

Supporting your Customer Success Team with Pardot

Intermediate | Strategy



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INVADO SOLUTIONS





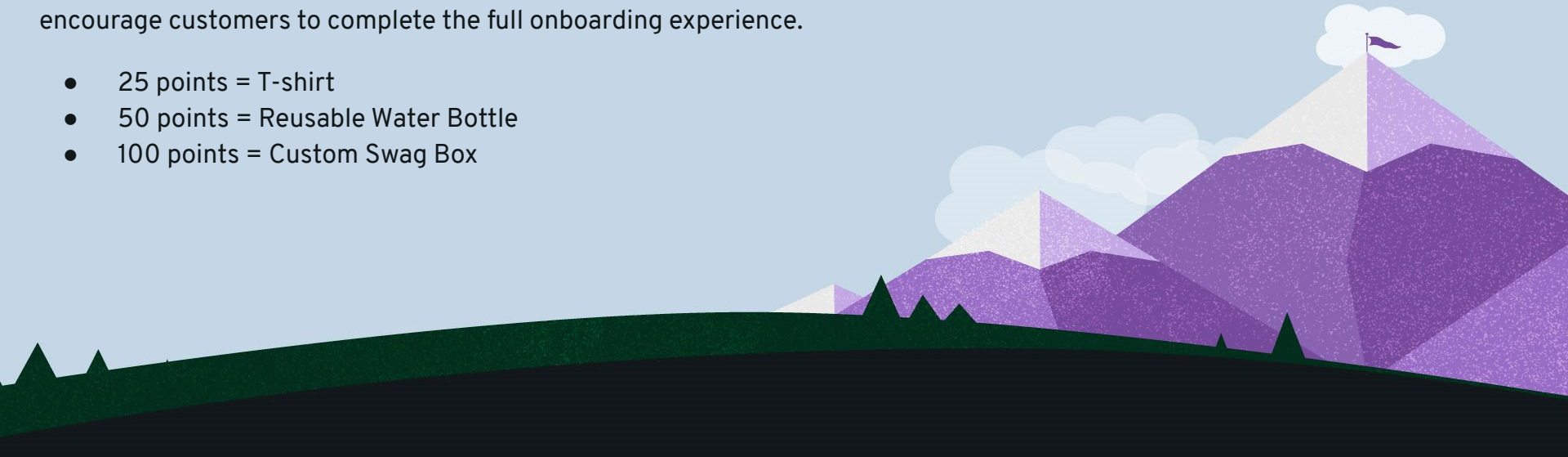
Pardot marketing doesn't stop after a closed-won opportunity. Now is the time to team up with your Customer Support Department and build out an onboarding journey utilizing gamification to increase engagement.

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!

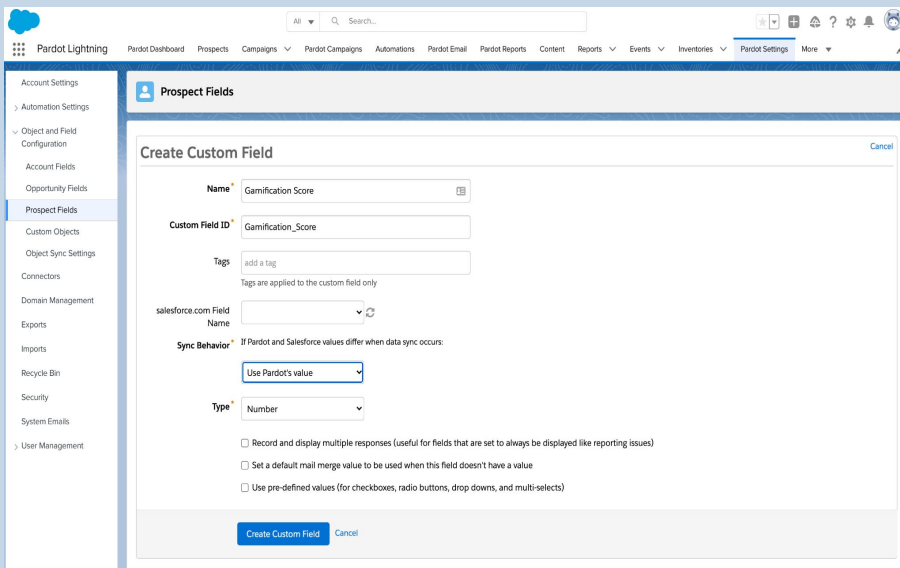
What Pardot tools we will be using:

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



Custom Field

Keep track of engagement points



The screenshot shows the Pardot Lightning interface with the 'Prospect Fields' section selected. The 'Create Custom Field' form is displayed with the following fields and options:

- Name:** Gamification Score
- Custom Field ID:** Gamification_Score
- Tags:** add a tag (Tags are applied to the custom field only)
- Domain Name:** salesforce.com
- Sync Behavior:** If Pardot and Salesforce values differ when data sync occurs: Use Pardot's value
- Type:** Number
- Record and display multiple responses (useful for fields that are set to always be displayed like reporting issues)
- Set a default mail merge value to be used when this field doesn't have a value
- Use pre-defined values (for checkboxes, radio buttons, drop downs, and multi-selects)

Buttons: Create Custom Field, Cancel

Why this is important

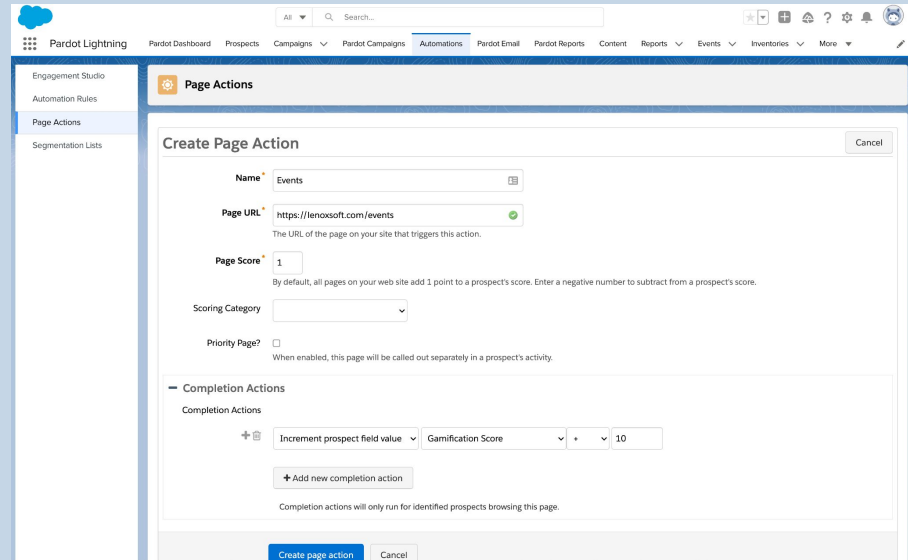
- We can use this field to collect points for specific activities
- This field should be a number type field
- We can then use this field for dynamic content, page actions & automation
- We can also use this field with HML to let our customers know where they stand point wise
- This creates demand for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



Pardot Lightning | Engagement Studio | Automations | Page Actions

Create Page Action

Name * Events

Page URL * https://lenoxsoft.com/events
The URL of the page on your site that triggers this action.

Page Score * 1
By default, all pages on your web site add 1 point to a prospect's score. Enter a negative number to subtract from a prospect's score.

Scoring Category [Dropdown]

Priority Page?
When enabled, this page will be called out separately in a prospect's activity.

Completion Actions

Completion Actions

+ Increment prospect field value | Gamification Score | + | 10

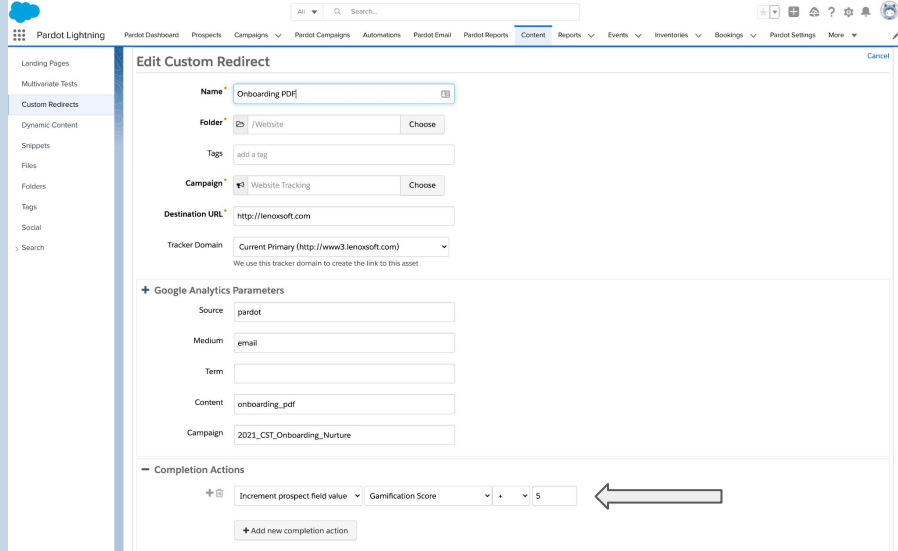
+ Add new completion action

Completion actions will only run for identified prospects browsing this page.

Create page action | Cancel

Custom Redirect

Give engagement points



The screenshot shows the 'Edit Custom Redirect' form in Pardot Lightning. The form includes the following fields and options:

- Name:** Onboarding PDF
- Folder:** /Website
- Tags:** add a tag
- Campaign:** Website Tracking
- Destination URL:** http://lenoxsoft.com
- Tracker Domain:** Current Primary (http://www3.lenoxsoft.com)
- Google Analytics Parameters:**
 - Source: pardot
 - Medium: email
 - Term:
 - Content: onboarding_pdf
 - Campaign: 2021_CST_Onboarding_Nurture
- Completion Actions:**
 - Increment prospect field value: Gamification Score, +, 5
 - + Add new completion action

An arrow points to the '5' in the completion action field.

Why this is important

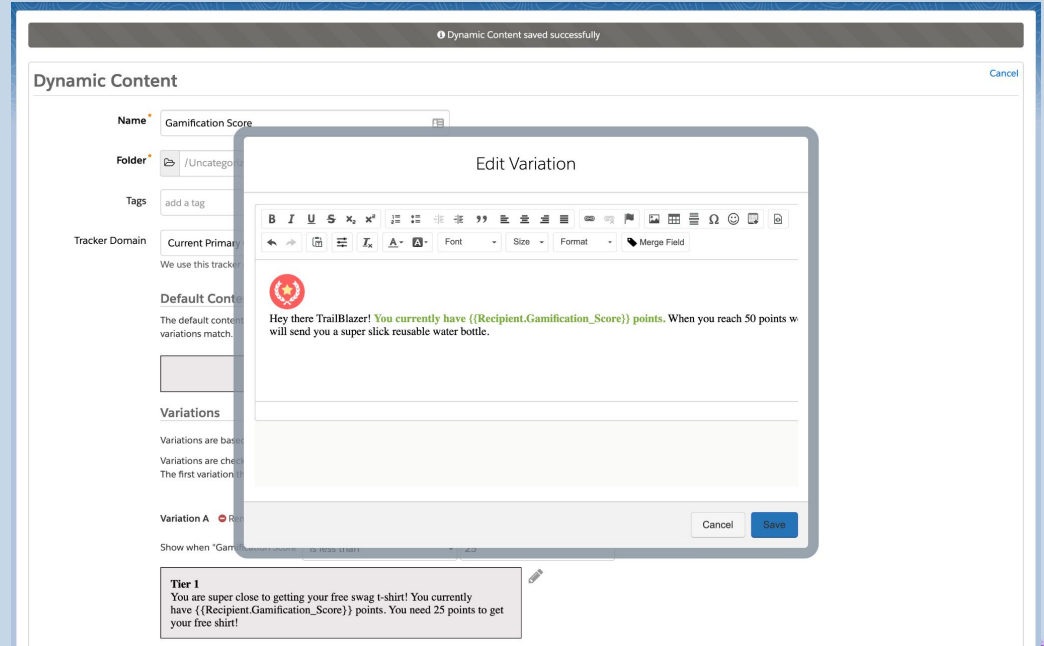
- We can also use custom redirects to give points via completion actions
- This is useful for placing custom redirects on your website to lead to a next step or action
- We can also use custom redirects in email templates to give additional points for downloading PDF's or other assets

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



Dynamic Content saved successfully

Dynamic Content

Name: Gamification Score

Folder: /Uncategor...

Tags: add a tag

Tracker Domain: Current Primary

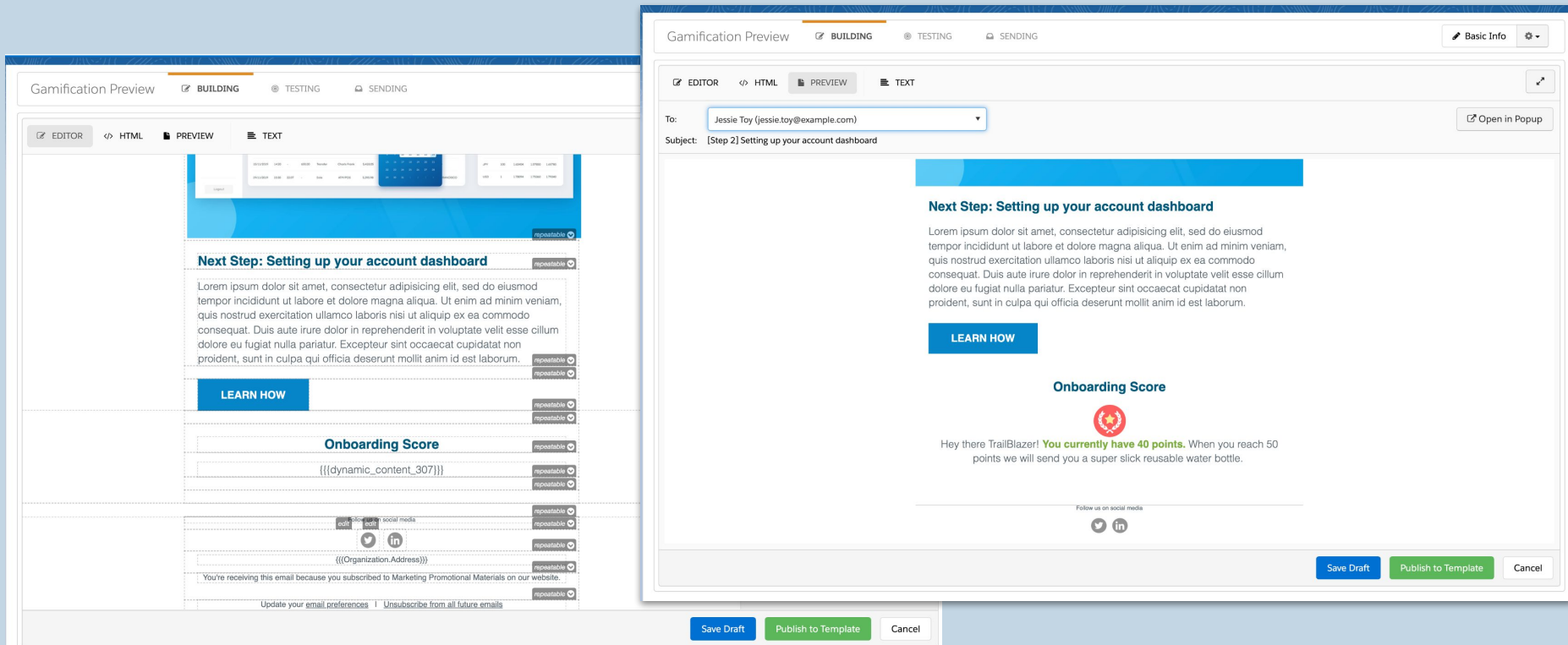
We use this tracker...

Default Content: Hey there TrailBlazer! You currently have {{Recipient.Gamification_Score}} points. When you reach 50 points we will send you a super slick reusable water bottle.

Variations: Variations are based on... Variations are checked... The first variation...

Variation A: Tier 1
You are super close to getting your free swag t-shirt! You currently have {{Recipient.Gamification_Score}} points. You need 25 points to get your free shirt!

Using Dynamic Content



The image displays two views of the 'Gamification Preview' interface. The left view shows the 'EDITOR' mode with a wireframe of an email template. The right view shows the 'PREVIEW' mode with a live rendering of the email.

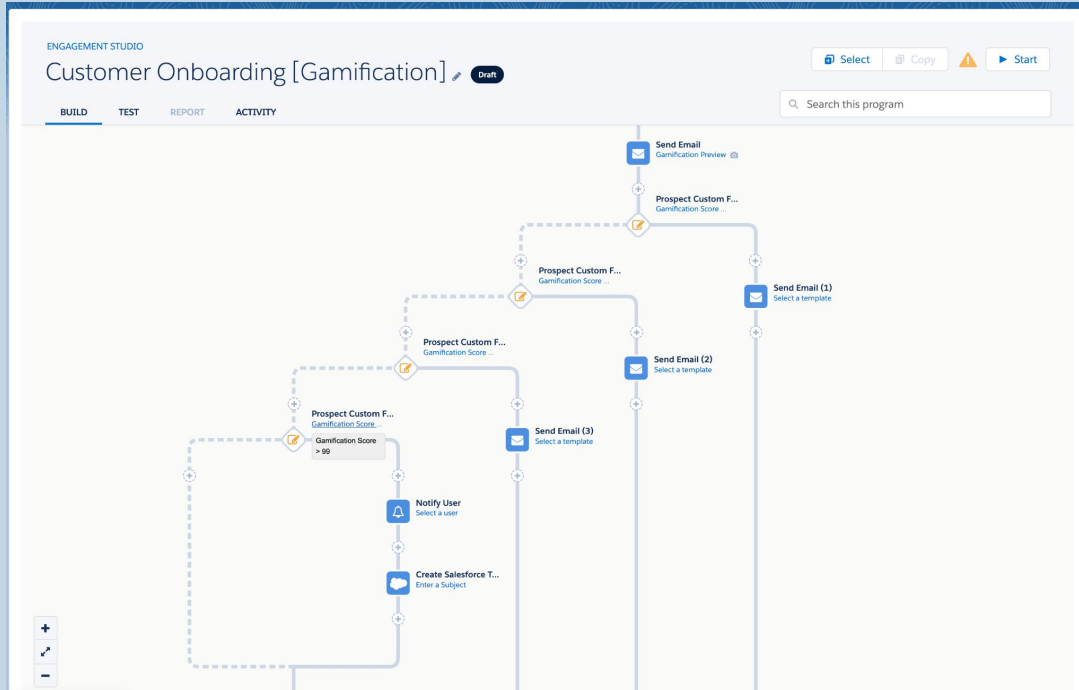
Editor View (Left):

- Navigation: BUILDING, TESTING, SENDING
- Mode: EDITOR, HTML, PREVIEW, TEXT
- Content: A blue header, a main text block with placeholder text, a 'LEARN HOW' button, an 'Onboarding Score' section with a dynamic content placeholder `{{{dynamic_content_307}}}`, and a footer with social media icons and a dynamic address placeholder `{{(Organization.Address)}}`.

Preview View (Right):

- Navigation: BUILDING, TESTING, SENDING
- Mode: EDITOR, HTML, PREVIEW, TEXT
- Header: 'Gamification Preview' and 'Basic Info' settings.
- Form Fields: 'To: Jessie Toy (jessie.toy@example.com)', 'Subject: [Step 2] Setting up your account dashboard'.
- Content: A blue header, the text 'Next Step: Setting up your account dashboard', a paragraph of placeholder text, a 'LEARN HOW' button, the 'Onboarding Score' section with a star icon and text: 'Hey there TrailBlazer! You currently have 40 points. When you reach 50 points we will send you a super slick reusable water bottle.', and social media icons.
- Footer: 'Save Draft', 'Publish to Template', 'Cancel' buttons.

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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