



Automate All the Things in Account Engagement



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SERCANTE

salesforce

stensul

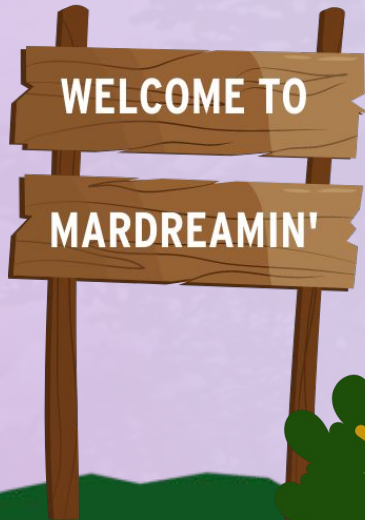
PFL

 **GRIDMATE**

THE SPOT
by SERCANTE

FÍONTA

Agenda



- Data Cleaning with Engagement Studio
- Master Suppression List
- Competitor Handling
- Other Helpful Dynamic Lists

Data Cleaning with Engagement Studio



Tedious imports into Pardot

Someone
sends you an
Excel file

Correct the
States and
Countries

Finally
import to
Pardot

Repeat ... over and over.

Let's save you some time

What you need:

1. What are the correct values you need for Salesforce?
2. Dynamic List
3. Engagement Studio
4. A little bit of time to build



Collect the Correct State and Country Values

Handy downloads for you

1. **States** - <https://www.pardotpro.com/pardot-state-values-for-dynamic-list.txt>
2. **Countries** - <https://www.pardotpro.com/pardot-country-values-for-dynamic-list.txt>



Make a Dynamic List for States

Criteria:

Prospect default field State is not empty

AND

Prospect default field Country is United States

AND

Prospect default field State is not ...

AND

Prospect default field State is not ...

US States - Dynamic List screenshot

Dynamic List Rules

Match type Match all Match any

+ Prospect default field State is not empty

and

+ Prospect default field Country is United States

and

+ Match all Match any

+ Prospect default field State isn't Alabama; Alaska; Arizona;

and

+ Prospect default field State isn't Montana; Nebraska; Nevada;

and

+ Prospect default field State isn't West Virginia; Wisconsin; \

+ Add new rule

Create an Engagement Studio Program

1. Use the dynamic list as your recipient list
2. Build out the steps:
 - a. Listening for field value (yellow step)
 - b. On yes path, correct the data (blue step)
 - c. Add an end step (red) below the blue step
 - d. On the left side, add a "Notify User" step

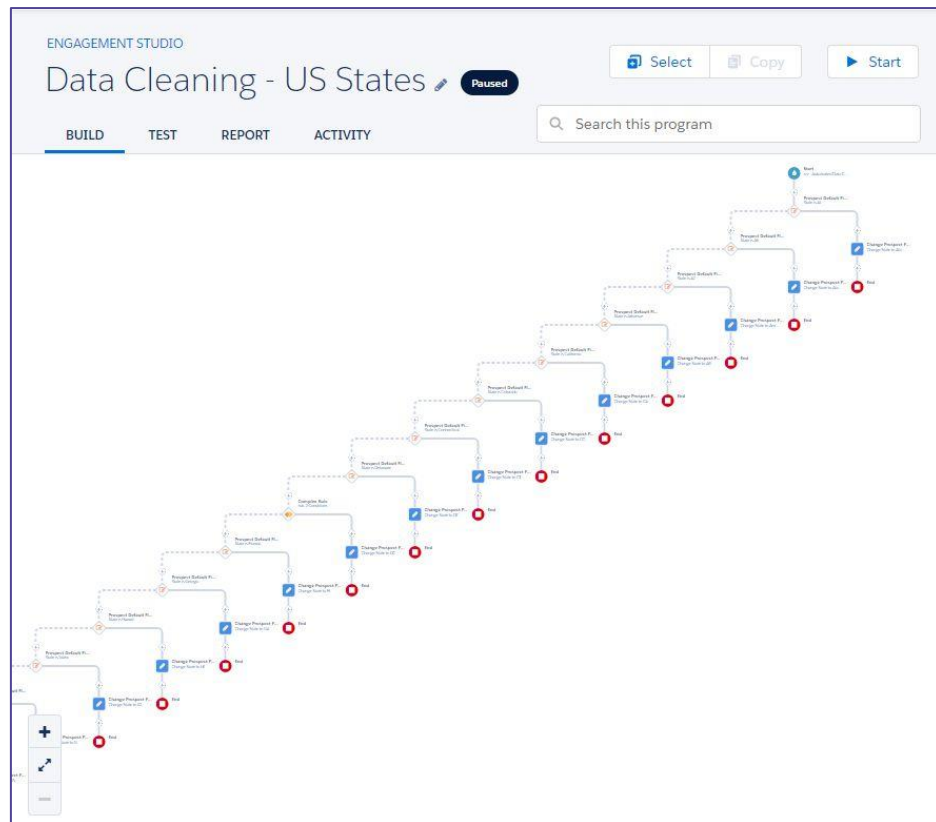


Full Engagement Studio screenshots

Zoomed out view

We're going to build a program which looks like this.

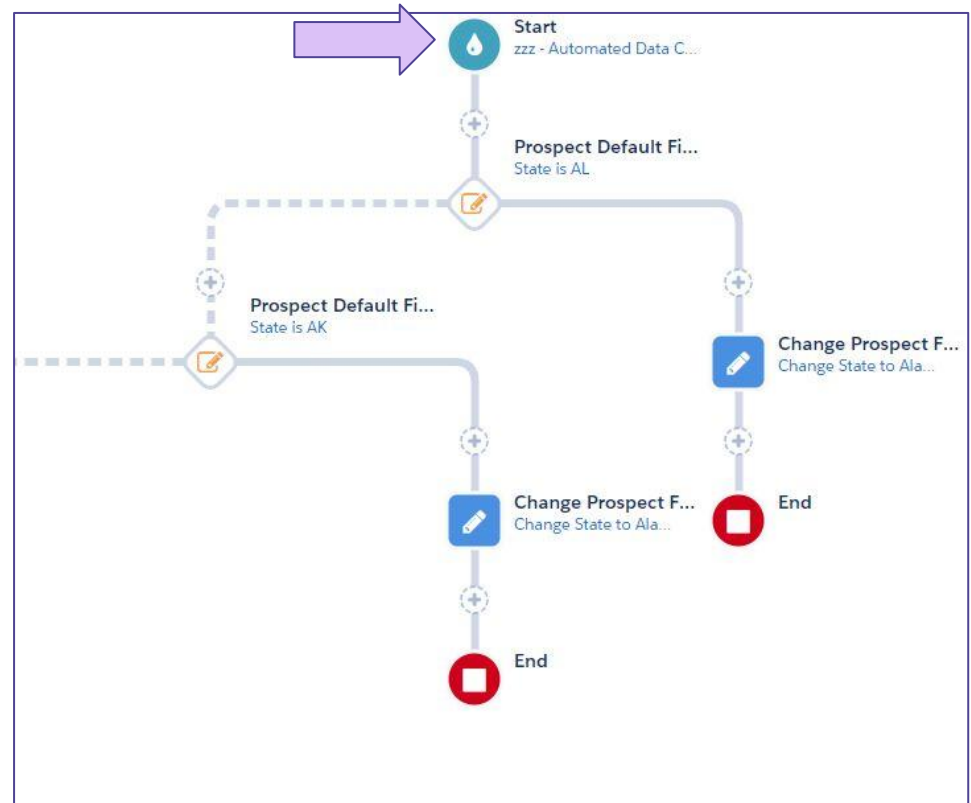
Note how it expands down and to the left.



Engagement Studio screenshots

How it begins

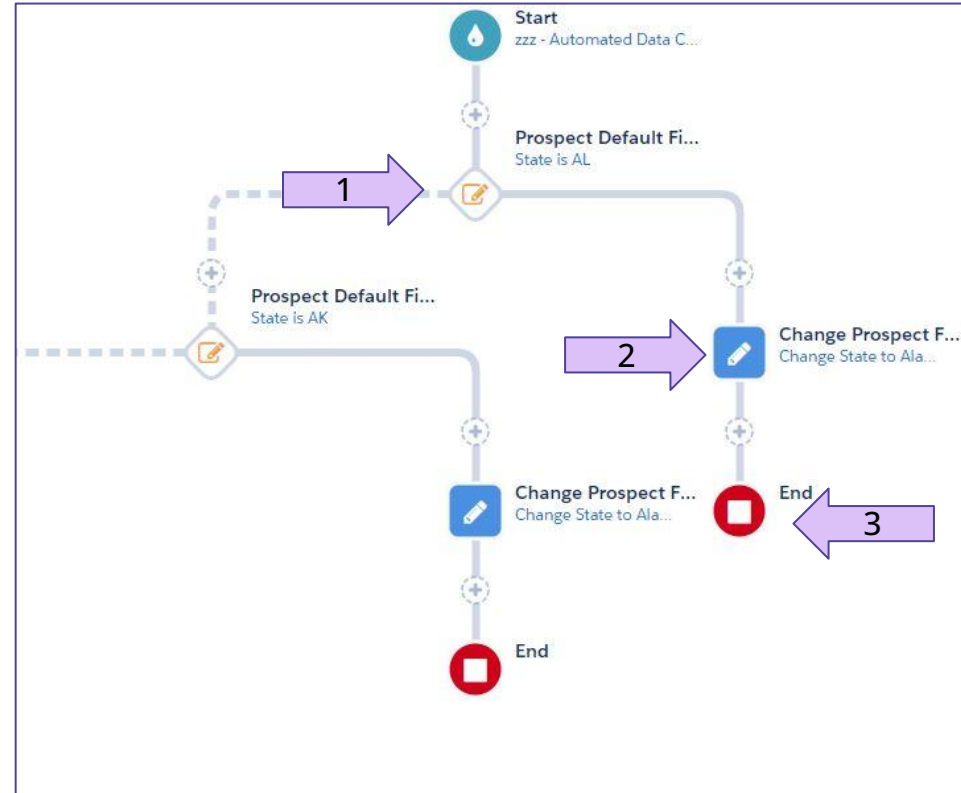
Recipient list is the dynamic list



Engagement Studio screenshots

Build out the logic:

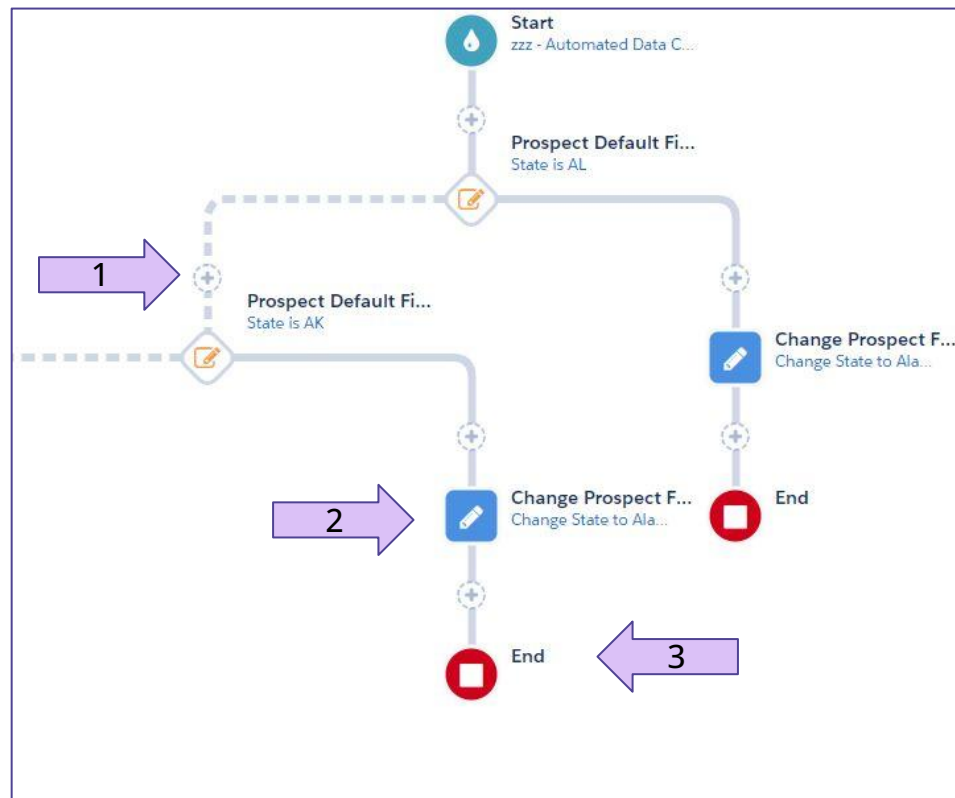
1. **Add a Yellow step:**
Is prospect default field State equal to AL?
2. **On Yes path, add a Blue step:**
Change Prospect field value to Alabama
3. **Add Red END step below Blue step**
Prospects who match Alabama now end program



Engagement Studio screenshots

Build out the logic:

1. **On the NO path:**
Click the plus and add a new Yellow step (next state value check)
2. **On new Yes path, add a Blue step:**
Change state value
3. **Add Red END step below Blue step**
Prospects who match now end program
4. **Continue Building on No paths**



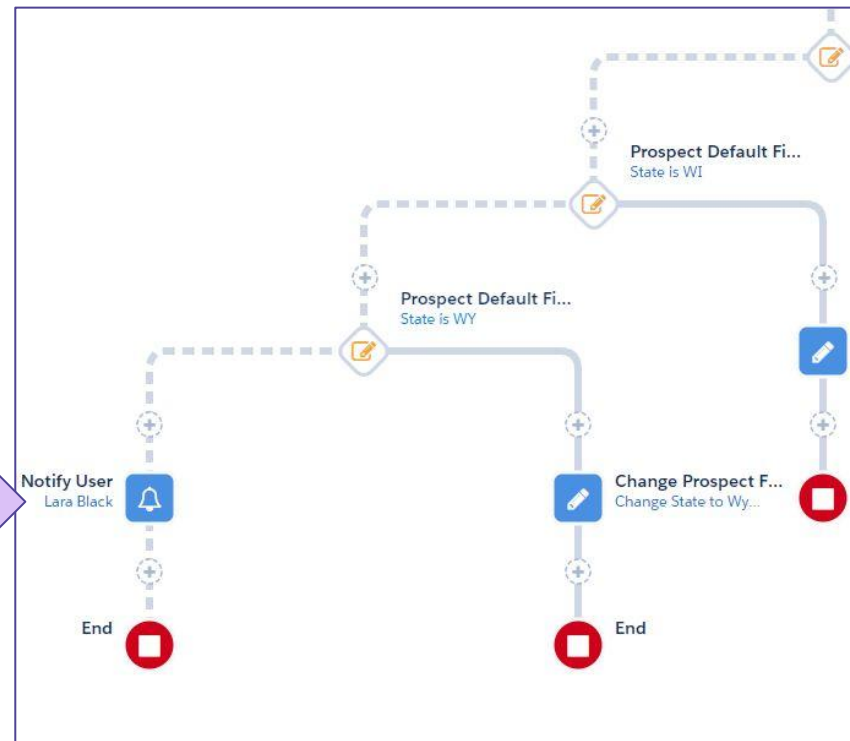
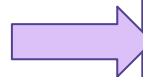
Engagement Studio screenshots

TIP: On the "ultimate NO" path, add a step to Notify User

Set it to notify someone (probably you)

Why:

- When someone matches the dynamic list (does not have the correct state)
- But they did not match any of the yellow steps
- You get a notification
- Now you can correct it



Full View

Full view again



Make a Dynamic List for Countries

Criteria:

Prospect default field Country is not empty

AND


Prospect default field Country is not ...

AND


Prospect default field Country is not ...


Countries - Dynamic List screenshot

Match type Match all Match any


+  Prospect default field Country is not empty

and _____


+  Match all Match any

+  Prospect default field Country isn't American Samoa; South K


and _____

+  Prospect default field Country isn't Saint Vincent and the Gre


and _____

+  Prospect default field Country isn't Tajikistan; Tokelau; Timor-I

and _____

+  Prospect default field Country isn't Slovakia; Sierra Leone; Sar

and _____

+  Prospect default field Country isn't Pitcairn; Palestine; Portuga

and _____

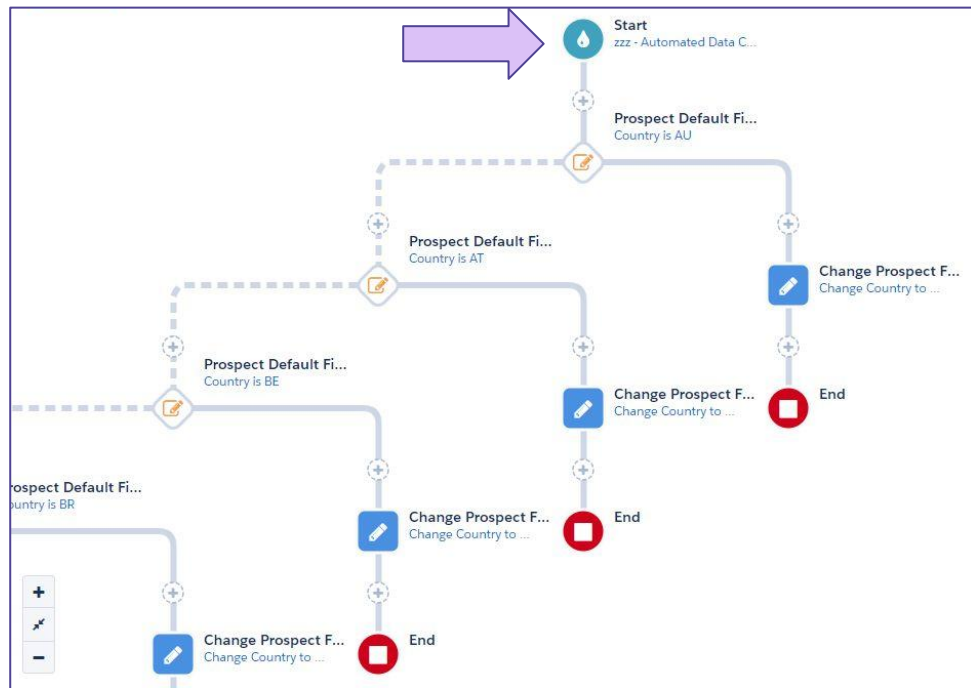


Engagement Studio screenshots

How it begins

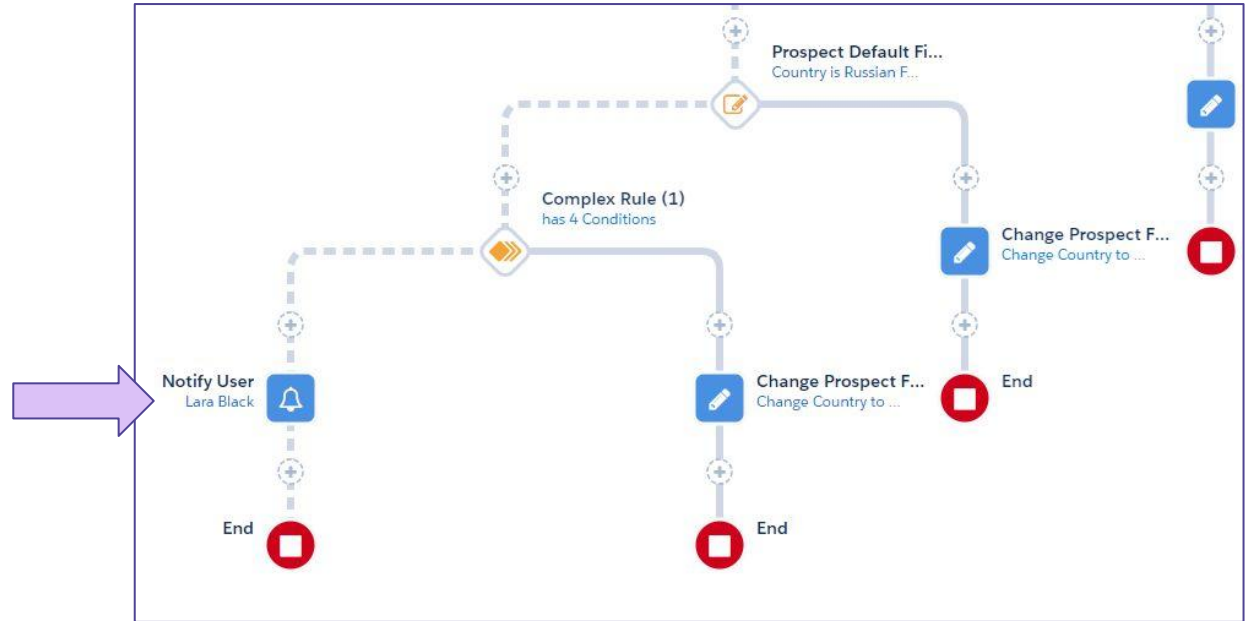
Recipient list is the dynamic list

Build out the logic just like the
State cleaning program



Engagement Studio screenshots

End with Notify User



Master Suppression List



Master Suppression List

Make a Dynamic List You Use On All Email Sends

1. **Create individual dynamic (or static) lists for different types of email suppression.** Some examples include:
 - a. Competitors
 - b. Employees
 - c. Job Titles you don't care about
2. **Roll all those lists into a Master Suppression List**
3. **Use the Master Suppression List as your suppression list on all email sends**



Master Suppression List

Pro tips:
















1. **Make your lists follow a naming convention - this groups them all together in the list view**
 - a. zzz - Competitors
 - b. zzz - Employees
 - c. zzz - junk email addresses
2. **You can keep adding to this list, as you discover more types of prospect you want to suppress**
3. **Train all Pardot users why this list is useful**



Sample Master Suppression List

Dynamic List Rules

Match type Match all Match any

| | | | | |
|---|---------------|--------------|--|--------|
|   | Prospect list | is member of |  Current clients | Choose |
| or | | | | |
|   | Prospect list | is member of |  zzz - junk email addresses - for suppression | Choose |
| or | | | | |
|   | Prospect list | is member of |  EXCL LST - Extensis Employees | Choose |
| or | | | | |
|   | Prospect list | is member of |  EXCL LST - Competitors | Choose |
| or | | | | |
|   | Prospect list | is member of |  LST - CRM Deleted - Direct Records | Choose |

Competitor Handling



Mark Competitors Unmailable

Every mailable prospect counts against your database limits (\$\$\$)

Mark your competitors unmailable - very easy to accomplish this, and they stop getting your content!

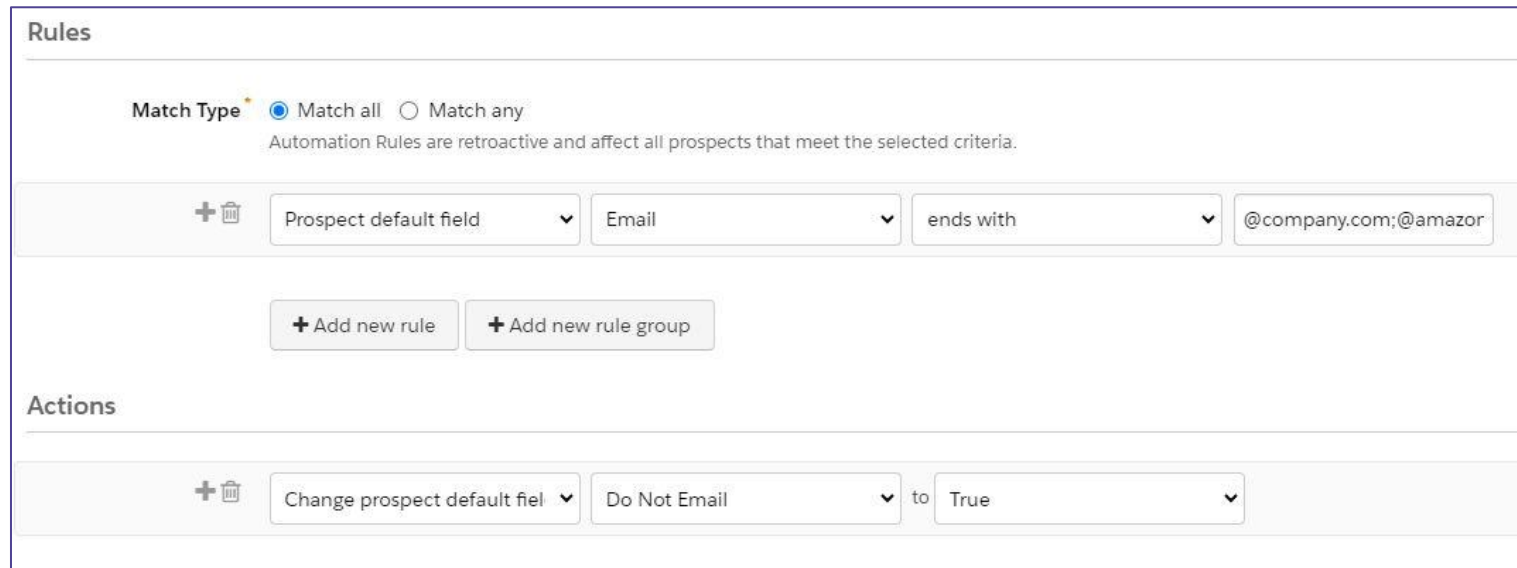
Make an Automation Rule:

- Criteria: Prospect default field email ends with @company.com
- Action: Change Prospect default field "Do Not Email" to "True"



Automate Competitor Handling

Optionally, add a line for "Or prospect tag is Competitor"



The screenshot shows the Salesforce Automation Rules configuration interface. It is divided into two main sections: "Rules" and "Actions".

Rules Section:

- Match Type:** Match all Match any. Below this, a note states: "Automation Rules are retroactive and affect all prospects that meet the selected criteria."
- Rule Configuration:** A single rule is defined with the following criteria:
 - Field: Prospect default field
 - Value: Email
 - Operator: ends with
 - Text: @company.com;@amazor
- Buttons:** "+ Add new rule" and "+ Add new rule group" are visible below the rule configuration.

Actions Section:

- Action Configuration:** A single action is defined with the following parameters:
 - Action: Change prospect default field
 - Field: Do Not Email
 - Value: True



Add any additional actions beneficial to your company, such as marking them disqualified, changing other Salesforce fields, etc.

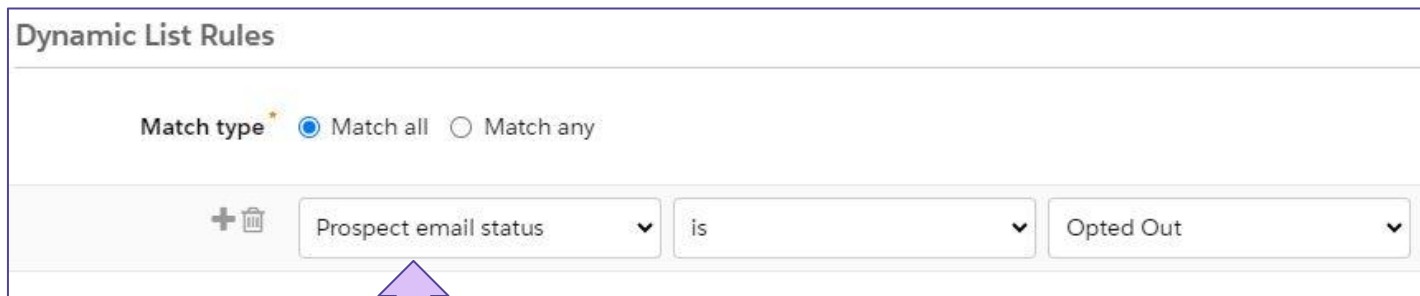
Other Helpful Dynamic Lists



Unmailable Prospects

Make dynamic lists for:

- Unmailable: Opted out
- Unmailable: Bounced (hard and soft bounced)
- Unmailable: Do not email




The screenshot shows a 'Dynamic List Rules' configuration interface. At the top, there is a 'Match type' section with two radio buttons: 'Match all' (selected) and 'Match any'. Below this is a rule configuration row consisting of three dropdown menus. The first dropdown is set to 'Prospect email status', the second to 'is', and the third to 'Opted Out'. A purple arrow points to the 'Prospect email status' dropdown.

Unmailable Prospects

Dynamic List Rules


Match type Match all Match any

+  Prospect email status is Opted Out

group

- Prospect CRM Campaign
- Prospect CRM campaign status
- Prospect CRM status
- Prospect account field
- Prospect assigned queue
- Prospect assigned user
- Prospect assignment status
- Prospect custom field
- Prospect custom redirect
- Prospect default field
- Prospect email opens
- Prospect email status**
- Prospect file
- Prospect form
- Prospect form handler
- Prospect grade
- Prospect has been emailed
- Prospect landing page
- Prospect list

- Opted Out
- Do Not Email
- Soft Bounce Detected
- Hard Bounce Detected



Competitors

Match by email domain, company name, and add a tag for Competitors

Dynamic List Rules

Match type Match all Match any

Prospect default field Email ends with @company.com; @abc123

or _____

Prospect default field Company is company; amazon;

or _____

Prospect tag is competitor

Employees of your company

Prospect default field Email ends with

Dynamic List Rules

Match type ^{*} Match all Match any

Prospect default field Email ends with @mycompany.com

or

Prospect tag is employees





CRM Status

- All Salesforce Leads
- All Salesforce Contacts
- Deleted from CRM

Dynamic List Rules

Match type ^{*} Match all Match any

  Prospect CRM status Contact



Junk Email Addresses

List of Junk Email Addresses:

<https://www.pardotpro.com/junk-email-domains.txt>

Dynamic List Rules

Match type ^{*} Match all Match any

Prospect default field Email contains !; #; \$; %; .draw4e; .hush.

or _____

Prospect default field Email contains @bugmenever.; @bugmer

or _____

Prospect default field Email contains @disposableaddress.; @di

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