PAR DREAMIN by SERCANTE

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Supporting your Customer Success Team with Pardot

Intermediate | Strategy

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INVADO SOLUTIONS

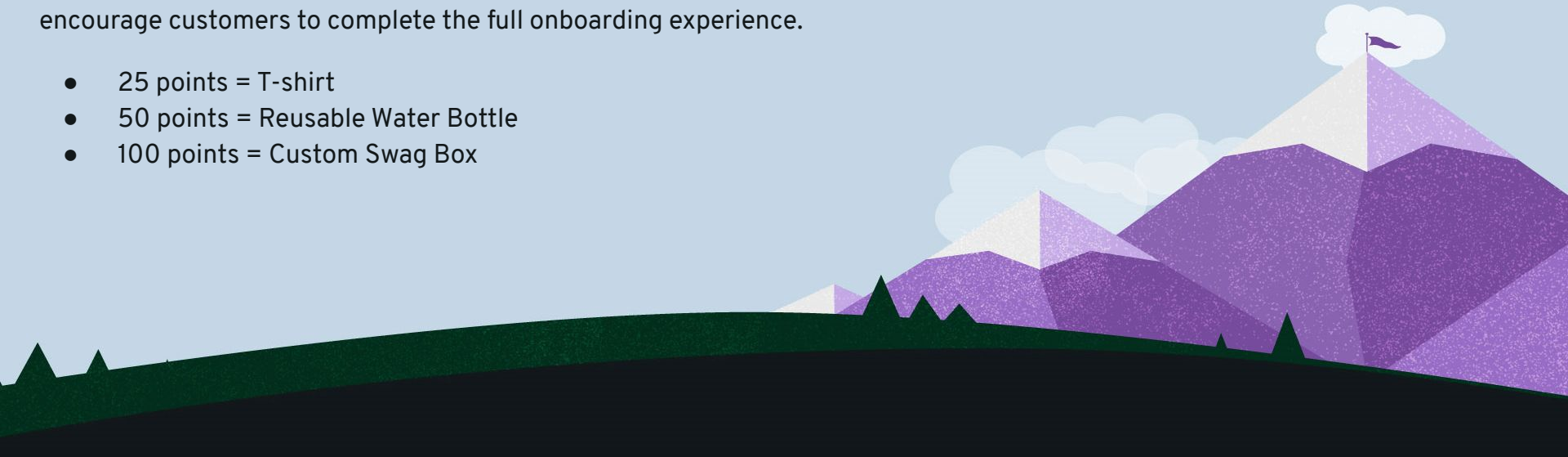
Pardot marketing doesn’t stop after a closed-won opportunity. Now is the time to team up with your Customer Support Department and build out an onboarding journey utilizing gamification to increase engagement.

Case Scenario

Use Gamification to increase actionable steps

Your customer success team wants to increase onboarding engagement with new customers. CST would like to give out swag based on onboarding points and encourage customers to complete the full onboarding experience.

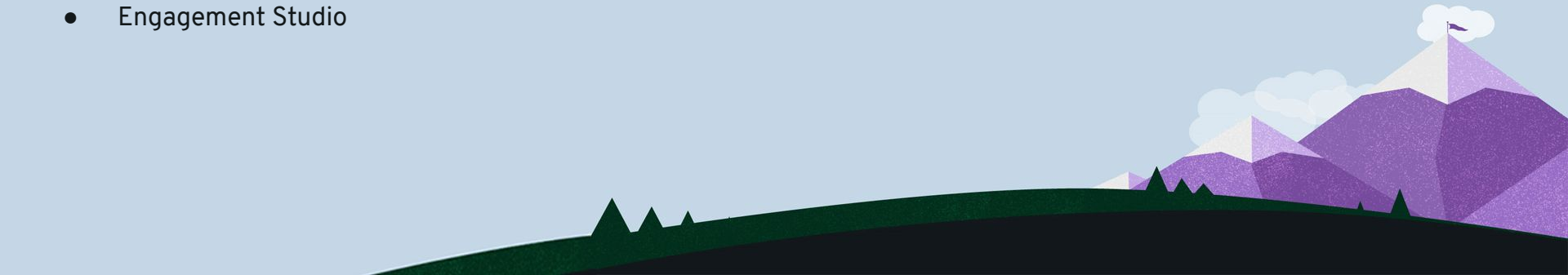
- 25 points = T-shirt
- 50 points = Reusable Water Bottle
- 100 points = Custom Swag Box



Getting Started!

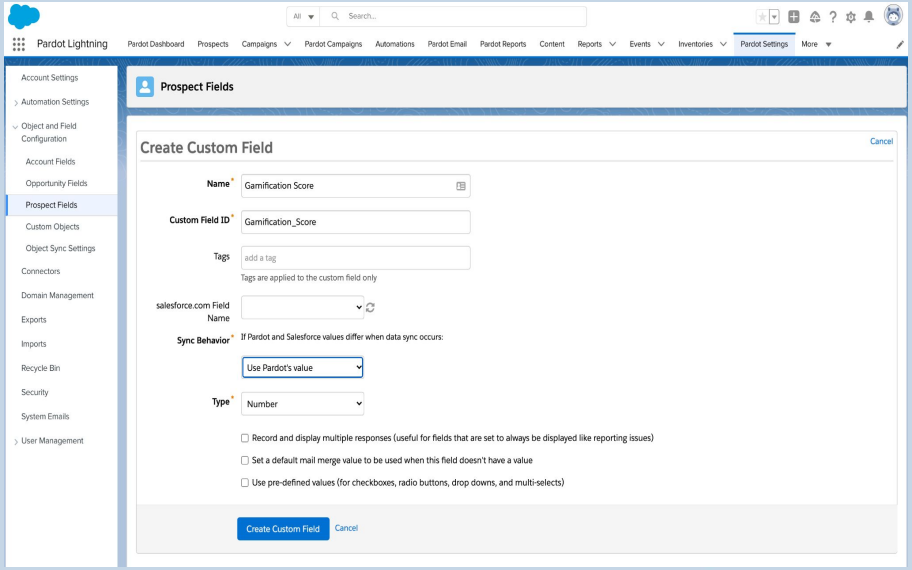
What Pardot tools we will be using:

- Custom Field
- Page Actions
- Custom Redirects
- Dynamic Content
- Email Templates
- Engagement Studio



Custom Field

Keep track of engagement points



Why this is important

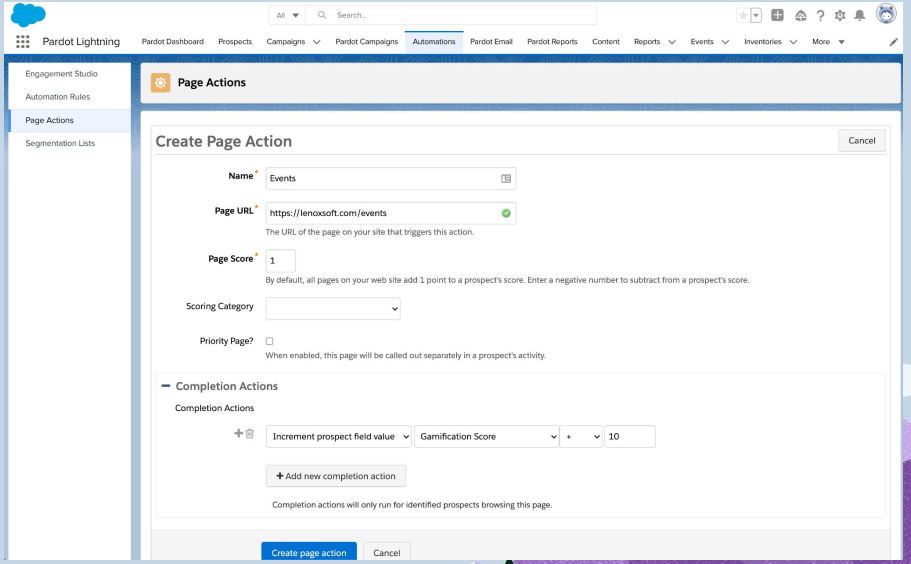
- We can use this field to collect points for specific activities
- This field should be a number type field
- We can then use this field for dynamic content, page actions & automation
- We can also use this field with HML to let our customers know where they stand point wise
- This creates demand for wanting to reach the next step/goal

Page Actions

Give engagement points

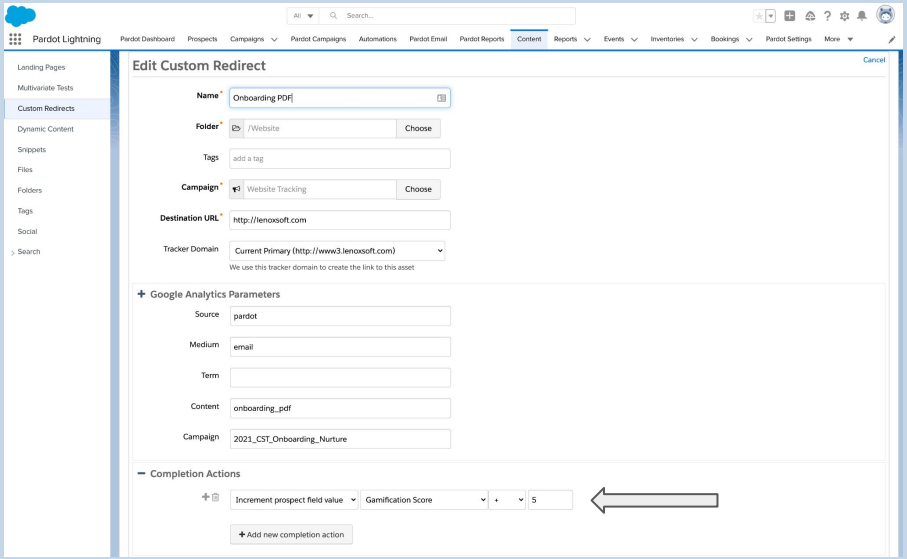
Why this is important

- We use page actions to capture specific pages from our website/LMS/partner portal
- We can assign points as a completion action when someone spends time on this page
- Make sure you have tracking code placed on your website/LMS/partner portal



Custom Redirect

Give engagement points



Why this is important

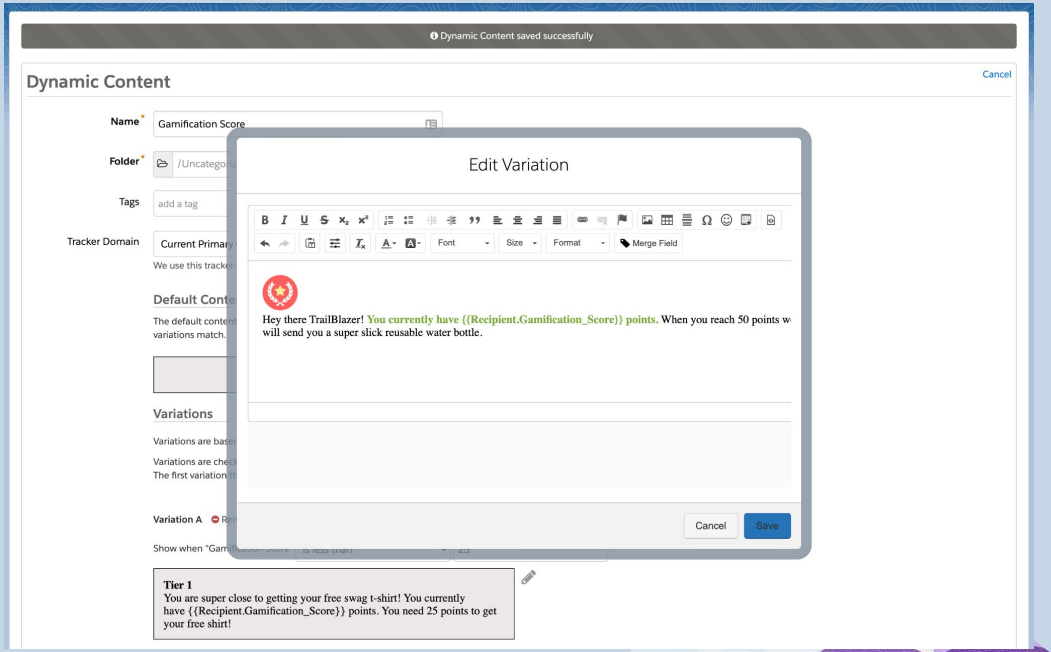
- We can also use custom redirects to give points via completion actions
- This is useful for placing custom redirects on your website to lead to a next step or action
- We can also use custom redirects in email templates to give additional points for downloading PDF's or other assets

Dynamic Content

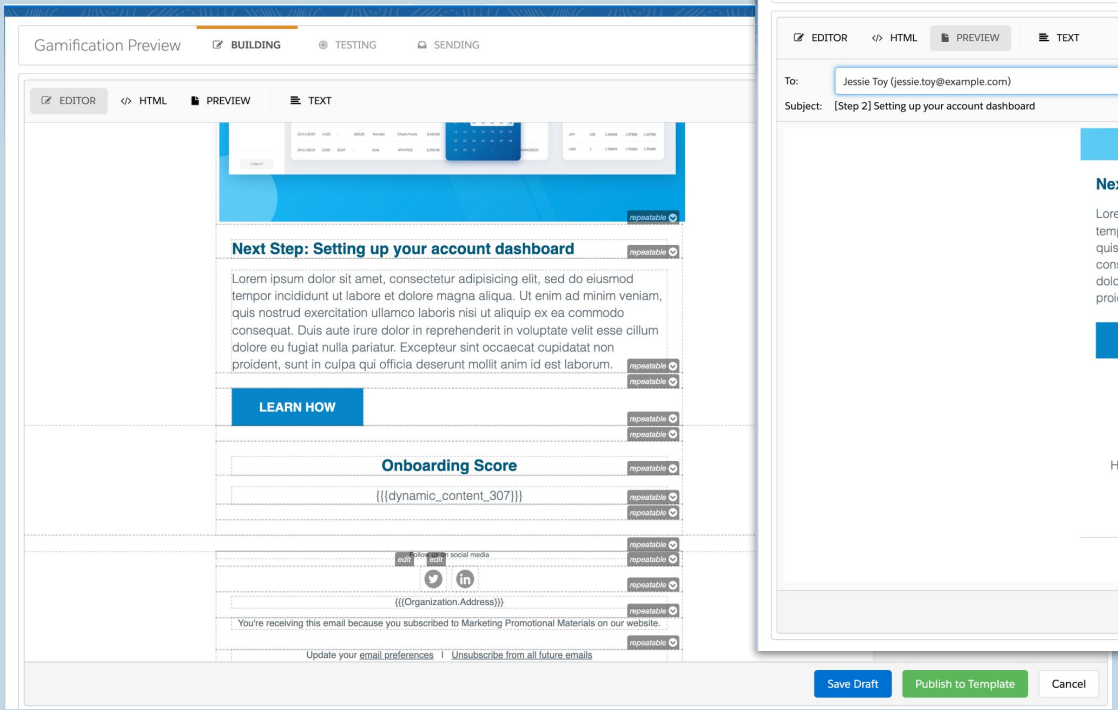
Display Engagement Points

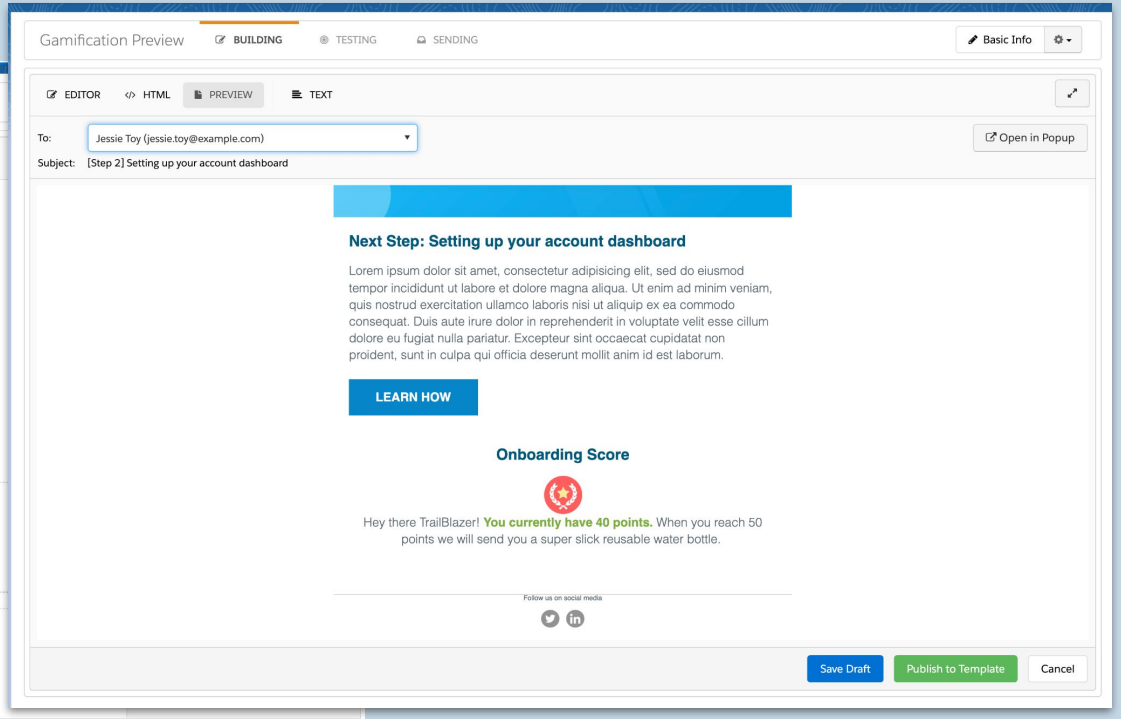
Why this is important

- Use the Gamification Score for variations
  - Less than 25 points
  - Less than 50 points
  - Less than 100 points
- Use HML to display current customer points
- Great creative! Add graphics, badges etc and variate it based on where they are point wise

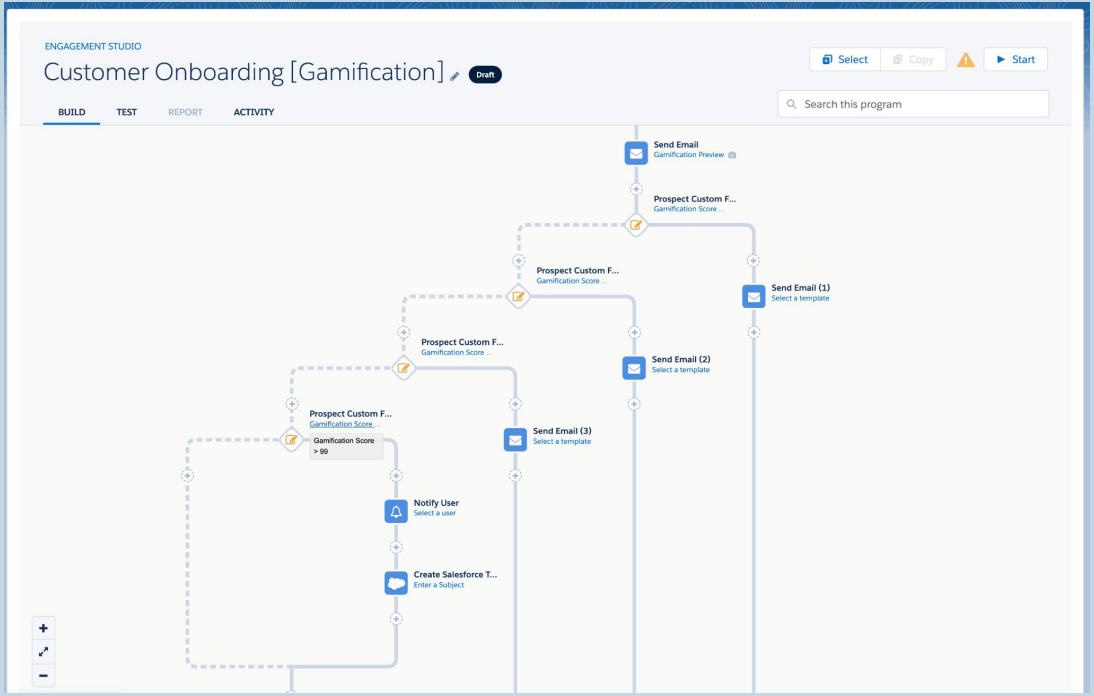


Using Dynamic Content





Engagement Studio

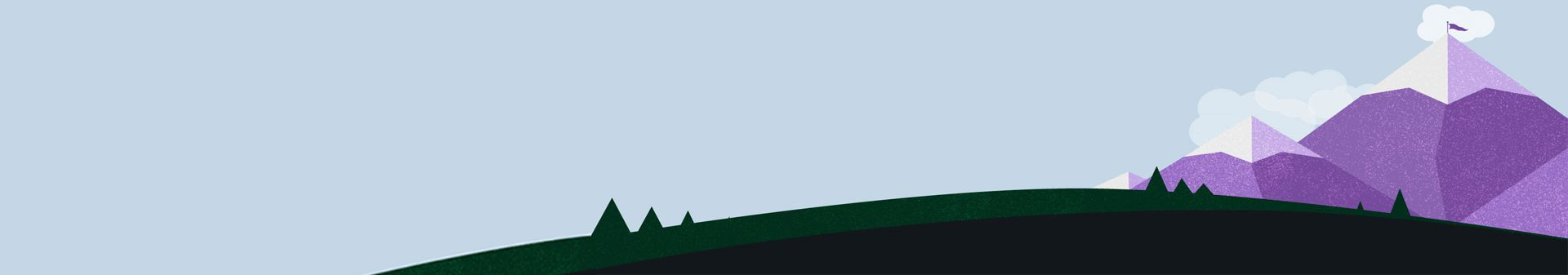


- Use engagement studio to setup onboarding
- Use rules to segment based on Gamification Score
- Don't forget to map out scoring scenarios

Strategy Q&A

What you should think about before, during and after your build

- **Work with your custom success team**
- ABM/ABX: How can you bring in your account based marketing strategy
- Map out the actionable strategies (scoring scenarios)
- Use a control group / demo group before opening the floodgates
- Setup connected campaigns for more in-depth reporting



Thanks for listening!

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