



Enrollment

REACHING NEW HEIGHTS ON SALESFORCE FOR ADMISSIONS

ENROLLMENT RX WEBINAR SERIES

Unleashing the Full Potential of Marketing Cloud Account Engagement (Pardot) in 2024

Presented by:



MATT PALMER
DIRECTOR OF CLIENT SUCCESS



KATIE-ELISABETH SCANLON
IMPLEMENTATION CONSULTANT

AGENDA

1. ACCOUNT ENGAGEMENT

FEATURES TO UTILIZE

2. ADMIN FEATURES/ RECENT UPGRADES

3. MAINTAINING YOUR

MAILABLE DATABASE

4. HOW ENROLLMENT RX

CAN HELP YOU

5. QUESTIONS & ANSWERS

THANK YOU/UPCOMING WEBINAR

6. RESOURCES

TOPIC LINKS/CLIENT SITE/SURVEY

Enrollment

REACHING NEW HEIGHTS ON SALESFORCE FOR ADMISSIONS

2024



ENROLLMENT RX R.A.D. CLIENT
TRAINING WEBINAR SERIES

Unleashing the Full Potential of Marketing Cloud Account Engagement (Pardot) in 2024

ACCOUNT ENGAGEMENT FEATURES TO TAKE ADVANTAGE OF

CLASSIC EMAIL BUILDER



REPORTING
ON EMAIL PERFORMANCE







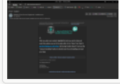




ABILITY
TO INSERT DYNAMIC CONTENT AND SNIPPETS



TESTING
EMAILS USING LITMUS

Email Clients Subject Line Preview Spam Analysis

DESKTOP EMAIL CLIENTS

 Outlook 2007	 Outlook 2010	 Outlook 2013	 Outlook 2016 for Windows	 Outlook 2019 for Windows	 Outlook Office 365 Dark for Mac
 Outlook Office 365 Dark for Windows	 Outlook Office 365 for Mac	 Outlook Office 365 for Windows	 Plain Text	 Thunderbird (Latest)	

WEB EMAIL CLIENTS

SNIPPETS



REUSABLE ASSETS

text, images, logos



STARTING TO USE SNIPPETS

- Connected Campaigns must be enabled
- Give access to the 'Snippets' tab
- Add Snippets related list to Campaigns page layout




AVAILABILITY

Forms, landing pages, email templates (classic builder)

COMMON USE CASES


EXAMPLES

- Legal disclaimer
- Location Information
- 'About Us' statement

 Snippet
Legal Disclaimer Example

Type: Text Created By: ERx Admin, 12/18/2023, 9:44 AM Last Modified By: ERx Admin, 3/21/2024, 7:01 AM

Related Details

 **Assignments (3)**

Name	Assignment Scope
Website Tracking	Campaign <input type="button" value="v"/>
Sample Account Engagement Campaign	Campaign <input type="button" value="v"/>
Email Plug-in	Campaign <input type="button" value="v"/>

[View All](#)

DYNAMIC CONTENT

CONTENT VARIATIONS BASED ON CRITERIA



USE CASE

EXAMPLE

Program-specific information



CUSTOM REDIRECTS

Trackable links created in Account Engagement to **track clicks** for third-party websites, external files

USE CASE

EXAMPLE

Can include a redirect link on direct mail/can use to calculate ROI

NEW EMAIL BUILDER



EMAIL CONTENT & EMAIL TEMPLATE TABS
DRAG & DROP INTERFACE
EMAILS CAN BE USED FOR AUTOMATION



CONSIDERATIONS

Must have Content Management System (CMS) Workspace and Channel

Snippets/Dynamic Cannot be Inserted

Reporting done in Salesforce

NEW LANDING PAGE BUILDER



LANDING PAGE TAB

DRAG & DROP INTERFACE

ABILITY TO ADD 'BUTTON' COMPONENT



CONSIDERATIONS

Must have Content Management System (CMS) Workspace & Channel

Snippets/Dynamic Text Not Supported

No Merge Field Picker

FORMS



Used to **capture** prospect information; Can be used to gatekeep content



Clients often use these for “**short RFI forms**”



Autoresponders and completion actions can be applied



Can be added to a Landing Page or embedded as an **iframe** on website

CONDITIONAL COMPLETION ACTIONS



Criteria is set so actions only takes place for prospects that meet criteria



Can be used on Forms, Custom Redirects, Page Actions, and Files

Completion Actions

Send autoresponder email [Initial Inquiry Email](#)

Assign prospect via Salesforce active assignment rule

Conditional Parameters If [Prospect custom field] [Program of Interest] [is] [Accounting]

Notify user [Matt Palmer](#)

Conditional Parameters If [Prospect custom field] [Program of Interest] [is] [Biology]

Notify user [Erx Account Engagement](#)

Conditional Parameters If [Prospect default field] [State] [is] [Illinois]

Add tags in-state

SCORING

Determined by a prospect's actions and activities.

Can have multiple scoring categories

How can scoring be used?



IDENTIFY

Identifying leads to be converted



PRIORITIZE

Prioritizing leads for specific outreach/direct mail



CONTACT

Admissions Reps can prioritize who to contact

GRADING PROFILES



Ideal prospects; Prospects can be assigned to one profile



Create Automation Rules to 'match' results or update prospect records manually

Profile Criteria

Overview Lists **Profile** Related Activities Audits Lifecycle Opportunities Related Objects

Profile Criteria: Default

CRITERIA	GRADE ADJUSTMENT	MATCH?
Location	2/3 letter	👍 👎
Job Title	2/3 letter	👍 👎
Industry	2/3 letter	👍 👎
Department	2/3 letter	👍 👎
Company Size	2/3 letter	👍 👎

Showing 5 of 5

AUTOMATION RULES

Criteria-based rules that find matching prospects then perform an action

EXAMPLES

- Send an email when a prospect field value changes
- Update a prospect's 'Do Not Email' field if they have been inactive for a period
- Determine that a prospect should be created as a Contact in Salesforce

PAGE ACTIONS



Page Actions are completion actions triggered when a designated page is viewed



URLs used for Page Actions must have tracking code applied



Use Page Actions for specific/valuable pages

USE CASE

EXAMPLES

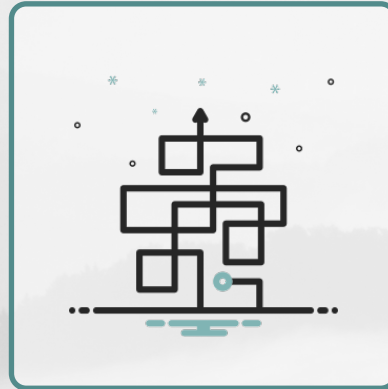
- Send a notification to an assigned Admissions Representative based on a page view
- Add a prospect to a segmentation list based on a page view
- Increase a prospect's score when they visit a high value page

ENGAGEMENT STUDIO

AUTOMATION/NURTURING TOOL



NOW AVAILABLE: COMPLEX RULES



USE CASE

EXAMPLES

- Prospect engagement
- Drive to apply campaigns
- Event invitation campaigns
- Admitted applicant nurture campaigns

ADMIN

FEATURES/UPGRADES



Upgrading to the Lightning App



How to Maintain Your Mailable Database



V2 Connector & Connector Settings



Explore the Optimizer Feature

ACCOUNT ENGAGEMENT

LIGHTNING APP



BENEFITS

Future of all new features

Can mix Pardot/Salesforce tabs

Example: Sales-only users can view prospects
without leaving Salesforce



HOW TO ENABLE

V2 CONNECTOR

CHECK YOUR CURRENT VERSION

Account Engagement Settings tab > Account Setting

Created At	Aug 4, 2021 3:48 PM
Updated At	Mar 19, 2024 12:51 AM
Created By	Pardot Support
Updated By	Pardot Support
Max Daily API requests	100000
Concurrent API Request Limit	5
Allow Multiple Prospects with the Same Email Address	Permanently Enabled Learn More
Operational Emails	Disabled Enable Operational Emails
Salesforce Connector Version	2



BENEFITS OF UPGRADING

- No Salesforce license used for integration user
- Ability to sync metadata on demand
- Ability to pause sync

CONNECTOR SETTINGS OVERVIEW



SYNC ERRORS

How often to
correct these



SYNC BEHAVIOR FOR FIELDS

Use Salesforce's Value
Used Pardot's Value
Use Most Recently Updated Record
Opt-Out field: option for most recently updated field



MARKET DATA SHARING

Advanced
Edition only

CUSTOM OBJECT SYNC



Ability to sync data from objects other than Contact/Lead/Account



Available for Plus Edition as add-on/Included with Advanced Edition

USE CASE

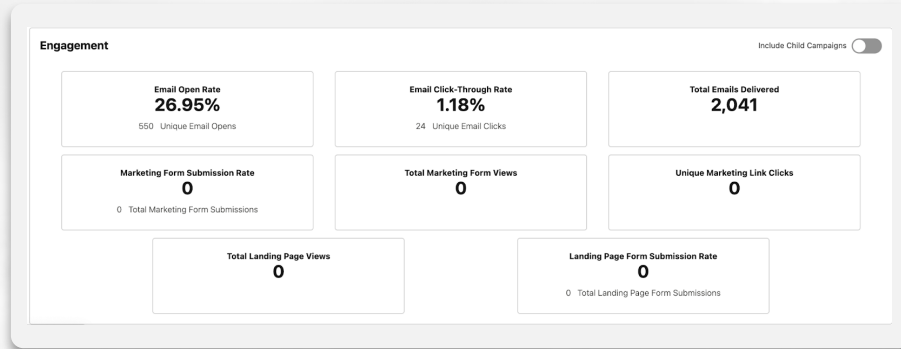
EXAMPLE

Syncing application fields to
be used for segmentation

CONNECTED CAMPAIGNS

REPORTING BENEFITS

- Engagement Analytics on Campaign record



- Native Salesforce reporting can be used



CONSIDERATIONS

- Once connected, Campaign can only be updated in Salesforce
- Uses Salesforce storage space (Engagement History)
- Need to Create Automation Rule to add Prospects as 'Campaign Members'

MAINTAINING YOUR MAILABLE PROSPECT DATABASE



IDENTIFY

How to check your limit



CREATE

A schedule for cleaning the database



CLEAN UP

- Mark records “Do Not Email”
- Send prospects to the Recycle Bin



SAVE

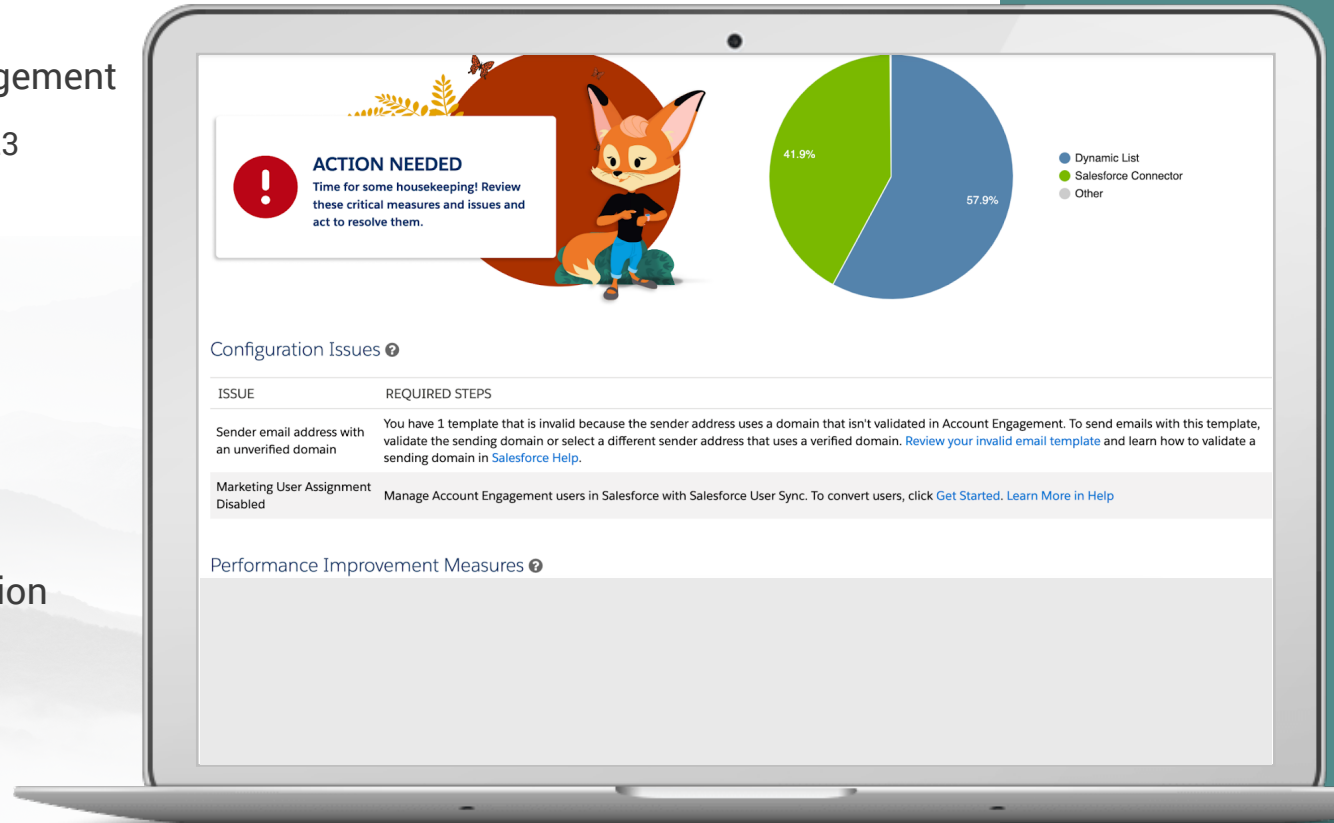
Keeping mailable database clean can save money vs. purchasing more prospects

Enrollment 

REACHING NEW HEIGHTS 
ON SALESFORCE FOR ADMISSIONS

OPTIMIZER FEATURE

- Available in Account Engagement Settings (as of the Summer '23 release)
- Shows critical issues and configuration issues
- Can view inactive automation rules/dynamic lists



HOW CAN ENROLLMENT RX HELP YOU?

Marketing Cloud *account engagement*

This specialized service is designed to help maximize your usage of Marketing Cloud Account Engagement (formerly known as Pardot).

The service can include:



Functional Team Business Review



Marketing Cloud Account Engagement Analysis



Findings and Recommendations



Contact Misty Mullenbach

misty@enrollmentrx.com

REACHING NEW HEIGHTS
ON SALESFORCE FOR ADMISSIONS  2024

Q & A

THANK YOU

Stay tuned for upcoming webinar details COMING SOON!

TOPIC RESOURCES

- ◆ [Upgrading Connector to V2](#)
- ◆ [Enabling Account Engagement Lightning App](#)
- ◆ [Completion Actions](#)
- ◆ [Choosing the Right Automation Rule](#)
- ◆ [Salesforce CMS](#)
- ◆ [Enhanced Landing Page Builder Guide](#)

REACHING NEW HEIGHTS
ON SALESFORCE FOR ADMISSIONS



ENROLLMENT RX CLIENT RESOURCES

R.A.D. NAVIGATOR



Easy Navigation & Search



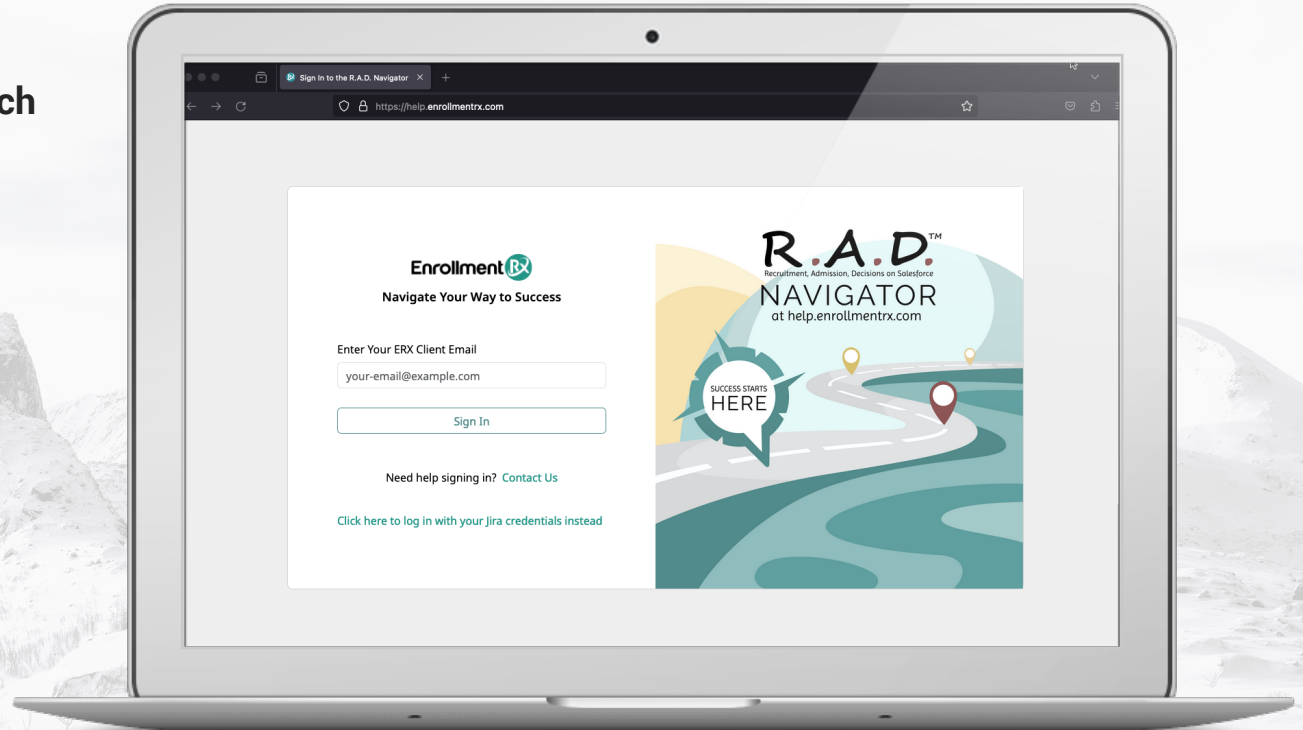
Product Tiles



Introduction & Setup



Release Notes



Session Survey

We Want Your Feedback!



Enrollment 

REACHING NEW HEIGHTS
ON SALESFORCE FOR ADMISSIONS  **2024**

Please complete the session survey you will receive after this session. Thank you!