



Learn. Network. Grow.

MParDreamin' 2022

Houston We Have A Problem: Avoiding Personalization SOS Scenarios

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Agenda

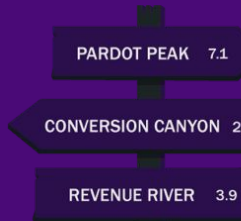


1. Quick Overview of Personalization

2. Personalization in Emails, Forms, and Landing Pages

3. How To Identify Issues & How To Avoid Them

4. Open Question and Answers



Personalization Using Account Engagement



Dynamic Content

Dynamic Content works by looking at the data in one specific field of your choice on the Prospect record (person) and updates the content based on the value of one field, it then gets rendered (viewed).

Field Name = Country
Value Requested = Ireland

Output: Shows Hero Image of Ireland

Handlebars Merge Language

HML works by looking at the data in one specific field of your choice on the Prospect record (person) and updates the variable based on the value of one field, it then gets rendered (viewed).

First Name field = Marcos

Output: Dear Marcos

Snippets

Snippets work by simply rendering the static content within them. There's no personalization for the end Prospect.

Snippet Value = MarDreamin' is the best conference for Marketers.

Output: MarDreamin' is the best conference for Marketers.



Poll Time

Which Personalization feature have you used?

What happens when the data fails you or these features don't play along with one another?

This will be a discussion and show and tell about personalization in Pardot. We will focus on key use cases where these features could fail AND how to prevent this from happening in the first case.





Poll Time

What Is Stopping You From Using Personalization?



Emails



In The Wild



Dynamic Content to swap out by Day

HML to populate the person's name

Hi {{Recipient.FirstName}},

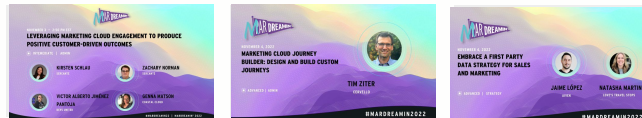
Thank you for registering for MarDreamin'. Please use the button below to jump into the event.

Snippets for consistent text, can be updated across multiple templates at a time

HML or Dynamic Content can be used to update text, color, URL link

Enter Event

We recommend that you watch these 3 fantastic {{Recipient.AttendeeInterest}} sessions at MarDreamin' this week!



Dynamic Content to update selections based on interest

To unsubscribe, please click here.

In The Wild



From Choose who your email is sent *from*.

We'll set the From address using your first option below. If it's not available for a given prospect, we'll send from the next option.

Note: autoresponder emails using this template will use the information set below.

Sender *

+ ▼



You can customize the sender to be personalized for each prospect

If the recipient does not have a value for the reply-to variables chosen below, replies will go to the address the email is sent from.

Custom Reply-To Address

+ ▼

Subject Adjust your subject line as needed.

Subject Line * [Advanced Subject Composer](#)



You can add HML, Snippets and Dynamic Content to your subject lines



Forms



In The Wild



HML to personalize entry point, can use conditional logic to personalize or have a backup

Contact Us

Hi {{Recipient.FirstName}},

Welcome Back! Please complete the following fields to contact the MarDreamin' team.

Name

Marcos Duran

Email

marcos@sercante.com

Support Preferred Language

Español

How Can We Help Today?

Hello, I am having issues with personalizing my emails. Can you help?

Can use HML inside of Dynamic Content if the person is a known Prospect

Can use this field to capture preferences for content, support, and email preferences centres



Landing Pages



In The Wild



Updated HML inside dynamic content with text setup according to language preference

Marcos, gracias por tu pregunta.

Estaremos en contacto contigo proximamente.

Marcos, thanks for your questions.

We will be in contact with you soon!

¿Preguntas?

Nombre

Email

Lenguaje Preferido

¿Cómo Te Podemos Ayudar Hoy?

Updated the form to a completely different one after it was filled out based on language preference



Personalization Planning



Why Personalization Fails?



1

No Data

No data in the field used for that prospect, you end with blanks

2

Incorrect Data

Misformatted information or completely incorrect

3

User Error

Added or deleted a bracket, didn't set a default, etc

Planning Process



What You
Want To Do?

What Assets
Do You
Need?

Do You Have
The Data To
Make It
Happen?

How will we
test?

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

How To Test



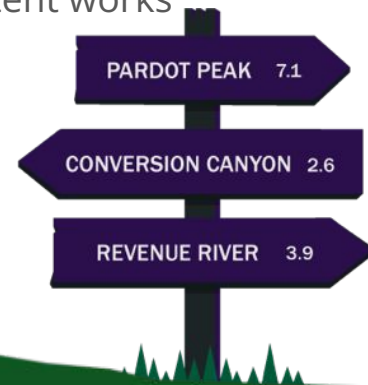
Always test incognito

Setup a list of “internal” Prospects with different values

Leverage Gmail function with +variable

Don't forget a default value when using HML and Dynamic Content

Use PREVIEW and TESTING TOOLS buttons to make sure you see how dynamic content works



Test Dynamic Content In Email



Use Preview +
Send It To Test
List

Make a copy of your email
for HTML to test for
rendering, then add it to
dynamic content and
validate the different
variations and make sure
things render properly

Rinse and Repeat

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

Test HML In Email



Review Your
Dynamic List For
Anyone Who
Doesn't Meet
Criteria

Leverage HML Syntax
to add a backup in the
event there are blanks
and test a blank
record

Use PREVIEW
button and send It
To Test List

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

Things To Keep In Mind



1. Personalization requires strategy AND **good data**
2. Bad data or no data can harm your brand when you attempt to personalize your emails and digital experiences
3. **Check your tier**, you will need Plus or Higher to leverage Dynamic Content
4. Connected Campaigns are a requirement to leverage Snippets
5. HML is enabled for new account since 2019 but if yours is older it may require migrating
6. Always test **incognito (no cookies)** or **with a cookie'd prospect**
7. Leverage the PREVIEW tab on email or the Dynamic Content TESTING TOOLS button
8. Know the difference between **global default values** and template **HML backup defaults**
9. Queues **do not have signatures - setup a Identity User**
10. **Test HML Syntax**, wherever you use it



Q&A Time



Resources

Dynamic Content, HML, Snippets

[Create Dynamic Content](#)

[Pushing Pardot: How to use Dynamic Content With More Than 25 Options](#)

[Creative Ways to Personalize Your Marketing with Pardot Advanced Dynamic Content](#)

[Beyond Dynamic Content: How to Create REAL Content Personalization in Pardot](#)

[Guidelines for Using Handlebars Merge Language in Pardot](#)

[Content Personalization Using Dynamic Content, Pardot HML, and Pardot Snippets](#)

[4 HML Tricks for Advanced Pardot Personalization Create and Manage Snippets](#)

[Duck, Duck, Goose: How to play with Pardot Snippets!](#)

[A Simple Guide To Using Pardot Snippets: A Feature Enabled By HML](#)

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FIONTA



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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