

# Pardot Prospect Mailability: What the Makeover Means for Admins

Beginner | Admin



**Lucy Mazalon**

[SALESFORCEBEN.COM/THE DRIP](https://salesforceben.com/the-drip)



# Lucy Mazalon

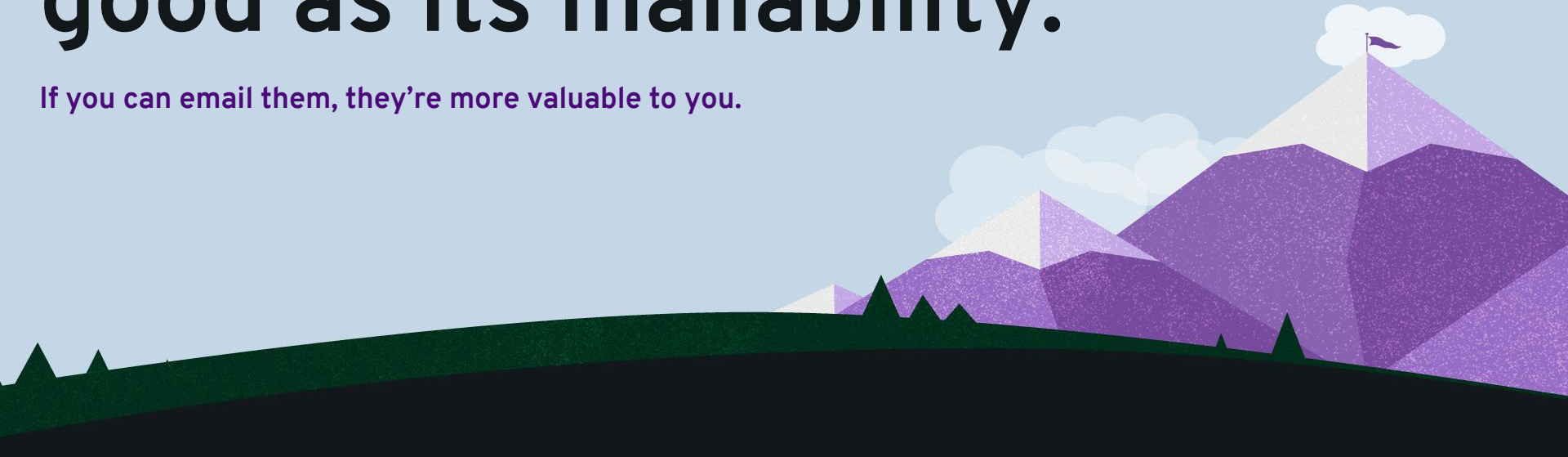
[SalesforceBen.com/The DRIP](https://SalesforceBen.com/TheDRIP)



**THEDRIP**

# A prospect record is only as good as its mailability.

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





#ParDreamin2020 @pardreamin

#### 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)



#ParDreamin2020 @pardreamin

Deliverability ultimately determines **mailability**.



Email sent

Email bounces

Prospect record marked as 'do not email'



Email sent

Prospect unsubscribes.  
Prospect record marked as 'do not email'

Prospect record marked as 'do not email'



# “Get more visibility on Prospect mailable status”

- Summer '21 Release

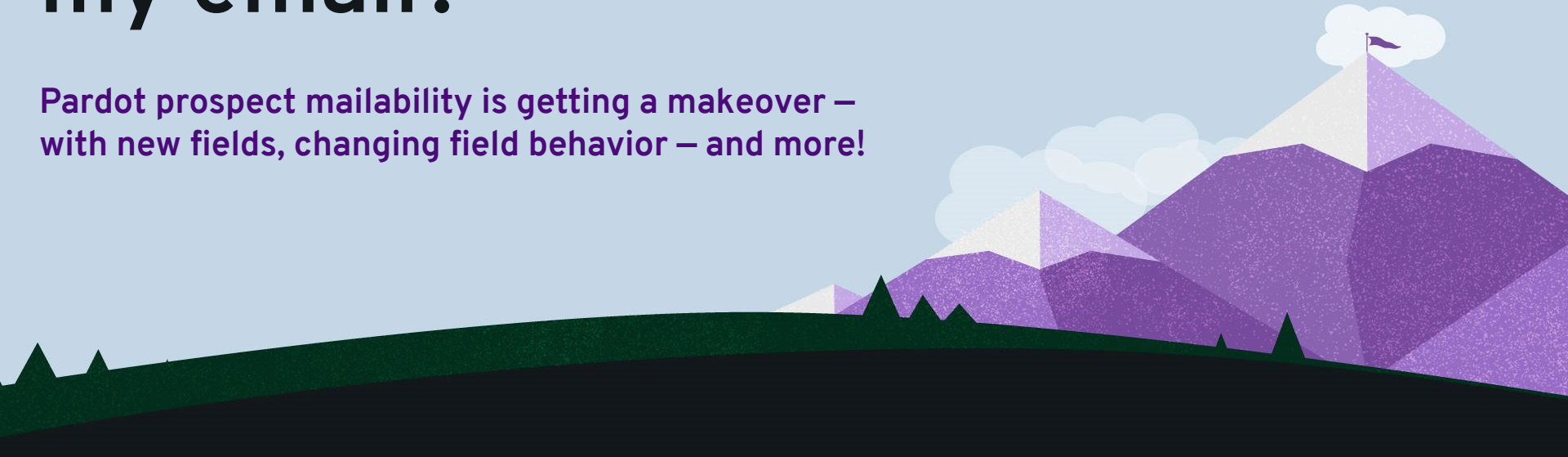




#PARDREAMIN2021 |  
@PARDREAMIN

# 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





# 6 changes to know about

the Pardot prospect mailability update



# #1 'Do Not Email' and 'Opted out' fields

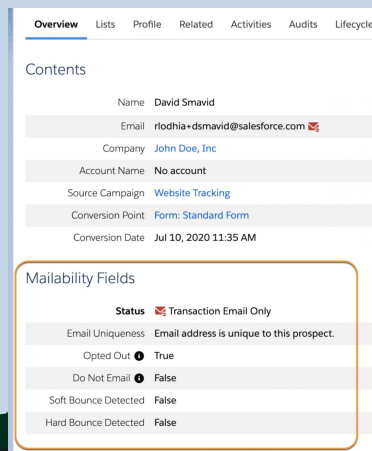
... have new ways marketers should be working with these fields.

## 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)



**Overview** Lists Profile Related Activities Audits Lifecycle

**Contents**

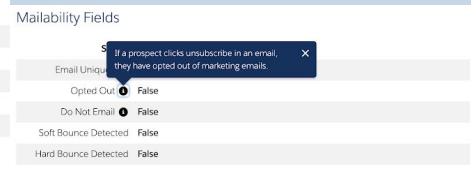
Name David Smavid  
 Email rlodhia+dsravid@salesforce.com  
 Company John Doe, Inc  
 Account Name No account  
 Source Campaign Website Tracking  
 Conversion Point Form: Standard Form  
 Conversion Date Jul 10, 2020 11:35 AM

**Mailability Fields**

Status Transaction Email Only

Email Uniqueness Email address is unique to this prospect.

Opted Out True  
 Do Not Email False  
 Soft Bounce Detected False  
 Hard Bounce Detected False



**Mailability Fields**

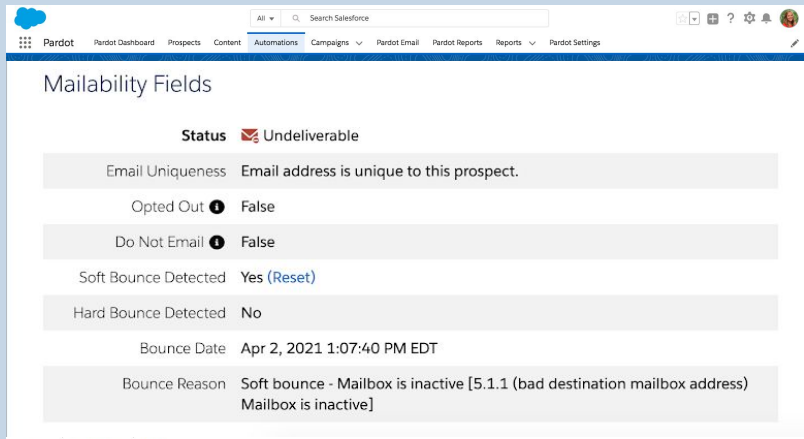
Email Uniqueness

Opted Out False  
 Do Not Email False  
 Soft Bounce Detected False  
 Hard Bounce Detected False

*If a prospect clicks unsubscribe in an email, they have opted out of marketing emails.*

# #2: Bounce fields

## Reset soft bounces

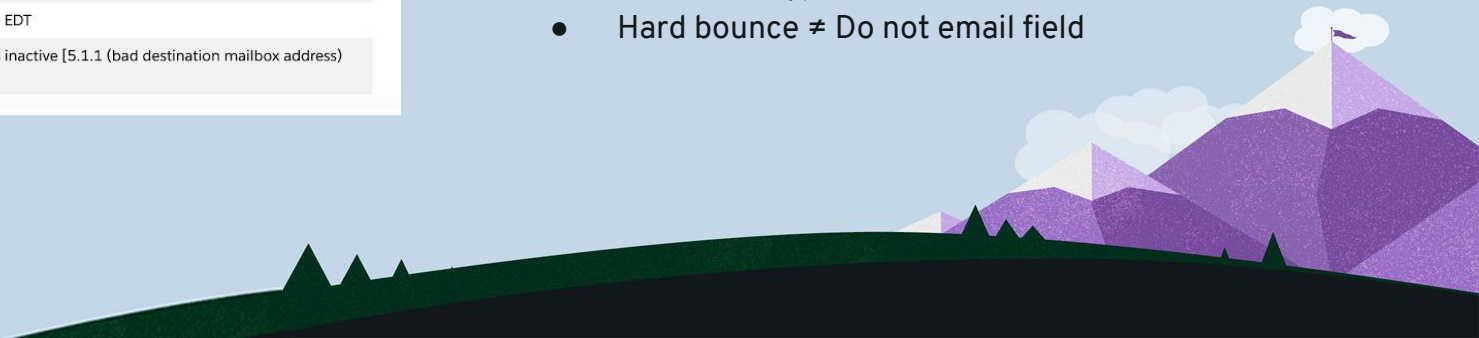


The screenshot shows the Pardot interface for a prospect's mailability fields. The status is 'Undeliverable'. The fields are as follows:

Field	Value
Status	Undeliverable
Email Uniqueness	Email address is unique to this prospect.
Opted Out	False
Do Not Email	False
Soft Bounce Detected	Yes (Reset)
Hard Bounce Detected	No
Bounce Date	Apr 2, 2021 1:07:40 PM EDT
Bounce Reason	Soft bounce - Mailbox is inactive [5.1.1 (bad destination mailbox address) Mailbox is inactive]

## 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

Prospects

View: (Based on 12am EDT): Filter:

All Prospects Last Activity All Time  Go

<input type="checkbox"/>	★ ▲	NAME	COMPANY
<input type="checkbox"/>	☆	David Smauid  	John Doe, Inc
<input type="checkbox"/>	☆	Jack Smith  	Beanstalk, Inc
<input type="checkbox"/>	☆	Josie MacAvin  	Office, Co.
<input type="checkbox"/>	☆	Mr. Andy Smith  	Universal Technologies
<input type="checkbox"/>	☆	Tom Brady  	Alaskan Airlines
<input type="checkbox"/>	☆	Ted Marshall  	Office, Co.
<input type="checkbox"/>	☆	Dave Bid  	David's Spades

## 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.

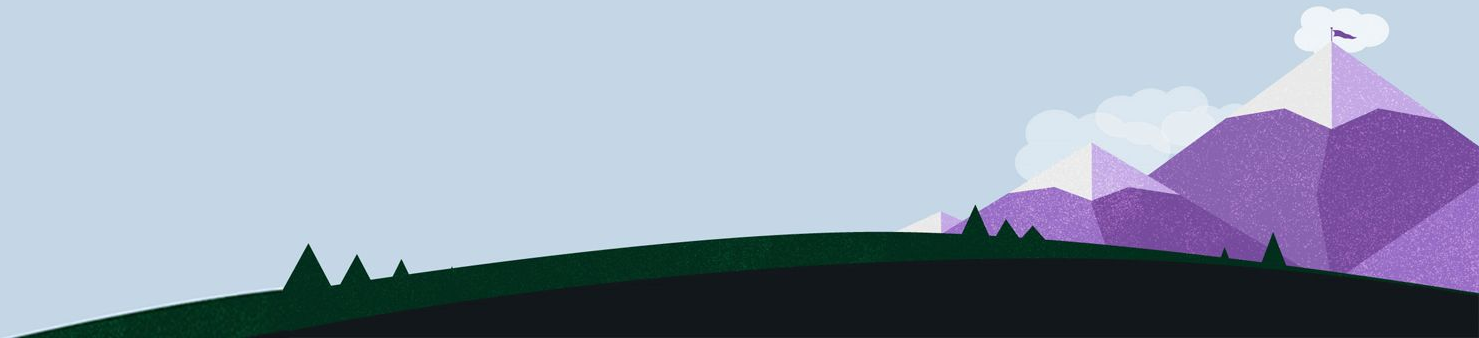
# #4: Mailability Field Sync Behavior

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.

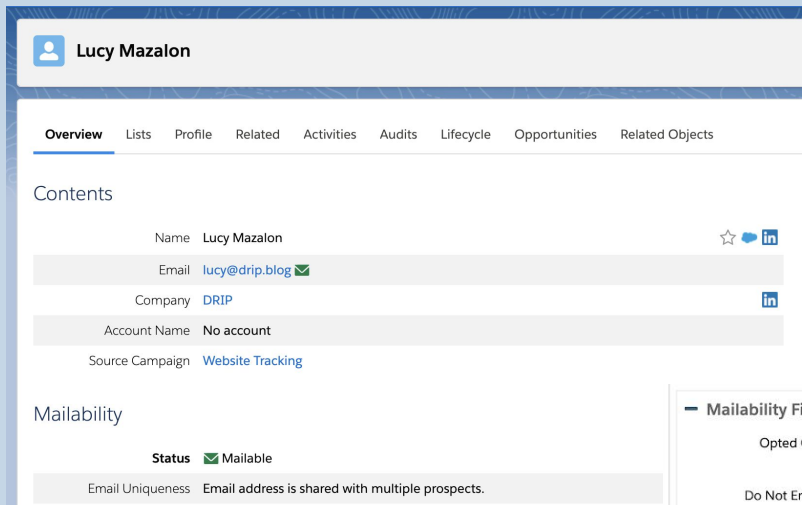
## Things to note going forward:

- "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 🤔



**Lucy Mazalon**

**Overview** Lists Profile Related Activities Audits Lifecycle Opportunities Related Objects

Contents

Name	Lucy Mazalon
Email	lucy@drjp.blog ✓
Company	DRIP
Account Name	No account
Source Campaign	Website Tracking

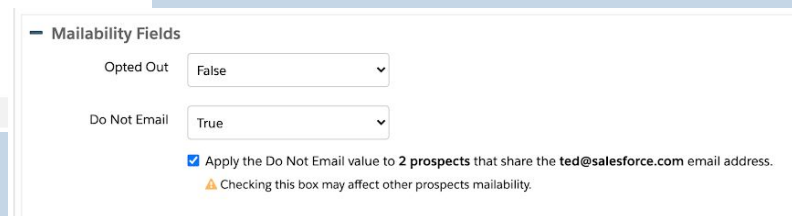
Mailability

**Status** ✓ Mailable

Email Uniqueness Email address is shared with multiple prospects.

## 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.



**Mailability Fields**

Opted Out

Do Not Email

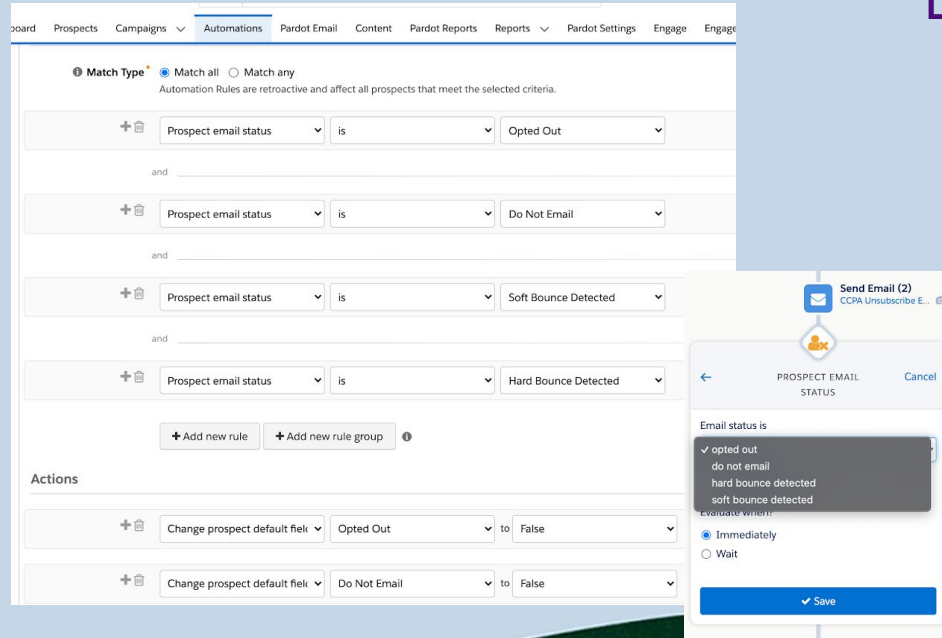
Apply the Do Not Email value to 2 prospects that share the ted@salesforce.com email address.

⚠️ Checking this box may affect other prospects mailability.



# 6. Rules and Actions

You've got new options...



The screenshot shows the Pardot Automations configuration page. At the top, there are navigation tabs: Dashboard, Prospects, Campaigns, Automations (selected), Pardot Email, Content, Pardot Reports, Reports, Pardot Settings, Engage, and Engage. Below the tabs, there are radio buttons for 'Match Type': 'Match all' (selected) and 'Match any'. A note states: 'Automation Rules are retroactive and affect all prospects that meet the selected criteria.'

The criteria section contains four rules, each with a '+ Add' icon on the left:

- Prospect email status is Opted Out
- Prospect email status is Do Not Email
- Prospect email status is Soft Bounce Detected
- Prospect email status is Hard Bounce Detected

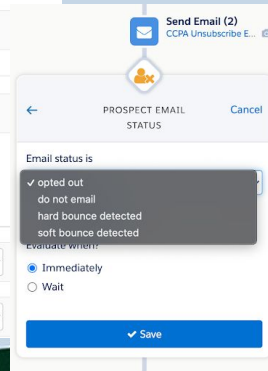
Below the criteria are two buttons: '+ Add new rule' and '+ Add new rule group'.

The 'Actions' section contains two rules, each with a '+ Add' icon on the left:

- Change prospect default field Opted Out to False
- Change prospect default field Do Not Email to False

Like, a lot more...

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



The screenshot shows a configuration dialog for 'Send Email (2)'. The title bar includes 'Send Email (2)' and 'CCPA Unsubscribe E...'. Below the title bar is a 'PROSPECT EMAIL STATUS' section with a 'Cancel' button. The main content area is titled 'Email status is' and contains a list of options:

- opted out
- do not email
- hard bounce detected
- soft bounce detected

Below this list is the text 'Evaluate when:' followed by two radio buttons:

- Immediately
- Wait

At the bottom of the dialog is a blue 'Save' button.

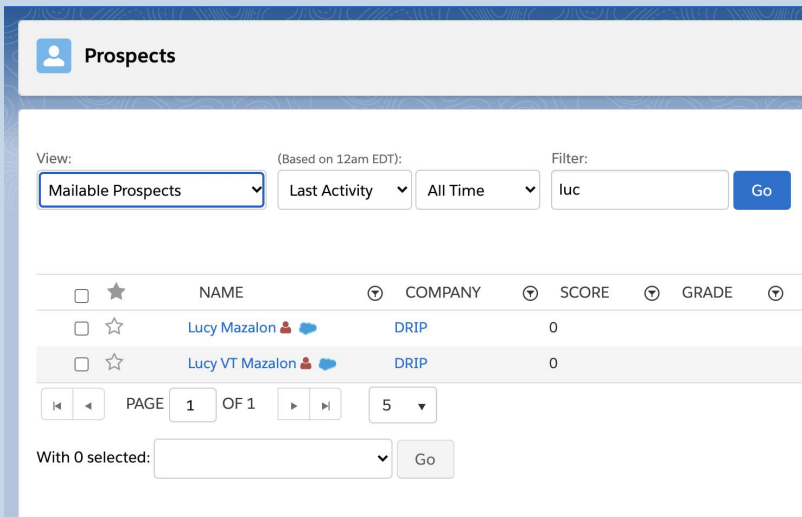


# Data actions to take

(Database management)

# How Many Mailable Prospects?

Here's how you should find out...



The screenshot shows the Pardot Prospects interface. At the top, there's a 'Prospects' header with a person icon. Below it, there are filters for 'View' (set to 'Mailable Prospects'), '(Based on 12am EDT):' (set to 'Last Activity'), 'All Time', and a 'Filter' box containing 'luc'. A 'Go' button is next to the filter. Below the filters is a table with columns: NAME, COMPANY, SCORE, and GRADE. The table contains two rows, both with a score of 0. At the bottom, there's a pagination bar showing 'PAGE 1 OF 1' and a 'Go' button.

NAME	COMPANY	SCORE	GRADE
Lucy Mazalon	DRIP	0	
Lucy VT Mazalon	DRIP	0	

- **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.

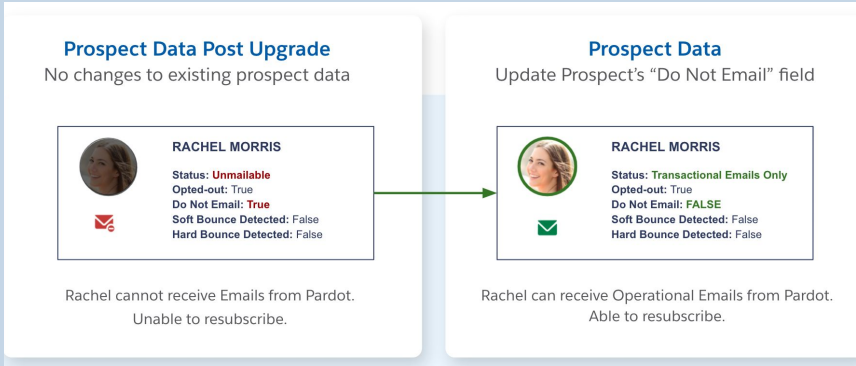
- Export your prospect data to use as a back-up in emergencies.
- **Ask yourself:** how did we use “Do Not Email” before? Did we edit that field ourselves to intentionally suppress prospects? If this is you, continue doing this (**Group A**)
- **Otherwise...**get used to “Do Not Email” no longer meaning that the prospect was systematically marked unavailable (**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**

# Soft Bounces

## Updating the 'Do Not Email' field


### Prospect Data Post Upgrade

No changes to existing prospect data



**JASON LEE**


Status: **Undeliverable**  
 Opted-out: **False**  
 Do Not Email: **True**  
 Soft Bounce Detected: **True**  
 Hard Bounce Detected: **False**



Jason cannot receive Emails from Pardot now or in the future.


### Prospect Data

Update Prospect's "Do Not Email" field



**JASON LEE**

Status: **Undeliverable**  
 Opted-out: **False**  
 Do Not Email: **False**  
 Soft Bounce Detected: **True**  
 Hard Bounce Detected: **False**



Jason can become mailable again if the bounce is cleared manually.

- 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


### Prospect Data Post Upgrade

No changes to existing prospect data



**JASON LEE**


Status: **Undeliverable**  
 Opted-out: **False**  
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Jason cannot receive Emails from Pardot now or in the future.


### Prospect Data

Update Prospect's "Do Not Email" field



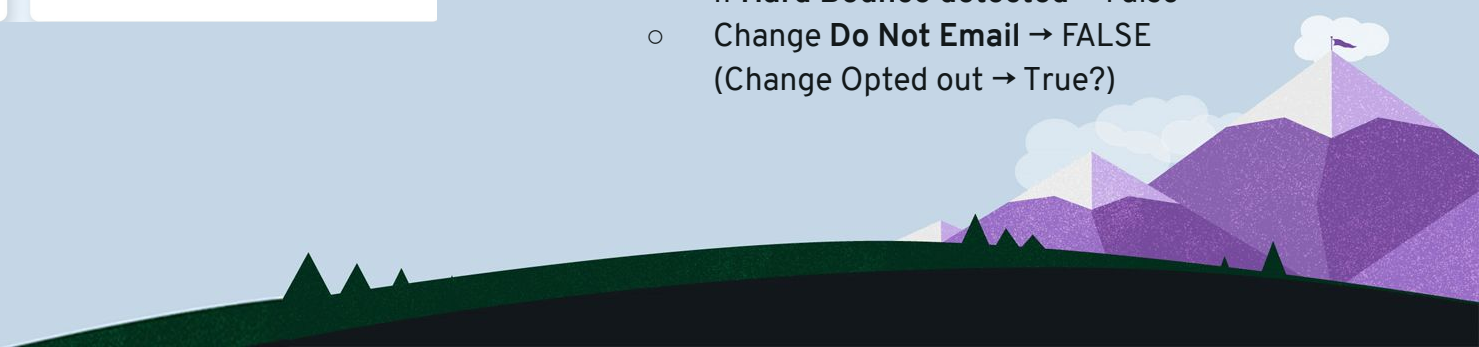
**JASON LEE**

Status: **Undeliverable**  
 Opted-out: **False**  
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 Soft Bounce Detected: **True**  
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Jason can become mailable again if the bounce is cleared manually.

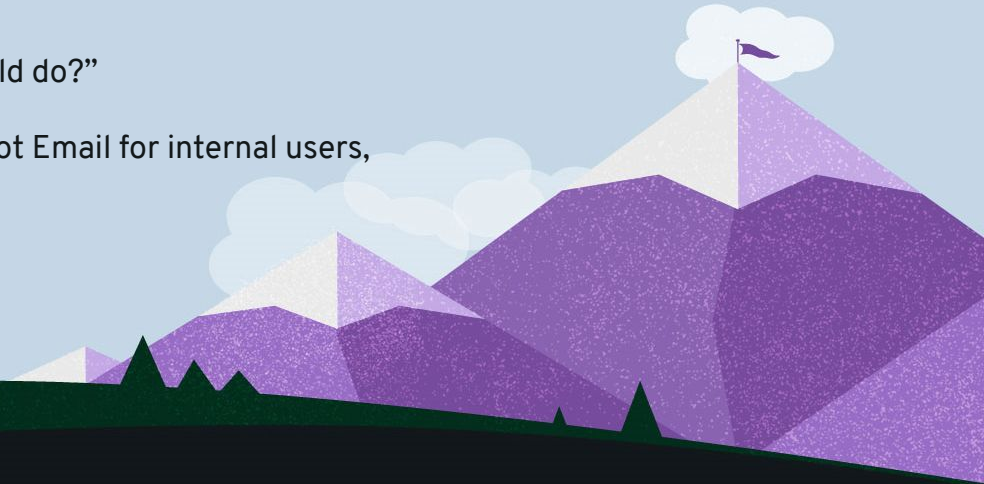
- No consistent use of 'Do Not Email' in the past?
- Run a permission pass campaign.
- 'Scooping up' the remainder.
- Segmentation rule criteria:
  - If **Opted Out** = False
  - If **Soft Bounce detected** = False
  - If **Hard Bounce detected** = False
  - Change **Do Not Email** → FALSE  
(Change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



PARDOT | REPORTING

## WHAT IS A MAILABLE PROSPECT IN PARDOT?

THE DRIP

PARDOT

## PROSPECT MAILABILITY: ACTIONS FOR YOUR PARDOT DATABASE AFTER UPGRADING

THE DRIP

PARDOT

## WHAT TO DO WHEN YOU HIT YOUR PARDOT PROSPECT DATA LIMIT

THE DRIP

MARKETING AUTOMATION

## DELIVERABILITY VS. MAILABILITY

NIGHTCLUB GUIDE FOR SALESFORCE/PARDOT MARKETERS

THE DRIP

# Thanks for listening!



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