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MParDreamin' 2022



Double Trouble or Double Awesome? Embedding Dynamic Content Within Itself

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Welcome

Quick Introductions

Session Purpose

Q & A at the End





The What

Dynamic Content is...



Variable content that displays custom HTML on your website or Account Engagement (Pardot) forms, landing pages, layout templates, and emails based on prospect criteria. When a prospect matches the criteria for your dynamic content, a variation of the content displays.

In other words...

Save yourself the headache of maintaining a multitude of versions of templated content with slight variances and instead maintain ONE version that dynamically displays content based on a user's known information (AKA field values).



“Double Dynamic Content”

The ability to embed a piece of dynamic content **inside** of another piece of dynamic content within the Account Engagement platform

Yay for advanced personalization!!!





The Who

Who can create Dynamic Content?



Admins

Default Role Permissions:

View
Create/Edit
Delete

Marketers

Default Role Permissions:

View
Create/Edit
Delete

**Custom
Roles**

Permission Options:

View Only
View + Create/Edit
View + Delete
View + Create/Edit + Delete



The When

Real-World Examples: Double Dynamic



Salesperson
+ Region

Product +
Language

Persona +
Sales Stage

Salesperson + Region



Use Case: A prospective customer is receiving an e-newsletter that contains location-based contact information based on their state, as well as the account executive who is assigned to them.

Around The Ledger

LenoxSoft's Monthly Newsletter

Companies are losing millions of dollars each year due to errors in expense reporting and non-compliant employees who don't understand how to properly track spending. With LenoxSoft tracking employee expenses is a breeze. Just snap, click, submit! Both accounting professionals and employees will love our easy to use tools.

Scalable No matter how big your organization today — LenoxSoft grows as you do.	Contact Us Seattle Location: 888-111-2323 Your Rep: Dwight Shrute
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Alerts

Want up to the minute notifications? You'll love the alerts that come built into LenoxSoft. You'll always know when reports come in — or when they are past due!

[Read more](#)

Advanced Reporting & Analytics

Compare month-to-month and year-to-year utility bills in order to identify outliers in your energy consumption.

[Read more](#)

Data Imports & Integrations

Need to import financial data from another system? No problem! Use one of our 23 native import drivers. You can also import simple spreadsheet files.

[Read more](#)

Dynamic Content 2

Block w/ Location & Phone


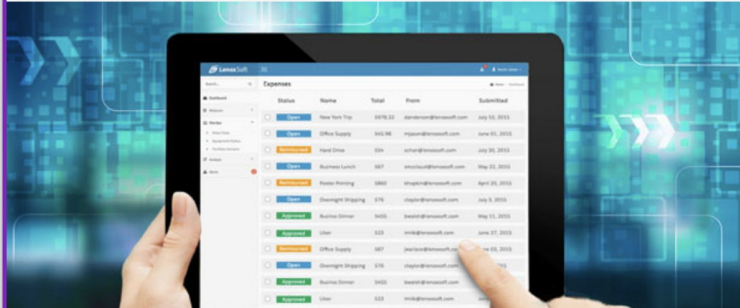
Dynamic Content 1 (Inside 2)

Salesperson Name

Product + Language



Use Case: A prospective customer has requested a spec sheet download based on a universal website form. They have indicated that they are interested in Product A as well as their primary language.

Expense	Name	Total	Phone	Submitted
Office Supplies	John Doe	100.00	555-555-5555	July 25, 2015
Office Supplies	Jane Smith	100.00	555-555-5555	July 25, 2015
Travel	John Doe	500.00	555-555-5555	July 25, 2015
Business Lunch	Jane Smith	100.00	555-555-5555	July 25, 2015
Business Training	John Doe	500.00	555-555-5555	April 25, 2015
Overnight Shipping	Jane Smith	50.00	555-555-5555	July 5, 2015
Business Dinner	John Doe	100.00	555-555-5555	July 25, 2015
User	Jane Smith	100.00	555-555-5555	July 25, 2015
Office Supplies	John Doe	100.00	555-555-5555	July 25, 2015
Overnight Shipping	Jane Smith	50.00	555-555-5555	July 25, 2015
Business Dinner	John Doe	100.00	555-555-5555	July 25, 2015
User	Jane Smith	100.00	555-555-5555	July 25, 2015

We hear you want information...
Good News: We Delivered.

{{Recipient.FirstName}},
Accounting professionals now face challenges that simply didn't exist a few years ago. Our hassle-free accounting software can help you grow.

This product overview highlights how easy it is to switch to LenoxSoft. Please contact us with any questions.

[Download Product Overview](#)

Dynamic Content 2

Body Content Based on Primary Language

Dynamic Content 1 (Inside 2)

Download Button Linking to Product Spec Sheet in Proper Language

Persona + Sales Stage



Use Case: A prospective customer is served up an Account Engagement (Pardot) Landing Page that needs to contain content that is specific to their role at their company as well as what stage their opportunity is to ensure they are provided the proper incentive(s).

LenoxSoft FEATURES PRICING RESOURCES ▾ ABOUT US ▾

Poor expense practices aren't just a headache. They impact your bottom line.

As a C-Suite Executive, we know you're conscious of accurate expense reporting and desire the ability to identify non-compliant employees who don't understand how to properly track their spending. With LenoxSoft, tracking employee expenses is a breeze. Just snap, click, submit! Both accounting professionals and employees will love our easy to use tools.

Our special pricing:

- First month FREE!
- 20% off following 11 months
- Access to Platinum Customer Support (\$5,000 value!)

FIRST NAME *

LAST NAME *

COMPANY *

EMAIL *

REQUEST DEMO

Dynamic Content 1 (Inside 2)

Discount Based on Opportunity Stage

Dynamic Content 2

Body Content w/ Persona

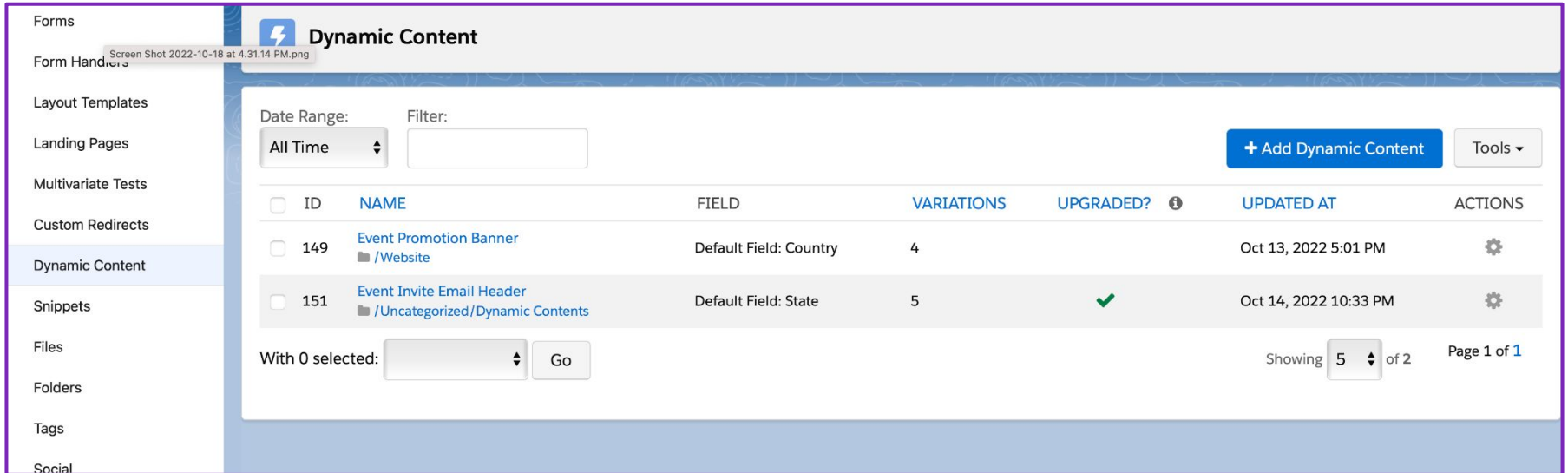


The Where

Where do I create Dynamic Content?



Pardot Lightning App > Content > Dynamic Content



The screenshot shows the 'Dynamic Content' management interface in the Pardot Lightning App. On the left is a navigation sidebar with categories like Forms, Form Handlers, Layout Templates, Landing Pages, Multivariate Tests, Custom Redirects, Dynamic Content (highlighted), Snippets, Files, Folders, Tags, and Social. The main content area has a header 'Dynamic Content' with a lightning bolt icon. Below the header are filters for 'Date Range' (set to 'All Time') and 'Filter'. A '+ Add Dynamic Content' button and a 'Tools' dropdown are on the right. A table lists two dynamic content items:

<input type="checkbox"/>	ID	NAME	FIELD	VARIATIONS	UPGRADED?	UPDATED AT	ACTIONS
<input type="checkbox"/>	149	Event Promotion Banner /Website	Default Field: Country	4		Oct 13, 2022 5:01 PM	
<input type="checkbox"/>	151	Event Invite Email Header /Uncategorized/Dynamic Contents	Default Field: State	5		Oct 14, 2022 10:33 PM	

At the bottom, there is a selection summary: 'With 0 selected:' followed by a dropdown menu and a 'Go' button. On the right, it shows 'Showing 5 of 2' and 'Page 1 of 1'.



The How

How to Embed Dynamic Content Within Existing Dynamic Content



Create a
Base
Template

Create
Dynamic
Content 1

Create
Dynamic
Content 2

Place
Dynamic
Content 1
inside 2

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

Return to
Template

Place Link:
Dynamic
Content 2

Test, Test,
Test!!!!

Launch!

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9



The Why

You should use Dynamic Content if...



- Your base template is the same but your content is variable
- You need to display text in multiple languages
- You want to swap imagery based on products or services of interest
- You're hosting global events and the invite is dependent on geographical location
- Signature line/contact information varies by salesperson and/or closest corporate location
- Content is controlled by a specific buyer persona
- You need to display discounts or incentives for a specific subset of your audience
- Content is controlled by user behavior: Page views, form submissions, etc.

If your content can be paired with another at the same time, **USE DOUBLE DYNAMIC CONTENT!!!**

Trouble with Dynamic Content



- Order your variations by the restrictiveness of the criteria. If a prospect matches multiple criteria, the prospect sees the first matched variation.
- Only HTML is supported.
- CSS on the page where you embed dynamic content affects the content's appearance.
- You can't use fields with the date field type as criteria.
- Create plain-text content for use with text emails.
- Dynamic content merge fields in emails display only the ID for that piece of content. To make sure you're using the right merge field, you can cross-reference the ID number on the Dynamic Content list view.

Important Reminders



Double Dynamic content **needs to have failsafe scenarios** planned out as well as **strategic implementation** to ensure content will populate accordingly.

1. **Include a Default option.** For example, if the Language field is blank, what content would show?
2. **Plan out scenarios in which content may be missing.** For example, if you're using a field that only is collected if they fill out one specific form, how can we ensure as many people submit that form as possible prior to engaging with the personalized content?
3. **Place the dynamic content in a logical order.** For example, create a dynamic button and THEN place it inside another content block with dynamic verbiage.
4. **Keep Pardot field data in sync with Salesforce.** Double-check field sync behavior and what individuals have access to modify data PRIOR to using those values for controlling content.

Double Dynamic Content means you can have twice the marketing headache if you're not careful!

Drumroll....



Dynamic content can only be nested as **two levels or layers.**



Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

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