Interaction_Date__c is NULL or older than 365 days?	Cold_Lead__c = TRUE	NOT a Cold Lead (Cold_Lead__c = FALSE)

Logic Summary

The following Boolean expression governs Cold Lead eligibility. This logic is implemented in Salesforce automation on the Cold_Lead__c field.

```
Cold_Lead__c = TRUE when:  
  
NOT HasOptedOutOfEmail  
AND NOT OverallHardBounce__c  
AND NOT [Customer Domain Match]  
  
-- If 1+ related contacts share a customer domain, this condition is TRUE (excluded)  
  
AND (  
  Status = 'Unqualified'  
  OR Last_Interaction_Date__c IS NULL  
  OR Last_Interaction_Date__c < TODAY - 365  
)
```

Automation

The Cold_Lead__c Boolean field is automatically calculated and updated by Salesforce automation. MARCOM can filter directly on Cold_Lead__c = TRUE when building campaign audiences or reports — no manual eligibility checks are required.

The Customer Domain Match exclusion reuses the logic of related Lead contacts. If a Lead has 1 or more related contacts whose email domain matches a known Customer contact domain, the Lead is automatically excluded.

Campaign Setup Checklist (Eligibility Gate)

1. Set **Campaign.AI_Outreach__c = TRUE** in Salesforce to scope the campaign correctly. All downstream reports and dashboards use this flag.
2. Add Members to the campaign depending on the scope and segmentation of the campaign.
3. Run the eligibility report — confirm all Campaign Members have Cold_Lead_Eligible__c = TRUE before export.
4. Confirm GBU-specific exclusions — some GBUs maintain additional exclusion lists. Verify with the responsible MARCOM contact.
5. Export using the approved report — use 'SFDC Campaign Member Export for Clay Import'. This report always includes CampaignMemberId and LeadId as stable mapping keys. (KLN-23)

The screenshot shows the Salesforce Campaign Setup interface for a campaign named "AI - Outreach Test". The "Campaign Information" section is expanded, showing various fields and their values. The "AI Outreach" checkbox is checked and highlighted in green.

Field	Value
Campaign Name	AI - Outreach Test
GBU	Specialty Polymers
Campaign code	BL202630667
Channel Type	Other
Market Cluster	
Market	
Fast Track Form	
Campaign Segmentation	AI Outreach
Campaign Owner	Nestor Teijeiroprado
Parent Campaign	AI - Outreach Test
Description	
Status	Active
Start Date	3/11/2026
End Date	
Campaign Currency	EUR - Euro
Region	

AI Identity Guidelines

All AI outreach must clearly identify whether the sender is a real person or a virtual agent. This prevents brand risk, recipient confusion, and escalation gaps. (KLN-8)

Scenario	Rule	Owner
Virtual AI agent as sender	Must be disclosed as AI-generated outreach. No impersonation of named employees.	MARCOM
Real person as sender	Permitted only with explicit approval from that person's manager and GBU lead.	GBU Lead
Escalations & replies	All positive or ambiguous replies must route to a named human owner within agreed SLA.	Sales / MARCOM
GBU misalignment	GBUs may opt out of virtual agent identity. Confirm preference during campaign setup.	MARCOM Ops
Tone & disclaimers	Outreach must not misrepresent the AI's role. Approved templates must be used.	MARCOM

Enrichment field governance

Clay may write back enrichment data (Company Description, Industry) to Salesforce only after Legal/DPO approval is confirmed. Fields company_description__c and Industry are provisioned with least-privilege access. (KLN-24)