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Deep Dive Into Account Engagement Automations

Jen Kazin
Greenkey, Consultant

Agenda

This is a beginner/intermediate session!

- Dynamic Lists
- Automation Rules
- Completion Rules
- Resource
- Try it out!

Dynamic Lists

Dynamic Lists

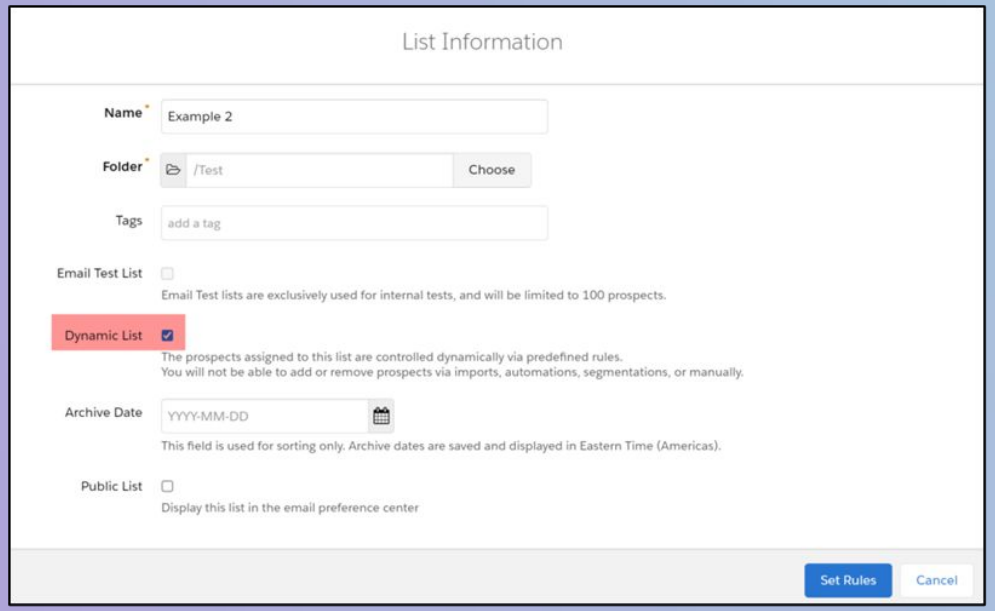
- John Smith
- McKenna Allen
- Jamie Nelson
- Natasha Warner
- Hannah Johnson
- Joe Kotz

Dynamic Lists

Adds prospects to the list automatically.

The list continuously updates on its own, pulling prospects in when they match criteria and removing them when the don't.

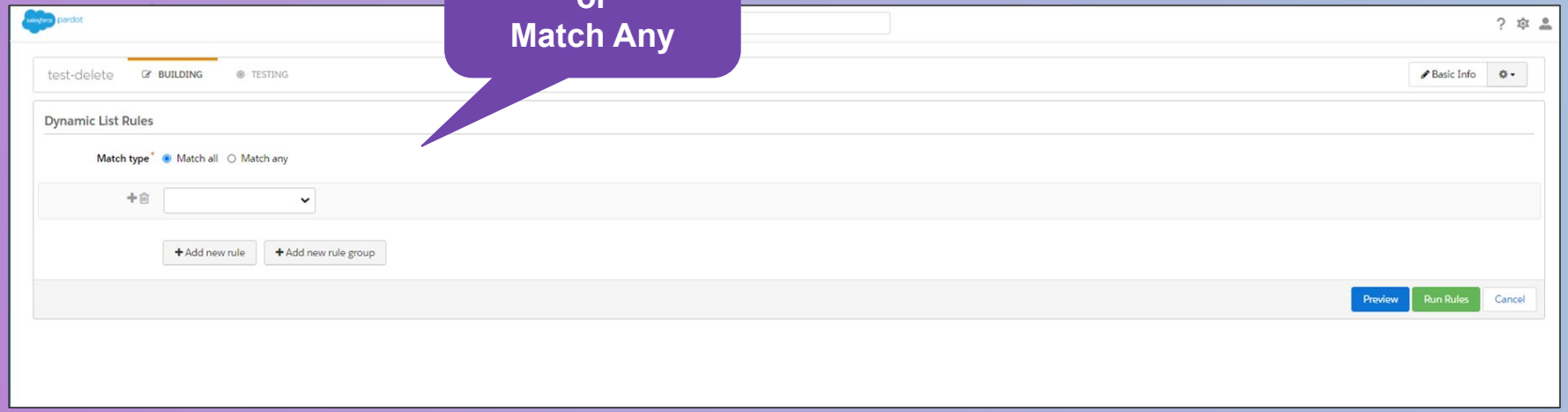
- List membership is exclusively based on criteria (no manual discretion involved).
- You want prospects to be removed from the list if they no longer match criteria.



Common Dynamic Lists

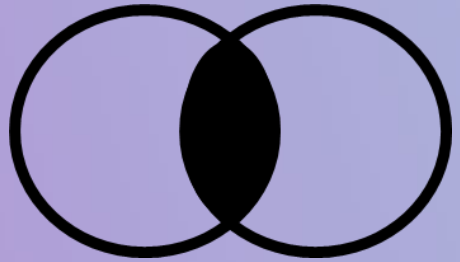
- To complete automations (Engagement Studio, delete prospects, tag prospects, etc.)
- To delete free emails
- To suppress emailing competitors
- To suppress emailing vendors
- To suppress emailing too frequently
- To honor GDPR requests
- To eliminate fake first name or last name submissions

Dynamic Lists



Dynamic Lists

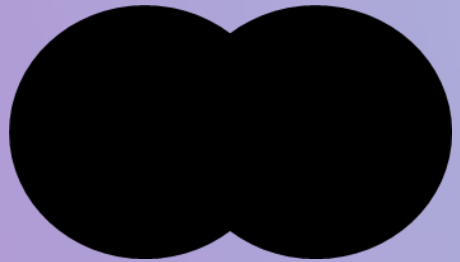
Match ALL= AND



State is Hawaii
and
Industry is Apparel

(Must be in both)

Match ANY = OR

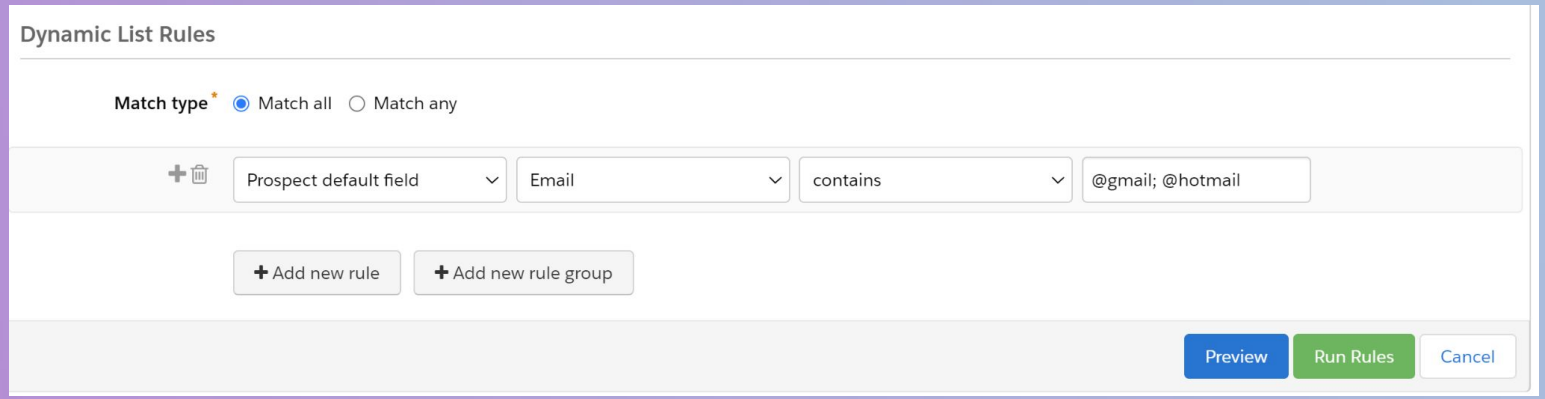


State is Hawaii
or
Industry is Apparel

(Can be in either)

Example

Create a dynamic list for anyone with an @gmail account OR @hotmail.com



Automation Rules

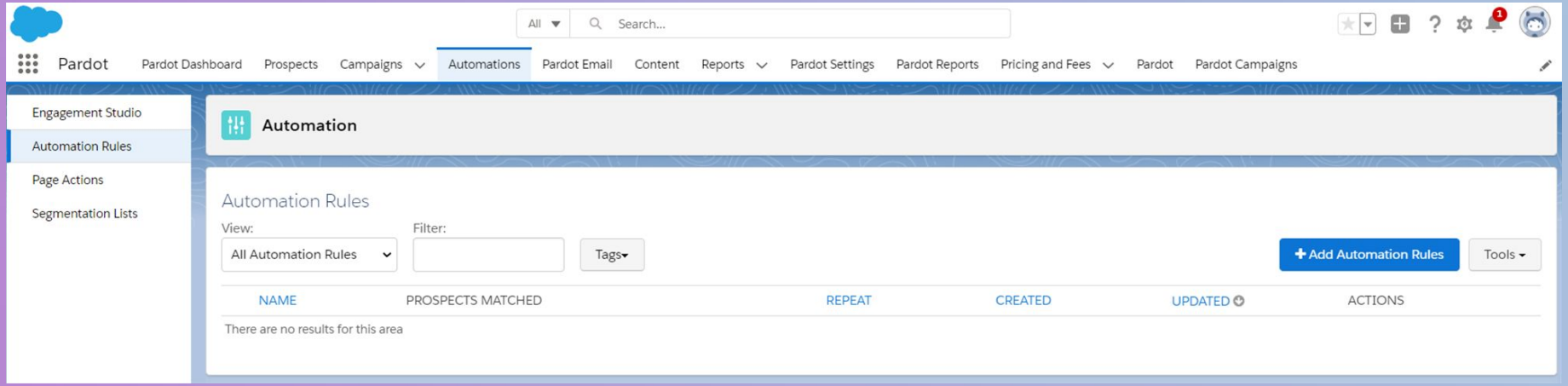
Coffee

Automation Rules

Automation rules are the heavy lifters in the automation toolbox.

They’re both powerful and flexible, which makes them a popular choice when automating Account Engagement.

Automation Rules



Automation Rules

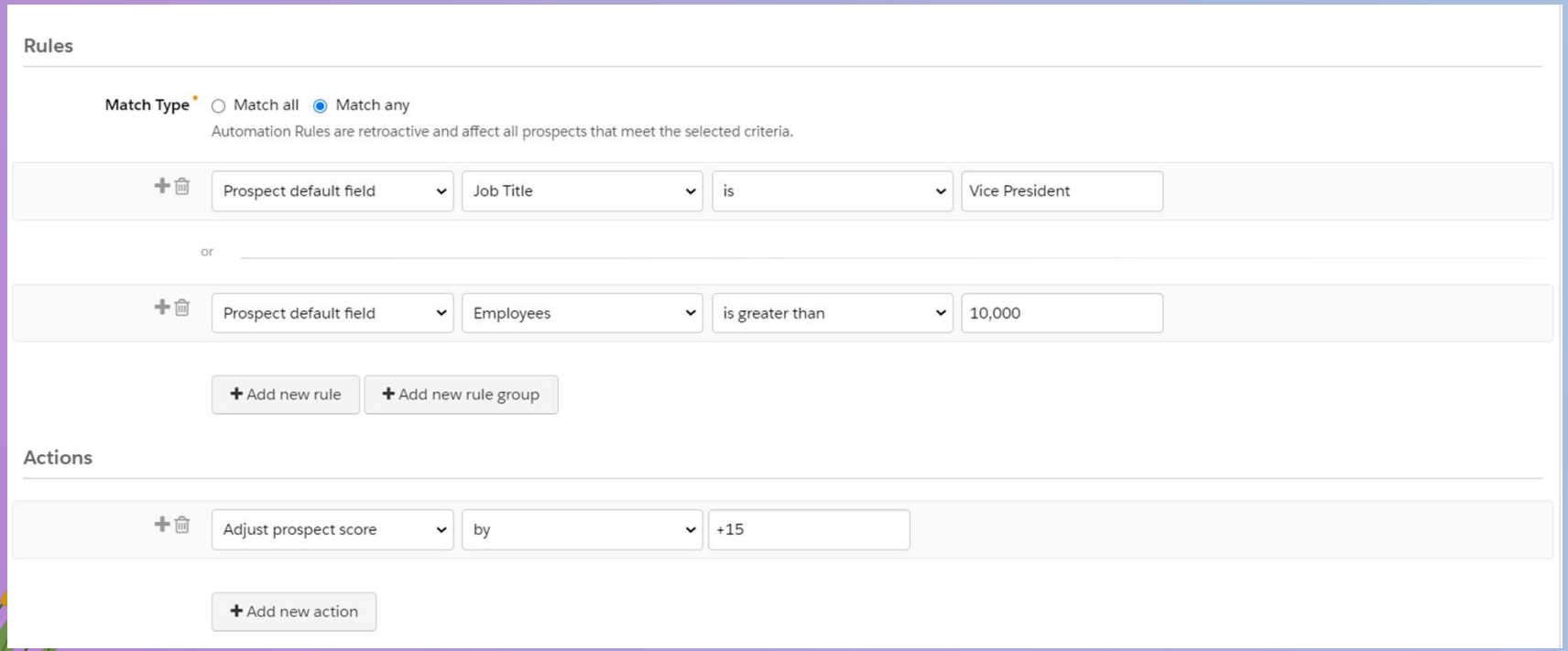
Automation rules are built from criteria and actions

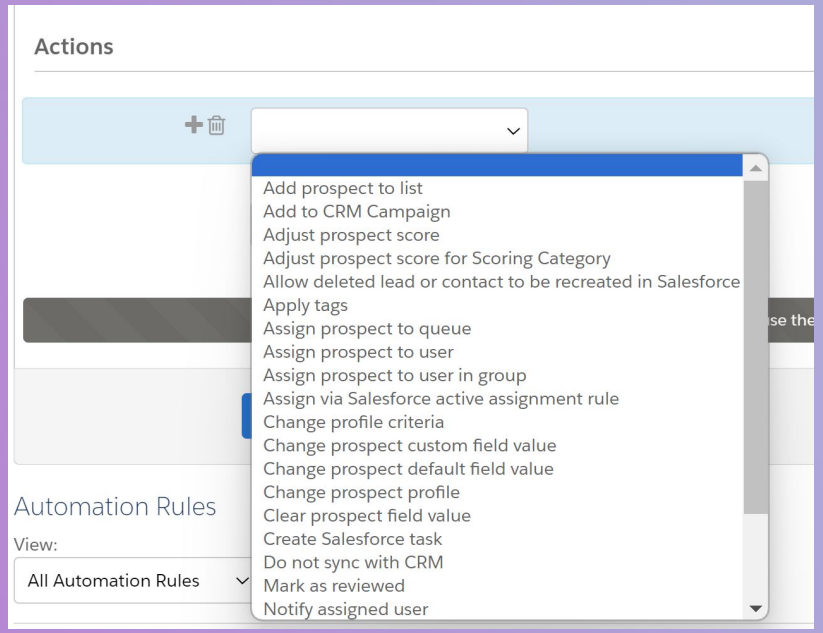
- The criteria sorts through your database
- The action is applied to those prospects matching your criteria

Automation rules continuously look for prospects who match the rule criteria.

They are retroactive; but any changes after the rule becomes live are not.

Automation Rules



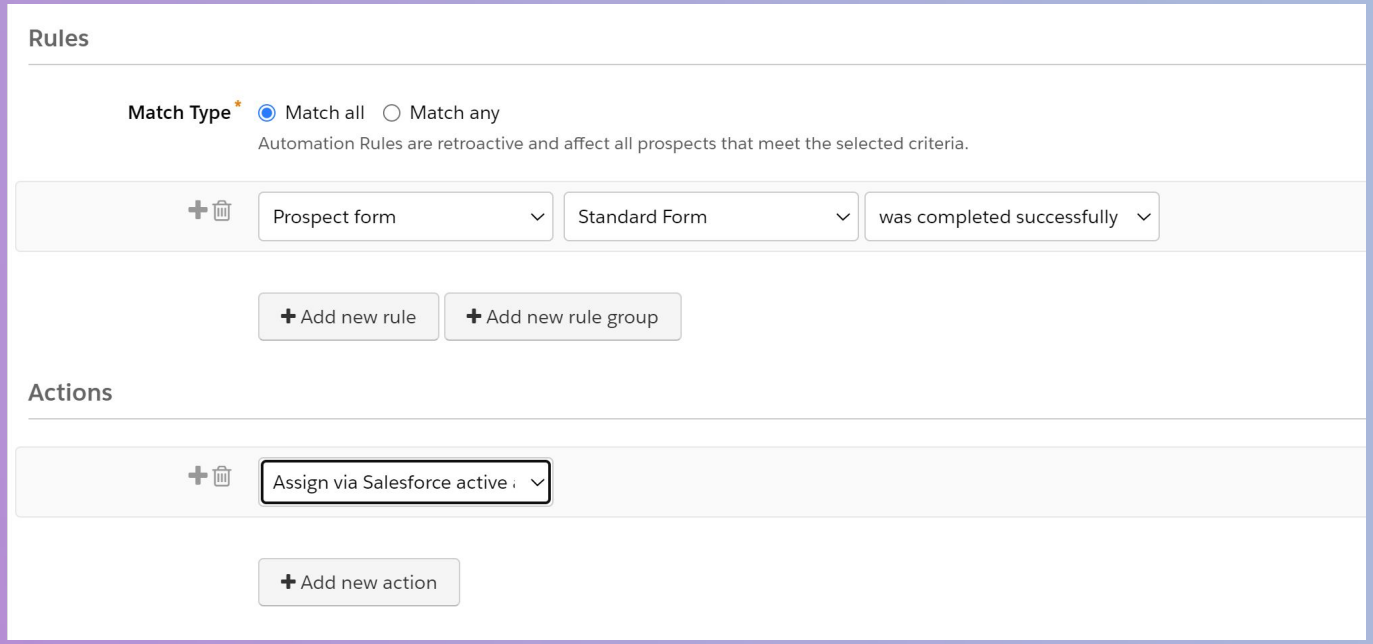


Automation Rule Actions

Add prospect to list
Add prospect to Salesforce campaign
Adjust Prospect Score
Adjust Prospect Score for Scoring Category
Allow Deleted CRM Lead or Contact to Recreate from Account Engagement
Apply tags
Assign prospect to queue
Assign prospect to user
Assign prospect to user in group
Assign prospect via Salesforce active assignment rule
Change profile criteria
Set prospect's first touch campaign
Change prospect custom field value
Change prospect default field value
Change prospect profile
Clear prospect field value
Create Salesforce task
Do Not Sync With CRM
Increment prospect field value
Mark as reviewed
Notify assigned user
Notify user
Remove prospect from list
Remove tags
Send prospect email

Example

If a prospect filled out a form (standard form), assign them to sales via a Lead Assignment rule.



Completion Actions

Completion Actions

Completion actions are a great way to automate actions from a marketing element.

For example, you can use a completion action to add prospects to a list when they complete a form. Completion actions are available on forms, form handlers, files, custom redirects, emails, and page actions.

Completion Actions

Trigger: Criteria

Dynamic Lists

Automation Rules

Trigger: Action

(email click, form submission etc.)

Completion Actions

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Completion Actions

Add supplemental automation to your email.

Learn more on the Knowledge Base »

Take action when...

- [ ] a prospect opens this email
- [x] a prospect clicks this email
  - [ ] Apply actions only if a specific URL is clicked

  Completion Actions

  + Add new completion action
- [ ] a prospect unsubscribes via this email

Save Cancel

- Add tags
- Add to CRM Campaign
- Add to list
- Adjust score
- Assign prospect via Salesforce active assignment rule
- Assign to user
- Change prospect custom field value
- Change prospect default field value
- Create Salesforce task
- Increment prospect field value
- Notify Assigned user
- Notify user
- Remove from list
- Remove tags
- Send autoresponder email
- Set profile
- Set prospect's source campaign

Completion Action Considerations

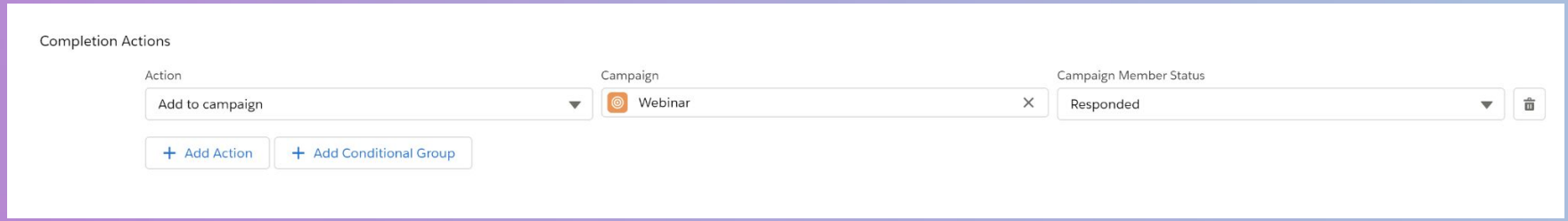
- Completion actions are not retroactive. They apply only to activities that happen after the completion action is added.

- Most completion actions execute every time they are triggered. However, completion actions based on email link clicks only execute once per prospect.

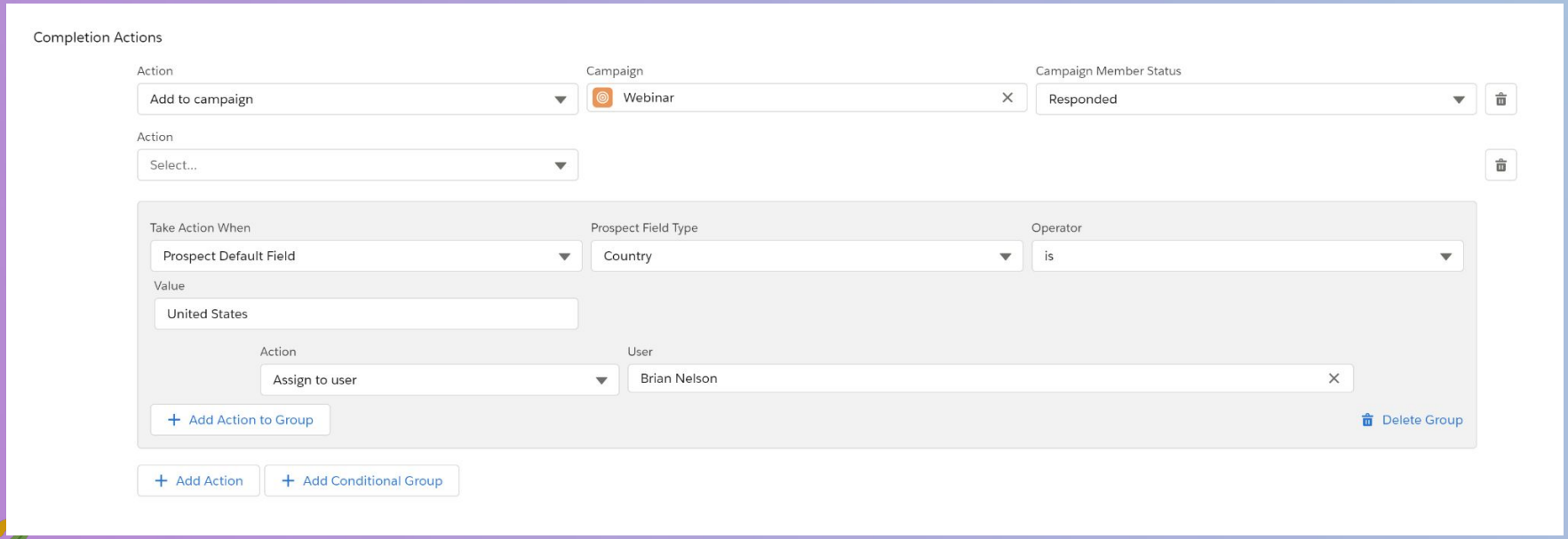
- If you have multiple completion actions on a marketing asset, the actions that affect other automations run first. Next, the automation runs, then the rest of the completion actions run.
    - For example, a form has these actions: assign to user, notify user, set custom field. Account Engagement assigns the prospect to the user first, then sets the custom field value, runs any real-time related automations, and then notifies the user.

Example

If a prospect fills out a form, add that prospect to the Webinar campaign.

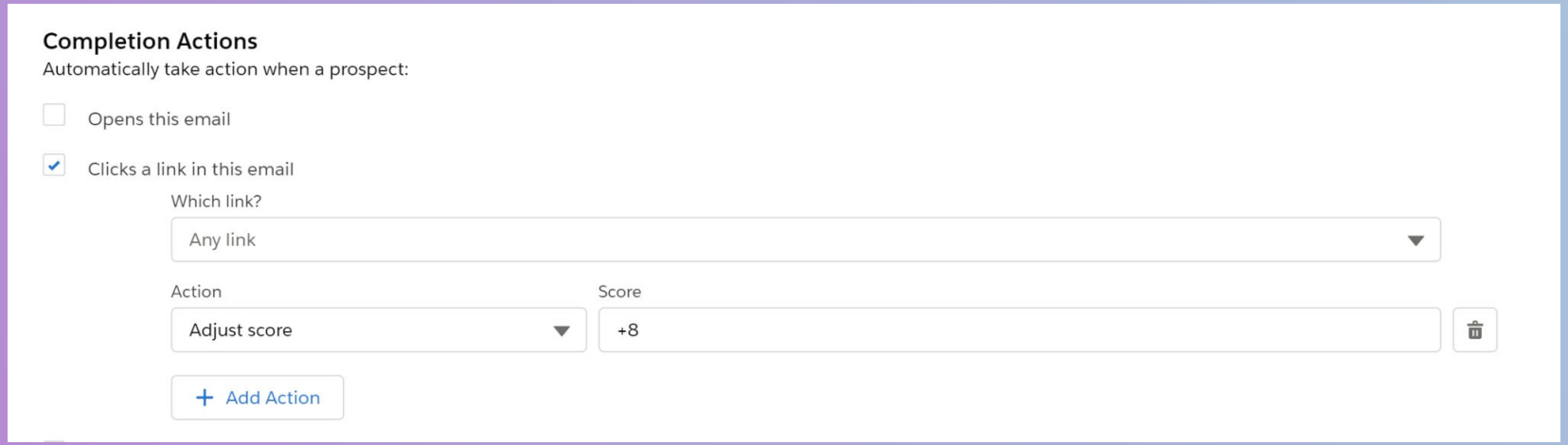


Conditional Completion Actions

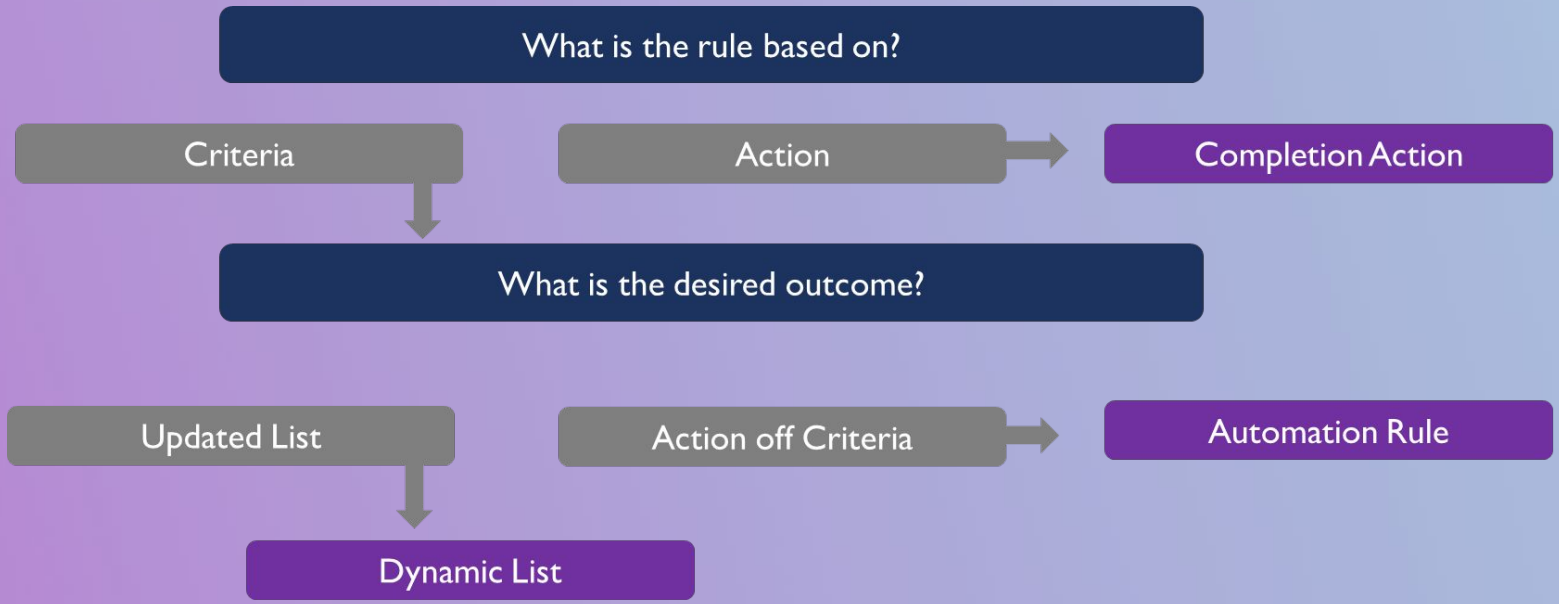


Example

If a prospect clicks in an email, adjust the score +8.



Automation Tools – Which one do I choose?



Source: Salesforce

What “Run Continuously” means for Automation Rules and Dynamic Lists:

Dynamic Lists:

Dynamic list continuously checking for qualified prospects.

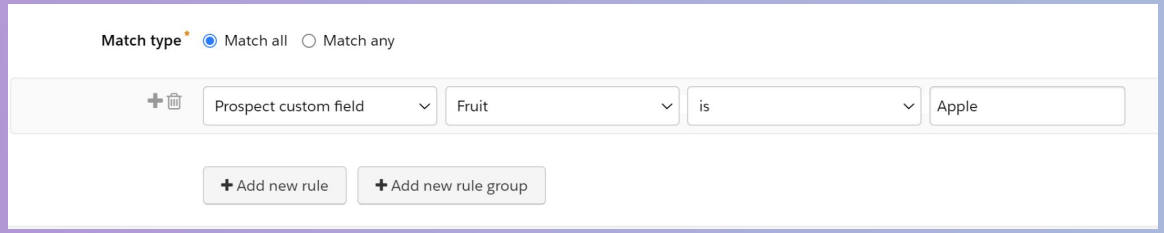
Prospects are added or removed from the list an unlimited number of times.

Automation Rules:

Automation Rules runs continuously checking for qualified prospects.

Once a prospect is matched, it’s a permanent member of the Automation Rule (Lifetime membership).

What “Run Continuously” means for Automation Rules and Dynamic Lists:



Prospect values	Dynamic List	Automation Rule
Prospect has Fruit=”Apple”	Prospect added to dynamic list	Prospect added to automation rule
Fruit value changed to “Orange”	Prospect removed from dynamic list	Prospect stays on automation rule
Fruit value corrected back to “Apple”	Prospect added to dynamic list	Prospect stays on automation rule
Fruit value changed to “Banana”	Prospect removed from dynamic list	Prospect stays on automation rule

Automation Guide

Thirty-three automation examples!

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Now you know the basics. But how do you put it all together?

First, start practicing!

Also, check out my Automation Cookbook.

It's a collection of common Account Engagement examples for typical marketing activities.

https://bit.ly/AutomationCookbook

“How Would You” Challenge

This will be a fun way to test your knowledge.

- Take out a piece of paper (or use Notepad, Word, Google Sheet on your computer.)
    - Number one through five on your page.
    - Write down either “1” or “2” for each question.

#1 How would you add a prospect to an email nurture?

Option 1

Create a dynamic list.

Add that dynamic list to an engagement studio.

Option 2

Create an automation rule to create a list.

Add that automation rule to the engagement studio.

#2 Add a prospect to a campaign when he/she/they click on an email.

Option 1

Add a completion action to the email to add the prospect to a campaign when he/she/they click on the email.

Option 2

Create a dynamic list to add the prospect to a campaign when he/she/they clicks on the email.

#3 Whenever a prospect has a title “CMO” you want to add 15 points to their score.

Option 1

Create a completion action with criteria for Title = “CMO” and Action of “Add 15 points.”

Option 2

Create an automation rule with criteria for Title = “CMO” and Action of “Add 15 points.”

#4 Mark any students or investors with Lead Status “Unqualified.”

Option 1

Create a dynamic list with Prospect Default Field “Job Title” contains “investor” or “student.”

Option 2

Create an automation rule:

If Prospect Default Field “Job Title” contains “investor” or “student,” change prospect custom field “Lead Status” value to “Unqualified.”

#5 Every time a prospect fills out a Contact Us form, notify Scott and create a Lead.

Option 1

Add a completion action to the Contact Us form to notify “Scott” and assign to Scott.

Option 2

Add an automation rule for Prospect Form “Contact Us” to notify “Scott.”

Thank You!

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