#PARDREAMIN2021 |
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Pardot Prospect Mailability: What the Makeover Means for Admins

Beginner | Admin

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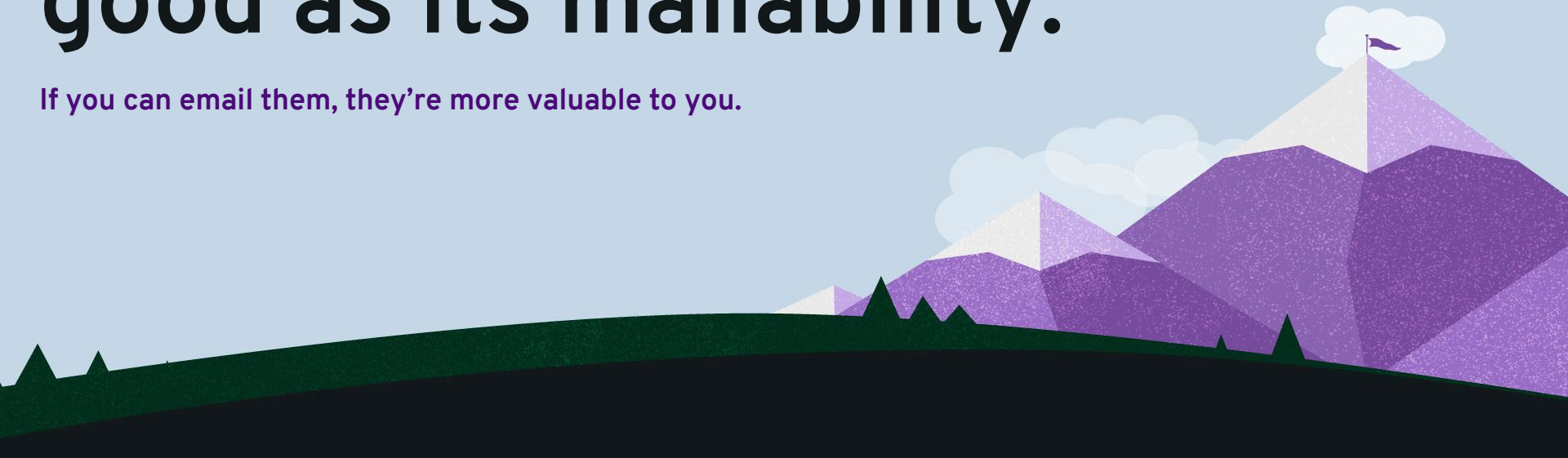
A prospect record is only as good as its mailability.

If you can email them, they're more valuable to you.



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SETTING THE SCENE - DELIVERABILITY

The Nightclub, the Guests & the Bouncers

- Inbox → nightclub
  Recipient's inbox is the nightclub that everyone is trying to get into.
- Email → nightclub goer
- Inbox filters → bouncers (security)

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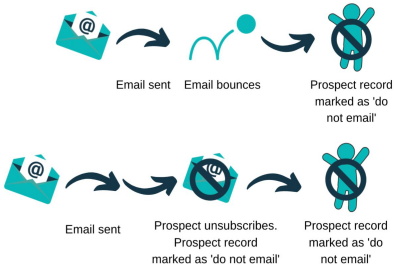
Deliverability ultimately determines **mailability.**

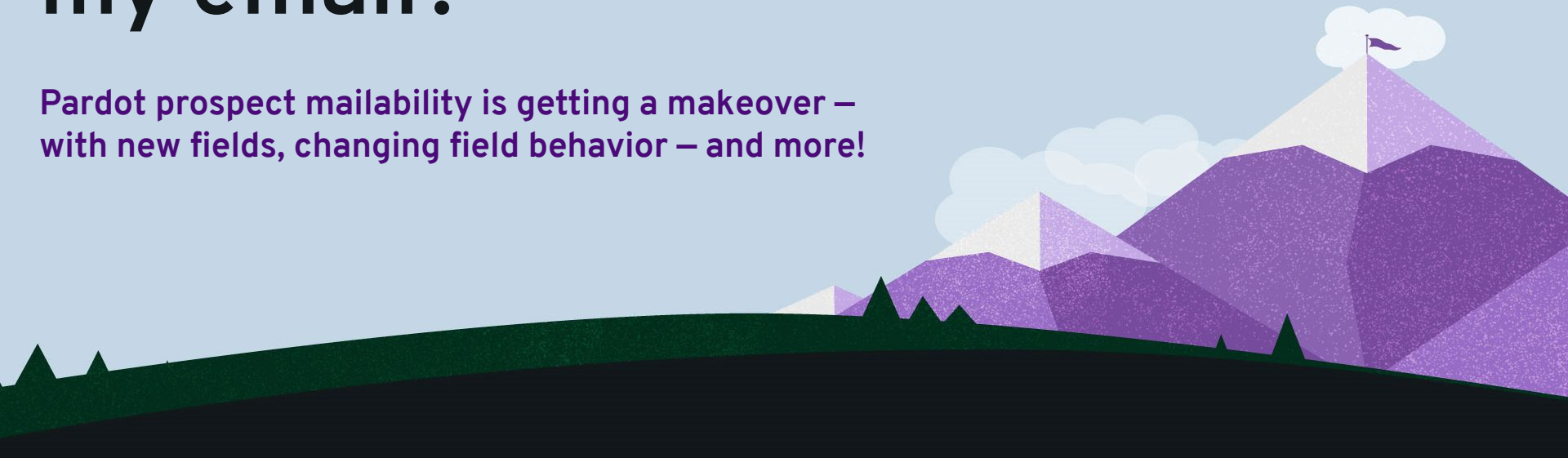


“Get more visibility on Prospect mailable status”

- Summer ‘21 Release

Will a Prospect receive my email?

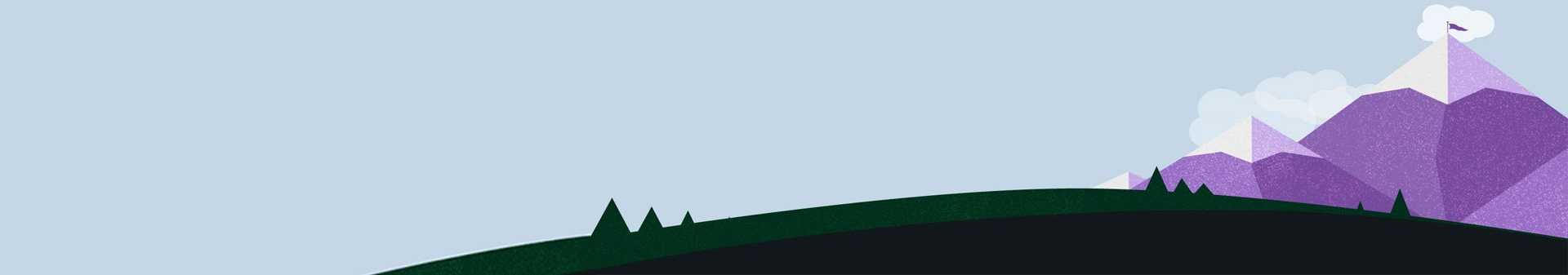
Pardot prospect mailability is getting a makeover — with new fields, changing field behavior — and more!



Agenda

What's going on here?

Pardot Prospect Mailability
6 changes to know about
Actions to take on your data
Training to benefit your team



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6 changes to know about

the Pardot prospect mailability update

#1 ‘Do Not Email’ and ‘Opted out’ fields

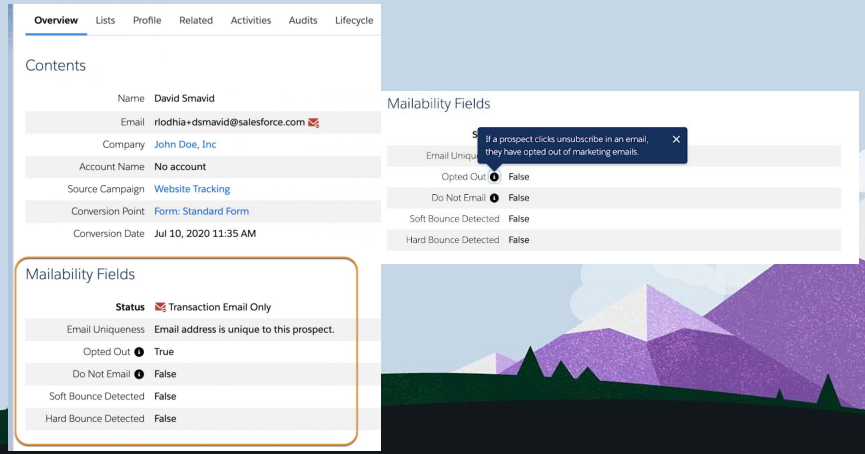
… have new ways marketers should be working with these fields.

Opted out:

- Controlled by the prospect
- Via the unsubscribe link/email preference center
- Training/user permissions! (return to later)

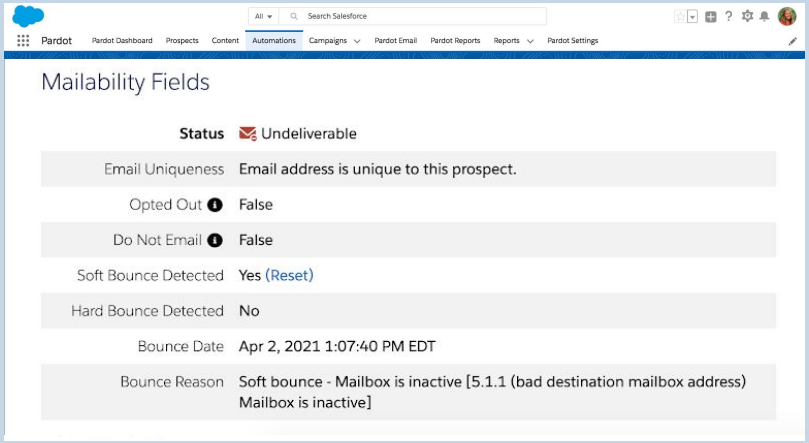
Do not email:

- For admins/marketers
- Global suppression (prevent from receiving emails)



#2: Bounce fields

Reset soft bounces

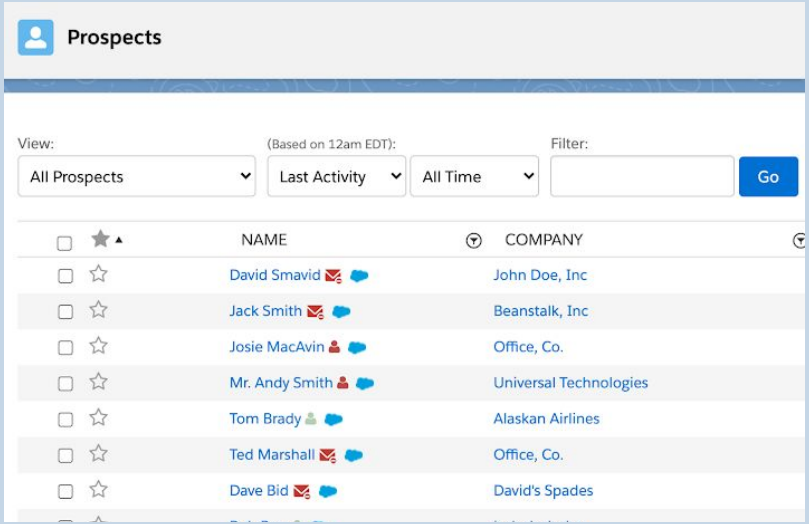


A temporary unmailable status...

- Usually caused by server downtime, inbox is at full capacity, or account not set up completely (yikes!)
- 5 soft bounces = hard bounce.
- Issue rectified? “wipe the slate clean” with the ‘reset’ hyperlink.
- Hard bounce ≠ Do not email field

#3: Mailability status

Bringing ‘Do Not Email’ and ‘Opted out’ back together



4 mailability ‘Status’ values:

- Mailable: everything is all good!
- Undeliverable: when 5 soft bounces or 1 hard bounce is detected.
- Transactional Emails Only: with either the ‘Do not email’ or ‘Opted out’ checkboxes checked, they cannot receive marketing emails (only operational emails).
- Archived: prospect is in the recycle bin.

#4: Mailability Field Sync Behavior

Pardot and Salesforce fields give Pardot admins a *healthy* challenge… You're gonna need more coffee ;)

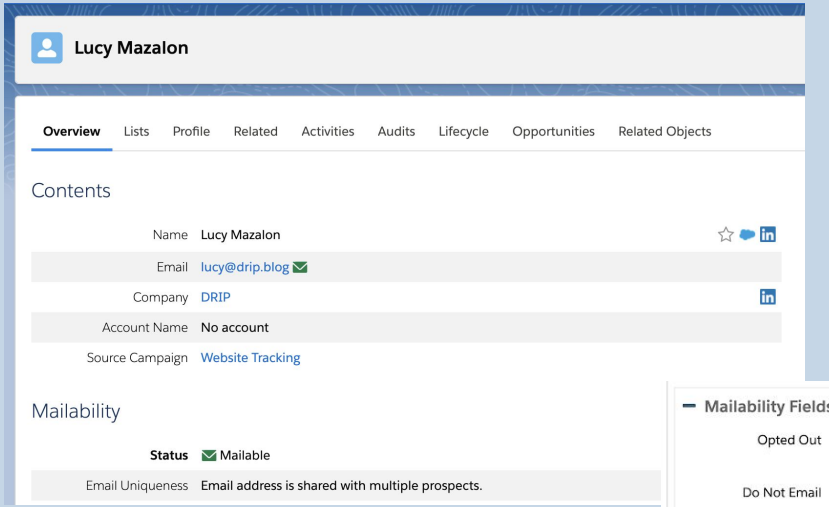
- Checkbox field sync 😱 'Do not email' and Opted out fields are both checkboxes 😱😱
- "Overwrite Prospect Opted Out" lifted guardrails - Pardot admins could deliberately override typical sync behavior.

Things to note going forward:

- "Overwrite Opted Out Field Sync" is the new default,
- 'Do not email' is treated like any other default field (gets rid of the 'sticky to true' sync behavior)

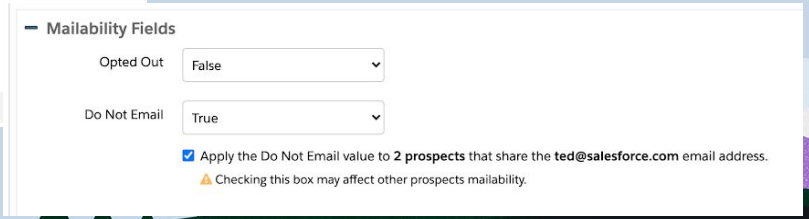
#5: Email Uniqueness

How many prospect records use that email address 🤔



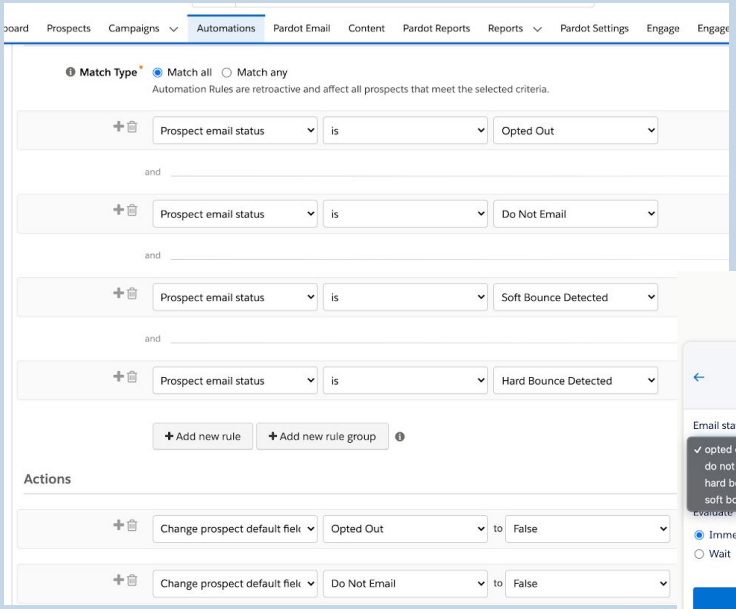
The cure for AMPSEA worries?!

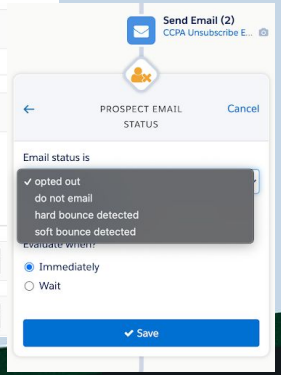
- Should records be merged, or they've been deliberately duplicated for a legitimate reason?
- Mailability fields updated manually - warning will appear if more than one prospect shares the same email address.



6. Rules and Actions

You've got new options...





Like, a lot more...

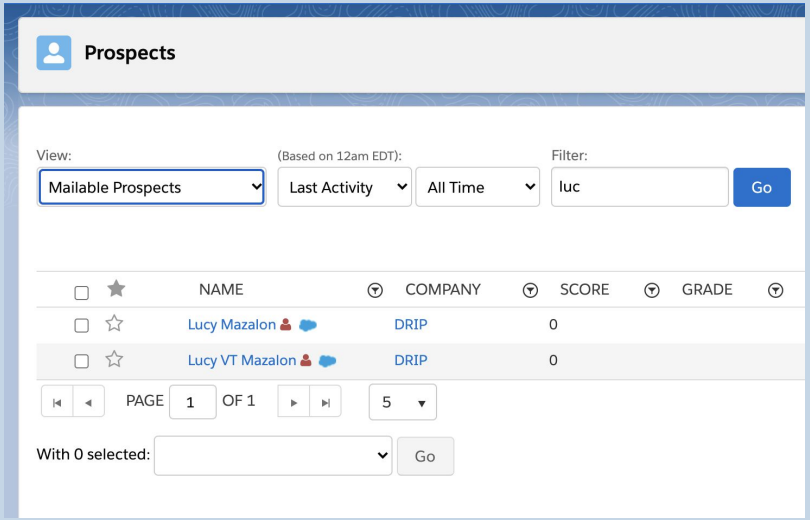
- Automation Rules, Dynamic Lists, and Completion Actions
- ...and in Engagement Studio. Example: use ES for operational data management.

Data actions to take

(Database management)

How Many Mailable Prospects?

Here's how you should find out...



- **Note:** numbers in the Pardot Settings 'Usage and Limits' update once daily – don't expect the numbers to change immediately.
- Use the Pardot Prospects **"Mailable Prospects" list view** for the real-time prospect count.
  ←
- Remember mailable prospect limits!

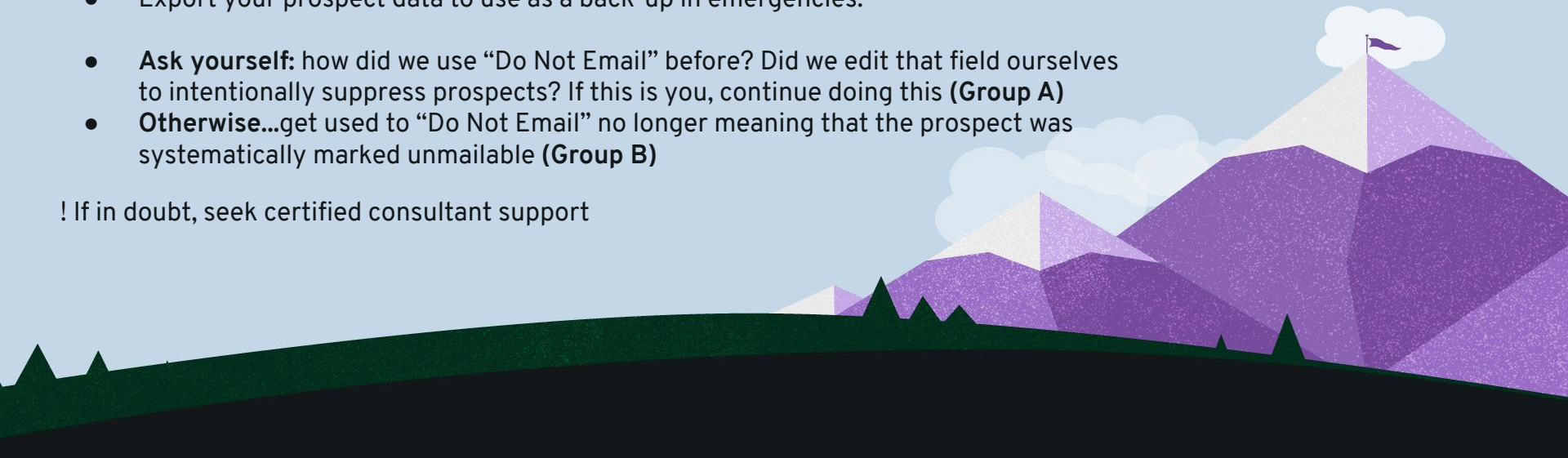
Prepare to update

Your Pardot database.

- Export your prospect data to use as a back-up in emergencies.

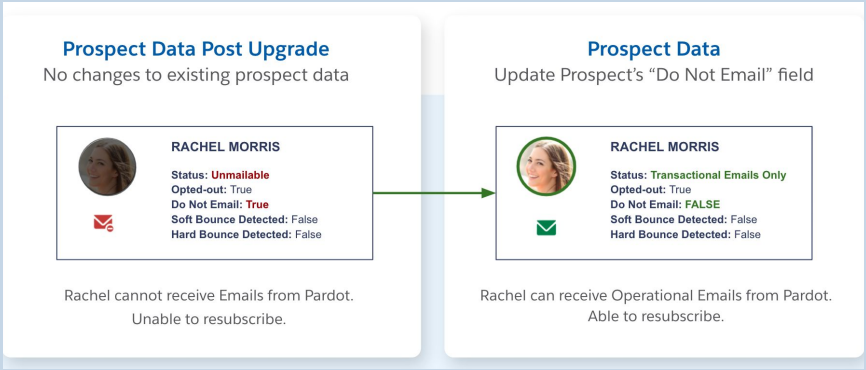
- **Ask yourself:** how did we use “Do Not Email” before? Did we edit that field ourselves to intentionally suppress prospects? If this is you, continue doing this **(Group A)**
- **Otherwise…**get used to “Do Not Email” no longer meaning that the prospect was systematically marked unmailable **(Group B)**

! If in doubt, seek certified consultant support



Unsubscribed Prospects

Updating the ‘Do Not Email’ field

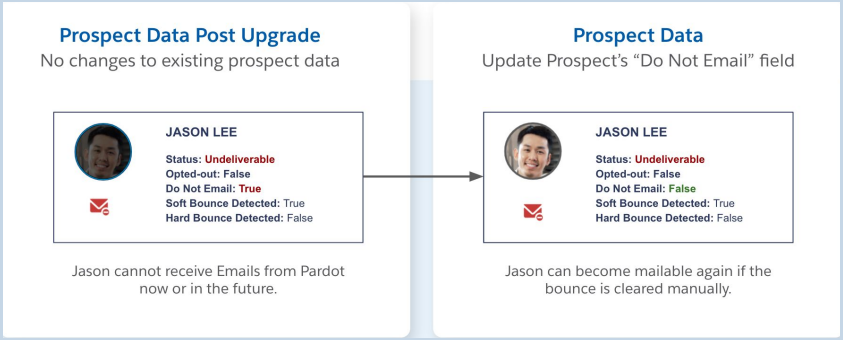


- Previously, the Do Not Email field was changed to “True” when a prospect was Opted Out (unsubscribed).
- Can’t resubscribe if Do Not Email’ field = “True”.
- Segmentation rule criteria:
  - If **Opted Out** = True
  - If **Soft/Hard Bounce detected** = False
  - Change **Do Not Email** → FALSE

Thanks to the Pardot Partner Enablement team for providing these great images!

Soft Bounces

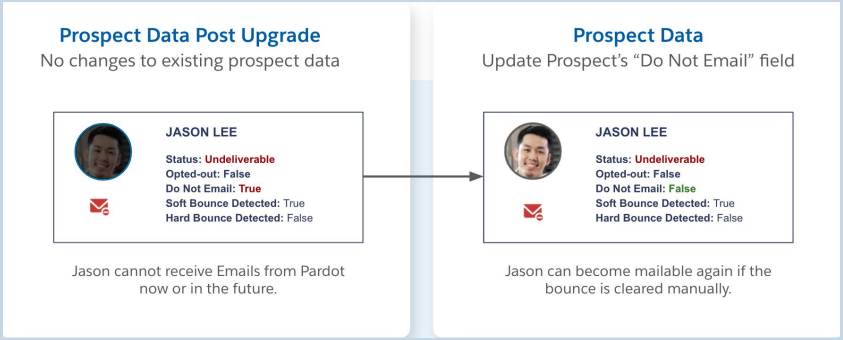
Updating the ‘Do Not Email’ field



- Soft bounce could be a result of a full inbox, temporary server glitch, etc.
- Don’t deserve to be ‘Do Not Email’!
- Segmentation rule criteria:
  - If **Opted Out** = False
  - If **Soft Bounce detected** = TRUE
  - If **Hard Bounce detected** = False
  - Change **Do Not Email** → FALSE

No Bounces

Updating the ‘Do Not Email’ field

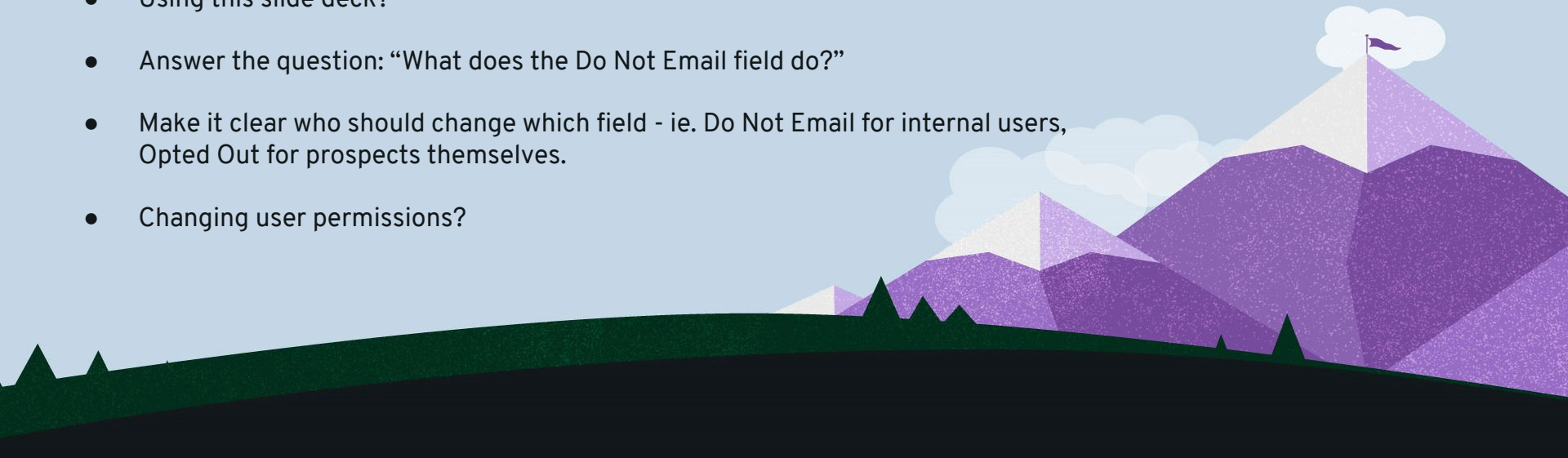


- No consistent use of ‘Do Not Email’ in the past?
- Run a permission pass campaign.
- ‘Scooping up’ the remainder.
- Segmentation rule criteria:
  - If **Opted Out** = False
  - If **Soft Bounce detected** = False
  - If **Hard Bounce detected** = False
  - Change **Do Not Email** → FALSE
    (Change Opted out → True?)

Training for your team

How can you communicate changes clearly?

- Using this slide deck?
- Answer the question: “What does the Do Not Email field do?”
- Make it clear who should change which field - ie. Do Not Email for internal users, Opted Out for prospects themselves.
- Changing user permissions?



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