



# Deep Dive Into Account Engagement Automations

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# 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 they 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.

### List Information

**Name**

**Folder**

**Tags**

**Email Test List**   
Email Test lists are exclusively used for internal tests, and will be limited to 100 prospects.

**Dynamic List**   
The prospects assigned to this list are controlled dynamically via predefined rules. You will not be able to add or remove prospects via imports, automations, segmentations, or manually.

**Archive Date**    
This field is used for sorting only. Archive dates are saved and displayed in Eastern Time (Americas).

**Public List**   
Display this list in the email preference center

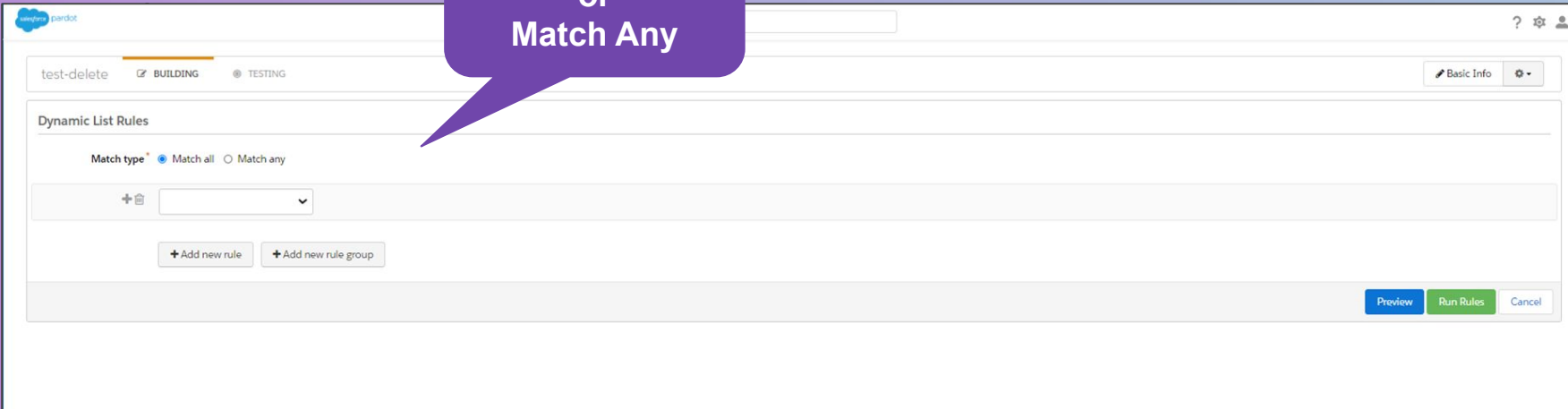
# Common Dynamic Lists

- 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

Match All  
or  
Match Any

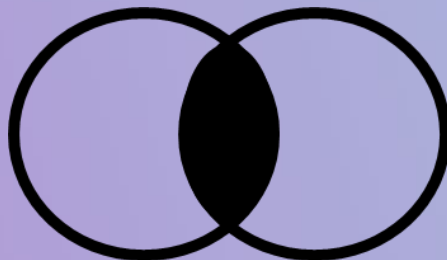


The screenshot shows the Pardot interface for configuring Dynamic List Rules. At the top, there is a breadcrumb trail: "test-delete" followed by "BUILDING" (active) and "TESTING". To the right of the breadcrumb is a "Basic Info" button with a settings icon. Below the breadcrumb is the "Dynamic List Rules" section. Under this section, the "Match type" is set to "Match all" (selected with a radio button) and "Match any" is unselected. Below the match type options is a single rule configuration row, which is currently empty. At the bottom of this row are two buttons: "+ Add new rule" and "+ Add new rule group". At the bottom right of the entire configuration area are three buttons: "Preview" (blue), "Run Rules" (green), and "Cancel" (grey).



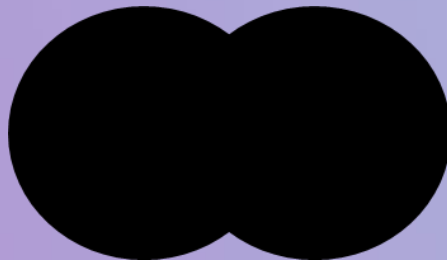
# Dynamic Lists

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

Dynamic List Rules

Match type <sup>\*</sup>  Match all  Match any

  Prospect default field  contains

# Automation Rules







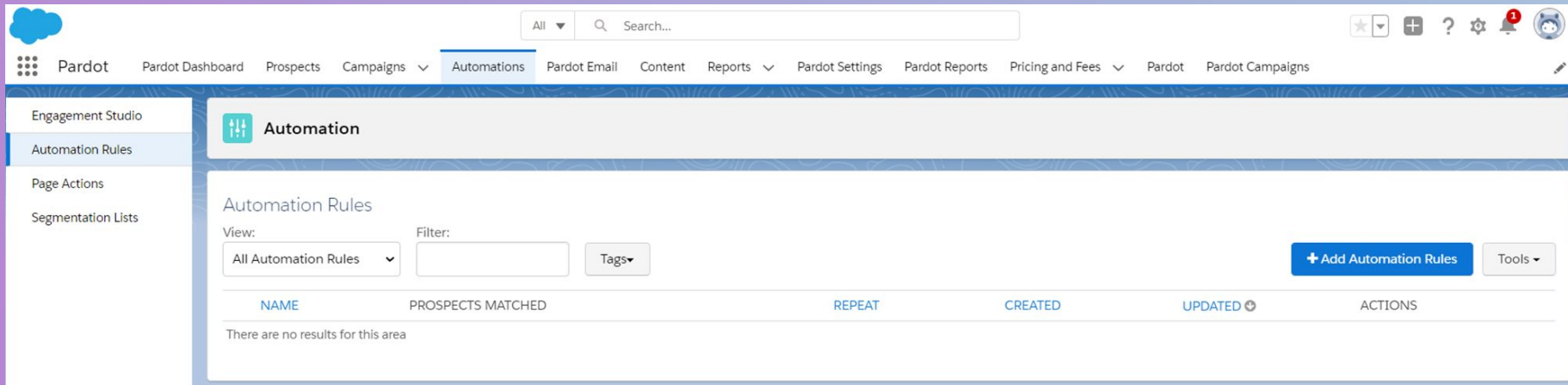
# Automation Rules

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

A screenshot of the Pardot user interface showing the Automation Rules page. The top navigation bar includes the Pardot logo, a search bar, and various menu items like "Pardot Dashboard", "Prospects", "Campaigns", "Automations", "Pardot Email", "Content", "Reports", "Pardot Settings", "Pardot Reports", "Pricing and Fees", "Pardot", and "Pardot Campaigns". The left sidebar lists "Engagement Studio", "Automation Rules", "Page Actions", and "Segmentation Lists". The main content area is titled "Automation" and "Automation Rules". It features a "View:" dropdown set to "All Automation Rules", a "Filter:" input field, and a "Tags" dropdown. A blue button labeled "+ Add Automation Rules" and a "Tools" dropdown are also present. Below these is a table header with columns: "NAME", "PROSPECTS MATCHED", "REPEAT", "CREATED", "UPDATED", and "ACTIONS". The table body contains the text "There are no results for this area".

Engagement Studio

Automation Rules

Page Actions

Segmentation Lists

Automation

Automation Rules

View: All Automation Rules Filter: Tags

+ Add Automation Rules Tools

| NAME                               | PROSPECTS MATCHED | REPEAT | CREATED | UPDATED | ACTIONS |
|------------------------------------|-------------------|--------|---------|---------|---------|
| There are no results for this area |                   |        |         |         |         |

# 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

## Rules

Match Type  Match all  Match any

Automation Rules are retroactive and affect all prospects that meet the selected criteria.



Prospect default field

Job Title

is

Vice President

or



Prospect default field

Employees

is greater than

10,000

+ Add new rule

+ Add new rule group

## Actions



Adjust prospect score

by

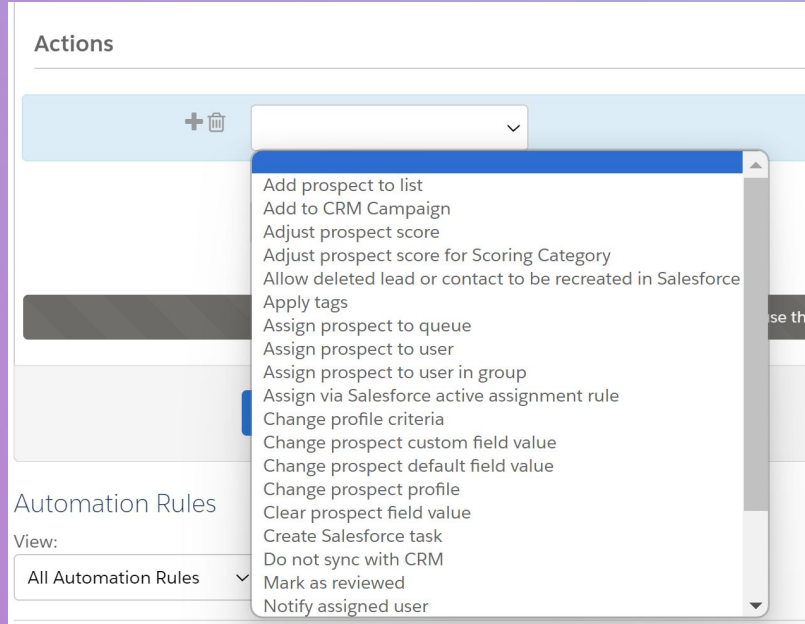
+15

+ Add new action



## 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
- Change prospect field value
- 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.

### Rules

Match Type <sup>\*</sup>  Match all  Match any  
Automation Rules are retroactive and affect all prospects that meet the selected criteria.

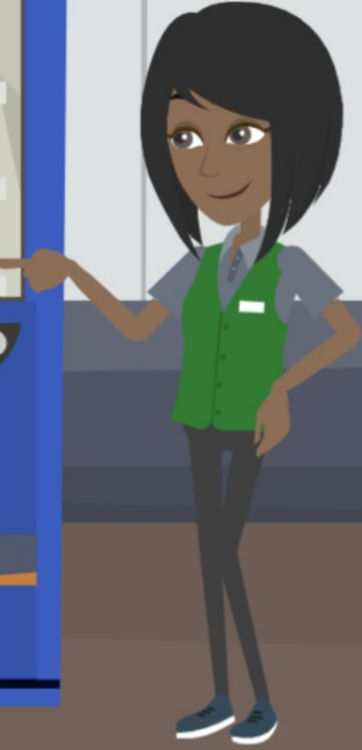
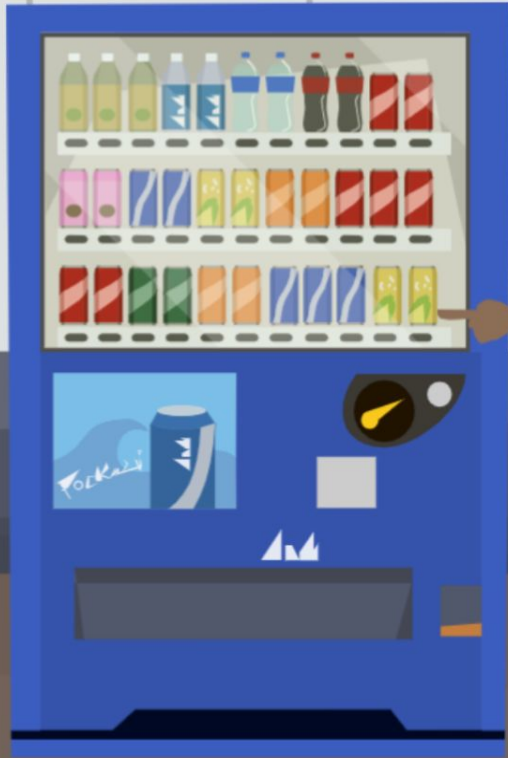
|   |                                    |                                    |   |
|---|------------------------------------|------------------------------------|---|
|   | Prospect form <input type="text"/> | Standard Form <input type="text"/> | was completed successfully <input type="text"/> |
|---|------------------------------------|------------------------------------|---|

### Actions

|   |   |
|---|---|
|   | Assign via Salesforce active : <input type="text"/> |
|---|---|

# 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



## Completion Actions Add supplemental automation to your email.

[Learn more on the Knowledge Base »](#)

### Take action when...

a prospect opens this email

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

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

Save

Cancel

# 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.

Completion Actions

|  |  |  |
|--|--|--|
| Action                                       | Campaign   | Campaign Member Status                 |
| <input type="text" value="Add to campaign"/> | <input type="text" value="Webinar"/>                   | <input type="text" value="Responded"/> |
| <input type="button" value="+ Add Action"/>  | <input type="button" value="+ Add Conditional Group"/> | <input type="button" value="X"/>       |

# Conditional Completion Actions

## Completion Actions

Completion Actions

Action: Add to campaign  
Campaign: Webinar  
Campaign Member Status: Responded

Action: Select...

Take Action When: Prospect Default Field  
Prospect Field Type: Country  
Operator: is  
Value: United States

Action: Assign to user  
User: Brian Nelson

+ Add Action to Group Delete Group

+ Add Action + Add Conditional Group

# Example

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

## Completion Actions

Automatically take action when a prospect:

- Opens this email
- Clicks a link in this email

Which link?

Any link

Action

Adjust score

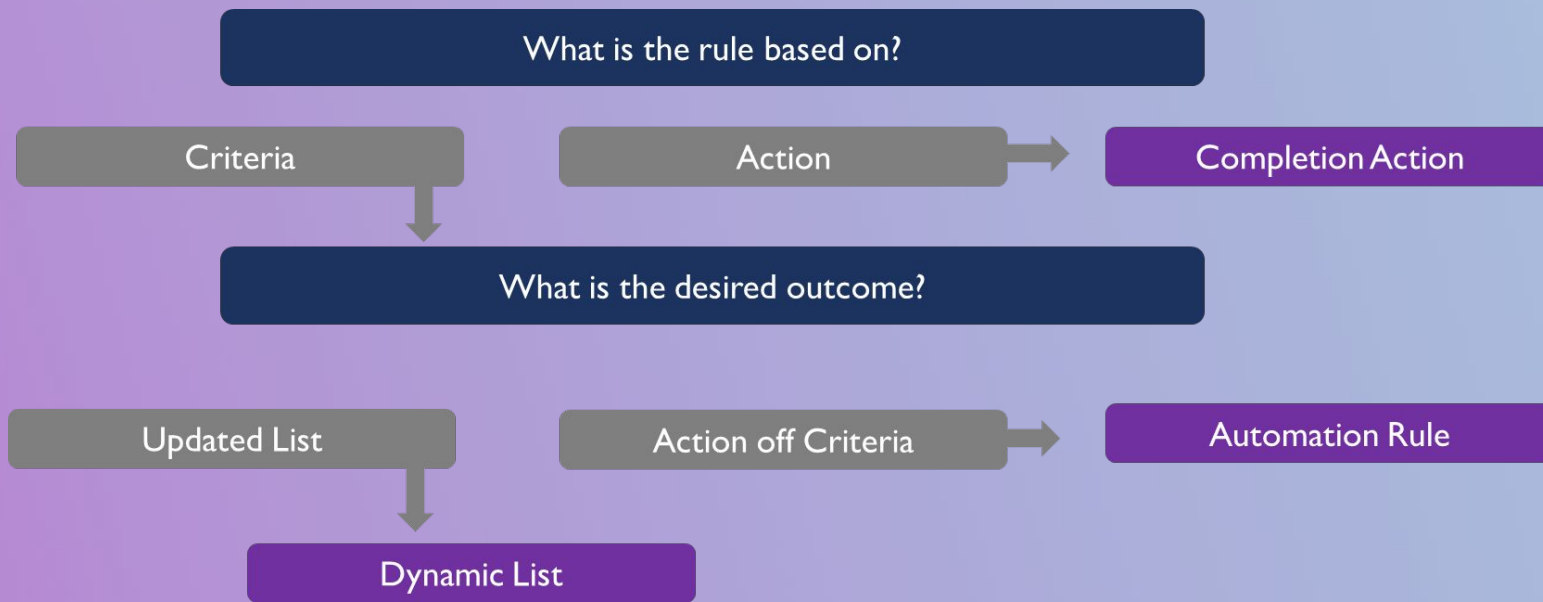
Score

+8

+ Add Action



# Automation Tools – Which one do I choose?





# 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:

Match type  Match all  Match any

 Prospect custom field  is

| 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 |



Thirty-three automation examples!

# Automation Guide

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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