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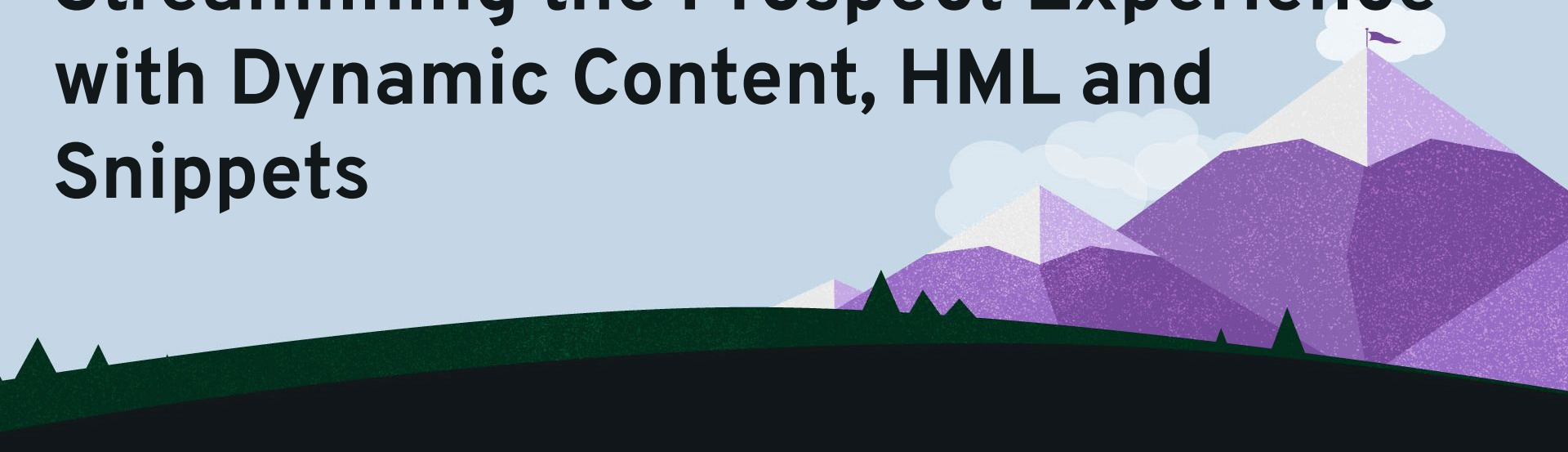
SESSION:

Streamlining the Prospect Experience with Dynamic Content, HML and Snippets



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Streamlining the Prospect Experience with Dynamic Content, HML and Snippets

Intermediate | Manufacturing

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Marketing Manager
Graphic Packaging International

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CRM and Marketing Automation Strategist
Sercante

About Graphic Packaging International

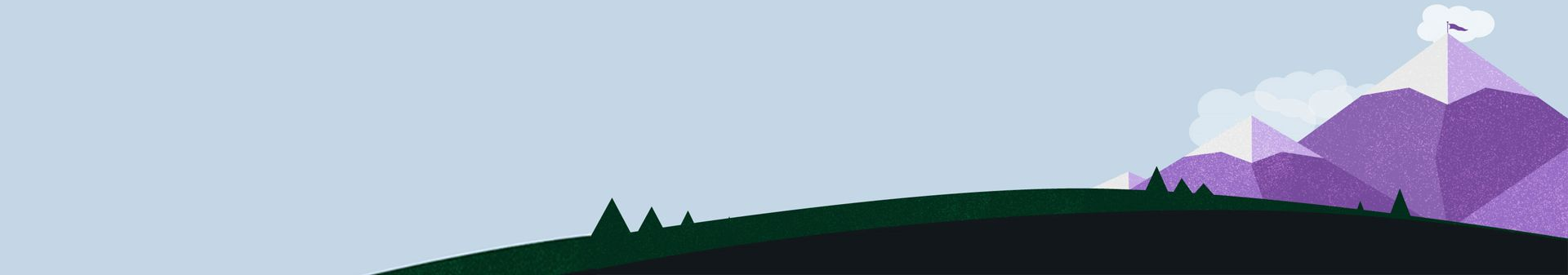
Session Agenda

Outline

Agenda
Intro
Challenge
Solution
Resources

As our content library grows, how do we scale up so we can continue to deliver our best content to our customers?

And how do we make it easy on us to do that?



Existing Process

Each content asset has its own form and email template

Prospect fills out form on website

Data is collected

Prospect received content via email

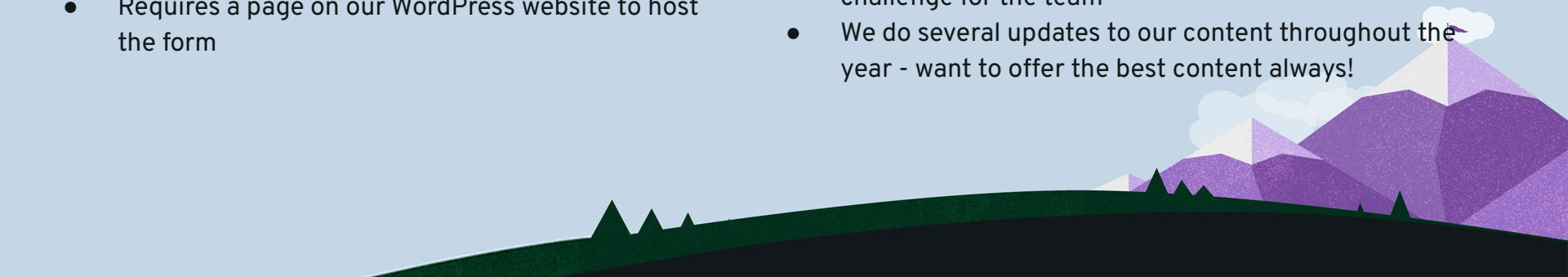
Details around process

This is what we didn't like about this process

- Required a new email template per content asset
- Required a new form handler per content asset - for added functionality we use Gravity Forms
    - Completion Actions
        - Autoresponder emails
        - Notify User
        - Salesforce Campaign
- Requires a page on our WordPress website to host the form

Although it is easy to setup we identified a few reasons why this would not work for us long term. Here are those reasons:

- It was creating clutter in our Pardot org
- It was easy to copy/redo templates but not easy to mass update them when new requirements rose
- Technically, setting up forms handlers can be a challenge for the team
- We do several updates to our content throughout the year - want to offer the best content always!



Discovery

Handlebars Merge Language (HML)

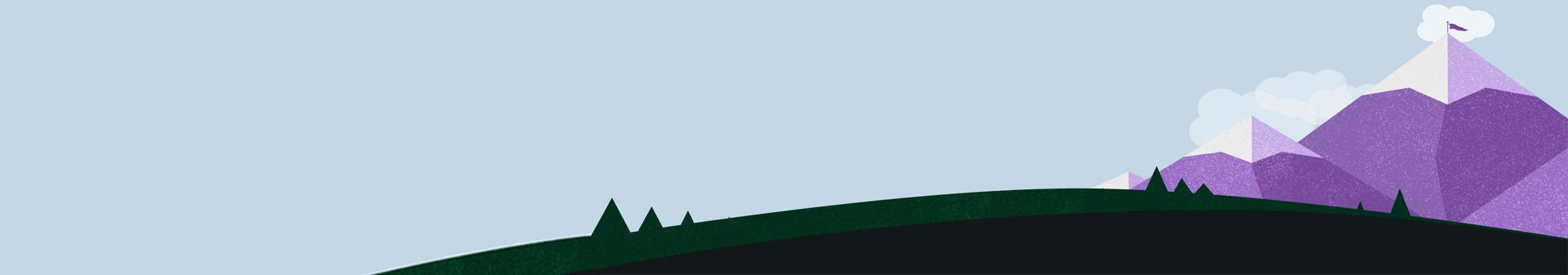
What is it?

How do we plan on using it?

Handlebars Mailmerge Language (HML) is….

According to Salesforce, a merge field is a placeholder in an email template or letterhead. When you send the email, the placeholder is replaced with the Salesforce data from the record or records of the people you are emailing.

The way HML works is it looks at the data on the record (person) and updates it as it is getting rendered (viewed).



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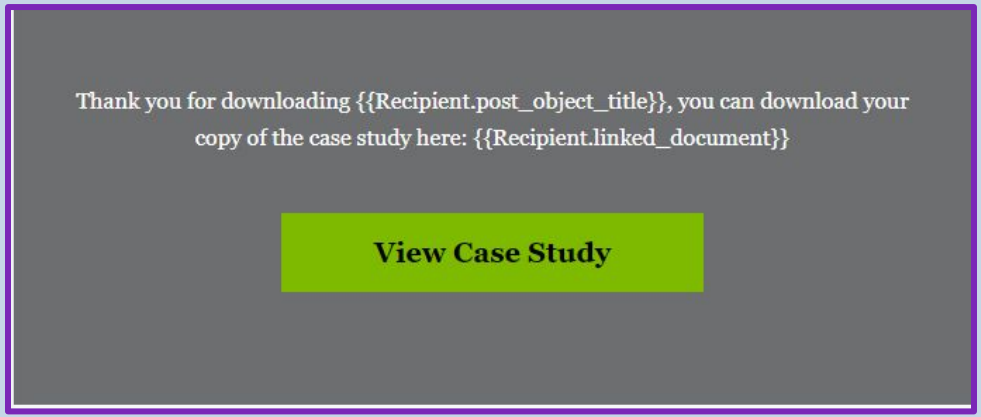
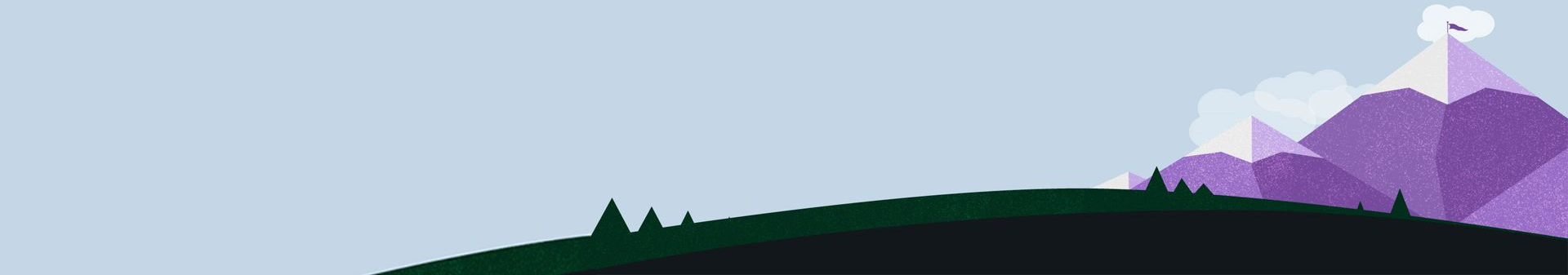


Primary methods we tried to use them:

- Update subject lines and preview text with content details
- Prepopulate persons name and company
- Prepopulate asset name, page name and asset URL they would like to receive
- Control URL of CTA buttons
- Create variations in text defaults for attendees/non-attendees of webinars (if/else)

Dynamic Content



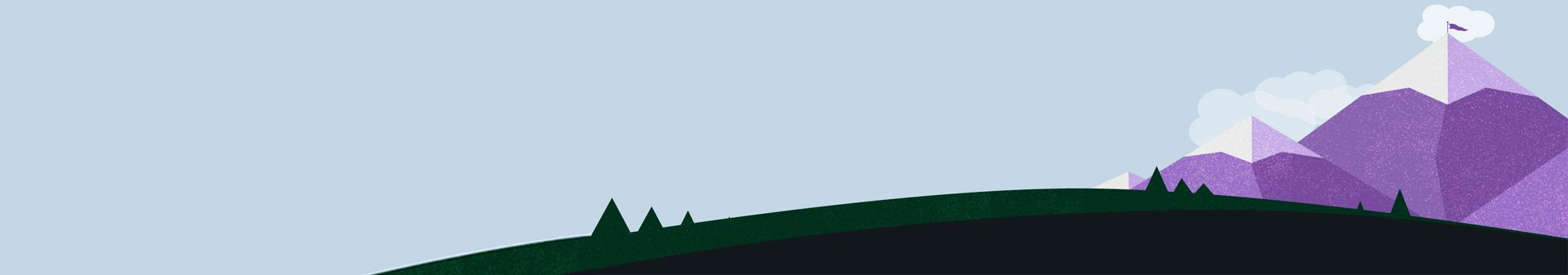
What is it?

How do we plan on using it?

Dynamic Content is....

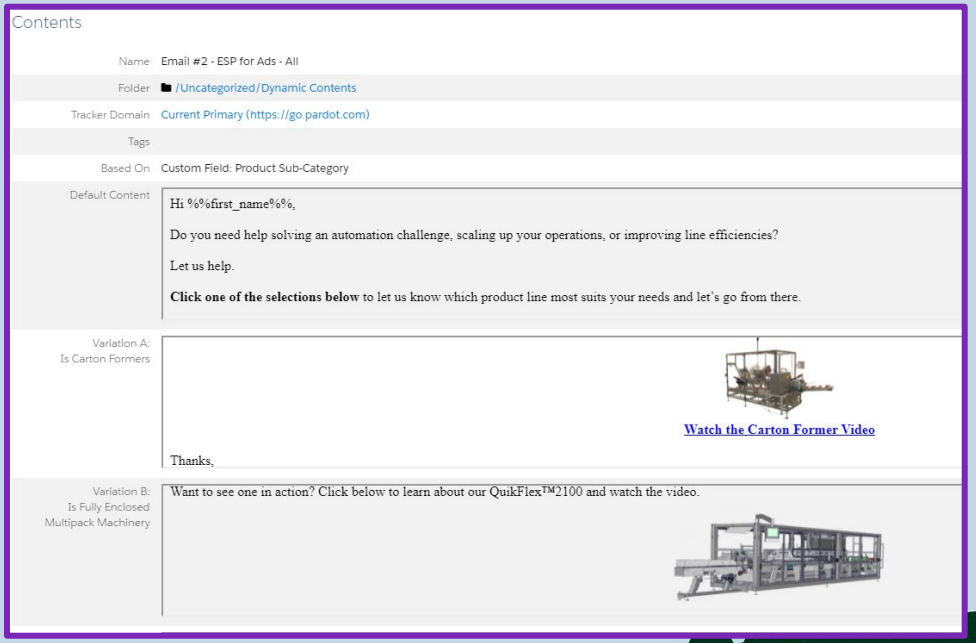
According to Salesforce, content that can be configured to display variations to prospects based on criteria you select.

The way that Dynamic Content works is you must a) have a person's data in Pardot, and b) you must build the criteria and content for each variation you wish to use.



What is it?

How do we plan on using it?


Contents

Name: Email #2 - ESP for Ads - All

Folder: /Uncategorized/Dynamic Contents

Tracker Domain: Current Primary (https://go.pardot.com)

Tags:

Based On: Custom Field: Product Sub-Category

Default Content:

Hi %%first_name%%,

Do you need help solving an automation challenge, scaling up your operations, or improving line efficiencies?

Let us help.

Click one of the selections below to let us know which product line most suits your needs and let's go from there.

Variation A: Is Carton Formers

Watch the Carton Former Video

Thanks,

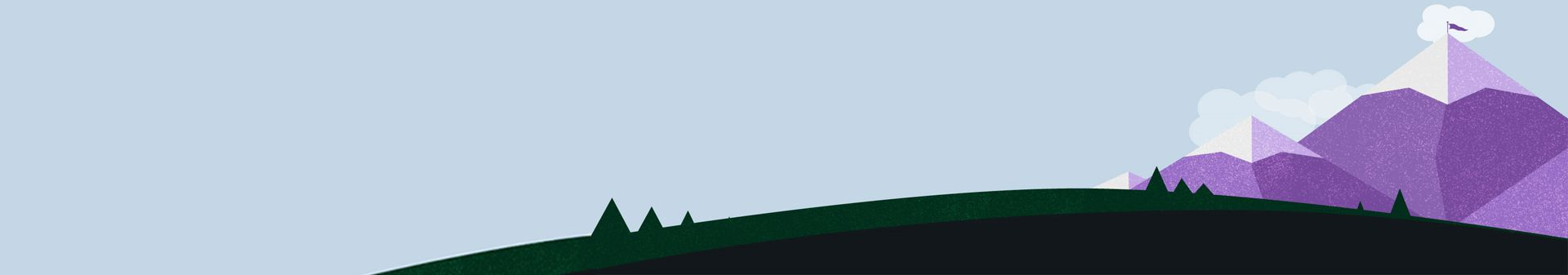
Variation B: Is Fully Enclosed Multipack Machinery

Want to see one in action? Click below to learn about our QuikFlex™2100 and watch the video.

Primary methods we tried to use them:

- Customize email subject lines based on product interest or sales rep
- Customize preview text based on content downloaded
- Shift email head banners depending on piece of content
- Switch CTA's and content around depending on criteria (PackExpo)

Snippets



What is it?

How do we plan on using it?

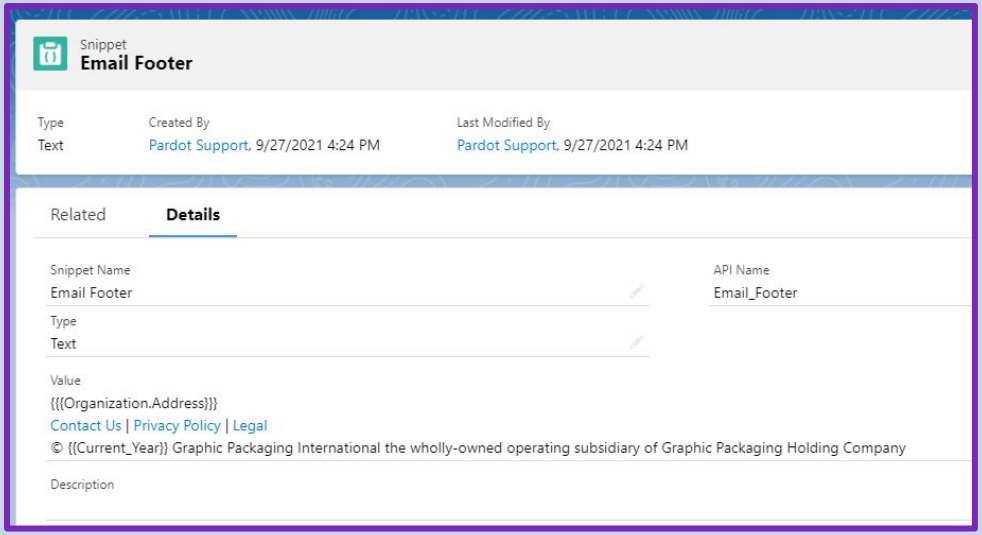
Snippets are….

According to Salesforce, Snippets are reusable pieces of content that streamline how you create recurring marketing assets for your campaigns and business as a whole. Snippets can be leveraged in list emails, email templates, forms, and landing pages.

The way Pardot snippets work focuses more on the relationship between the content block and the campaign or business unit, versus individual prospect data. In general this content stays static until you change it.

What is it?

How do we plan on using it?



Primary methods we tried to use them

- Provide form contact or disclaimer information (below the form)
- Maintain email footers (can't contain Unsubscribe link)
- List upcoming events in emails in email body

New Process

One form and one email template is used for everything

Prospect fills out form on website

Data is collected in hidden fields and passed

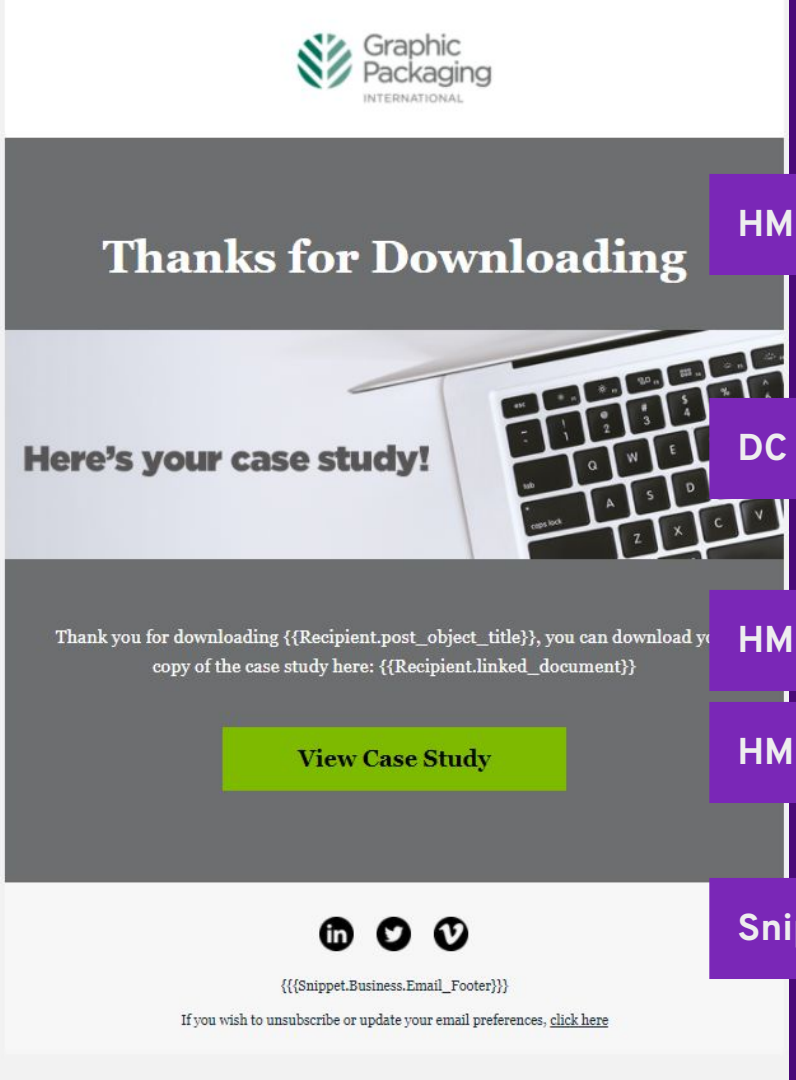
Prospect receives email with specific download

Benefits Of Personalization

Why did we do this?

- Less time from setup to execution
- More streamlined and efficient process
    - Less email templates to build (1 to be exact)
    - One form to rule them all
    - Easier to troubleshoot any issues
    - Simpler to adjust content across the organization
- Easier to train a growing marketing department

Email Design



HML/DC

DC

HML/DC

HML/DC

Snippet/DC

Lessons learned

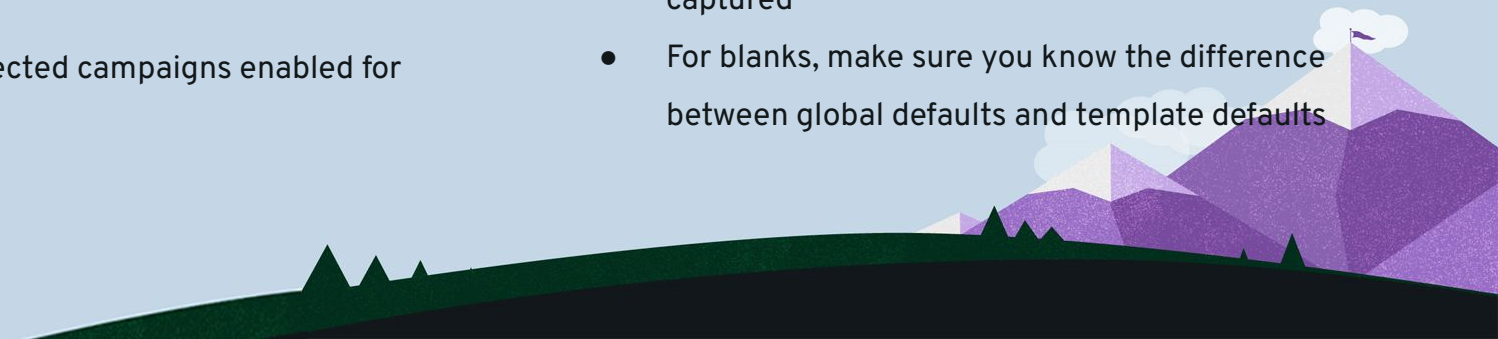
Things to keep in mind...

Basics

- HML may need to be enabled in your account if you haven't (main difference variable tags look like this {{tag}} versus %%tag%%
- Dynamic content is only available in Plus-tiered accounts or higher
- You will need connected campaigns enabled for Snippets

Troubleshooting

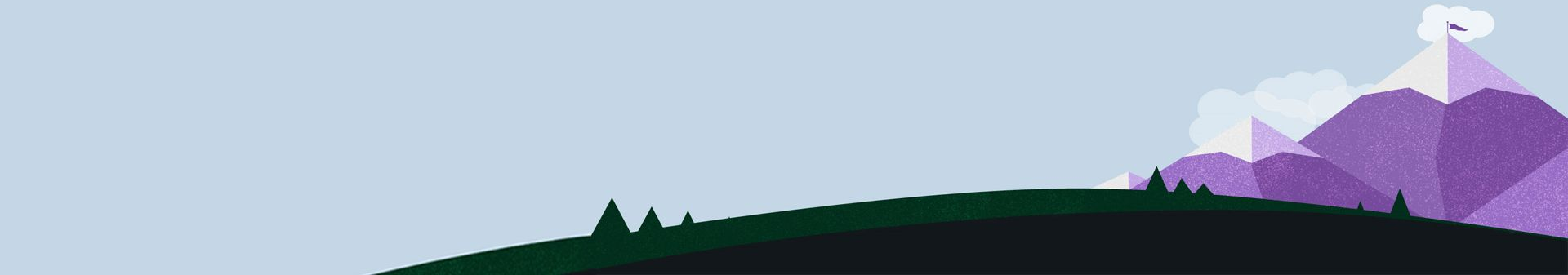
- When testing make sure you create either new records or use the Dynamic Content testing tools to make sure you see the correct values populating
- Snippets can sometimes take a few min to sync over to Pardot,
- Form handlers can be tricky, make sure you test both cookie and incognito to ensure all data is being captured
- For blanks, make sure you know the difference between global defaults and template defaults



Bonus: Will this work in new Email Lightning Builder?

- Short answer is yes, but…
  - You need Salesforce access
  - You need to be in Pardot Lightning
  - We tested:
    - Dynamic content in emails and it worked
    - HML also worked as expected in emails and forms
    - Snippets will work as well in emails
- You should also test in your account as you try new features

Resources



Resources

Dynamic Content

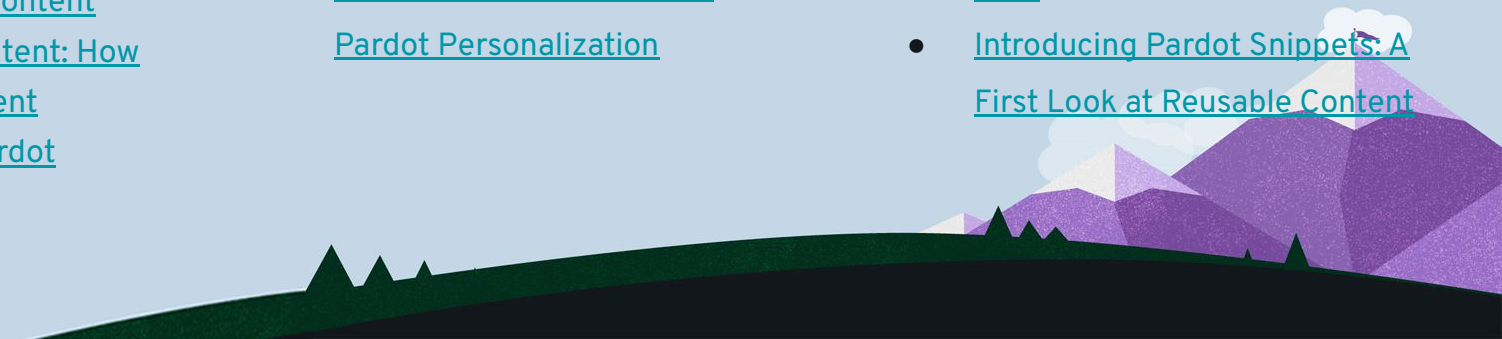
- Create Dynamic Content
- Pushing Pardot: How to use Dynamic Content With More Than 25 Options
- Creative Ways to Personalize Your Marketing with Pardot Advanced Dynamic Content
- Beyond Dynamic Content: How to Create REAL Content Personalization in Pardot

HML

- Guidelines for Using Handlebars Merge Language in Pardot
- Content Personalization Using Dynamic Content, Pardot HML, and Pardot Snippets
- 4 HML Tricks for Advanced Pardot Personalization

Snippets

- Create and Manage Snippets
- Duck, Duck, Goose: How to play with Pardot Snippets!
- A Simple Guide To Using Pardot Snippets: A Feature Enabled By HML
- Introducing Pardot Snippets: A First Look at Reusable Content



Thanks for listening!

mimihubbard

You can find me on the social media links above
or hit me up at Mimi.Hubbard@graphicpkg.com

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