



Creating Unforgettable Experiences With Marketing Cloud Personalization And Account Engagement



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Personalization Consultant



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Manager



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salesforce

stensul

PFL

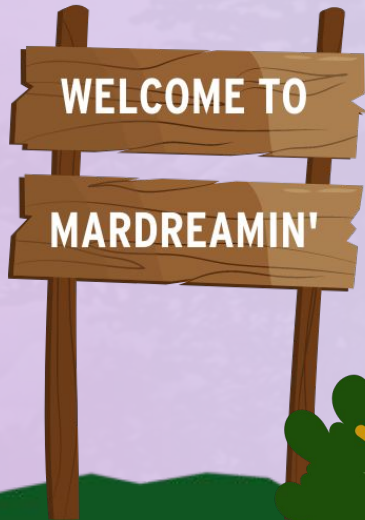
 **GRIDMATE**

THE SPOT
by SERCANTE

FÍONTA

Agenda

- Top Trends In Personalization
- Behind The Scenes
- You Really Want To See This Demo!
- The Take Home Kit



Top Trends In Personalization



Top Trends in Personalization

Personalization strategies are still evolving, but marketers are making progress. Here's a look at the personalization landscape today.



Top 3 Channels Marketers are Personalizing



Top 3 Personalization Use Cases



Top 5 Benefits of Marketing Personalization for Organizations Today

- ✦ Improved customer experience
- ✦ Increased conversion rates
- ✦ Increased visitor engagement
- ✦ Increased lead generation and customer acquisition
- ✦ Improved brand perception

Behind The Scenes



Existing Connectors and Motivation for Improvement

- Data can go from MCP to MCAE through SF CRM using the MCP <-> SF CRM native connector
 - The sync between MCP and CRM only happens nightly at an unspecified time
 - The types of data sent from MCP to CRM are limited
- The MCP Beacon can be added to MCAE forms
 - This creates some issues with the MCP event stream
 - This is only useful for scraping new data, not sending data between systems
- We want to recreate the “Triggered Campaign” functionality that exists between MCP and Marketing Cloud Engagement (MCE), so that a similar experience is delivered with MCP and MCAE!



Scenarios

Identifying records in both MCP and Account Engagement and sharing data in real-time for channel personalization uses cases and triggered campaigns

Visitor unknown in by either system

Visitor known by Account Engagement but not MCP

Sending data from MCP to MCAE

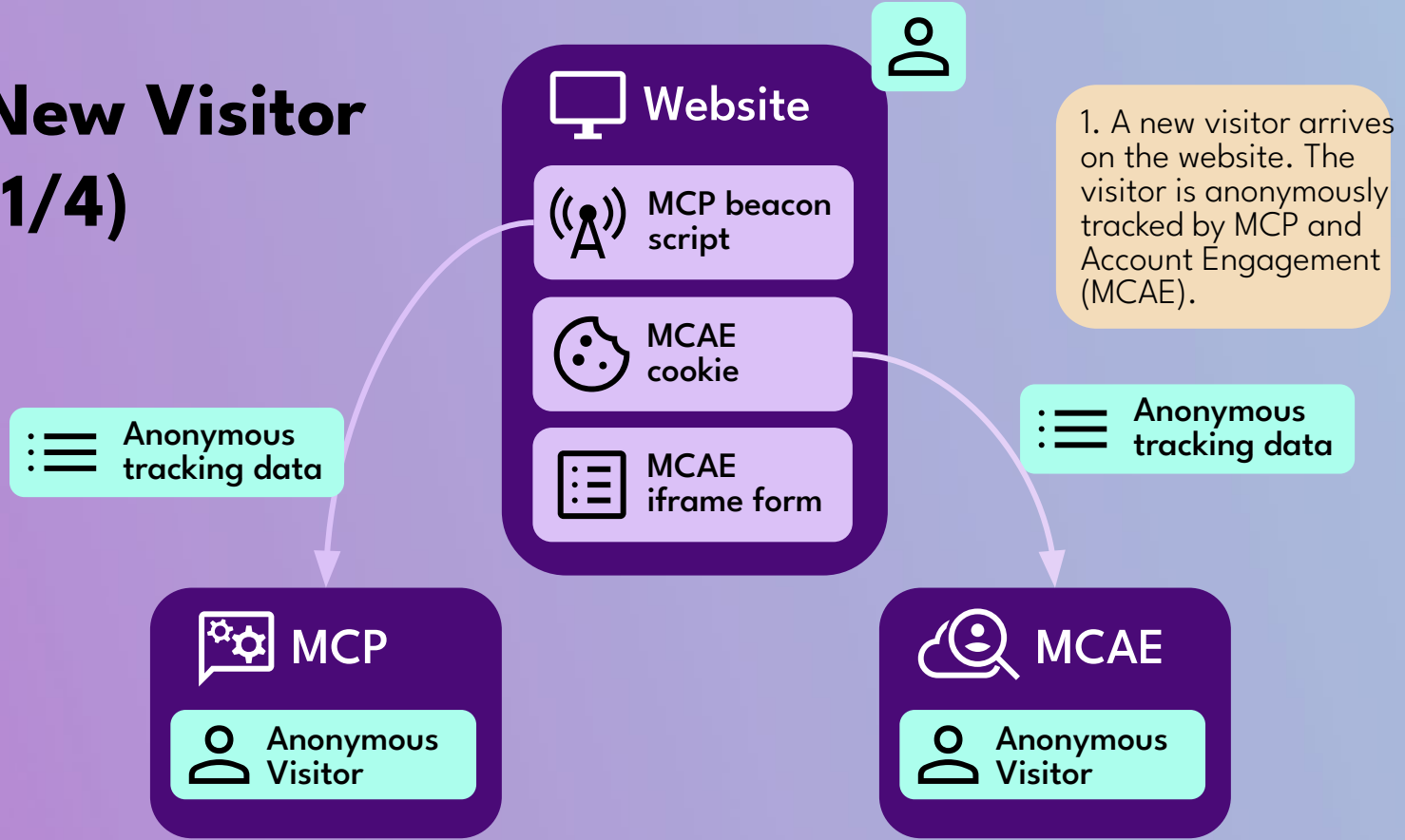
Full Data Diagram



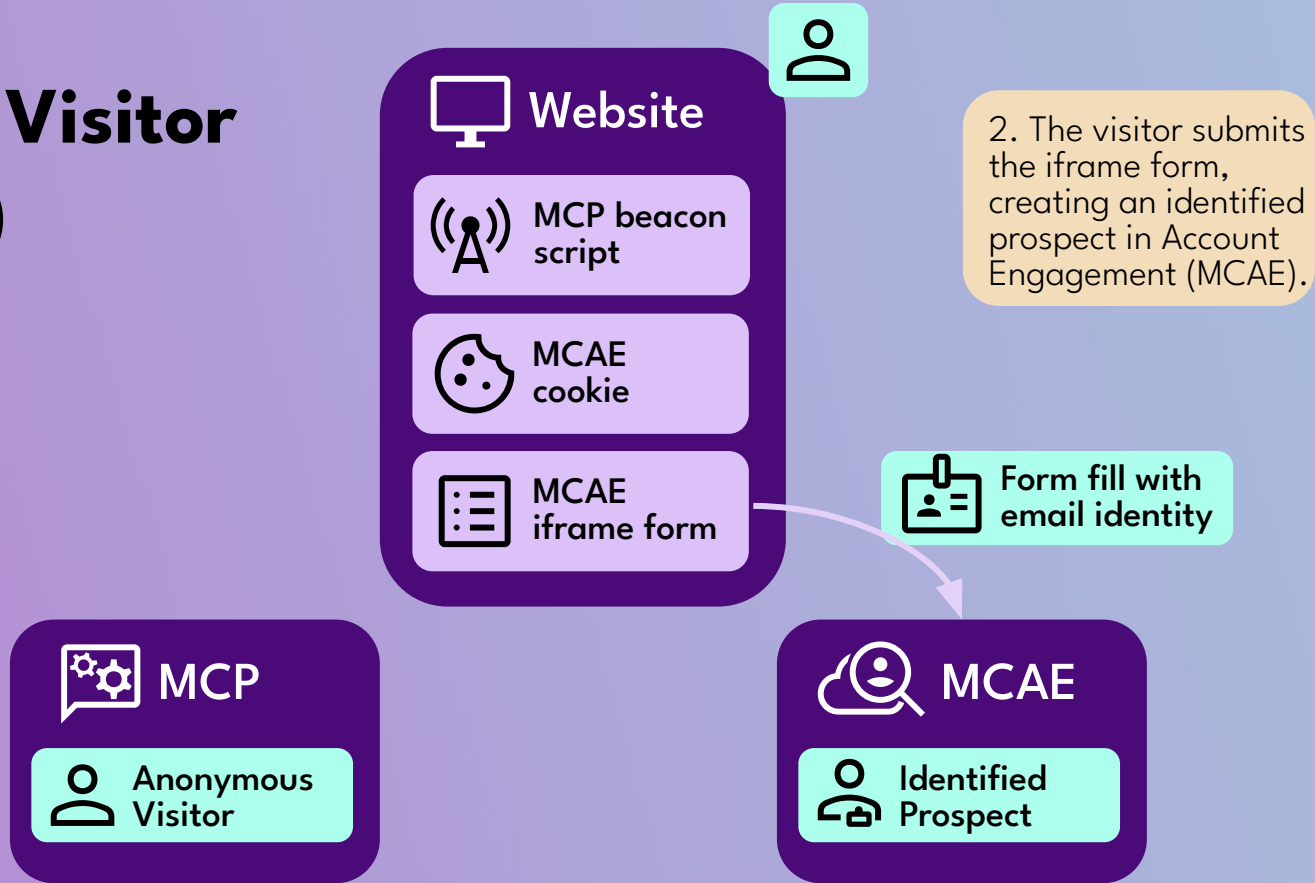
**New visitor unknown by
either system**



New Visitor (1/4)





New Visitor (2/4)





New Visitor (3/4)


3b. The MCP beacon forwards the email address (identity attribute) and other data to MCP to create a named profile in MCP.


 Email identity (+other data)


 **MCP**

 **Named Profile**

 **Website**


 MCP beacon script

 MCAE cookie


 MCAE iframe form



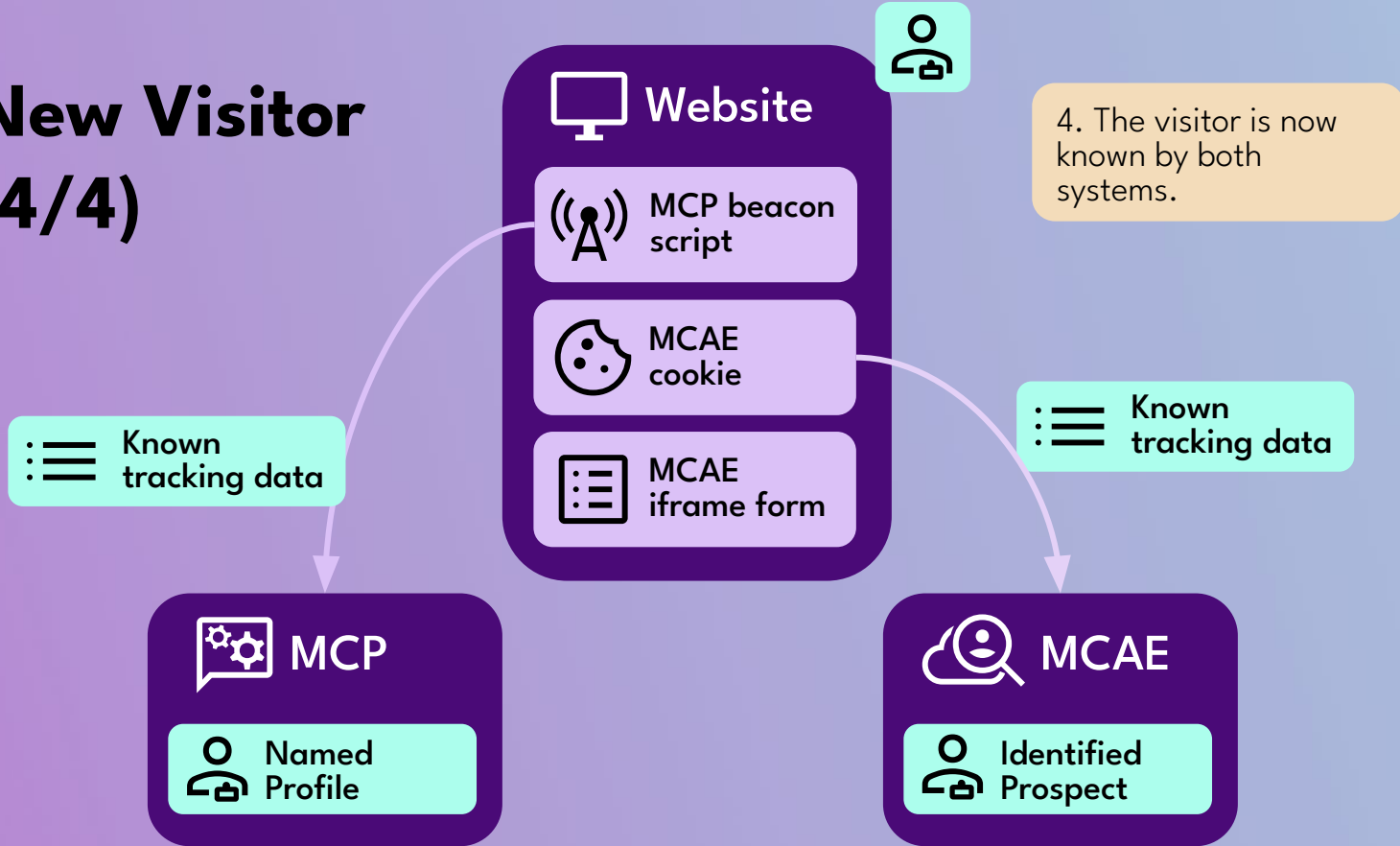
3a. The Account Engagement (MCAE) iframe form contains MessageEvent code to send the info it collected to the MCP beacon script

 Form fill with email identity

 **MCAE**

 **Identified Prospect**

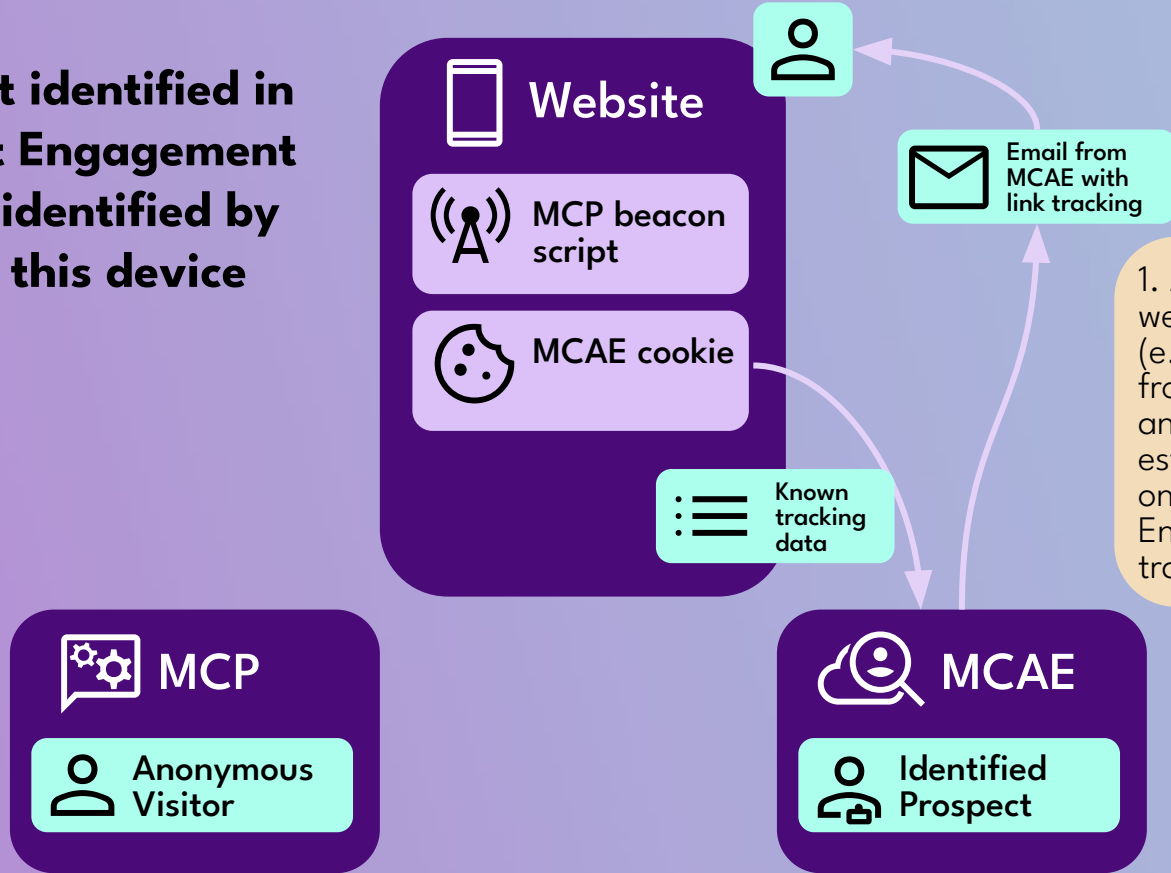
New Visitor (4/4)



Visitor known by Account Engagement (MCAE) but not MCP



Prospect identified in Account Engagement but not identified by MCP on this device (1/5)



1. A visitor arrives on the website on a new device (e.g. mobile) via an email from Account Engagement, and the MCAE cookie establishes prospect identity on this device for Account Engagement using link tracking.



Prospect identified in Account Engagement but not identified by MCP on this device (2/5)

 Anonymous tracking data



 MCP Web Campaign




2. An MCP web campaign is set to target anonymous visitors once per day. The campaign contains a hidden MCAE iframe form in the background of the website.

Prospect identified in Account Engagement but not identified by MCP on this device (3/5)





MCP

 Anonymous Visitor



Website


 MCP beacon script

 MCAE cookie

 Hidden MCAE iframe form served by MCP



3. The Account Engagement (MCAE) cookie populates the form with known information about the prospect, in particular, their email address.


 Email address (+other data)





MCAE

 Identified Prospect

Prospect identified in Account Engagement but not identified by MCP on this device (4/5)

 Email address (+other data)

 **MCP**


 **Named Profile**

 **Website**

 MCP beacon script

 MCAE cookie

 Hidden MCAE iframe form served by MCP

 Email address (+other data)

 **MCAE**

 **Identified Prospect**

4. The data populated in the hidden Account Engagement (MCAE) iframe form is passed back to MCP.

Note: What if the visitor wasn't actually known by Account Engagement? (MCP is going to show the hidden form either way). If identity data is not returned to MCP, it can be set not to check again for a set period of time (or ever) via campaign logic.

Prospect identified in Account Engagement but not identified by MCP on this device (5/5)

 Known tracking data


Website

-  MCP beacon script
-  MCAE cookie


5. The visitor is now known by both systems.

 Known tracking data

MCP

-  Named Profile

MCAE

-  Identified Prospect





Sending data from MCP to Account Engagement (MCAE)





Sending data from MCP to Account Engagement (1/3)

 Various actions tracked


 Website


 MCP beacon script


 MCAE cookie

 Known visitor currently browsing the site.

1. Actions tracked for a visitor in MCP (e.g. high engagement in a particular category, abandoning a form) cause us to want to send data to, or start an engagement program in, Account Engagement (MCAE).

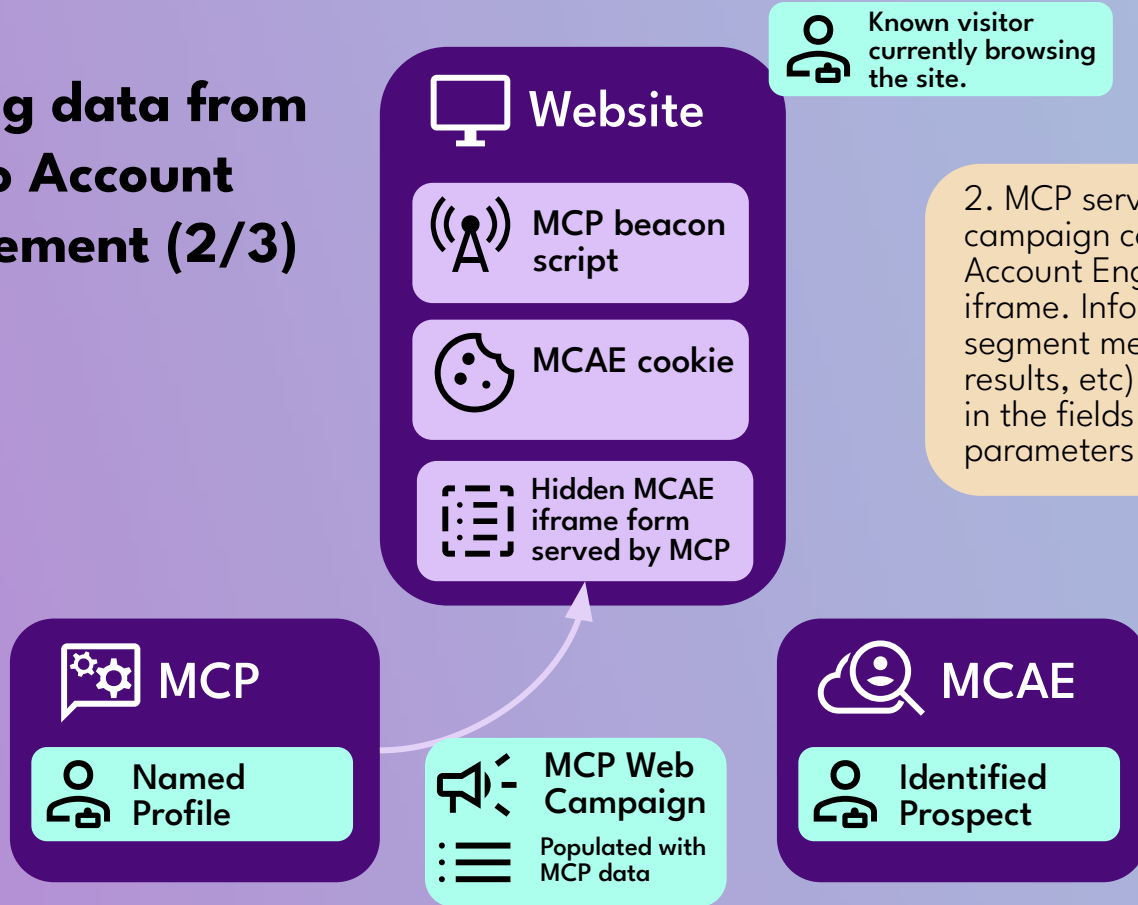
 MCP

 Named Profile


 MCAE




 Identified Prospect


Sending data from MCP to Account Engagement (2/3)




Sending data from MCP to Account Engagement (3/3)


 Website


-  MCP beacon script
-  MCAE cookie
-  Hidden MCAE iframe form served by MCP

 Known visitor currently browsing the site.

3. MessageEvent code is used to automatically submit the form in the background, sending the info to Account Engagement (MCAE).

 Form submission

 MCP

 Named Profile

 MCAE

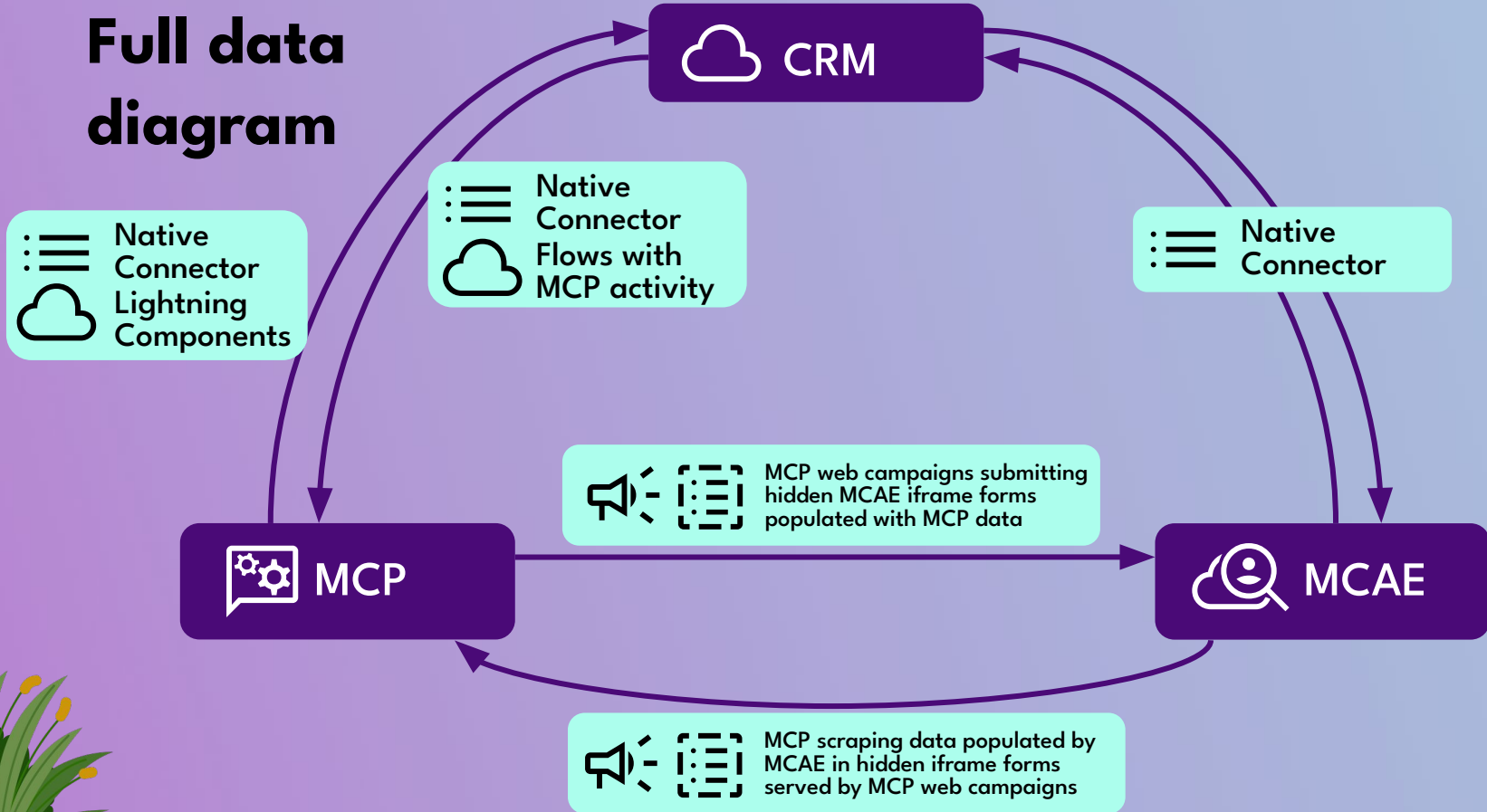
 Identified Prospect



Full data diagram

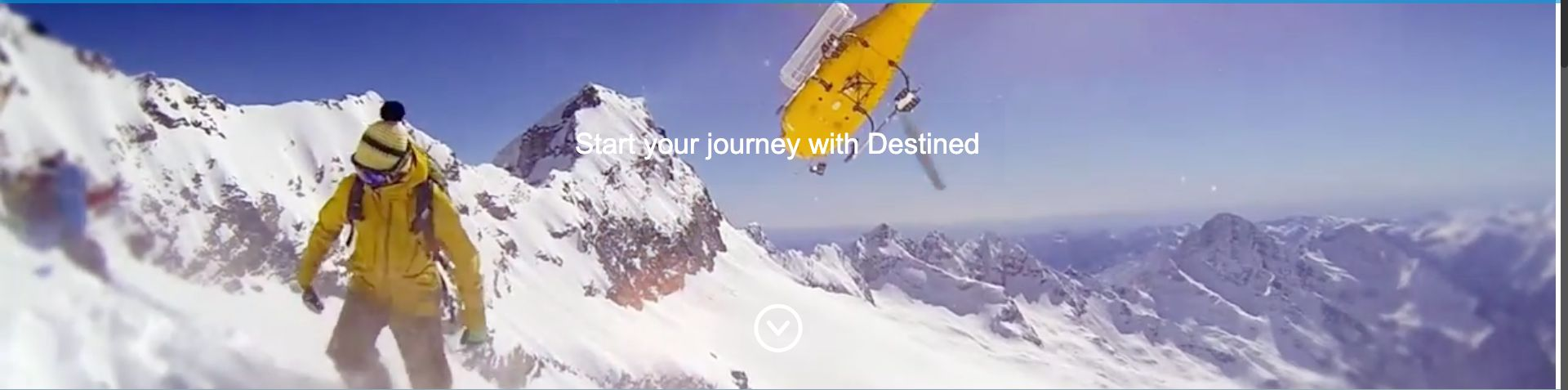


Full data diagram





**You Really Want To See
This Demo!**



Start your journey with Destined



A Salesforce Partner dedicated to customer success.



Media.Monks is a global content, data, digital and media powerhouse, disrupting the traditional agency model and breaking new ground in technology.

In July 2021 Destined joined [Media.Monks](#) following the merger of MediaMonks and MightyHive—two of the most entrepreneurial and innovative companies worldwide.

Together with cutting-edge technology, we build the architecture that underpins every moment in your customer's experience, provide insights & intelligence to inform every stage of the customer journey, enabling you to transform your content, augment marketing, sales, customer service and more.



Event Stream

Search for: UserID keyword... Event Type: All

Table with columns: Timestamp, User Name or Email, Interaction Name or URL. Contains 20 rows of event data.

Last Refreshed: Oct 16 22:00:42 Most Recent Event: Oct 16 21:56:14 Refreshing In: 10s

Event Detail sidebar showing fields: Timestamp, User ID, Interaction Name, URL, Client IP, User Agent, Beacon Version, contentZones, pageType, channel, .skipProcessing, .scv.

Looking to get more sales from the leads you have already captured?



This practical guide provides you with ideas on how to do just that.

It includes five simple funnels you could build today and suggests the kind of content you could include.

How to recycle leads.
Download your guide.

First Name*

Last Name*

Work Email*

Company*

Get My Copy!

Adding Pardot to our marketing strategy has been a transforming experience. However, marketing automation at this level was new to us and we were very fortunate to have had Destined take us by the hand.



Looking to get more sales from the leads you have already captured?



This practical guide provides you with ideas on how to do just that.

It includes five simple funnels you could build today and suggests the kind of content you could include.

How to recycle leads.
Download your guide.

First Name*

Nathan

Last Name*

Bouman

Work Email*

nathan.bouman@maverickdigital.com

Company*

Media.Monks

Get My Copy!

Taking the time to stop and think about our overall strategy and how automation fits into it has been invaluable. It has given us the framework to then implement the kind of customer journey that matches our brand aspiration.

Looking to get more sales from the leads you have already captured?



This practical guide provides you with ideas on how to do just that.

It includes five simple funnels you could build today and suggests the kind of content you could include.

How to recycle leads.
Download your guide.

Thanks - We have sent you an email with the document.
Good luck recycling your leads and growing your revenue.

Taking the time to stop and think about our overall strategy and how automation fits into it has been invaluable. It has given us the framework to then implement the kind of customer journey that matches our brand aspiration.



Social
Search

Company (r) [Default Field: Company]

Submit Button Text: Get My Copy!

Always Display Form: Enabled

Tags

Created At: Jun 1, 2016 3:57 PM

Updated At: Oct 13, 2023 8:25 AM

Created By: Andrew France

Updated By: Destined Standard

Completion Actions

Notify user

Notify Assigned user

Send autoresponder email

Add to list

Notify user

Notify user

Prospects

View: Active Prospects Date Range (Based on 12am EDT): All Time Filter: Tags Tools

<input type="checkbox"/>	★	NAME	COMPANY	SCORE	GRADE	LAST SUBMITTED	LAST ACTIVITY	ACTIONS
<input type="checkbox"/>	☆	Nathan Bouman	Media.Monks	267		Oct 17, 2023 1:15 PM	Oct 17, 2023 1:49 PM	⚙️



With 0 selected: Go

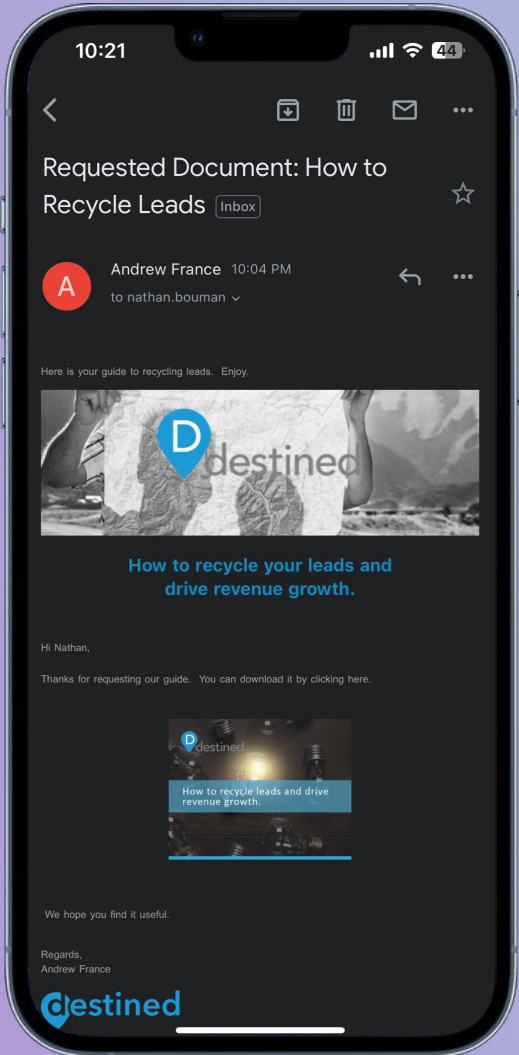
Event Stream

Search for: UserID keyword... Event Type: All

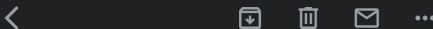
Last Refreshed: Oct 16 22:18:20 Most Recent Event: Oct 16 22:15:56 Refreshing In: 10s

Table with columns: Timestamp, Interaction Name or URL, User Name or Email, Company. Contains 20 rows of event data.

Event Detail sidebar showing metadata: Timestamp, User ID, Interaction Name, URL, Client IP, User Agent, Beacon Version, contentZones, channel, .skipProcessing, .scv, firstName, lastName, emailAddress.



10:21



Requested Document: How to Recycle Leads

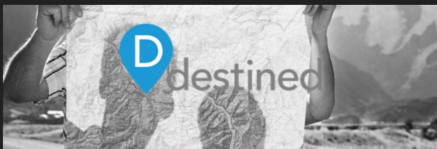
Inbox



Andrew France 10:04 PM
to nathan.bouman



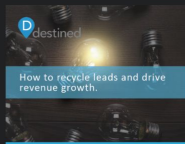
Here is your guide to recycling leads. Enjoy.



How to recycle your leads and drive revenue growth.

Hi Nathan,

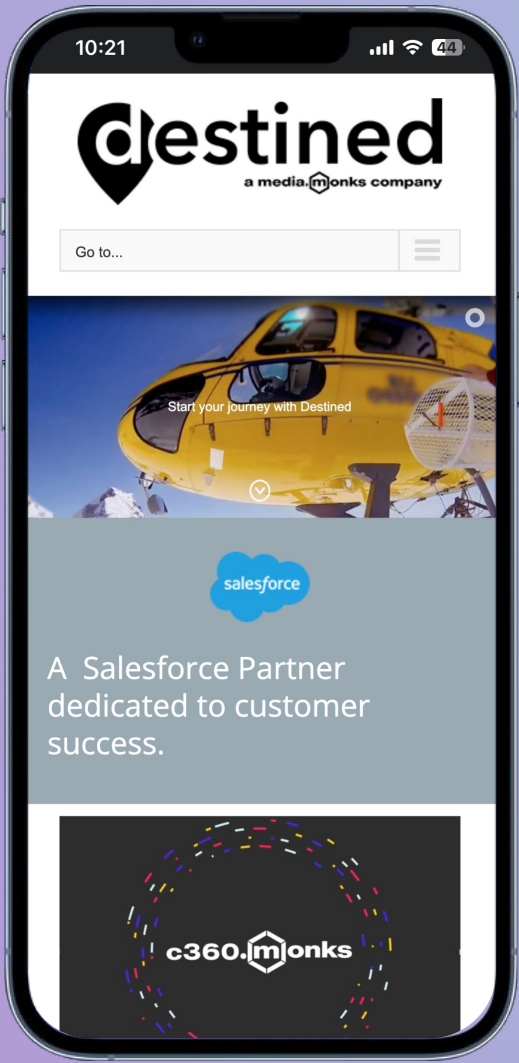
Thanks for requesting our guide. You can download it by clicking here.



We hope you find it useful.

Regards,
Andrew France





Edit Segment

Is anonymous AND Did not view campaign MCAE Identity Check in the past day

User (1492) Membership Segment Compare Category Affinities Setup

Segment Name: MCAE Identity Check Segment

DISABLED ENABLED

SAVE CANCEL

SYNC TO OTHER SYSTEMS

AND OR

Visits Anonymous User is anonymous

AND Campaigns Campaign Stat Recen... User did not view MCAE Identity Check ANY EXPERIENCE SPECIFIC EXPERIENCE in the past 1 day

+ NEW RULE

+ NEW GROUP

Email Reporting



Email daily updates to:

[Empty text box for email updates]

- Reports
- CHANNELS & CAMPAIGNS
 - Web
 - Server-Side
 - Triggered
 - Mobile
 - Email
 - Third Party
- AUDIENCES
 - User Segments
 - Account Segments
- CATALOG
 - Catalog
 - Promotions
 - Surveys
- MACHINE LEARNING
 - Einstein Recipes
 - Einstein Decisions
 - Einstein Reports
- GEARS
 - Gears
 - Feeds

MCAE Identity Check

CAMPAIGN TARGETING

 MCAE Identity Check 

CAMPAIGN TYPE


 A/B Test 

EXPERIENCES +

0% Control

Experience 1


 100%

 MCAE Identity Check


MCAE Identity Check

Experience 1

< ALL EXPERIENCES

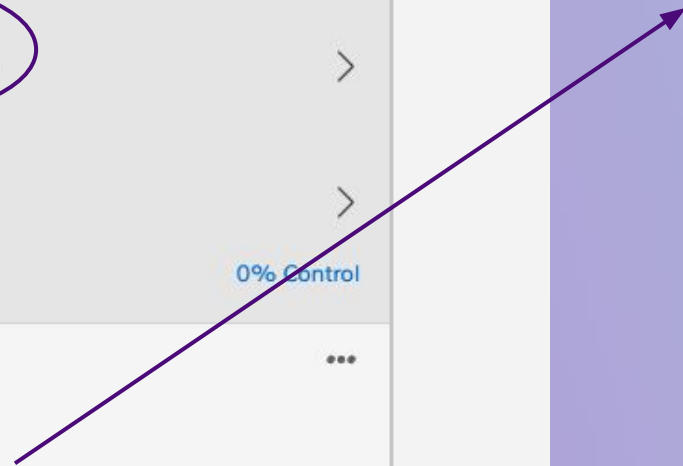
 MCAE Identity Check

Content Zone

global_hidden 

MCAE Form src URL

<https://go.destined.com.au/I/36862/2023-11>



Event Stream

Search for: UserID

Event Type: All

Last Refreshed: Oct 16 23:04:19
 Most Recent Event: Oct 16 22:49:03
 Refreshing In: 10s

Timestamp	Interaction Name or URL	User Name or Email	Company
15 minutes ago	Found MCAE Email	2c652dee5c94427aec842b51	
15 minutes ago	MCAE Identity Check	ba6001b66f197b00	
15 minutes ago	Homepage	ba6001b66f197b00	
15 minutes ago	Found MCAE Email	2c652dee5c94427aec842b51	evg:357931329
15 minutes ago	MCAE Identity Check	2c652dee5c94427aec842b51	
15 minutes ago	Homepage	2c652dee5c94427aec842b51	evg:357931329
22 minutes ago	Homepage	ba6001b66f197b00	
29 minutes ago	Homepage	2c652dee5c94427aec842b51	evg:357931329
an hour ago	Merge	2c652dee5c94427aec842b51	
an hour ago	Submitted MCAE form - Lead Recycle	2c652dee5c94427aec842b51	
an hour ago	Homepage	30db8546dd6b4182	
an hour ago	Homepage	b043398f34a40d10	
6 hours ago	//36862/2015-12-01/3d5cjb	2cbf598f718699fb	
6 hours ago	//36862/2015-12-01/3d5cjb	0da7f6c4e21baba3	
6 hours ago	//36862/2015-12-01/3d5cjb	c7a3b07bddcb2071	
6 hours ago	//36862/2015-12-01/3d5cjb	12230c2a91898721	
6 hours ago	//36862/2015-12-01/3d5cjb	c7a3b07bddcb2071	
7 hours ago	Had Demo From Sales	d5652d9a6136faa941deae37	
8 hours ago	//36862/2015-12-01/3d5cjb	c7a3b07bddcb2071	
8 hours ago	//36862/2015-12-01/3d5cjb	c7a3b07bddcb2071	

Event Detail

Timestamp Oct 16 22:49:03

User ID [2c652dee5c94427aec842b51](#)

Interaction Name Found MCAE Email

URL <https://destined.com.au/?evergageTestMessages=p4X2M>

Client IP 75.221.215.0

User Agent Mozilla/5.0 (iPhone; CPU iPhone OS 13_2_3 like Mac OS X) AppleWebKit/605.1.15 (KHTML, like Gecko) Version/13.0.3 Mobile/15E148 Safari/604.1

Beacon Version 16

contentZones []

.pt 2

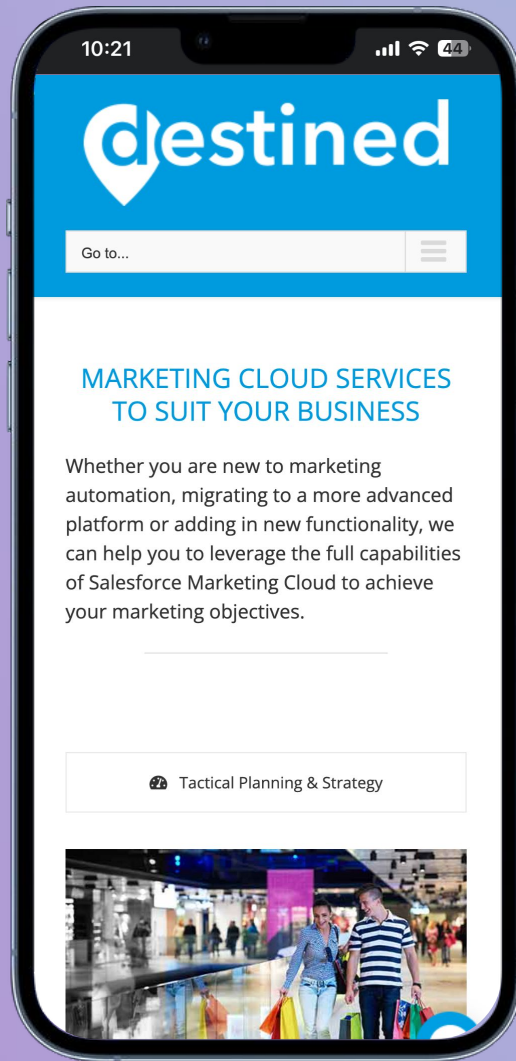
channel Web

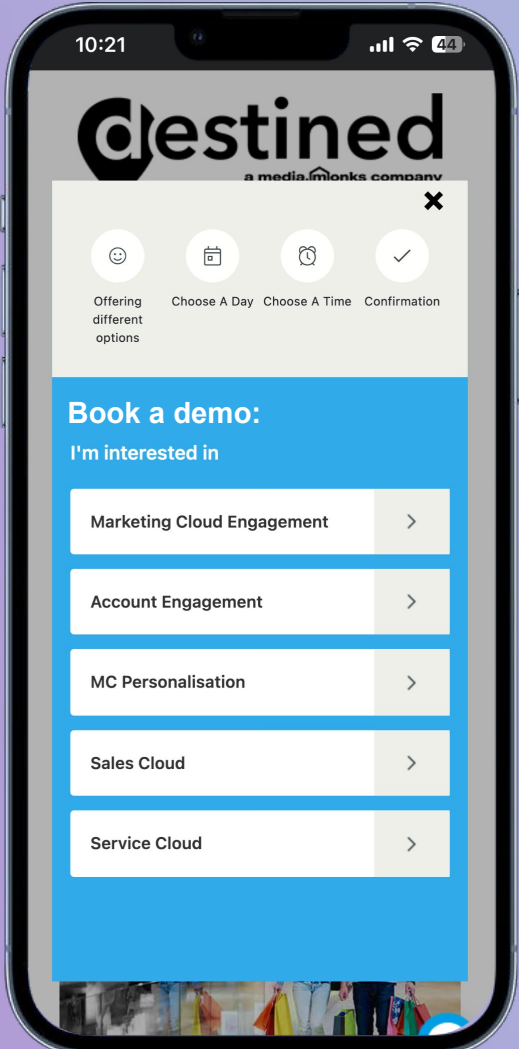
.testMessages p4X2M

.skipProcessing false

.scv 29

emailAddress nathan.bouman@maverickdigital.com





Book a Demo

Is not anonymous AND Visited at least 2 times for all time AND Viewed at least 2 pages today AND Did not view campaign Book a demo in the past day AND Did not click campaign Book a demo at least once

Users (0) Membership Segment Compare Category Affinities Setup

Segment Name: Book a Demo [DISABLED] [ENABLED] [SAVE] [CANCEL]

SYNC TO OTHER SYSTEMS

AND OR

- Visits Anonymous User is not anonymous
- AND Visits Visit Count User Visited 2 or more times for all time
- AND Actions Page View Count User viewed at least 2 pages today
- AND Campaigns Campaign Stat Recen... User did not view Book a demo ANY EXPERIENCE SPECIFIC EXPERIENCE in the past 1 day
- AND Campaigns Campaign Stat Count User did not click Book a demo ANY EXPERIENCE SPECIFIC EXPERIENCE at least 1 time

+ NEW RULE

+ NEW GROUP

Email Reporting


Email daily updates to:

Salesforce Marketing Cloud Se x Personalization - Marketing Cl x Cam


partnerdestinedaus.us-4.evergage.com/ui/new-app/#/datase

Book a demo

CAMPAIGN TARGETING



-  Book a Demo >

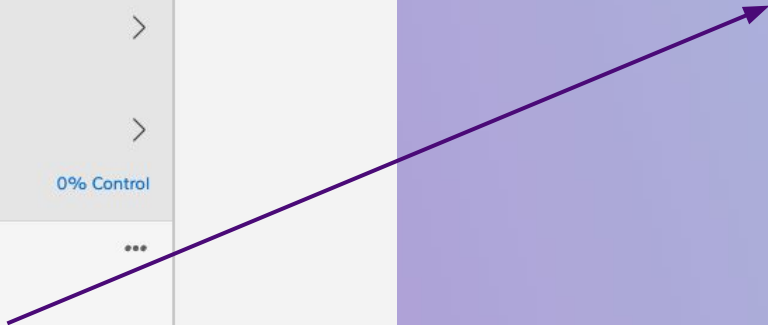
CAMPAIGN TYPE

-  A/B Test >

EXPERIENCES + 0% Control

Experience 1 ...

-  100%
-  iframe pop-up with MCAE abandon



Salesforce Marketing Cloud Se x Personalization - Marketing Cl x Cam

partnerdestinedaus.us-4.evergage.com/ui/new-app/#/datase

Book a demo

Experience 1 ▼

< ALL EXPERIENCES

iframe pop-up with MCAE abandon

Content Zone

global_popup ▼

Lightbox

Height

700

Width

600

Delay

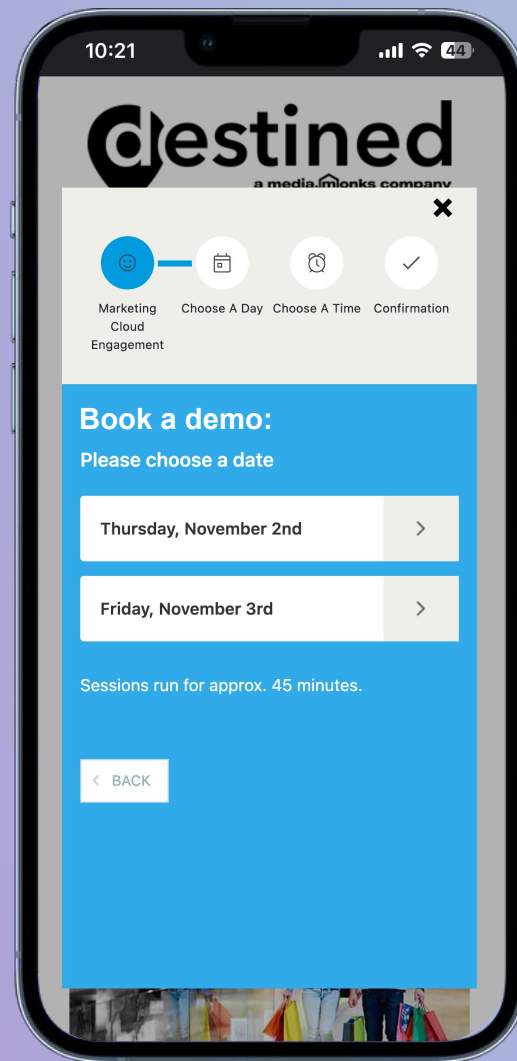
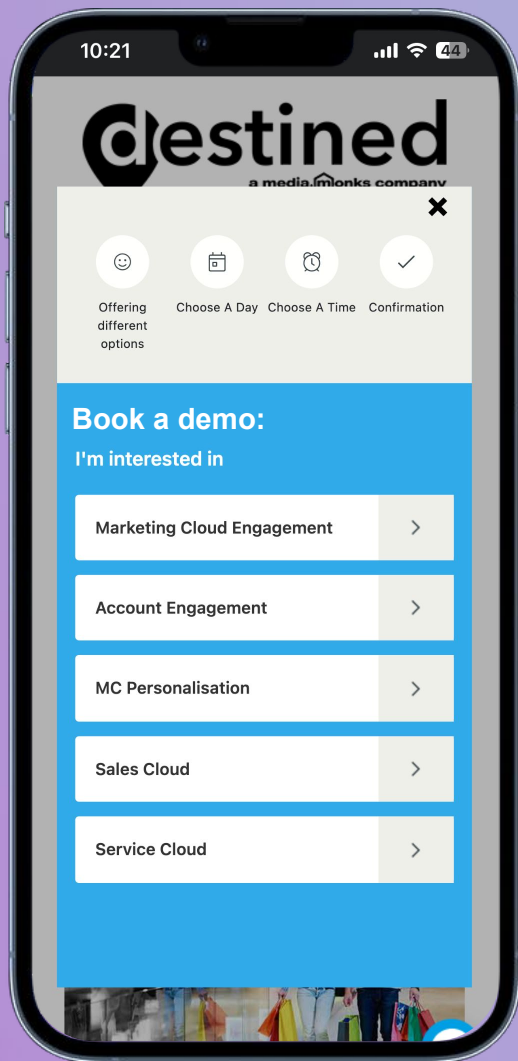
0

iFrame URL

https://go.destined.com.au/l/36862/2023-1

Abandon MCAE Form src URL

https://go.destined.com.au/l/36862/2023-1



- Forms
- Form Handlers
- Layout Templates
- Landing Pages
- Multivariate Tests
- Custom Redirects
- Dynamic Content
- Snippets
- Files
- Form Fields
- Tags
- Social
- Search

MCP Form Start Edit form View online View report

Contents

Name	MCP Form Start
Folder	/Uncategorized/Forms
Campaign	MCP Abandoned Book a Demo Follow Up
Tracker Domain	https://go.destined.com.au
Link	https://go.destined.com.au/36862/2023-10-12/xzyzhm
Layout Template	Whitepaper landing page Form Template
Form Fields	• Email (r) (a) [Default Field: Email]
Submit Button Text	Submit
Always Display Form	Enabled
Tags	
Created At	Oct 13, 2023 1:51 AM
Updated At	Oct 17, 2023 1:19 PM
Created By	Destined Standard
Updated By	Destined Marketing

Completion Actions

Change prospect custom field value	MCP Demo Status to Started
------------------------------------	----------------------------

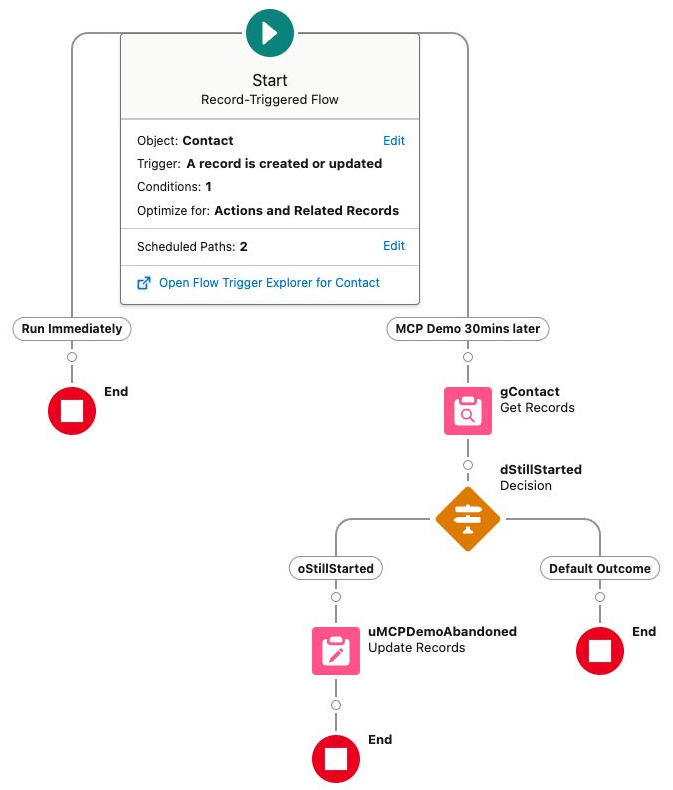
Prospects

View: **Active Prospects** Date Range (Based on 12am EDT): **All Time** Filter: **Tags** Tools

<input type="checkbox"/>	★	NAME	COMPANY	SCORE	GRADE	LAST SUBMITTED	LAST ACTIVITY	ACTIONS
<input type="checkbox"/>	★	Nathan Bouman	MediaMonks	532		Oct 18, 2023 7:14 AM	Oct 18, 2023 7:14 AM	

Select Elements

Auto-Layout Version 2: Active—Last modified 18 hours ago



Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

Field	Operator	Value
<input type="text" value="MCP_Demo_Status__c"/>	<input type="text" value="Equals"/>	<input type="text" value="Started"/>

[+ Add Condition](#)

When to Run the Flow for Updated Records ⓘ

- Every time a record is updated and meets the condition requirements
- Only when a record is updated to meet the condition requirements

* Optimize the Flow for:

-
-

- Custom redirects
- Dynamic Content
- Snippets
- Files
- Folders
- Tags
- Social
- Search

Campaign: [MCP Abandoned Book a Demo Follow Up](#)
Tracker Domain: <https://go.destined.com.au>
Link: <https://go.destined.com.au/36862/2023-10-04/xzy2x7>
Layout Template: [Web Contact layout - Destined](#)

- Form Fields
- **I'm interested in** (r) (a) [Custom Field: Interested In:]
 - **Please choose a date** (r) (a) [Custom Field: Offering different dates]
 - **Please choose a time** (r) (a) [Custom Field: Offering different times]
 - **First Name** (r) (a) [Default Field: First Name]
 - **Last Name** (r) (a) [Default Field: Last Name]
 - **Email** (r) (a) [Default Field: Email]
 - **Company** (a) [Default Field: Company]
 - **Job Title** (r) (a) [Default Field: Job Title]
 - **Mobile number** (r) (a) [Default Field: Phone]
 - **Industry** (r) [Default Field: Industry]

Submit Button Text: **Book Demo**
Always Display Form: **Enabled**
Tags
Created At: **Oct 5, 2023 3:07 AM**
Updated At: **Oct 18, 2023 7:17 AM**
Created By: [Destined Marketing](#)
Updated By: [Destined Marketing](#)

Completion Actions

Change prospect custom field value: [MCP Demo Status](#) to **Finished**

Prospects

View: [Active Prospects](#) Date Range (Based on 12am EDT): [All Time](#) Filter: [Tags](#) [Tools](#)

<input type="checkbox"/>	<input type="checkbox"/>	NAME	COMPANY	SCORE	GRADE	LAST SUBMITTED	LAST ACTIVITY	ACTIONS
<input type="checkbox"/>	<input type="checkbox"/>	Nathan Bouman	MediaMonks	532		Oct 17, 2023 3:27 PM	Oct 18, 2023 7:14 AM	

- Engagement Studio
- Automation Rules
- Page Actions
- Segmentation Lists

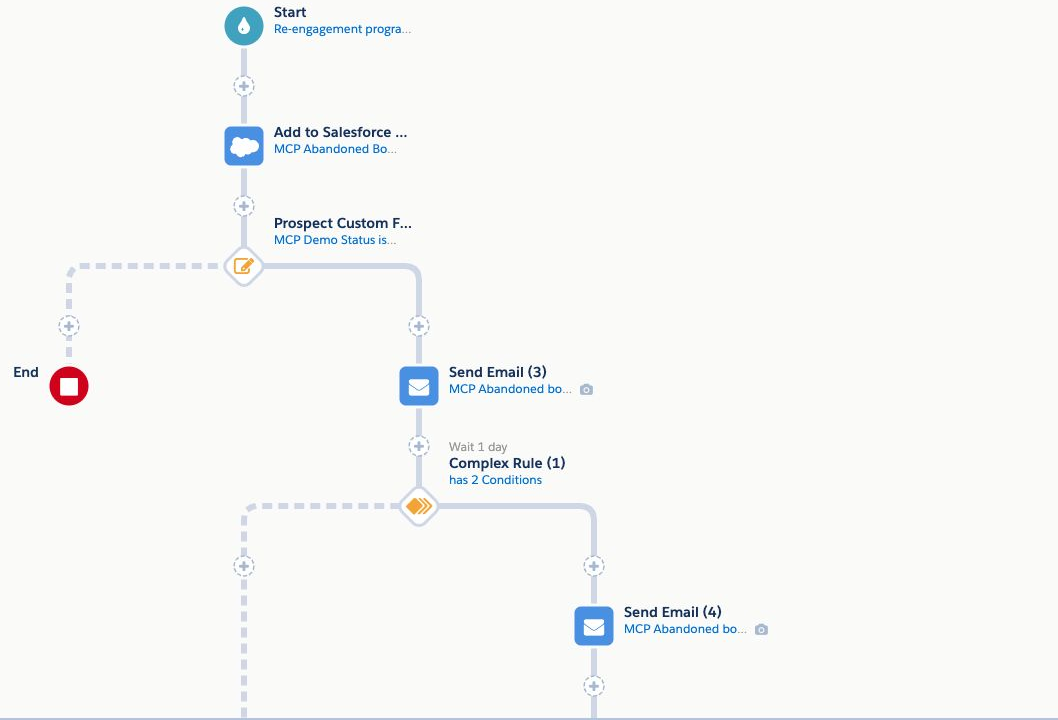
ENGAGEMENT STUDIO

MCP Abandoned Book a Demo Form Follow Up Draft

Select Copy Start

Search this program

BUILD TEST REPORT ACTIVITY



Nathan, did you forget something? Your Exclusive Marketing Demo Awaits

Inbox x



Claudia Hoops
to me

Mon, Oct 16, 5:04 PM (7 hours ago) ☆ ↶ ⋮

Hey Nathan,

Ready to supercharge your marketing game? I noticed you started booking a demo for Marketing Cloud but got sidetracked. Don't worry, I've got your back!

At Destined, I understand the challenges of the ever-evolving marketing landscape. That's why I'm thrilled to offer you an exclusive, tailored demo of Marketing Cloud. Get ready to unleash the power of personalized customer journeys, impactful campaigns, and invaluable insights.

Don't let this opportunity slip away! [Schedule your demo now](#). I'm here to help you unlock the full potential of Marketing Cloud.

Get ready to conquer the marketing universe!

Best regards,

Claudia Hoops

↶ Reply

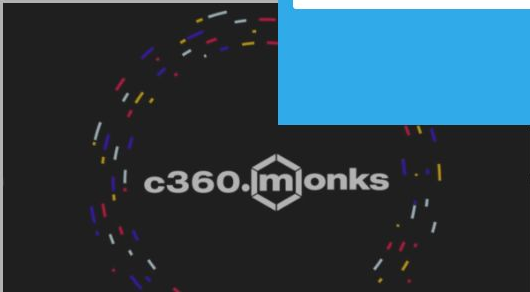
↷ Forward



Offering different options Choose A Day Choose A Time Confirmation

I'm interested in

- Marketing Cloud Engagement >
- Account Engagement >
- MC Personalisation >
- Sales Cloud >
- Service Cloud >



customer success.

a, digital and media powerhouse, level and breaking new ground in

monks following the merger of mediaworks and mightyfive—two of the most entrepreneurial and innovative companies worldwide.

Together with cutting-edge technology, we build the architecture that underpins every moment in your customer's experience, provide insights & intelligence to inform every stage of the customer journey, enabling you to transform your content, augment marketing, sales, customer service and more.



CAMPAIGN TARGETING

- book-a-demo

CAMPAIGN TYPE

A/B Test

EXPERIENCES + 10% Control

Experience 1

- 90%
- iframe pop up

CAMPAIGN TARGETING

URL contains one or more of book-a-demo

+ ADD RULE

- Reports
- CHANNELS & CAMPAIGNS
- Web
- Server-Side
- Triggered
- Mobile
- Email
- Third Party
- AUDIENCES
- User Segments
- Account Segments
- CATALOG
- Catalog
- Promotions
- Surveys
- MACHINE LEARNING
- Einstein Recipes
- Einstein Decisions
- Einstein Reports
- GEARS
- Gears
- Feeds

DESTINED WEBSITE

Reports > Event Stream

Oct 9 2023 - Oct 16 2023

Event Stream

Search for:

Event Type:

Last Refreshed: Oct 17 00:28:03
 Most Recent Event: Oct 17 00:27:21
 Refreshing In: 12s

Timestamp	Interaction Name or URL	User Name or Email	Company
49 seconds ago	Submitted MCAE form - Book Demo	2c652dee5c94427aec842b51	evg:357931329
49 seconds ago	Book a demo	2c652dee5c94427aec842b51	
8 minutes ago	Homepage	2c652dee5c94427aec842b51	evg:357931329
8 minutes ago	Dismiss Book a demo Experience 1	2c652dee5c94427aec842b51	evg:357931329
THIRD PARTY SETUP			
Integration Setup			
17 minutes ago	Book a demo	2c652dee5c94427aec842b51	
17 minutes ago	View Book a demo Experience 1	2c652dee5c94427aec842b51	evg:357931329
17 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
17 minutes ago	View Book a demo Experience 1	2c652dee5c94427aec842b51	evg:357931329
17 minutes ago	Book a demo	2c652dee5c94427aec842b51	
17 minutes ago	Homepage	2c652dee5c94427aec842b51	evg:357931329
17 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
yesterday	Found MCAE Email	2c652dee5c94427aec842b51	
yesterday	MCAE Identity Check	ba6001b66f197b00	
yesterday	Homepage	ba6001b66f197b00	
yesterday	Found MCAE Email	2c652dee5c94427aec842b51	evg:357931329
yesterday	MCAE Identity Check	2c652dee5c94427aec842b51	
yesterday	Homepage	2c652dee5c94427aec842b51	evg:357931329
yesterday	Homepage	ba6001b66f197b00	
yesterday	Homepage	2c652dee5c94427aec842b51	evg:357931329

Event Detail

Timestamp Oct 17 00:27:14

Company [evg:357931329](#)

User ID [2c652dee5c94427aec842b51](#)

Interaction Name Submitted MCAE form - Book Demo

URL <https://destined.com.au/?evergageTestMessages=ZgmDG>

Client IP 75.221.215.0

User Agent Mozilla/5.0 (Macintosh; Intel Mac OS X 10_15_7) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/117.0.0.0 Safari/537.36

Beacon Version 16

contentZones []

channel Web

.testMessages ZgmDG

.skipProcessing false

.scv 29

emailAddress nathan.bouman@maverickdigital.com

Contact **Nathan Bouman**

+ Follow New Account New Opportunity Edit

Account Name: MediaMonks Phone (2): 5555555555 Email: nathan.bouman@maverickdigital.com Title: MC Personalization Consultant

Details Related Marketing Activity Chatter

Personalisation Affinities Event Stream Account Engagement Account Engagement Lists

Affinities

Filters: Product by for



We found no potential duplicates of this Contact.

Account Engagement History

Engagement History (43)

- Form View** - 1 day 23 hrs ago
Form: MCP Form Start
- Form View** - 1 day 23 hrs ago
Form: Web Contact - Destined - Book a demo
- Form Success** - 1 day 23 hrs ago
Form: MCP Form Start
- Website Visit** - 1 day 23 hrs ago
Page Views: 1 (Show)
- Form View** - 1 day 23 hrs ago
Form: D - Lead_Recycle_download_doc

« First | Showing 1 - 5 | « Previous 5 | Next 5 »

> MC Event Streme

Contact **Nathan Bouman**

+ Follow New Account New Opportunity Edit

Account Name: MediaMonks Phone (2): 5555555555 Email: nathan.bouman@maverickdigital.com Title: MC Personalization Consultant

Details Related Marketing Activity Chatter

Personalisation Affinities Event Stream Account Engagement Account Engagement Lists

Event Stream

Showing all available events

17 October 2023

- View Product - Marketing Cloud Engagement Channel: Web 17/10/2023 3:34 PM
View Product - Marketing Cloud Engagement Channel: Web 17/10/2023 3:34 PM
View Product - Strategy Channel: Web 17/10/2023 3:34 PM
View Product - Account Engagement Channel: Web 17/10/2023 3:34 PM
View Product - Marketing Cloud Engagement Channel: Web 17/10/2023 3:34 PM
View Product - Marketing Cloud Engagement Channel: Web 17/10/2023 3:33 PM
View Product - Marketing Cloud Engagement Channel: Web 17/10/2023 3:32 PM
View Product - Marketing Cloud Engagement Channel: Web 17/10/2023 3:32 PM

We found no potential duplicates of this Contact.

Account Engagement History

Engagement History (43)

- Form View Form: MCP Form Start 1 day 23 hrs ago
Form View Form: Web Contact - Destined - Book a demo 1 day 23 hrs ago
Form Success Form: MCP Form Start 1 day 23 hrs ago
Website Visit Page Views: 1 (Show) 1 day 23 hrs ago
Form View Form: D - Lead_Recycle_download_doc 1 day 23 hrs ago

« First | Showing 1 - 5 | « Previous 5 | Next 5 »

MC Event Stream

Contact
Nathan Bouman

+ Follow New Account New Opportunity Edit

Relationship - Support

--None--

Reference - Quote

Salesforce Sans 12 B I U S
[Rich Text Editor Icons]

*Contact Currency

AUD - Australian Dollar

TL

This field is calculated upon save

Product Interest / Focus

Available: Core - Sales Cloud +, Pardot, Marketing Cloud, Sales Cloud
Chosen: [Empty]

Contact External ID

[Empty]

Is Managed Services Resource

MCP Demo Booking Status

Finished

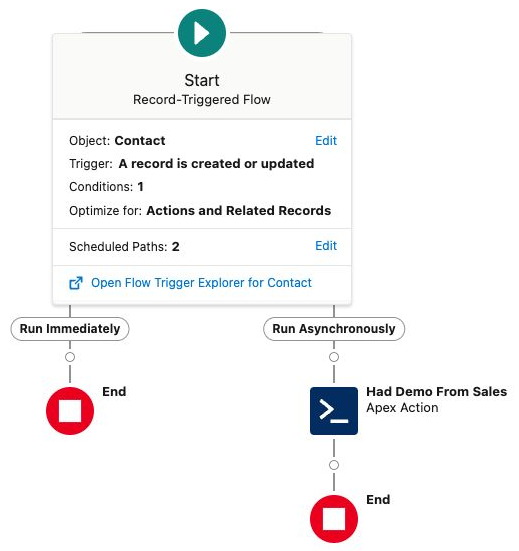
Marketing Cloud Demo Completed

Salesforce AE Information

Cancel Save [Country Alignment]

Select Elements

Auto-Layout Version 3: Active—Last modified 8 hours ago Run Debug View Tests Deactivate Save As Save



Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Contact

Configure Trigger

- * Trigger the Flow When:
- A record is created
 - A record is updated
 - A record is created or updated
 - A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
All Conditions Are Met (AND)

Field	Operator	Value
Marketing_Cloud_Demo__c	Equals	True

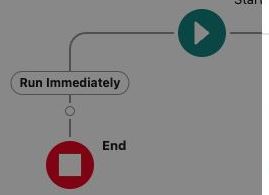
+ Add Condition

When to Run the Flow for Updated Records

- Every time a record is updated and meets the condition requirements
- Only when a record is updated to meet the condition requirements

* Optimize the Flow for:

- Fast Field Updates
- Actions and Related Records



Edit Automate Data Sent for Personalization

Had Demo From Sales (Copy_1_of_Had_Demo_From_Sales)

*** Interaction Name**
Had Demo From Sales

*** Dataset**
Destined Website

*** Identities**

Value	Attribute
\$Record.Email	Email Address

[Add Attribute](#)

User Attributes

Value	Attribute
-------	-----------

[Add Attribute](#)

Profile Objects

[Add Profile Object](#)

Options

Increase Batch Size

> **Advanced**

[Cancel](#) [Done](#)

- DESTINED WEBSITE
- Reports > Event Stream
- CHANNELS & CAMPAIGNS
- Web
- Server-Side
- Triggered
- Mobile
- Email
- Third Party
- AUDIENCES
- User Segments
- Account Segments
- CATALOG
- Catalog
- Promotions
- Surveys
- MACHINE LEARNING
- Einstein Recipes
- Einstein Decisions
- Einstein Reports
- GEARS
- Gears
- Feeds

Event Stream

Search for:

Event Type:

Timestamp	Interaction Name or URL	User Name or Email	Company
7 seconds ago	Had Demo From Sales	2c652dee5c94427aec842b51	
13 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
13 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
14 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
14 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
14 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
14 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
15 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
15 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
16 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
21 minutes ago	✘ Book a demo	2c652dee5c94427aec842b51	
21 minutes ago	Dismiss Book a demo Experience 1	2c652dee5c94427aec842b51	evg:357931329
21 minutes ago	Submitted MCAE form - Book Demo	2c652dee5c94427aec842b51	evg:357931329
21 minutes ago	👉 Book a demo	2c652dee5c94427aec842b51	
28 minutes ago	Homepage	2c652dee5c94427aec842b51	evg:357931329
28 minutes ago	Dismiss Book a demo Experience 1	2c652dee5c94427aec842b51	evg:357931329
28 minutes ago	✘ Book a demo	2c652dee5c94427aec842b51	
37 minutes ago	🗨 Book a demo	2c652dee5c94427aec842b51	
37 minutes ago	View Book a demo Experience 1	2c652dee5c94427aec842b51	evg:357931329
37 minutes ago	View Item	2c652dee5c94427aec842b51	evg:357931329
37 minutes ago	View Book a demo Experience 1	2c652dee5c94427aec842b51	evg:357931329

Last Refreshed: Oct 17 00:48:13
 Most Recent Event: Oct 17 00:48:06
 Refreshing In: 4s

Event Detail

Timestamp Oct 17 00:48:06

User ID [2c652dee5c94427aec842b51](#)

Interaction Name Had Demo From Sales

User Agent SFDC-Callout/59.0

nonInteractive true

.ssc true

application 00D28000000s2BgEAI

.noCampaigns true

channel Server

.skipProcessing false

.an 00D28000000s2BgEAI

emailAddress nathan.bouman@maverickdigital.com

Demo Feedback

Did action Had Demo From Sales at least 1 times for all time AND Did not view campaign demo feedback in the past day AND Did not click campaign demo feedback at least once AND Did not dismiss campaign demo feedback

Users (2) Membership Segment Compare Category Affinities Setup

Segment Name: Demo Feedback [DISABLED] [ENABLED] [SAVE] [CANCEL]

[SYNC TO OTHER SYSTEMS]

[AND] [OR]

Actions | Action Count | User: did | any of specific actions | Had Demo From Sales (Had Demo From Sales) | at least 1 time for all time

AND | Campaigns | Campaign Stat Recen... | User: did not | view | demo feedback | ANY EXPERIENCE | SPECIFIC EXPERIENCE | in the past 1 day

AND | Campaigns | Campaign Stat Count | User: did not | click | demo feedback | ANY EXPERIENCE | SPECIFIC EXPERIENCE | at least 1 time

AND | Campaigns | Campaign Stat Count | User: did not | dismiss | demo feedback | ANY EXPERIENCE | SPECIFIC EXPERIENCE

[+ NEW RULE]

[+ NEW GROUP]

Email Reporting

Email daily updates to:

[Empty text box for email reporting configuration]



Hey, Nathan how did the demo go?

Email *

nathan.bouman@maverickdigital.com

Provide Feedback



A Salesforce Partner dedicated to customer success.



Media.Monks is a global content, data, digital and media powerhouse, disrupting the traditional agency model and breaking new ground in technology.

In July 2021 Destined joined [Media.Monks](#) following the merger of MediaMonks and MightyHive—two of the most entrepreneurial and innovative companies worldwide.

Together with cutting-edge technology, we build the architecture that underpins every moment in your customer's experience, provide insights & intelligence to inform every stage of the customer journey, enabling you to transform your content, augment marketing, sales, customer service and more.



...but what if?



- Engagement Studio
- Automation Rules
- Page Actions
- Segmentation Lists

ENGAGEMENT STUDIO

MCP Abandoned Book a Demo Form Follow Up Draft

Select Copy Start

Search this program

BUILD TEST REPORT ACTIVITY



End

Send Email (3)
MCP Abandoned bo...

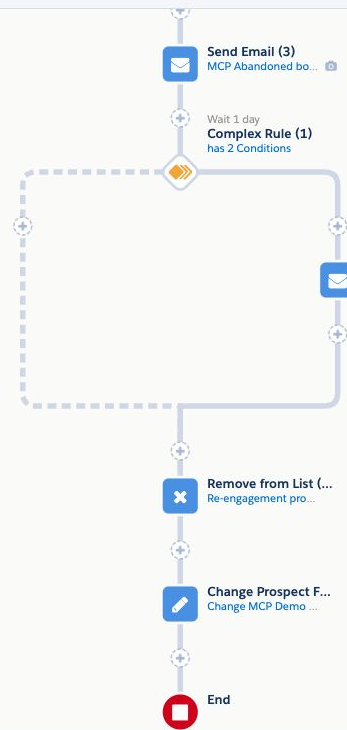
Wait 1 day
Complex Rule (1)
has 2 Conditions

Send Email (4)
MCP Abandoned bo...

Remove from List (...)
Re-engagement pro...

Change Prospect F...
Change MCP Demo ...

End



Edit Segment

Viewed specific product marketing-cloud for at least 2 minutes for all time AND Did not click campaign MCAE Marketing Cloud Interest at least once

Users (0) Membership Segment Compare Category Affinities Setup

Segment Name
MCAE Marketing Cloud Interest Send
DISABLED ENABLED

SAVE CANCEL SYNC TO OTHER SYSTEMS

AND OR

Items Time Spent Viewed specific Product marketing-cloud at least 2 minutes for all time

AND
Campaigns Campaign Stat Count User did not click MCAE Marketing Clo... ANY EXPERIENCE SPECIFIC EXPERIENCE at least 1 time

NEW RULE

NEW GROUP

Email Reporting

Email daily updates to:

[Empty text box for email reporting configuration]

MCAE Marketing Cloud Interest

Experience 1 ▾

< ALL EXPERIENCES

MCAE Data Send

Content Zone

global_hidden ▾

MCAE Form src URL

https://go.destined.com.au/1/36862/2023-11

Map MCP User Attributes to MCAE form fields

Main content area for editing the MCAE Marketing Cloud Interest experience. The area is currently blank.

MCAE Marketing Cloud Interest

Experience 1 ▼

< ALL EXPERIENCES

MCAE Data Send

Content Zone

global_hidden ▼

MCAE Form src URL

https://go.destined.com.au/1/36862/2023-11

Map MCP User Attributes to MCAE form fields

MCAE Form Name ×

first_name

MCP Attribute

firstName (First Name) ▼

MCAE Form Name ×

MCP Attribute

Select... ▼

- Forms
- Form Handlers
- Layout Templates
- Landing Pages
- Multivariate Tests
- Custom Redirects
- Dynamic Content
- Snippets
- Files
- Forms
- Tags
- Social
- Search

MCP Marketing Cloud Interest Edit form View online View report

Contents

Name	MCP Marketing Cloud Interest
Folder	/Uncategorized/Forms
Campaign	MCP Abandoned Book a Demo Follow Up
Tracker Domain	https://go.destined.com.au
Link	https://go.destined.com.au/1/36862/2023-10-12/xzz1f4
Layout Template	Whitepaper landing page Form Template
Form Fields	• Email (r) (a) [Default Field: Email]
Submit Button Text	Submit
Always Display Form	Enabled
Tags	
Created At	Oct 13, 2023 8:51 AM
Updated At	Oct 17, 2023 1:20 PM
Created By	Destined Standard
Updated By	Destined Marketing

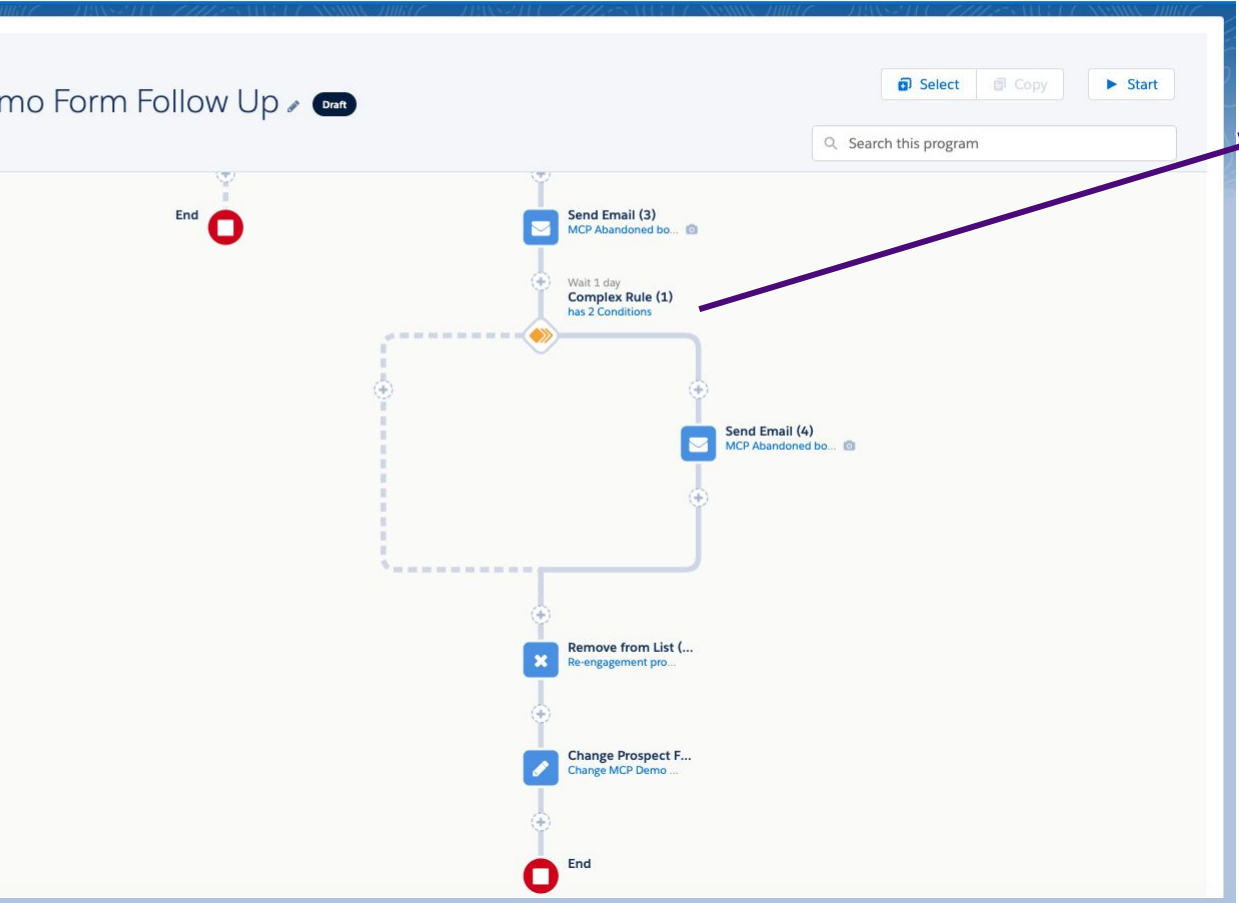
Completion Actions

Change prospect custom field value	Engagement in Marketing Cloud Segment to True
------------------------------------	---

Prospects

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

<input type="checkbox"/>	★	NAME	COMPANY	SCORE	GRADE	LAST SUBMITTED	LAST ACTIVITY	ACTIONS
<input type="checkbox"/>	★	Nathan Bouman	MediaMonks	481		Oct 17, 2023 4:33 PM	Oct 17, 2023 4:33 PM	<input type="button" value=""/>



COMPLEX RULE

Cancel

Name
Complex Rule (1)

Take Action When
All Conditions Are Met

Prospect Custom Field
MCP Demo Status is Abandoned

AND Prospect Custom Field
Engagement in Marketing Cloud Segment is True

+ Add Condition

Evaluate when?
 Immediately
 Wait

1 day

Delete Save

The Take Home Kit



Use Case Ideas

- Increase the ROI of every site visit by showing prospects with tailored content that your solution is right for them based on their source, location, behaviour, history and other data
- Improve ABM by recognizing and targeting high-value visitors the instant they hit your site. You can put the most relevant content and messaging in front of them immediately
- Drive greater visibility and attendance to your webinars & events by promoting them to the right audience. Highlight webinars and events that align to individuals' interests, personas, or geography to generate more registrations
- Collect zero-party data - Ask them directly, using personalized and targeted surveys on your website. Data is added to each person's profile to enrich your database, to trigger personalized experiences in the moment

Key Takeaways

- Combining Marketing Cloud Personalisation and Account Engagement allows for (B2B) personalization at scale
- Leverage the two systems for real-time campaign triggering in Account Engagement
- Place MCAE forms in MCP web campaigns to create a pop up to ask for information from prospects at the right moment while the prospect is browsing the website
- Connect the two platforms by leveraging MCP's beacon and Account Engagement's first-party cookie to exchange and submit pre-filled forms using MessageEvent code and listeners in MCP sitemap and MCAE forms

Thank You!

