

Gong Flows in SFDC

Introduction [↗](#)

Gong provides a handful of default syncing features to connect to Salesforce: It can sync activities like emails and calls, you can set up a frame to be able to see the Gong UI on the record page, it gives you buttons and direct links for better navigation. Gong also has a strong feature, it can provide account managers automated sequences, called Flows.

Gong Flow data is synced as well, but they don't appear by default on the records and there are no cool features where you can pull nice reports upon the performance of your Flows. In Gong you have an Analytics tab, where you can see some summarized Flow performance, but it's very high-level overview imo.

In this article, I am going to present you a dashboard that was built upon a custom object I created called "Gong flow" and the "Campaign" standard object.

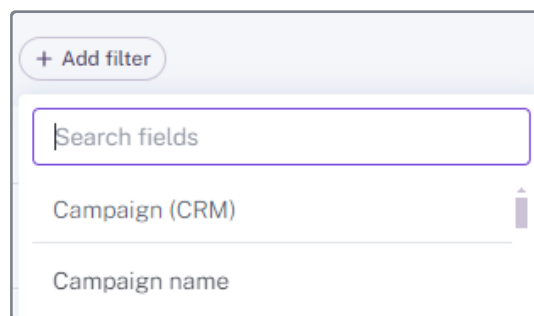
Main objectives [↗](#)

1. Being able to **segment contacts** for mass-enrolling contacts in Gong to be participants of the Gong flow and send them automated emails in a sequence
2. Being able to **pull detailed reports** based on the participants and the flow process.

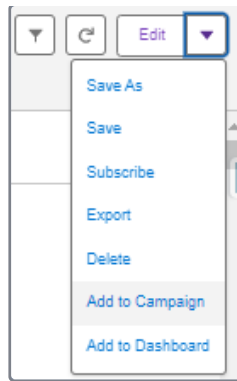
Segment Contacts - Salesforce Campaign [↗](#)

In Gong you have the option to filter the Contacts or Leads by fields such as the owner, country etc. and luckily they added the option to filter them by Campaign name. This opens the possibility to

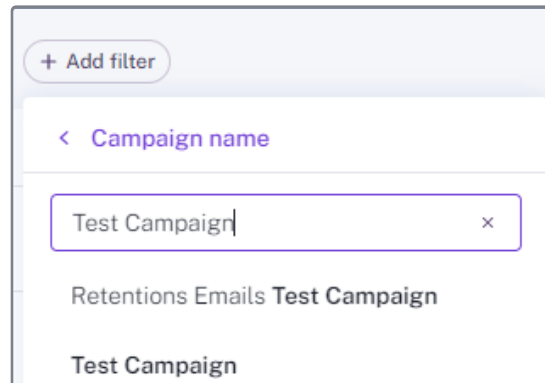
1. Create a report to determine your audience based on specific criteria



2. Add the filtered Contacts/Leads as Campaign members
-



3. Choose the Campaign you created for that purpose and enrol them in Gong as participants of the Gong Flow.



Pull detailed reports [↗](#)

To be able to do that, you need to control/use the synced fields of the “Gong flow” object and the Campaign object.

“Gong flow” object [↗](#)

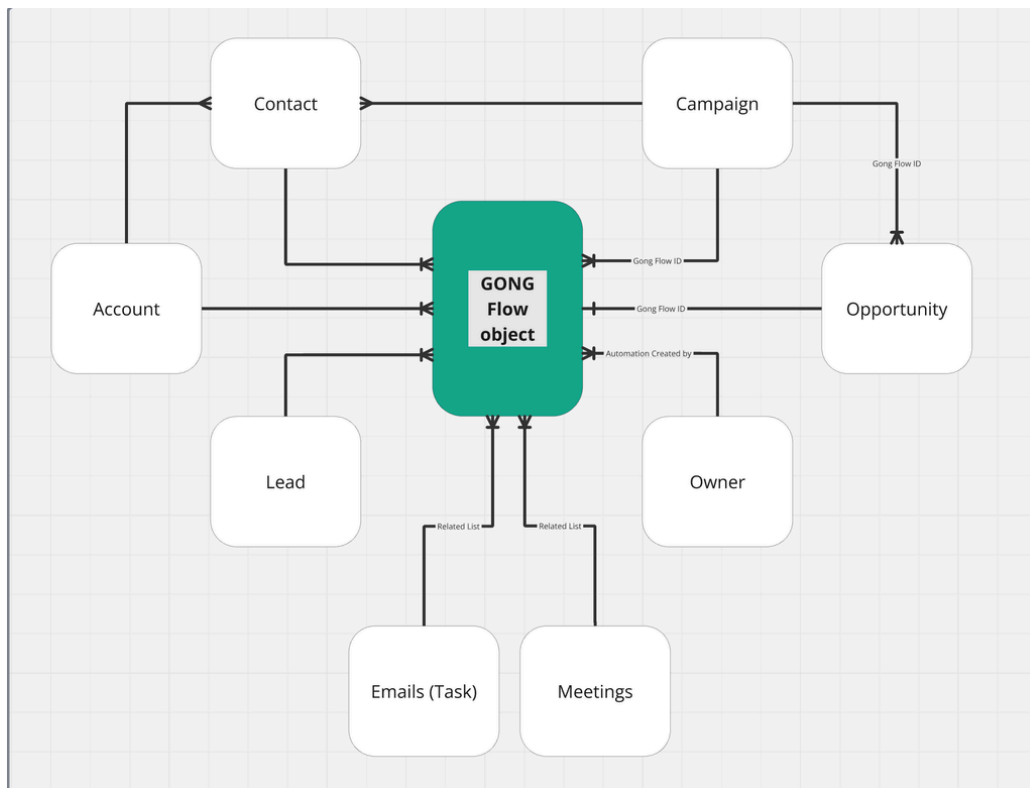
This object will be the container of all the related data, that is created every time, whenever someone is added to one of the flows in Gong. The basic idea came from the fact, that the new flow enrolments overwrite data on lead/contact level. It is useful to keep all the relevant data in one place and to relate this object with others we want to report on, without changing anything on the other objects.

1. Create the custom object

<div> <div>Setup</div> <div>Home</div> <div>Object Manager</div> </div> <div> <div>Object Manager</div> <div>1 item, Sorted by Label</div> </div> <div> <div>gong flow</div> <div>Schema Builder</div> <div>Create</div> </div>					
Label	API Name	Type	Description	Last Modified	Deployed
Gong Flow	Gong_Flow__c	Custom Object	This object is for storing records of contact Gong flow enrolments (since the new flow enrolments overwrite data on lead/contact level)	11/6/2024	✓

2. Create relationship map

The following map has been created to track to creation of relationships



Gong Flow
GF-000002135

Related Details

Gong Flow Number	GF-000002135	Owner	Daniel Szaloczi
Gong Flow Name	Test	Engage Flow Status	
Date Added to Engage Flow		Engage Step Type	
Currently in Engage Flow	<input type="checkbox"/>	Engage Step Number	

Associated Record

Lead	Campaign
Contact	Opportunity
Account	
Engage Flow ID	Created By
Added to Engage Flow By	Last Modified By

Created By: Daniel Szaloczi - 2/7/2025 5:12 AM
Last Modified By: Daniel Szaloczi - 2/7/2025 5:12 AM

3. Add fields based on the map and the documentation

There are 3 types of fields I have on this custom object:

- Captured data synced from Gong to Salesforce, you can see the documentation [here](#).
- Fields added by Salesforce automatically
- Fields I created for the purpose of relationships (lookup fields) or process support fields (handler).

Field Label	Field Name	Data Type	Description
Account	Account__c	Lookup(Account)	Lookup field to be able to relate with the Account object
Campaign	Campaign__c	Lookup(Campaign)	Lookup field to be able to relate with the Campaign object
Contact	Contact__c	Lookup(Contact)	Lookup field to be able to relate with the

			Contact object
Currently in Engage Flow	Currently_in_Engage_Flow__c	Checkbox	Captured data synced from Gong to Salesforce
Date Added to Engage Flow	Date_Added_to_Engage_Flow__c	Date	Captured data synced from Gong to Salesforce
Engage Flow ID	Engage_Flow_ID__c	Text(30)	Captured data synced from Gong to Salesforce
Engage Flow Owner	Engage_Flow_Owner__c	Text(80)	Captured data synced from Gong to Salesforce
Engage Flow Status	Engage_Flow_Status__c	Picklist	Captured data synced from Gong to Salesforce
Engage Step Attempt ID	Engage_Step_Attempt_ID__c	Text(80)	Captured data synced from Gong to Salesforce
Engage Step Completion Date	Engage_Step_Completion_Date__c	Date	Captured data synced from Gong to Salesforce
Engage Step Number	Engage_Step_Number__c	Text(10)	Captured data synced from Gong to Salesforce
Engage Step Type	Engage_Step_Type__c	Text(80)	Captured data synced from Gong to Salesforce
Gong Flow Name	Gong_Flow_Name__c	Text(255)	Captured data synced from Gong to Salesforce
Gong Flow Number	Name	Auto Number	Captured data synced from Gong to Salesforce
Handler - Gong Flow Update	Handler_Gong_Flow_Update__c	Number(18, 0)	Created to trigger Salesforce Flows when updating with Dataloader
Lead	Lead__c	Lookup(Lead)	Lookup field to be able to relate with the Lead object

Number of Active Engage Flows	Number_of_Active_Engage_Flows__c	Number(18, 0)	Captured data synced from Gong to Salesforce
Opportunity	Opportunity__c	Lookup(Opportunity)	Lookup field to be able to relate with the Opportunity object

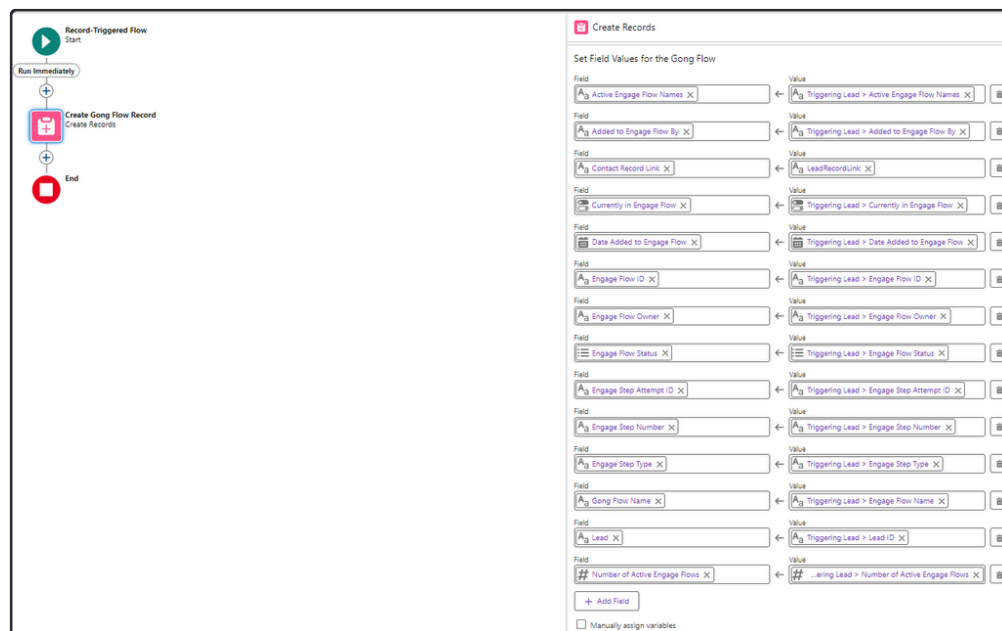
The Campaign object also needs a GONG ID field.

Field Label	Field Name	Data Type	Description
Engage Flow ID	Engage_Flow_ID__c	Text(30)	This will be the connection to identify Gong Flow records and Campaigns.

4. Create Flows in Salesforce

To be able to get all the data I need on the Gong flow record, I built the following flows:

1. Create the records for Leads / Contacts: whenever they enroll in a new Gong Flow.



Record-Triggered Flow

Start

Run Immediately

Create Gong Flow Record
Create Records

End

Create Records

*Object
Gong Flow

Set Field Values for the Gong Flow

Field	Value
Account Record Link X	AccountRecordLink X
Active Engage Flow Names X	Triggering Contact > Active Engage Flow Names X
Added to Engage Flow By X	Triggering Contact > Added to Engage Flow By X
Contact Record Link X	ContactRecordLink X
Contact X	Triggering Contact > Contact ID X
Currently in Engage Flow X	Triggering Contact > Currently in Engage Flow X
Date Added to Engage Flow X	Triggering Contact > Date Added to Engage Flow X
Engage Flow ID X	Triggering Contact > Engage Flow ID X
Engage Flow Owner X	Triggering Contact > Engage Flow Owner X
Engage Flow Status X	Triggering Contact > Engage Flow Status X
Engage Step Attempt ID X	Triggering Contact > Engage Step Attempt ID X
Engage Step Number X	Triggering Contact > Engage Step Number X
Engage Step Type X	Triggering Contact > Engage Step Type X
Gong Flow Name X	Triggering Contact > Engage Flow Name X
Number of Active Engage Flow X	Triggering Contact > Number of Active Engage Flow X

2. Update the records for Leads / Contacts: whenever they advance a step in the Flow.

Record-Triggered Flow

Start

Run Immediately

Update Field Values
Update Records

End

Update Records

*Label
Update Field Value

*API Name
Update_Field_Value

Description

*How to Find Records to Update and Set Their Values

- ☐ Use the lead record that triggered the flow
- ☐ Update records related to the lead record that triggered the flow
- ☐ Use the ID and all field values from a record or record collection
- ☒ Specify conditions to identify records, and set fields individually

Update Records of This Object Type

*Object
Gong Flow

Filter Gong Flow Records

Condition Requirements to Update Records
All Conditions Are Met (AND)

Field	Operator	Value
EngageFlowID_c	Equals	Triggering Contact > Engage Flow ID X

+ Add Condition

Set Field Values for the Gong Flow Records

Field	Value
Engage_Flow_Status__c	Triggering Contact > Engage Flow Status X
Engage_Step_Number__c	Triggering Contact > Engage Step Number X
Engage_Step_Type__c	Triggering Contact > Engage Step Type X

+ Add Field

Record-Triggered Flow

Start

Run Immediately

Update Field Values

Update Records

End

Update Records

Label

Update Field Values

API Name

Update_Field_Values

Description

*How to Find Records to Update and Set Their Values

☐ Use the contact record that triggered the flow
 ☐ Update records related to the contact record that triggered the flow
 ☐ Use the IDs and all field values from a record or record collection
 ☒ Specify conditions to identify records, and set fields individually

Update Records of This Object Type

*Object

Gong Flow

Filter Gong Flow Records

Condition Requirements to Update Records

All Conditions Are Met (AND)

Field

Account__c

Operator

Equals

Value

{!\$Record > Account ID > Assoc. X}

Field

Engage_Flow__c

Operator

Equals

Value

{!\$Record > Engage Flow ID X}

+ Add Condition

Set Field Values for the Gong Flow Records

Field

Engage_Flow_Status__c

Value

{!\$Record > Engage Flow Status X}

Field

Engage_Step_Number__c

Value

{!\$Record > Engage Step Number X}

Field

Engage_Step_Type__c

Value

{!\$Record > Engage Step Type X}

+ Add Field

3. Create association Flows. Account, Campaign, Meeting, Opportunity, Task.

Record-Triggered Flow

Start

Run Immediately

Update Account Association

Update Records

End

Update Records

Label

Update Account Association

API Name

Update_Account_Association

Description

*How to Find Records to Update and Set Their Values

☒ Use the gong flow record that triggered the flow
 ☐ Update records related to the gong flow record that triggered the flow
 ☐ Use the IDs and all field values from a record or record collection
 ☐ Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Gong Flow Record

Field

Account__c

Value

{!\$Record > Contact > Account ID > Account ID X}

+ Add Field

Record-Triggered Flow

Start

Run Immediately

Get Campaign

Get Records

Found Campaign?

Decision

Yes

Update Flow with Campaign

Update Records

End

Default Outcome

End

Get Records

Label

Get Campaign

API Name

Get_Campaign

Description

Get Records of This Object

*Object

Campaign

Filter Campaign Records

Condition Requirements

All Conditions Are Met (AND)

Field

Gong_Flow__c

Operator

Equals

Value

{!\$Record > Engage Flow ID X}

+ Add Condition

Sort Campaign Records

Sort Order

Not Sorted

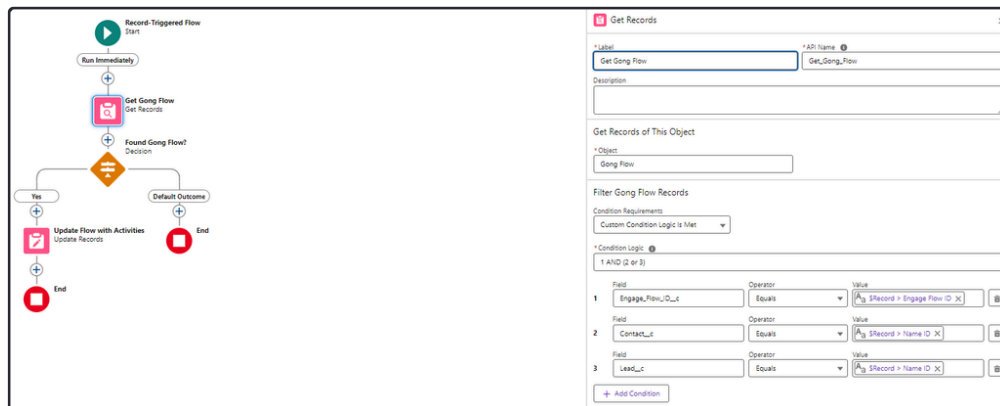
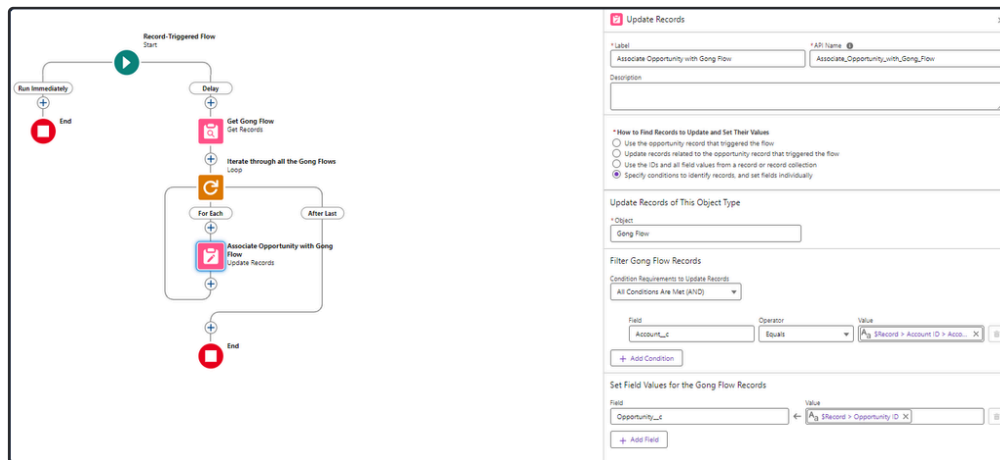
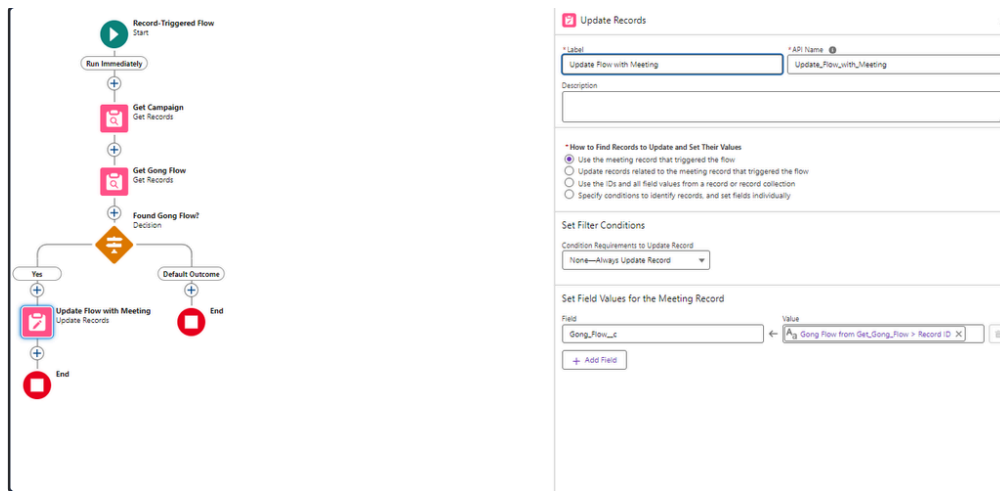
⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

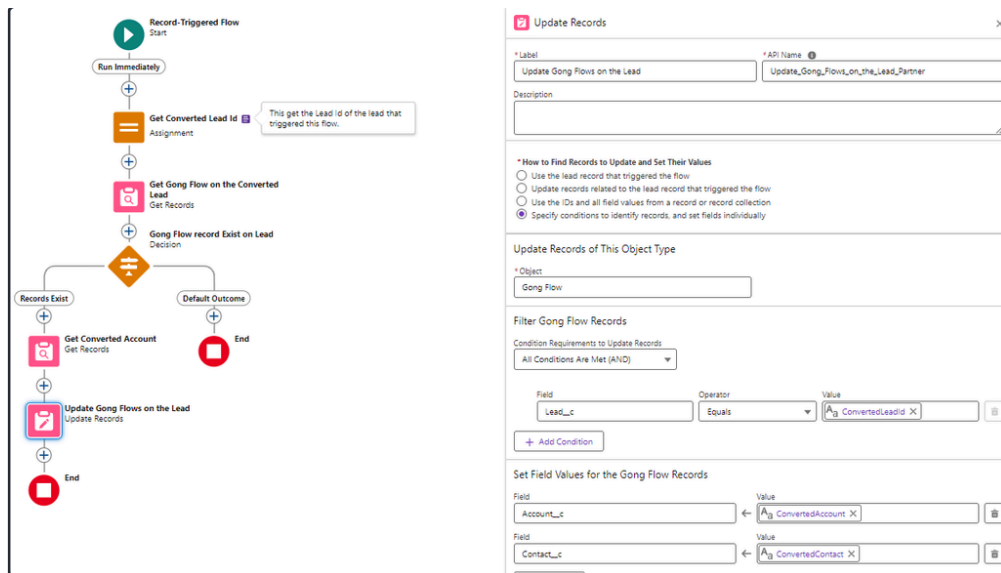
☒ Only the first record
 ☐ All records, up to a specified limit
 ☐ All records

How to Store Record Data

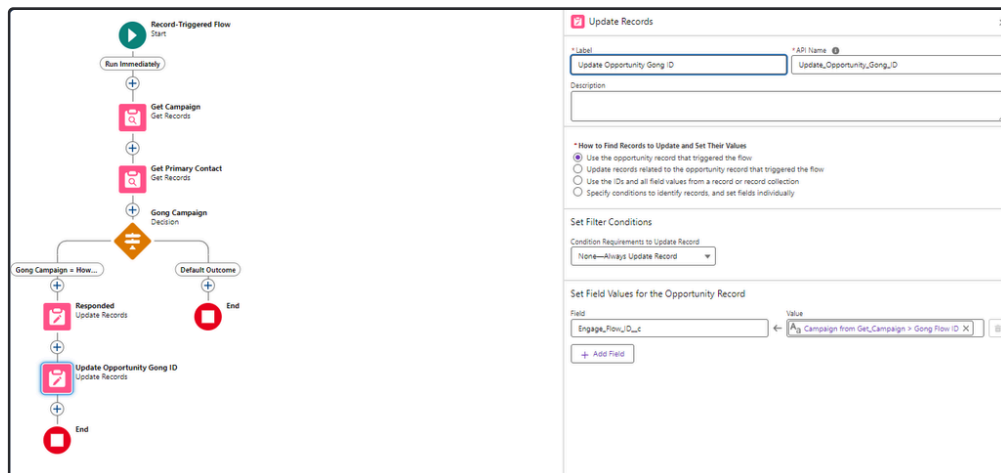
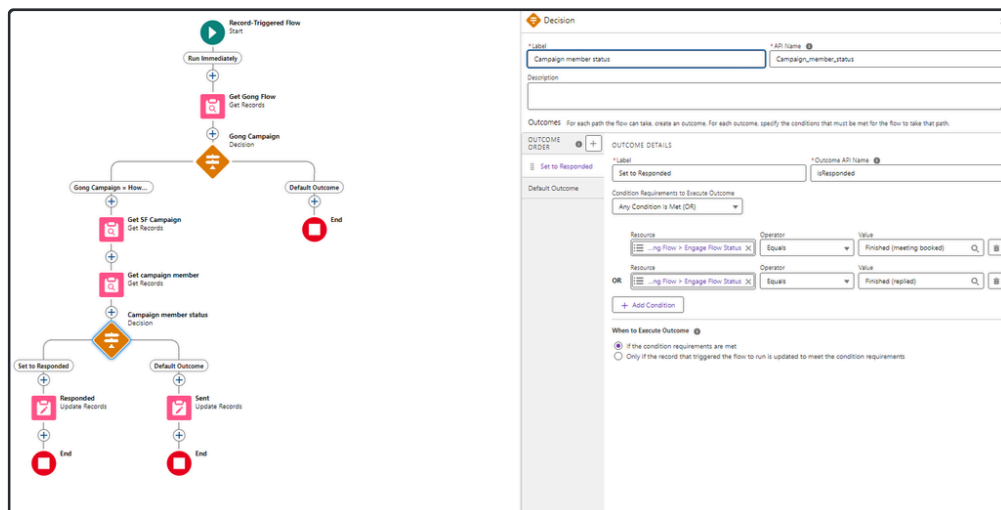
☒ Automatically store all fields
 ☐ Choose fields and let Salesforce do the rest
 ☐ Choose fields and assign variables (advanced)



4. Handle Lead Conversion



5. Additionally, I wanted to change Campaign member status based on the Flow action, so if a reply was received, or a meeting was booked, it changed the Campaign member status to responded. The other event I wanted this to happen, whenever a related opportunity was created.

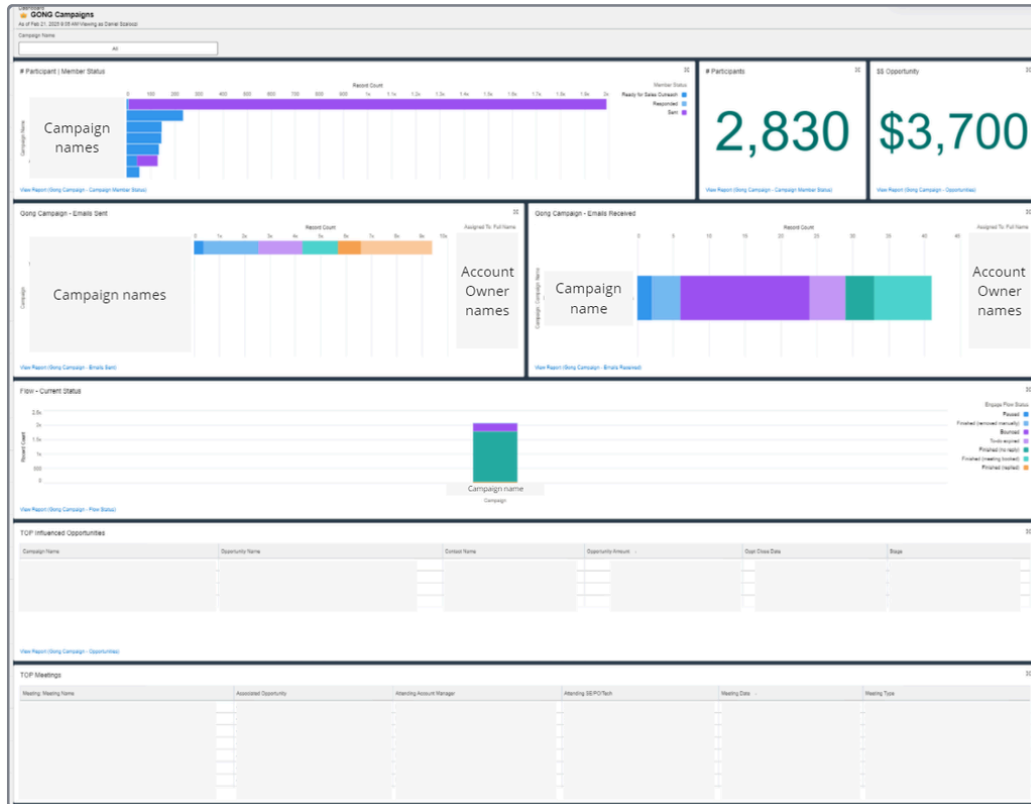


5. Create Reports and the Dashboard

By setting up the prerequisites and associating all relevant objects, I had a much broader field list I could involve in creating the relevant reports. These reports then made sure, that I can add a global filter to my dashboard.

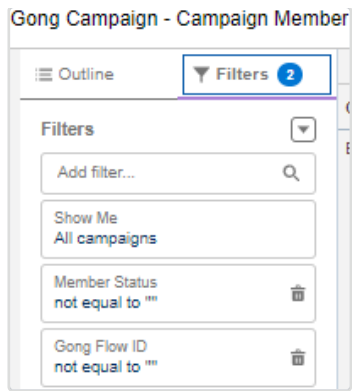
i Global filters on Dashboards only work, if all the reports contain the field and object the filter is referring to.

My global filter is the Campaign name (the name I gave for my Salesforce Campaigns)

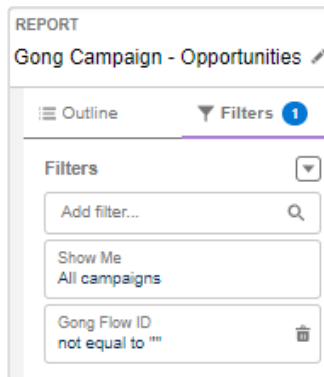


Reports and metrics:

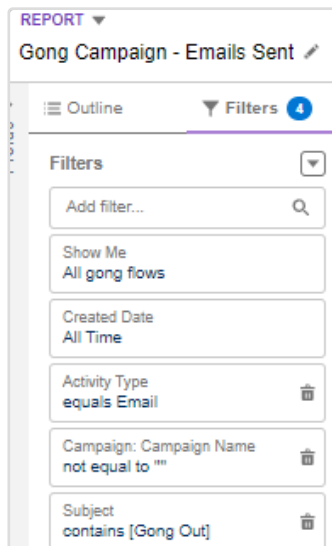
- Number of Participants / member status: (Stacked Horizontal Bar Chart, KPI)
 - Report Type: Campaigns with Campaign Members
 - Added as Campaign member, but not yet added in Gong to the Flow? → “Ready for Sales Outreach”
 - Added to the Gong Flow, but not yet Responded? → “Sent”
 - Replied to an email, or booked a meeting? → Responded



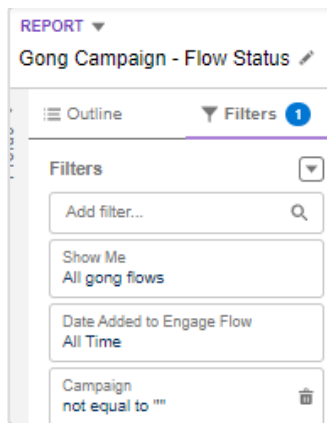
- Total value of opportunities (KPI, Table) and Top Influenced Opportunities
 - Report Type: Campaigns with Influenced Opportunities (Customizable Campaign Influence)



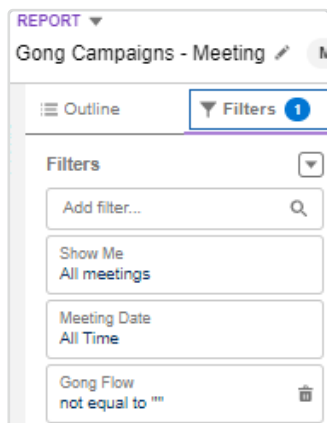
- Emails sent / received by Account manager (Stacked Horizontal Bar Charts)
 - Report Type: Gong Flows with Activities
 - Emails sent is where the subject contains [Gong Out], received when subject contains [Gong In]



- Gong Flow status / Campaign (Stacked Vertical Bar Chart)
 - Report Type: Gong Flows with Contacts



- Gong Flow Meetings (Table)
 - Report Type: Meetings with Campaign



The result is a well-functioning and dynamic dashboard with an extendable, customizable setup of the Gong Flow feature, that, although provides a handful of data, their usability mostly depends on the Salesforce side.