



Here At Last:

Pardot Conditional Completion Actions



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MParDreamin' 2022



Here At Last: Pardot Conditional Completion Actions

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Goal

Conditional Completion Actions was much-awaited for in the Pardot community and was only just released this year.

Today we will cover tips and tricks to maximize the new Marketing Cloud Account Engagement (Pardot) Conditional Completion Actions feature that's sure to be a time saver for Pardot admins everywhere.

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Did you know?

The Conditional Completion Actions feature was an idea submitted to the Idea Exchange board.



Summer '22 Release

Conditional Completion Actions feature rolled out to Account Engagement (Pardot) users worldwide.



Conditional Completion Actions



What is it?

- Completion Action + Automation Rule

How do you use it?

- Define criteria + Action to Take

What is the benefit?

- Immediate + Interaction Based + Doesn't Count Towards Automation Rule Allowance

A screenshot of a configuration interface for a conditional completion action. The interface is organized into several sections. At the top, there are three dropdown menus: 'Take Action When' (set to 'Prospect Default Field'), 'Prospect Field Type' (set to 'Job Title'), and 'Operator' (set to 'is'). Below these is a 'Value' field containing the text 'Student'. The next section is for 'Action', with a dropdown menu set to 'Add tags' and a 'Tags' search field containing 'Search tags...'. Below the 'Action' section is another 'Action' dropdown menu set to 'Send auto respond' and a 'Template' field containing a blurred text area. At the bottom of the configuration area, there are two buttons: '+ Add Action to Group' and 'Delete Group'. Below the main configuration area, there are two additional buttons: '+ Add Action' and '+ Add Conditional Group'.

Where can I use CCA?

YES!!

- Forms
- Form Handlers
- Landing Pages



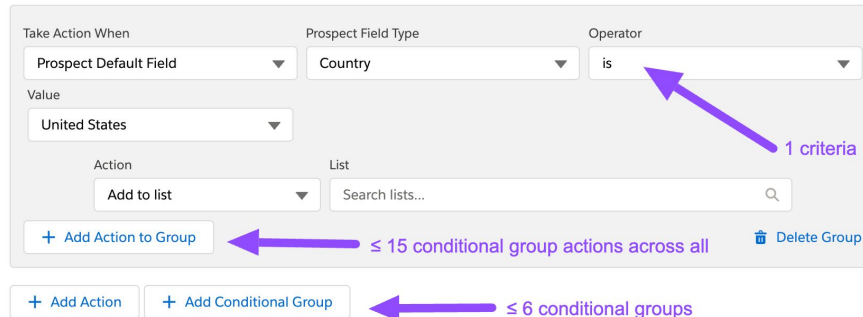
Yes, but some caveats...

- Custom Redirects
- Page Actions
- File Downloads



Are there any limits to CCA?

- 1 criteria per conditional group to take actions
- ≤ 6 conditional groups per asset
- ≤ 15 conditional group actions across all conditional groups per asset



The screenshot shows a configuration interface for a Conditional Criteria Action (CCA). It includes the following elements:

- Take Action When:** Prospect Default Field (dropdown), Prospect Field Type (Country), Operator (is).
- Value:** United States (dropdown).
- Action:** Add to list (dropdown).
- List:** Search lists... (input field).
- Buttons:** + Add Action to Group, + Add Action, + Add Conditional Group, and Delete Group.

Annotations with purple arrows and text:

- An arrow points to the Operator dropdown with the text "1 criteria".
- An arrow points to the "+ Add Action to Group" button with the text " ≤ 15 conditional group actions across all".
- An arrow points to the "+ Add Conditional Group" button with the text " ≤ 6 conditional groups".





My Favorite Use Cases for CCA

Use for Campaign Hygiene



Scenario:

- You want to keep competitors and others not wanted out of full completion actions

Goal:

- To avoid folks from entering lists, campaigns, clog sync error queue.

Take Action When	Operator	Prospect List
Prospect List ▼	isn't member of ▼	Keep Out 🔍



Use for ABM Strategy



Scenario:

- You want to take a different action depending on the account type.

Goal:

- To notify CRM owners, set tasks, tag, and provide a personalized response.



Take Action When: Prospect Account Field | Account Field Type: Key Account | Operator: is

Value: Select...

Action: Notify assigned user

Action: Send auto responder email | Template: Search templates...

Action: Create Salesforce task

* Subject: Type a subject...

* Assigned to: Select a user

* Priority: Select a priority

* Status: Select a status

Take Action When: Prospect Account Field | Account Field Type: Account Status | Operator: is

Value: Current Client

Action: Add tags | Tags: Search tags...
EDU-Quote-Account-Current Client X

+ Add Action to Group | Delete Group

Use for Webinar Registrations+



Scenario:

- You have a series of webinars and want consolidate registration on one form.

Goal:

- To make it easier for folks to register for webinar series.



Take Action When	Custom Field	Operator
Prospect Custom Field ▼	Events: Comments ▼	contains ▼
Value		
Webinar A; Webinar B;		
Action		
Register for webina ▼	Webinar	
	Select a webinar ▼	🗑️
Action		
Register for webina ▼	Webinar	
	Select a webinar ▼	🗑️
+ Add Action to Group		
🗑️ Delete Group		

Other Notable Mentions



Send a proactive re-subscribe notice :

- Those who filled out the form were required to have opted in.

Warning for people using bounced emails:

- Create a task to let the CRM owner know.

Conditions based on hidden UTM fields:

- Add them to campaigns, tag them, and update the source field if empty.

Lead Routing by Product/Region:

- Easily create assignments depending on product/regions/assignment category field.

When to Use CCA vs Automation Rules



Conditional Completion Actions

- Single criteria
- Immediate
- Not retroactive
- ≤ 6 conditional groups per asset
- ≤ 15 conditional group actions across all conditional groups per asset

Automation Rules

- Multiple criteria
- Retroactive
- Not tied to a singular marketing asset



Try it today!



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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