Salesforce Engage

GREENKEY DIGITAL

Talking points

- What is Salesforce Engage
- How to install Salesforce Engage
- Salesforce Engage
- Engage Alerts
- Engage Reporting
- Q&A with Rahmaan

What is Salesforce Engage?

Example of Typical Sales Activities Today

You come into office and check any emails

Follow up on cold leads and prospect new leads

If you don't get the lead on the phone, you send an email

You finally get a prospect on the phone, but she won't have funding for another year

You set reminders to reach out to the prospect throughout the year

You got busy and missed the reminders, but you call 9 months later

You find out the prospect got unexpected funding mid-year, and decided to purchase from your competitor

Example of Activities With Salesforce Engage

You come into office and check any emails

Follow up on cold leads and prospect new leads

Use Salesforce Engage to send mass personalized email with a buyer's guide to 150 leads

Check Engage Alerts to see which prospects have been active in the past 24 hours, & use that to plan your call list for the next few hours

You check Engage reports to see if anyone downloaded the buyer's guide from the email you sent earlier

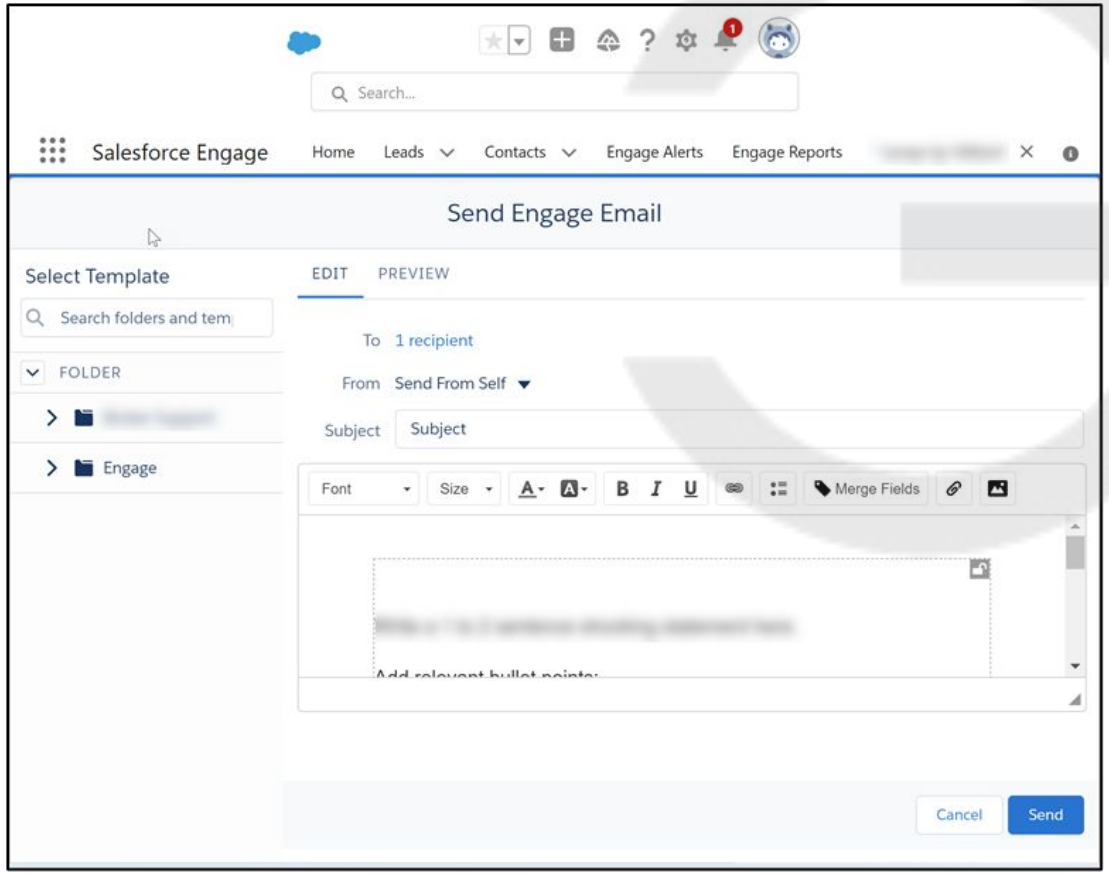
Good news! You got a few calls scheduled from those emails

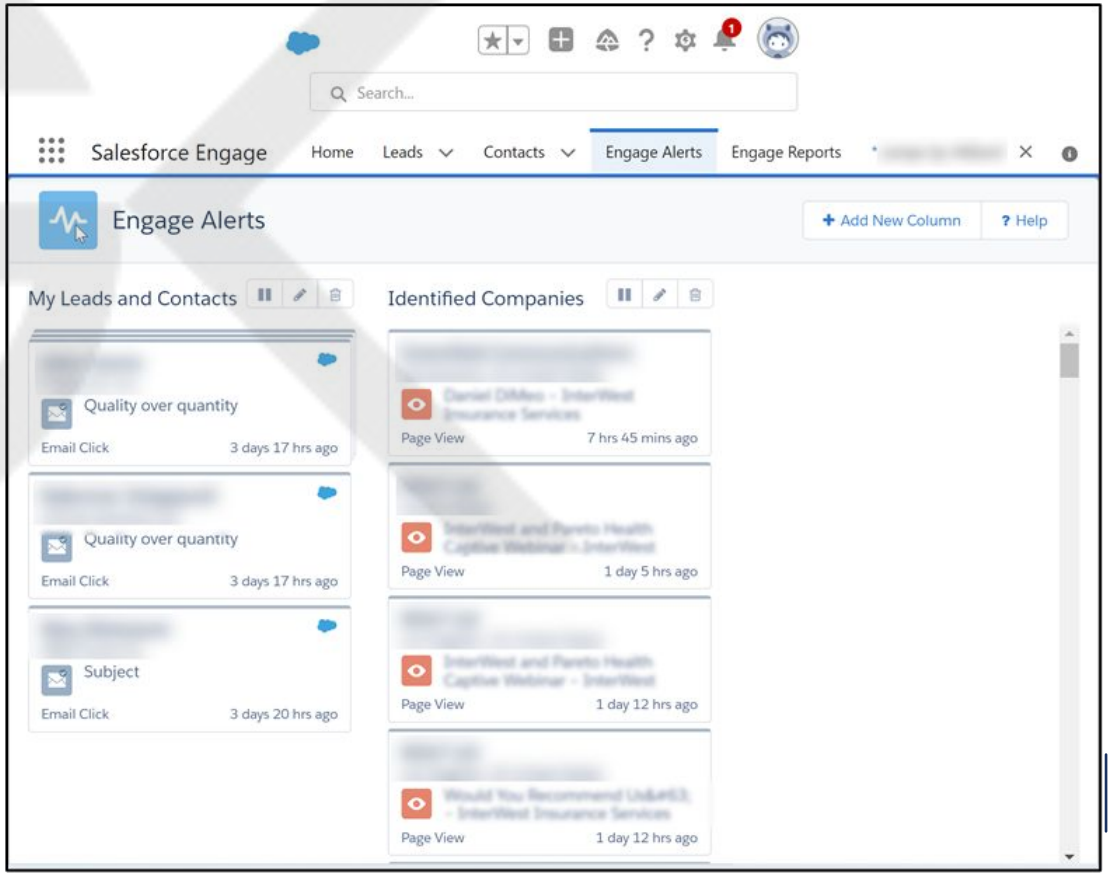
You discover one buyer won't have funds for another year, so you set a reminder to follow up

A few months later, you notice on Alerts that the prospect is all over your website, so you call her. They got unexpected funding and will make a purchase. You are the first to reach out and you win the business.

Salesforce Engage

Empowers your Sales team to send marketing emails and track the Engagement.





How do you install Salesforce Engage?

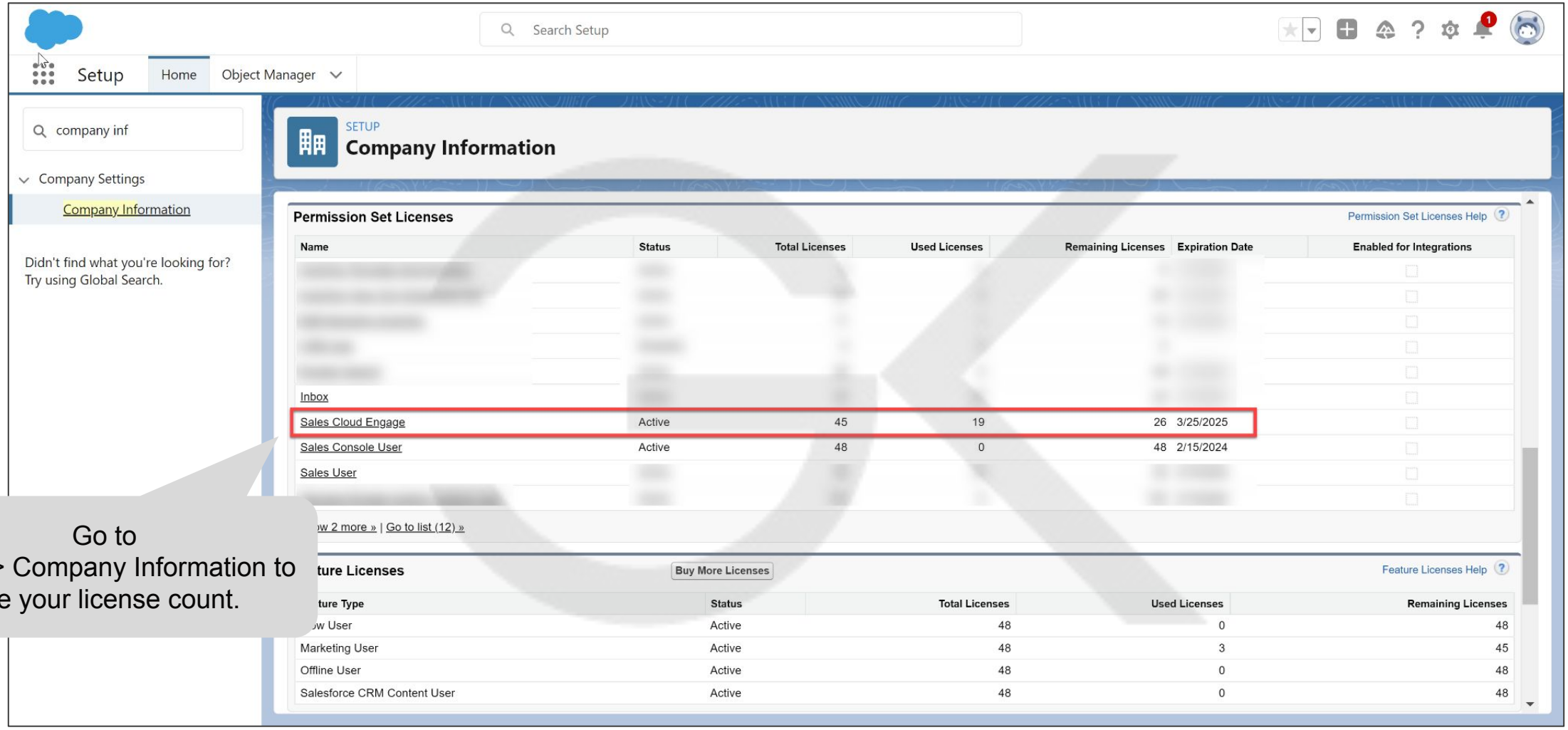
Enable Salesforce Engage

Easy setup when you follow the links.

Links: https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_setup_parent.htm&type=5
https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_team_reports_parent.htm&type=5
https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/pardot_salesforce_engage_implementation_guide.pdf

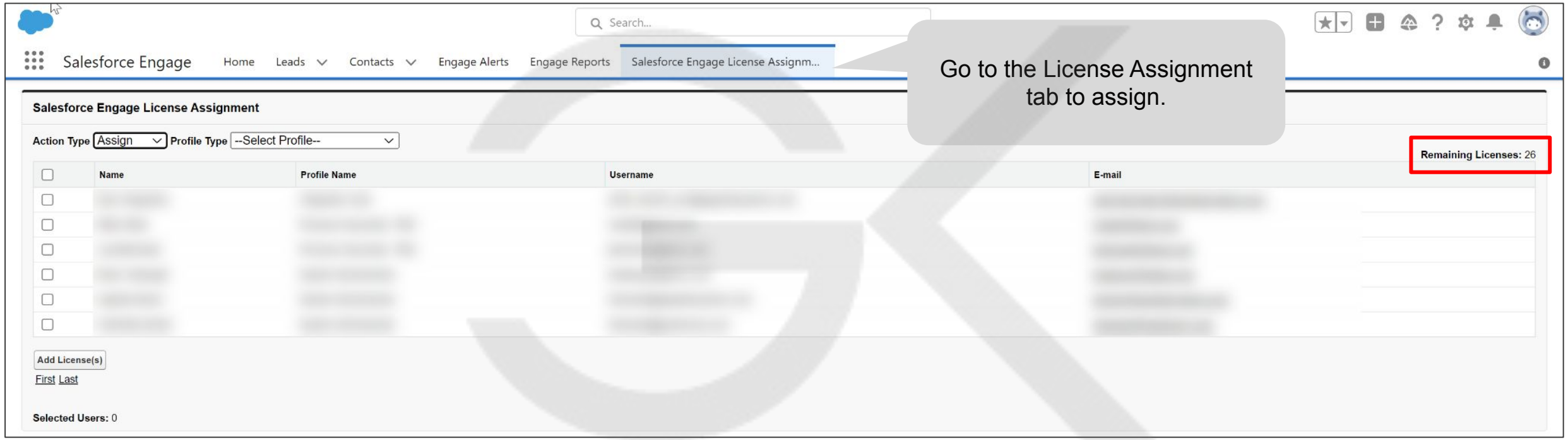
1. Enable Salesforce User Sync to add Engage Users to Pardot
2. Assign “Salesforce Engage” permissions to users
3. Edit Engage account settings.
4. Set template options (Classic or Lightning)
5. Add “Add to Engagement Studio” and “Send Engage Email” buttons
6. Enable Engage Teams Reports

Separate package install (second link above)



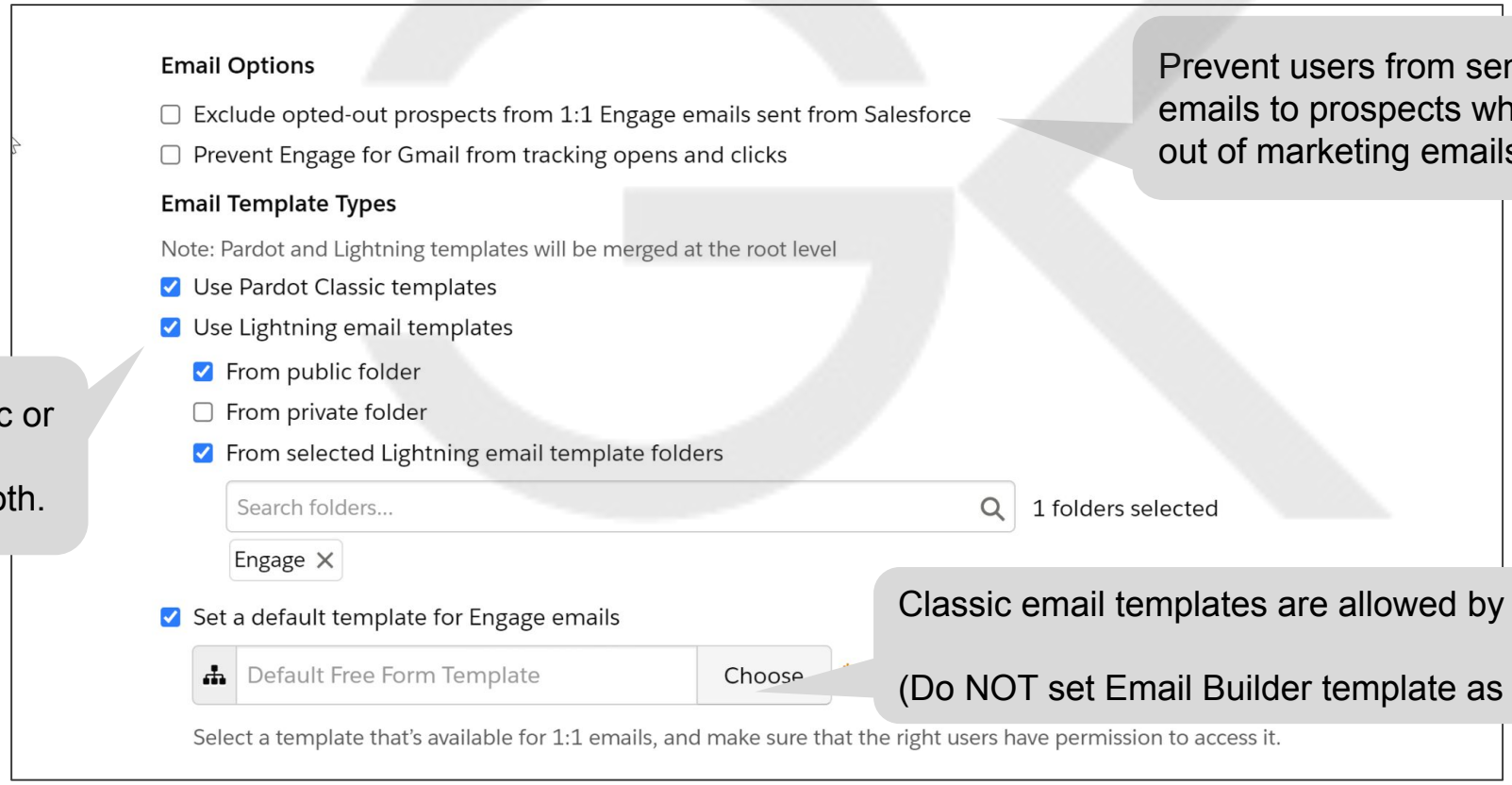
Go to
Setup > Company Information to see your license count.

Assign Engage Licenses



Enable Salesforce Engage

Go to Pardot Settings > Account Settings > Edit > Expand Salesforce Engage



Prevent users from sending 1:1 emails to prospects who opted out of marketing emails.

Allow for Classic or Lightning email templates, or both.

Classic email templates are allowed by default.

(Do NOT set Email Builder template as a default.)

Enable Salesforce Engage

Pardot Settings > Account Settings > Edit > Expand Salesforce Engage

Limits the number of Engage Campaign emails an Engage user can send over a 24-hour period.

Choose a number between zero and 500. 24-hour rollovers respect the user's timezone.

Salesforce Engage

Engage Campaign Limit: 500

The max number of Engage Campaign emails that can be sent by an Engage user over a 24 hour period

Salesforce Engage

Salesforce Engage can help

Salesforce Engage allow you to:

- Effortlessly build tailored campaigns with marketing-curated content
- Deliver a phenomenal buyer experience
- Close deals faster

With Engage emails you can:

- Send one-to-one or one-to-many emails directly from Salesforce
- Tailor email to your audience with editable text-only or marketing-approved templates
- Automatically track all email activities

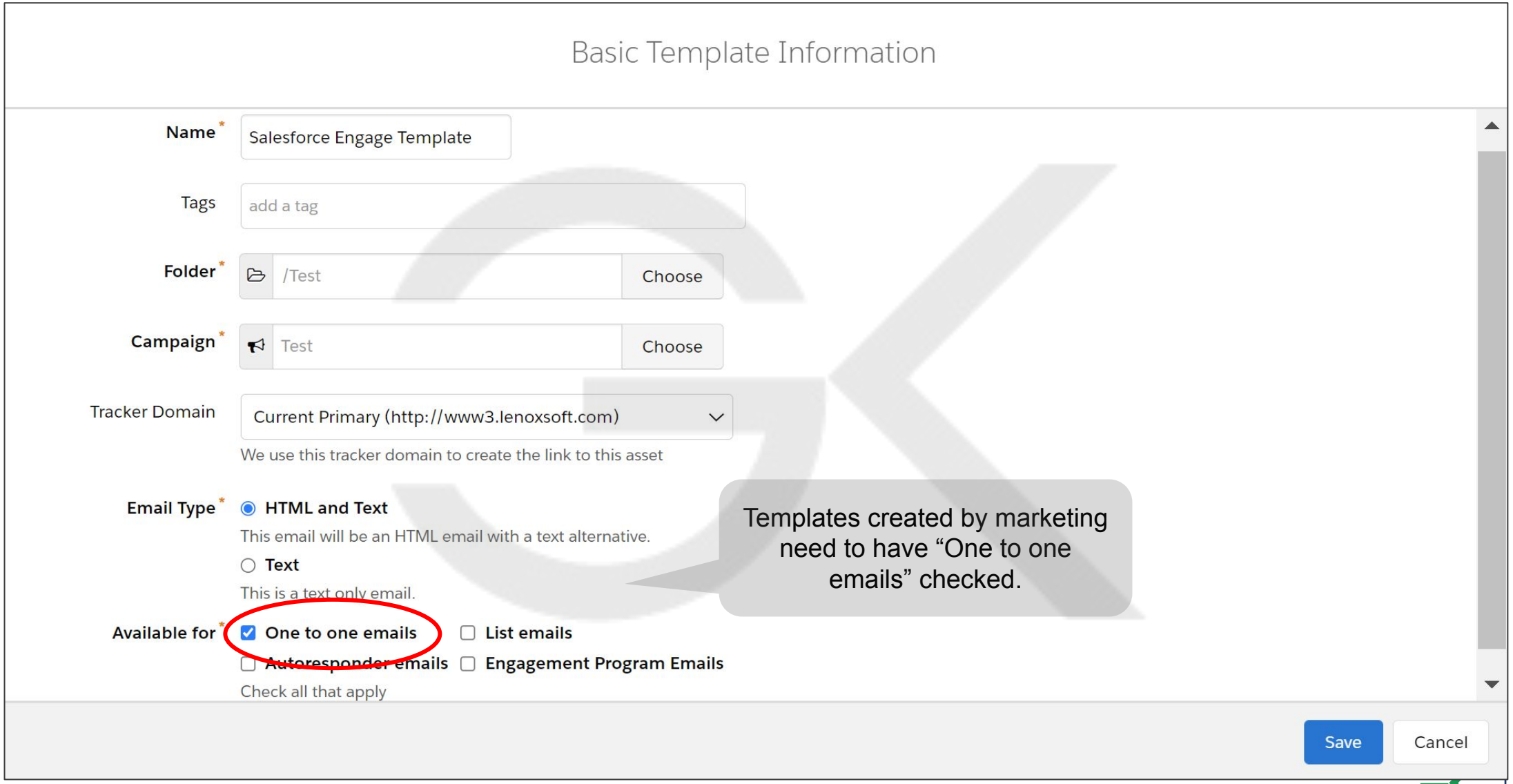
Marketing templates

Choose a marketing template and it will populate in the email editor.

- Editable sections will be marked by an unlocked icon.
- Merge fields can be used in marketing templates

Want more templates?

- Talk to your marketing team
- Marketing creates the templates in Pardot so you can focus on selling



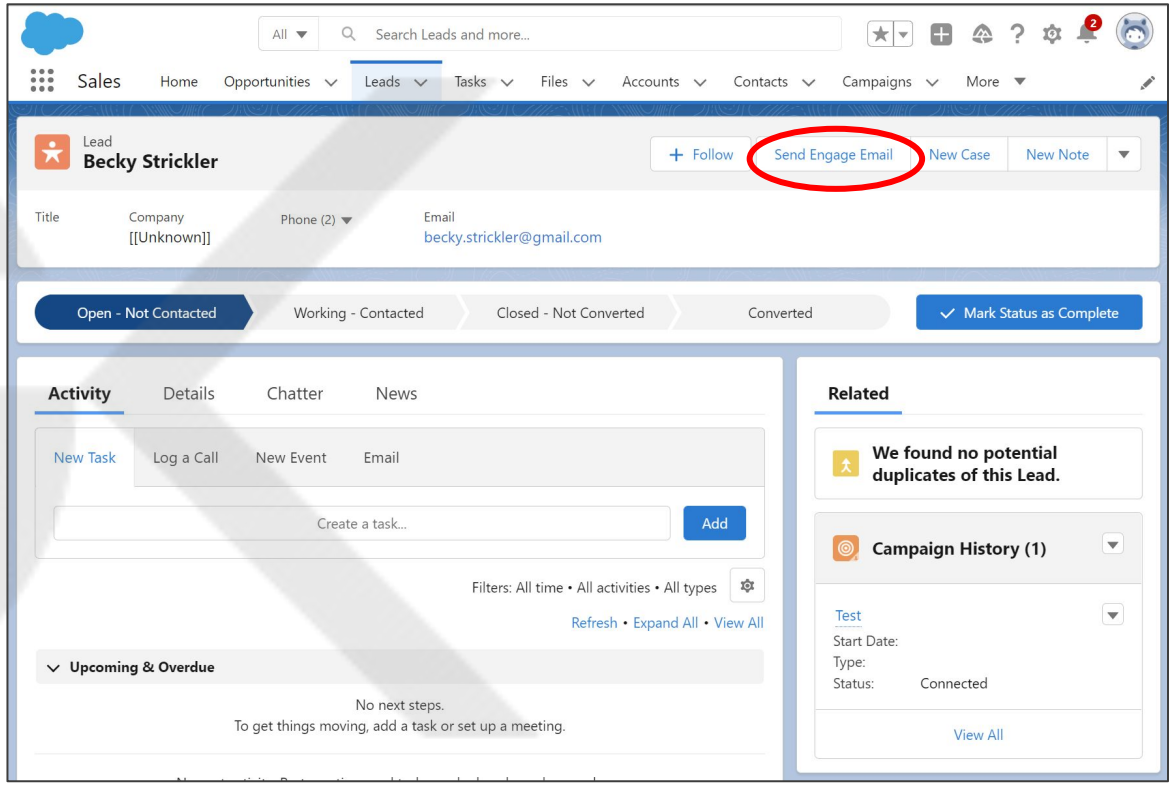
Templates created by marketing need to have “One to one emails” checked.

One-to-one Engage emails

Engage campaigns let you deploy your own personalized, one-to-one email campaigns:

1. Go to a Lead or Contact record
2. Click the Send Engage Email button to access the Engage email editor

Track email interactions on the Pardot Activities section of a record, or using real-time Engage Alerts.



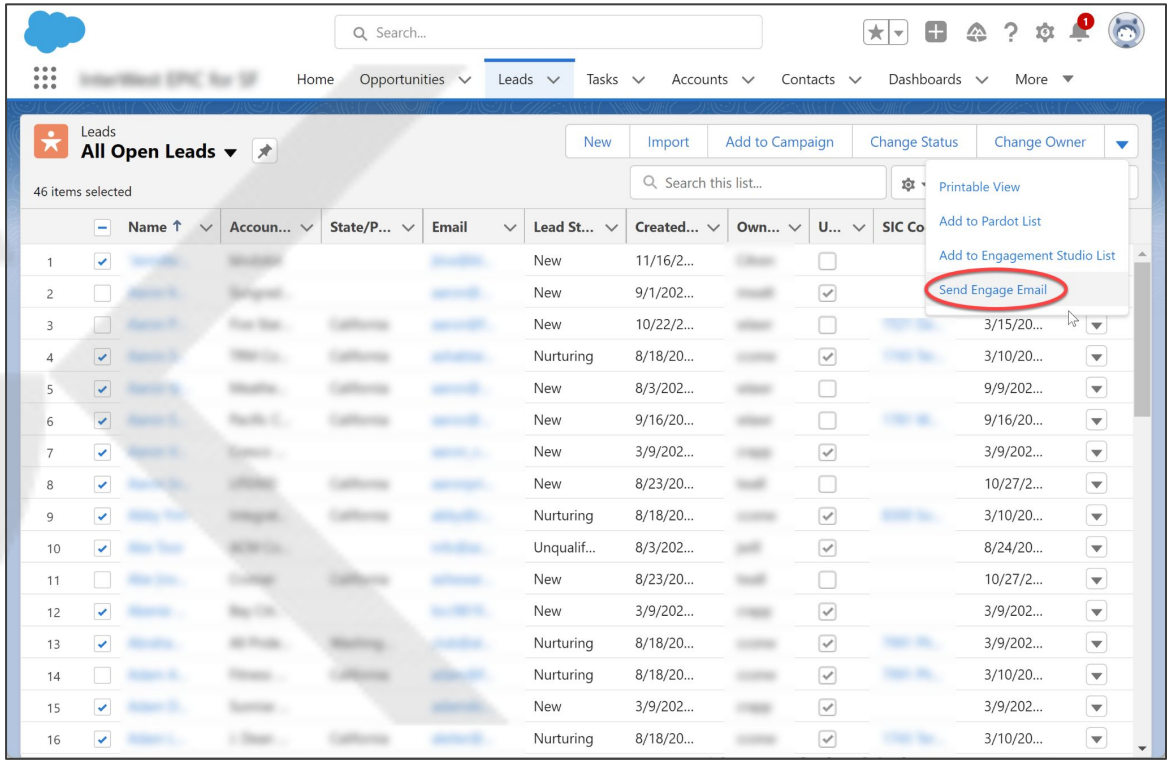
One-to-many Engage emails

Send targeted emails to groups of leads or contacts:

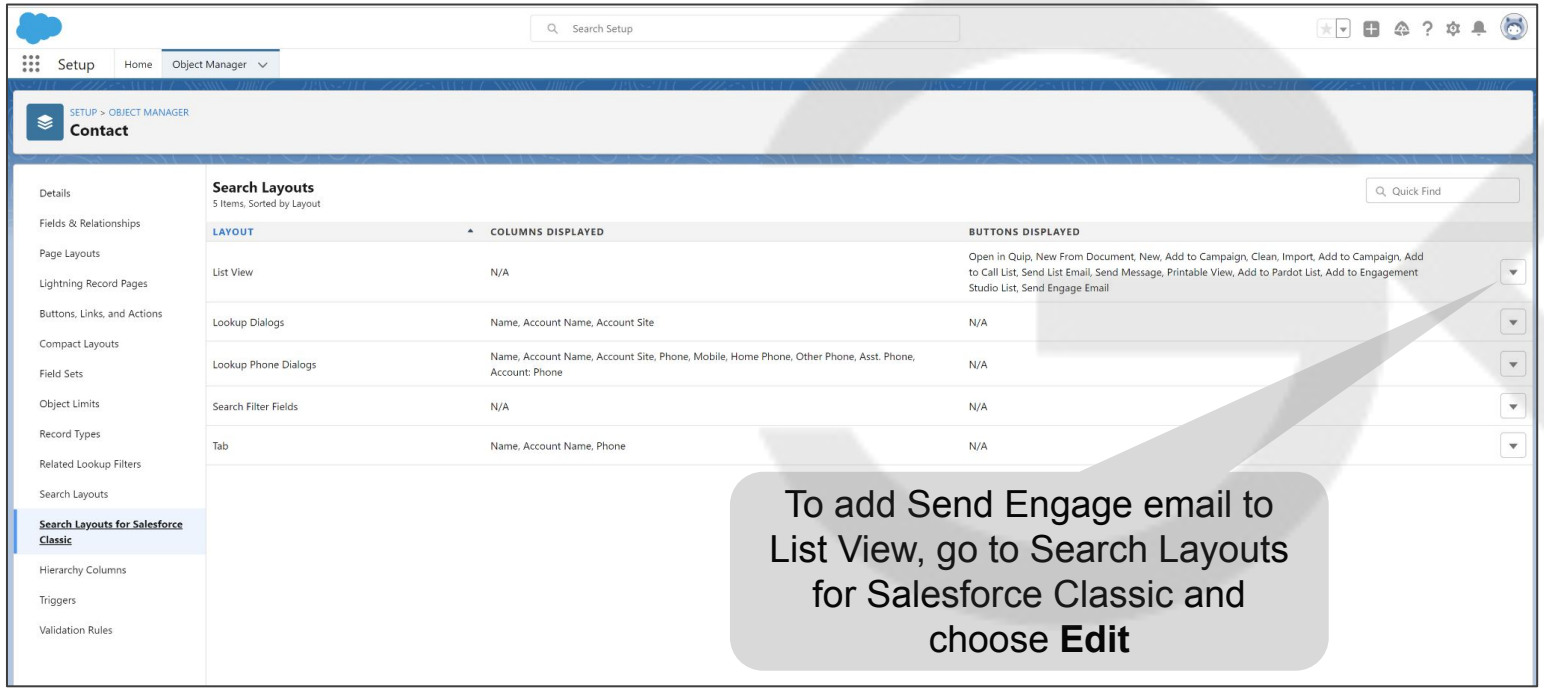
1. Go to the Lead or Contact tabs
2. Select or create a List View
3. Click the Send Engage Email button to access the Engage email editor

Pro-Tip: Create targeted List Views of your database for easy Engage sends. *Think: lists for upsell, cross-sell, regional and competitive campaigns.*

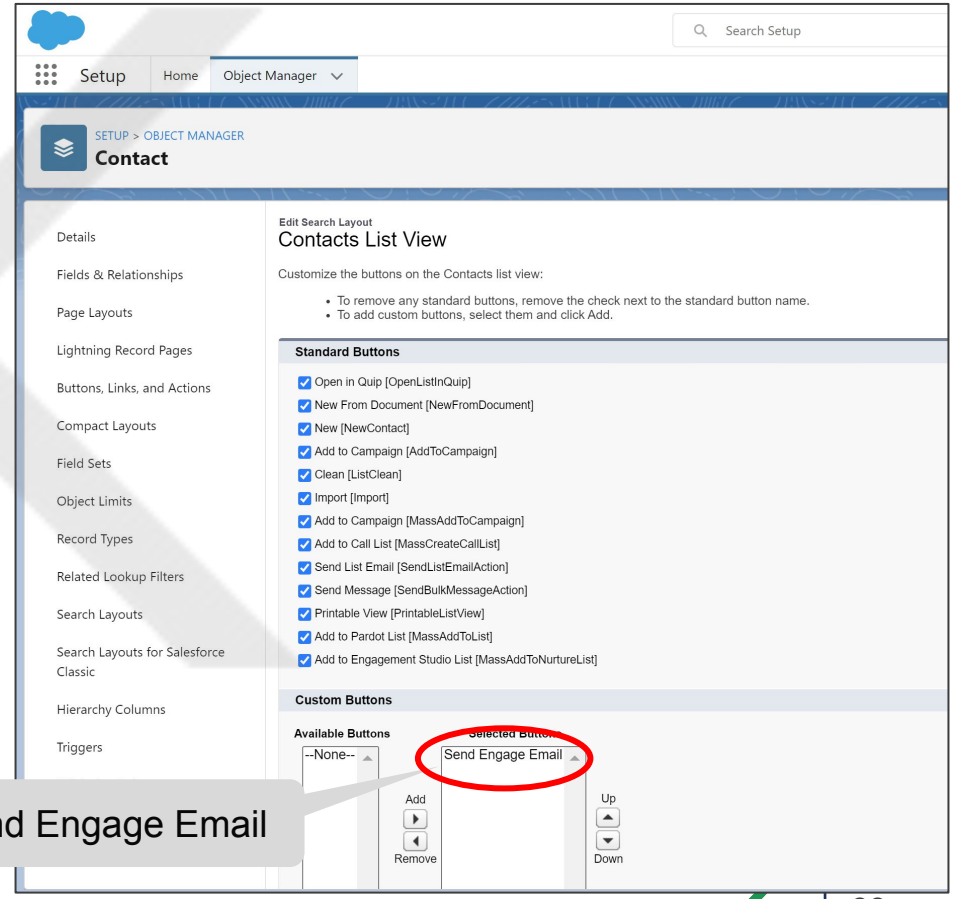
Note: Each user has a daily Engage email sending default limit of 500 emails that is set up by your Pardot administrator.



How to add Send Engage Emails to List views



To add Send Engage email to List View, go to Search Layouts for Salesforce Classic and choose **Edit**

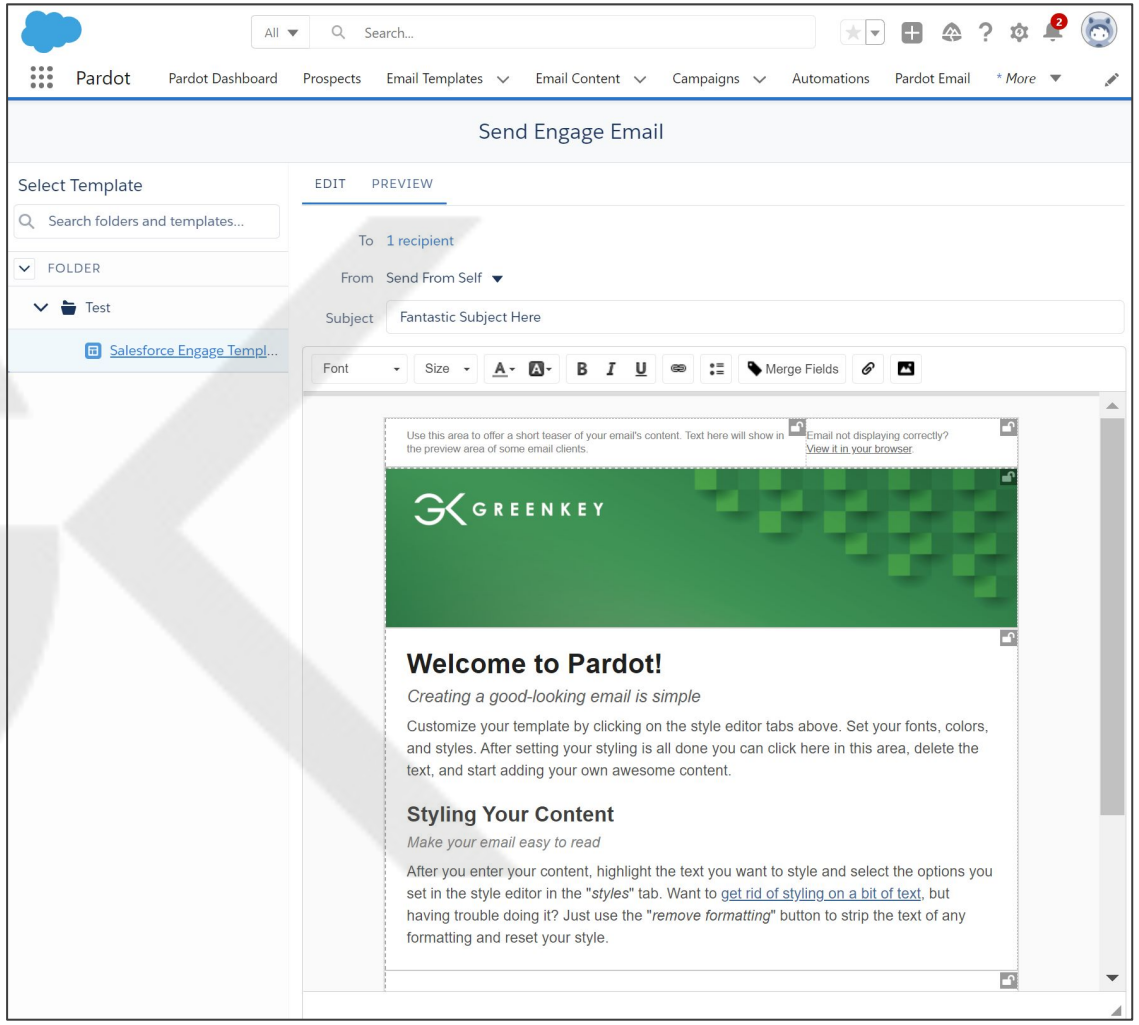


Choose Send Engage Email

Email editor

The email editor lets you create personalized messages on the fly.

- Select a predefined template on the left-hand side
- Create a new email using the blank email draft on the right

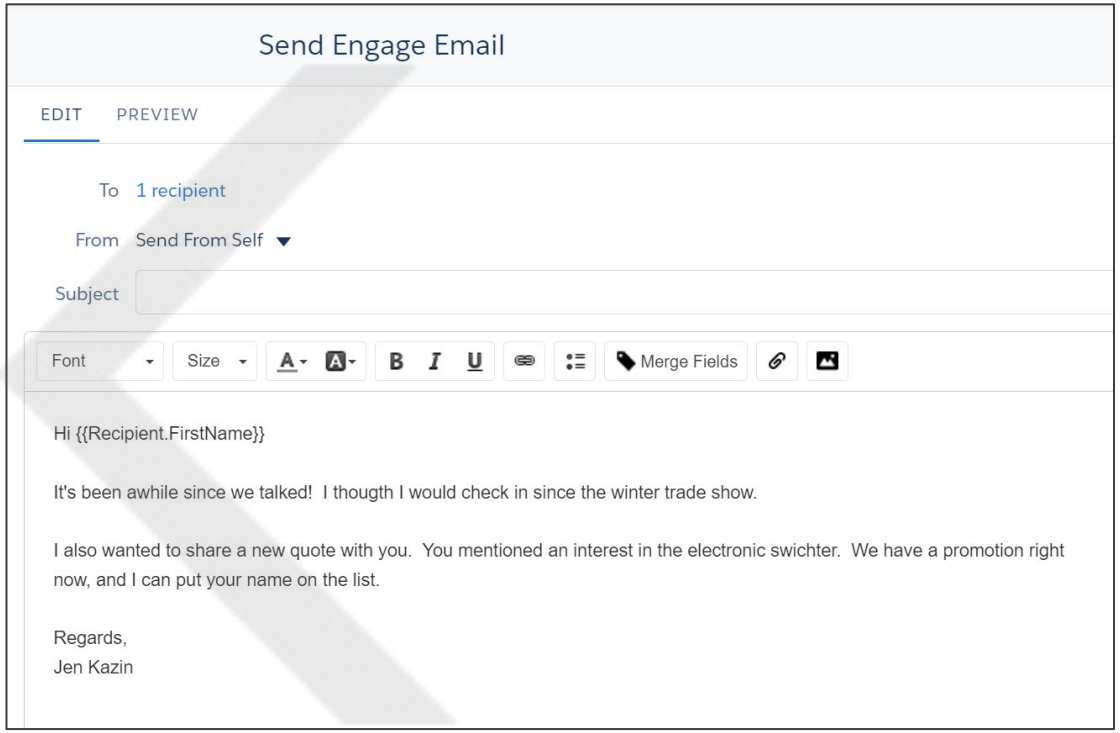


Merge fields

Merge fields personalizes your emails by pulling information from fields on the Lead or Contact record.

Merge fields will appear as {{Recipient.FirstName}} within the editor.

To preview as a recipient, select a name within the **Preview > Preview As** dropdown.



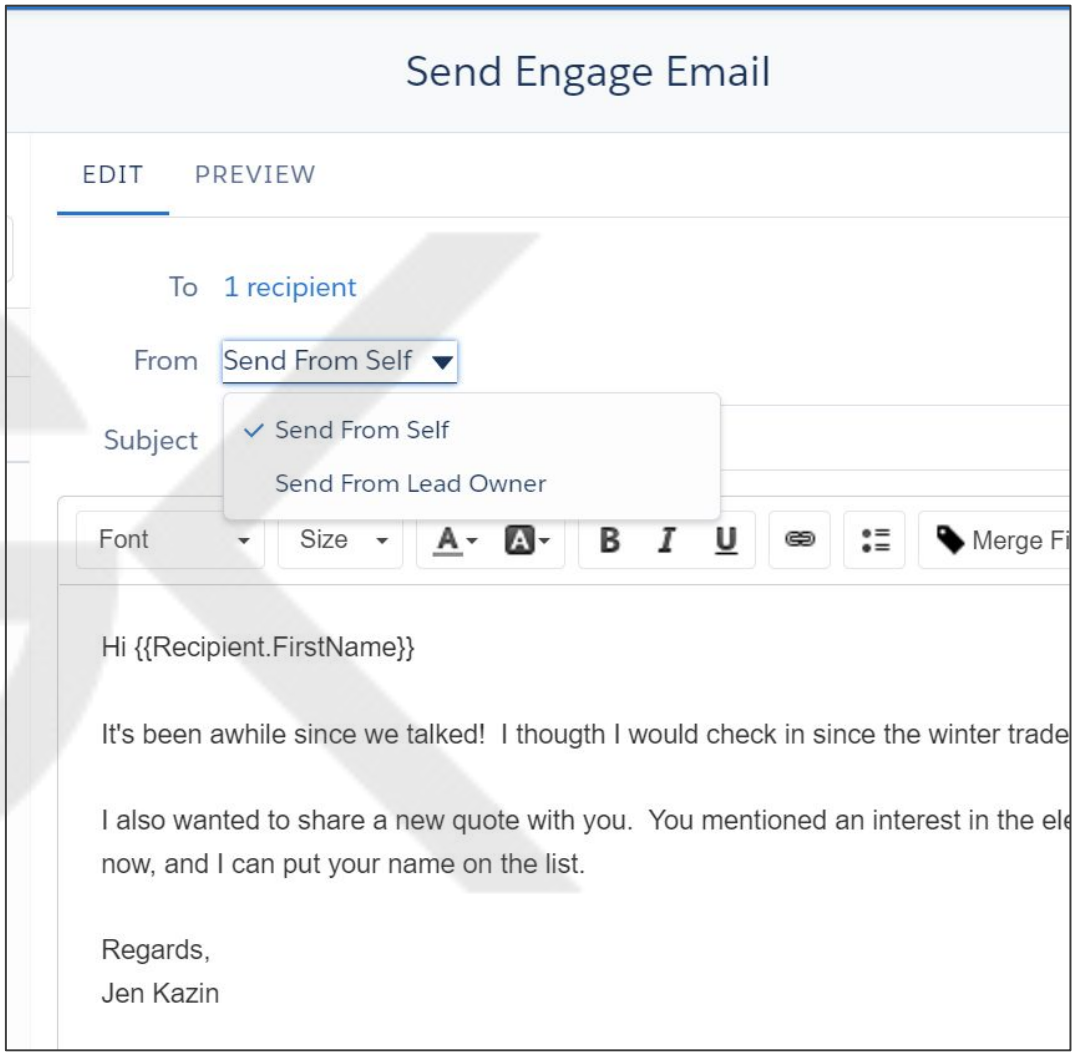
Delegated sending

Engage delegated sending lets you send campaigns from yourself, the record owner, or the account owner.

To select the sender:

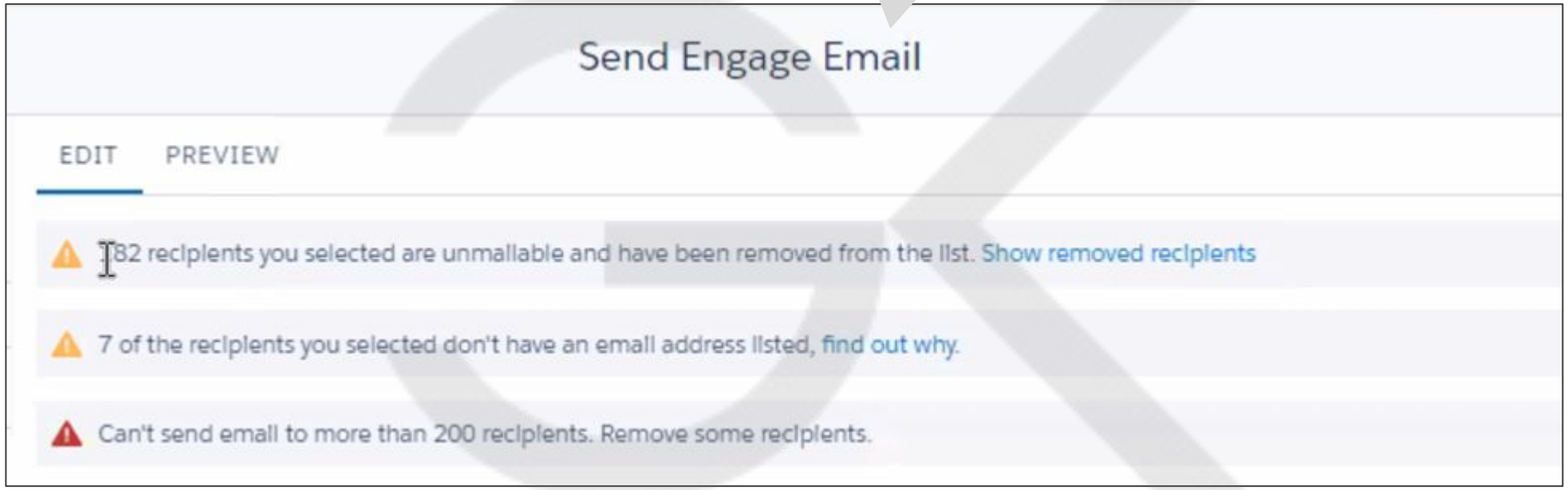
1. Click into the **From** field and select the appropriate sender

Your sending options are dependent on your Engage settings. Talk to your Pardot administrator if you don't see the same options on your screen.



Engage Emails

Sales will get notifications about their Engage emails.



Send from Salesforce Campaigns & Opportunities

Send from Engage Campaigns is great for sending event invites or targeted marketing promos.

Send from Opportunities sends all contacts related to a specific opportunity or a targeted list view of specific deals.

NOTE: A common issue is sales doesn't like to send Engage emails from the list views. They either want to create their own list (not based on list view criteria) or they don't want to painstakingly send 50 Engage emails at a time.

Encourage those sales people to use campaigns. They can then keep their own "list" as campaign members. The salesperson can add or remove Leads or Contacts as needed. Or, marketers can populate the campaigns with a segmentation rule.

I've also seen sales split their lists with campaigns. If their Engage limit is 500, but they have 700 names, sales will use campaign#1 with 500 names for Engage emails on Monday and campaign#2 with 200 names for Engage emails on Tuesday.

Send emails to leads or contacts added as campaign members in campaign object.

Pardot | Pardot Dashboard | Prospects | Campaigns | Automations | Pardot Email | Content | Pardot Reports | Reports | Pardot Settings | Pardot Campaigns | Email Templates | More

Campaign

Send List Email | Edit | Delete

Clone
Child Campaign
View Campaign Hierarchy
Send Engage Email

Type | Status: In Progress | Start Date | End Date

Details | Engagement | Related

Campaign Name | Campaign Owner
Active | Status: In Progress
Parent Campaign | Start Date
Type | End Date
Description

Planning

Num Sent in Campaign: 0 | Budgeted Cost in Campaign
Expected Response (%): 0.00% | Actual Cost in Campaign
Expected Revenue in Campaign

Campaign Statistics

Responses in Campaign: 15 | Opportunities in Campaign: 0

Number of Members

15

View All

Campaign Hierarchy (0)

Campaign Member Statuses (2)

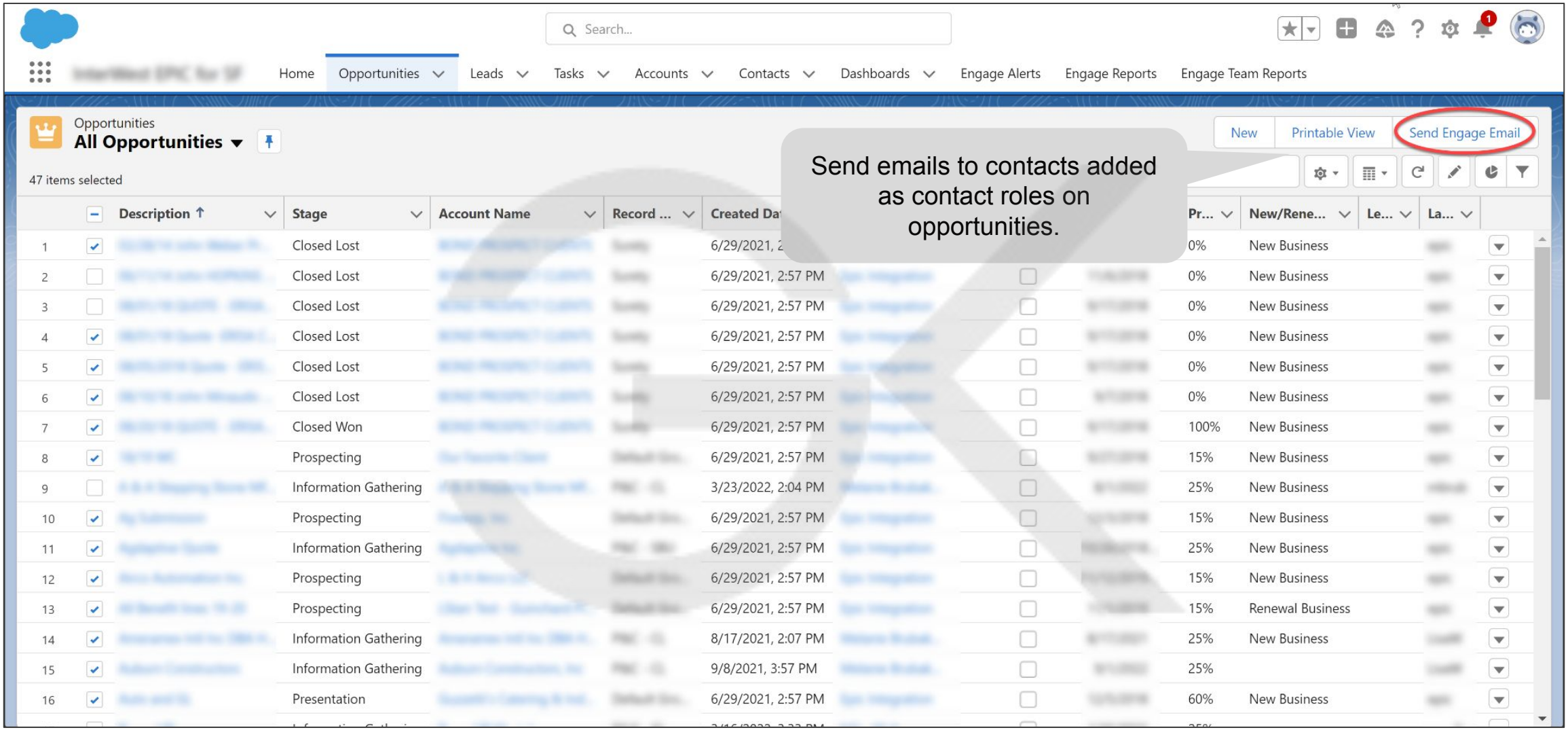
javascript:void(0);

Sending from Opportunity List Views

Use List Views to target opportunities that meet specific criteria, like your biggest deals, deals in a certain stage, upsell deals, and more.

To send an Engage Campaign from an Opportunity List view:

- Create your list view, select opportunities to include in the campaign, then click the Send Engage Email button.
- All Contact Roles for all selected opps will be added as recipients.
- You can remove recipients from the list if you don’t want to include everyone.


Search...
Home
Opportunities
Leads
Tasks
Accounts
Contacts
Dashboards
Engage Alerts
Engage Reports
Engage Team Reports
Opportunities
All Opportunities
47 items selected
New
Printable View
Send Engage Email
Send emails to contacts added as contact roles on opportunities.
Description
Stage
Account Name
Record ...
Created Da
Pr...
New/Rene...
Le...
La...
1 Closed Lost 6/29/2021, 2 0% New Business
2 Closed Lost 6/29/2021, 2:57 PM 0% New Business
3 Closed Lost 6/29/2021, 2:57 PM 0% New Business
4 Closed Lost 6/29/2021, 2:57 PM 0% New Business
5 Closed Lost 6/29/2021, 2:57 PM 0% New Business
6 Closed Lost 6/29/2021, 2:57 PM 0% New Business
7 Closed Won 6/29/2021, 2:57 PM 100% New Business
8 Prospecting 6/29/2021, 2:57 PM 15% New Business
9 Information Gathering 3/23/2022, 2:04 PM 25% New Business
10 Prospecting 6/29/2021, 2:57 PM 15% New Business
11 Information Gathering 6/29/2021, 2:57 PM 25% New Business
12 Prospecting 6/29/2021, 2:57 PM 15% New Business
13 Prospecting 6/29/2021, 2:57 PM 15% Renewal Business
14 Information Gathering 8/17/2021, 2:07 PM 25% New Business
15 Information Gathering 9/8/2021, 3:57 PM 25%
16 Presentation 6/29/2021, 2:57 PM 60% New Business

Guidelines for sending Engage emails

- When an Engage email has 10 or more recipients, Pardot places an unsubscribe tag (%%unsubscribe%%) in the body of the email. If you remove this tag, you can't send the email.
- Pardot doesn't send one-to-many emails to prospects that have opted out or are marked as Do Not Email. These prospects can still receive one-to-one emails.
- If you send an email to a lead or contact without a corresponding prospect record in Pardot, Pardot creates a record.
- Any template in Pardot that is available for 1:1 emails is available for Engage Campaigns.
- Users can view all templates marked for 1:1 emails that are in any folder they have permissions to view. If your Pardot edition doesn't include folder permissions, users can browse all folders that contain email templates marked for 1:1 use.
- The From address is the logged-in Pardot user's email address or the lead, contact, or account owner's email address (when using delegated sending). Engage emails override the sender specified in the email template.
- To use Salesforce Files in Engage Campaigns, enable Content Deliveries and Public Links for users.
- Files uploaded from the Engage editor are saved as Salesforce files under Owned by Me.
- Only those Salesforce files that are shared via a link (in Salesforce Classic) or have a public link (Lightning Experience) are available to choose in the Engage editor.

Source:https://help.salesforce.com/s/articleView?id=sf.pardot_guidelines_for_sending_engage_campaigns.htm&type=5

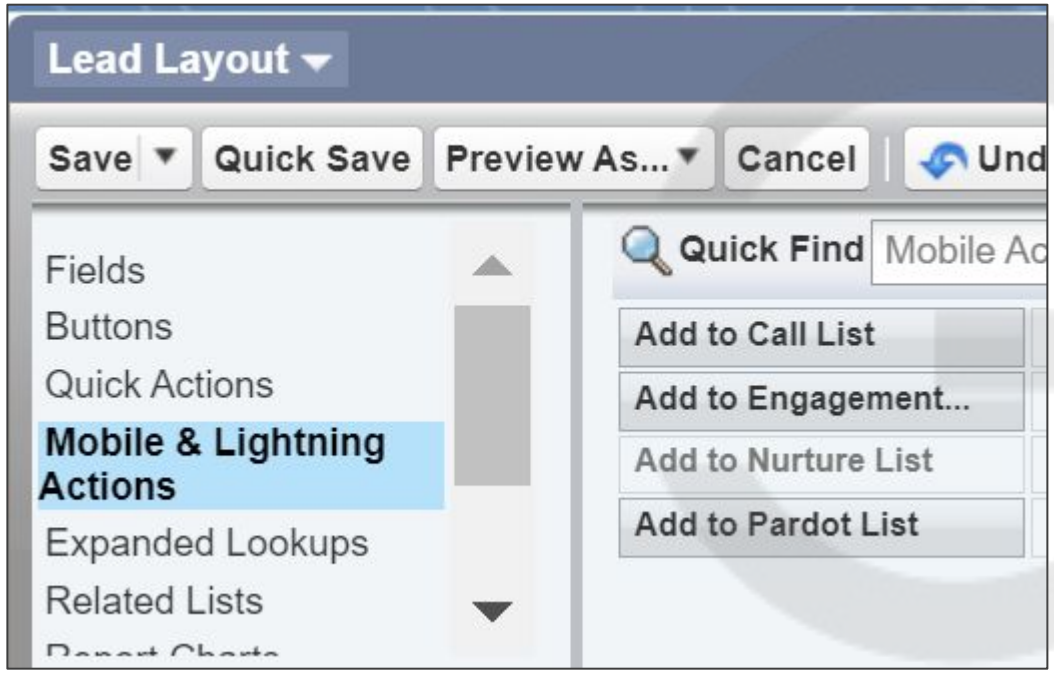
Engagement Programs

Engagement programs are a series of emails sent to your prospects over a prolonged period of time.

- Add Leads or Contacts to marketing-approved engagement programs.
- This can be done from your desktop or mobile device!

Talk to your marketing team about common follow-tasks or programs you'd like to automate. They could be a great fit for a nurture! *Think: 30-day nurtures, event follow-ups and cold lead re-engagements.*

Engagement Programs - What's the difference?



Add to Engagement Program - Will add prospect to any lists are are attributed to an Engagement Program.

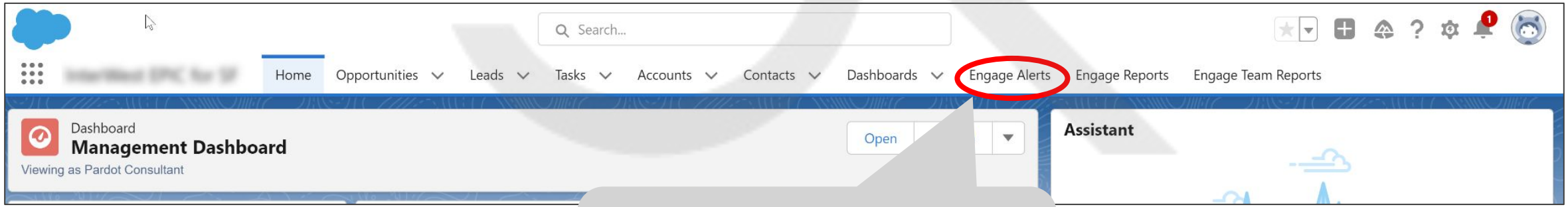
Add to Pardot List - Will add prospect to any lists are "CRM visible," including engagement program lists.

Add to Nurture List - This is a legacy feature. Use the two choices above.

Engage Alerts

Engage Alerts

Engage Alerts notify sales of prospect engagement.



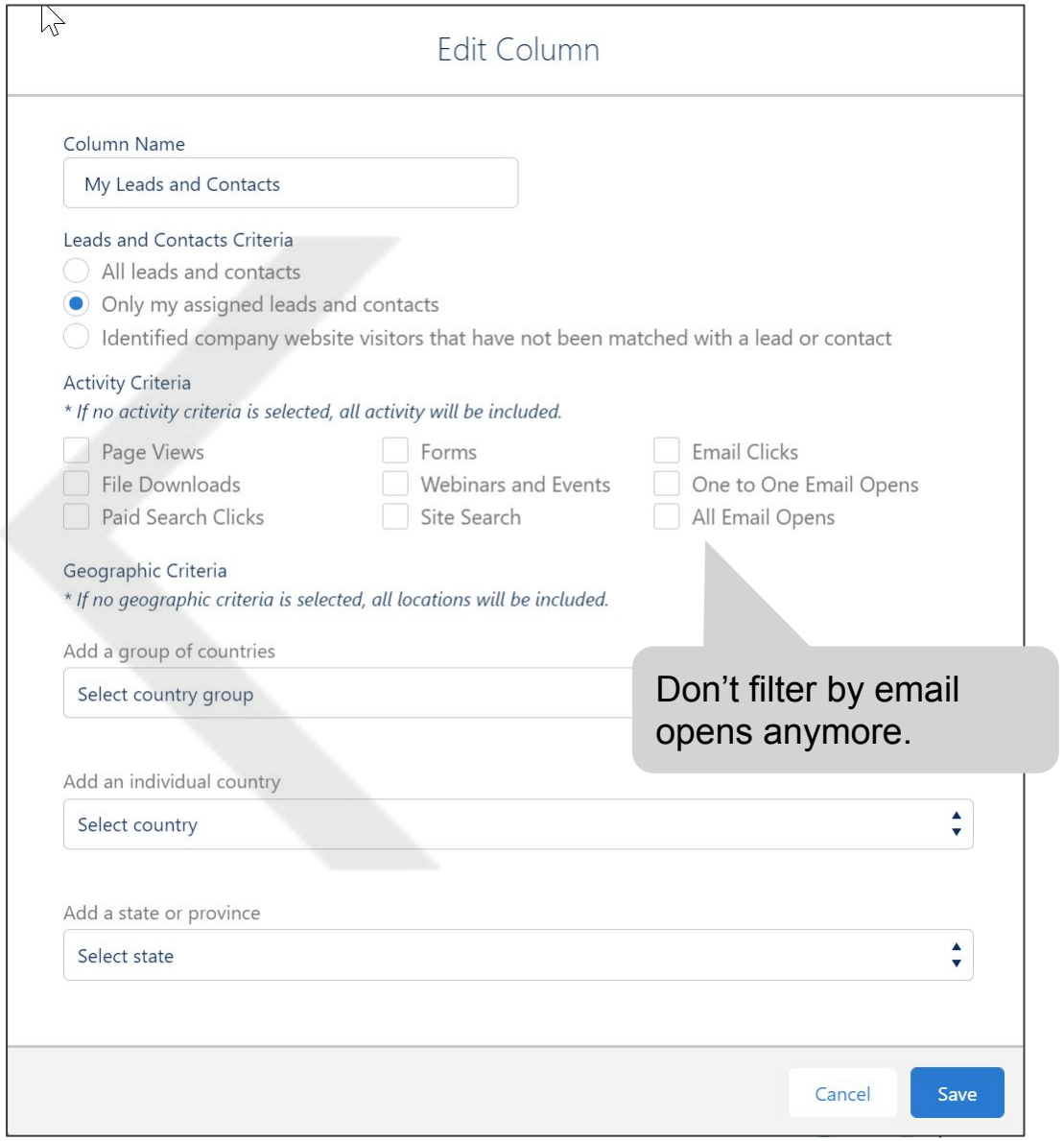
Engage alerts show all engagement (from marketing or Engage emails).

Engage Alerts

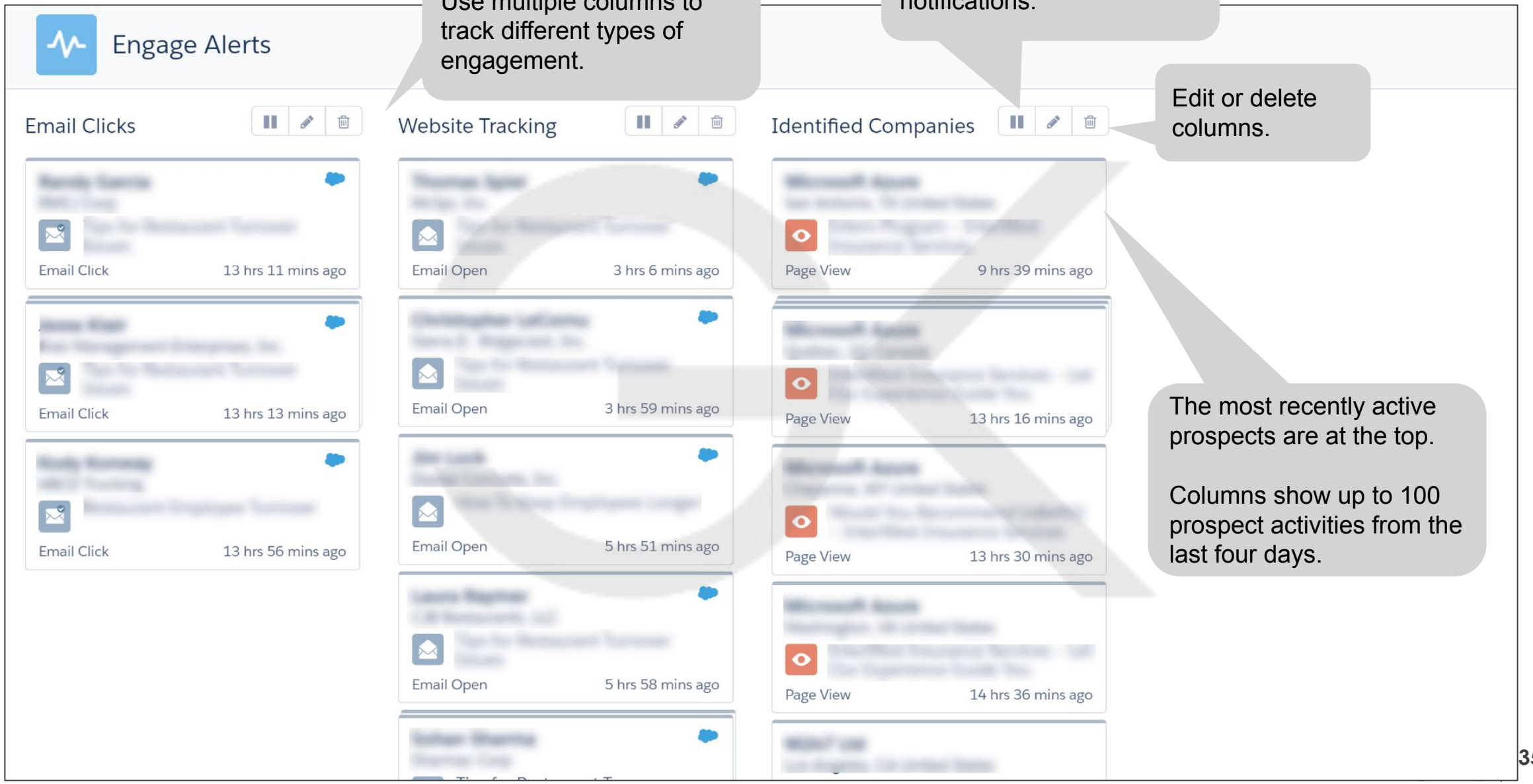
Customize your column to view only certain activities.

- Customize an existing column by clicking on the pencil icon on the right side of the column
- If no activity type or geographic region is selected, all criteria will be included.
- Add a new column by clicking on the +Add New Column button

TIP: Customize your columns to focus on the purchasing activities that are most relevant to your sales cycle and your role. *Think: page views for BDRs, form fills for SDRs, file downloads and email clicks for AE's.*



Don't filter by email opens anymore.



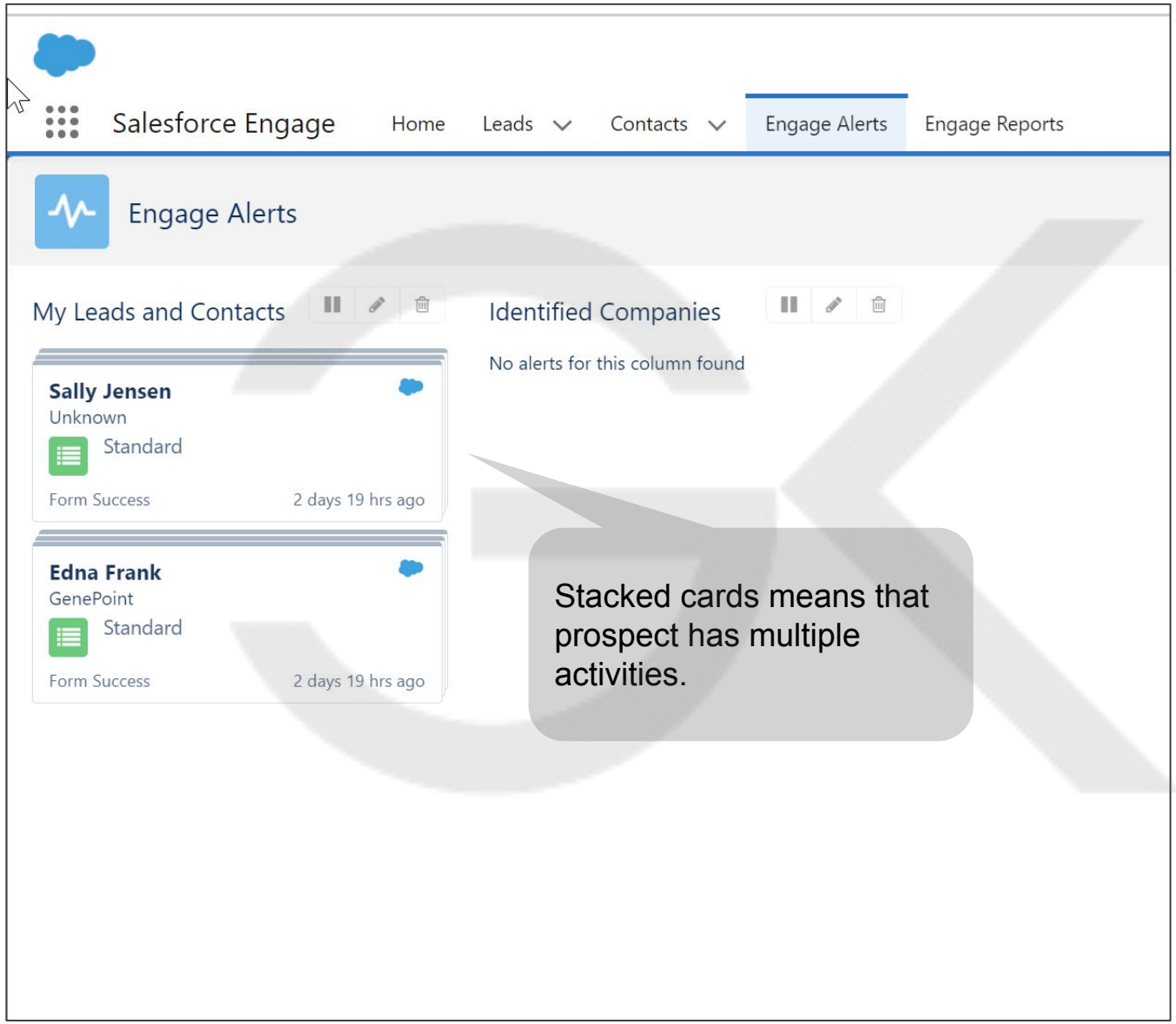
Use multiple columns to track different types of engagement.

You can pause the alerts if you get overwhelmed with notifications.

Edit or delete columns.

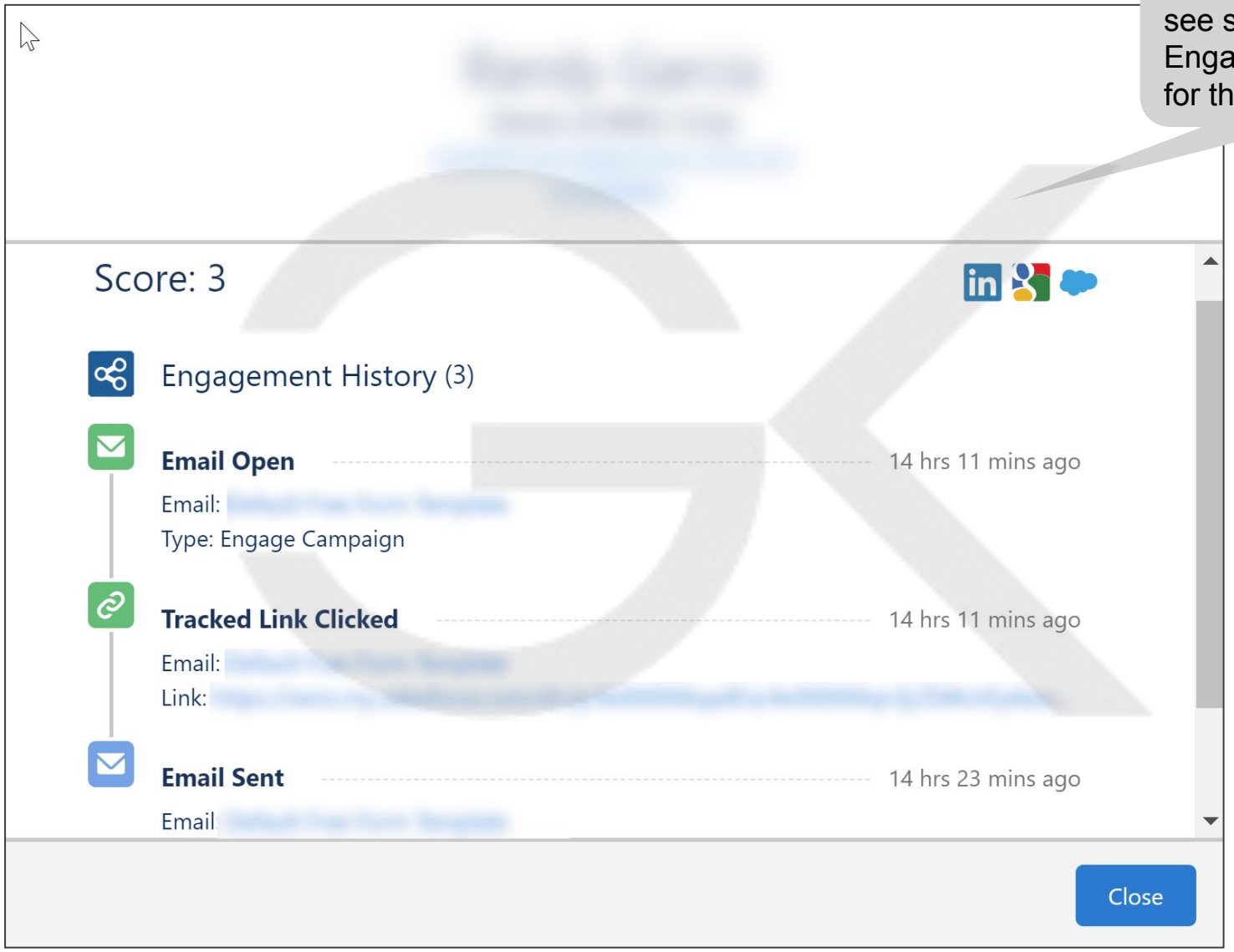
The most recently active prospects are at the top.

Columns show up to 100 prospect activities from the last four days.



Stacked cards means that prospect has multiple activities.

Click on the card to see score and Engagement History for the last seven days.

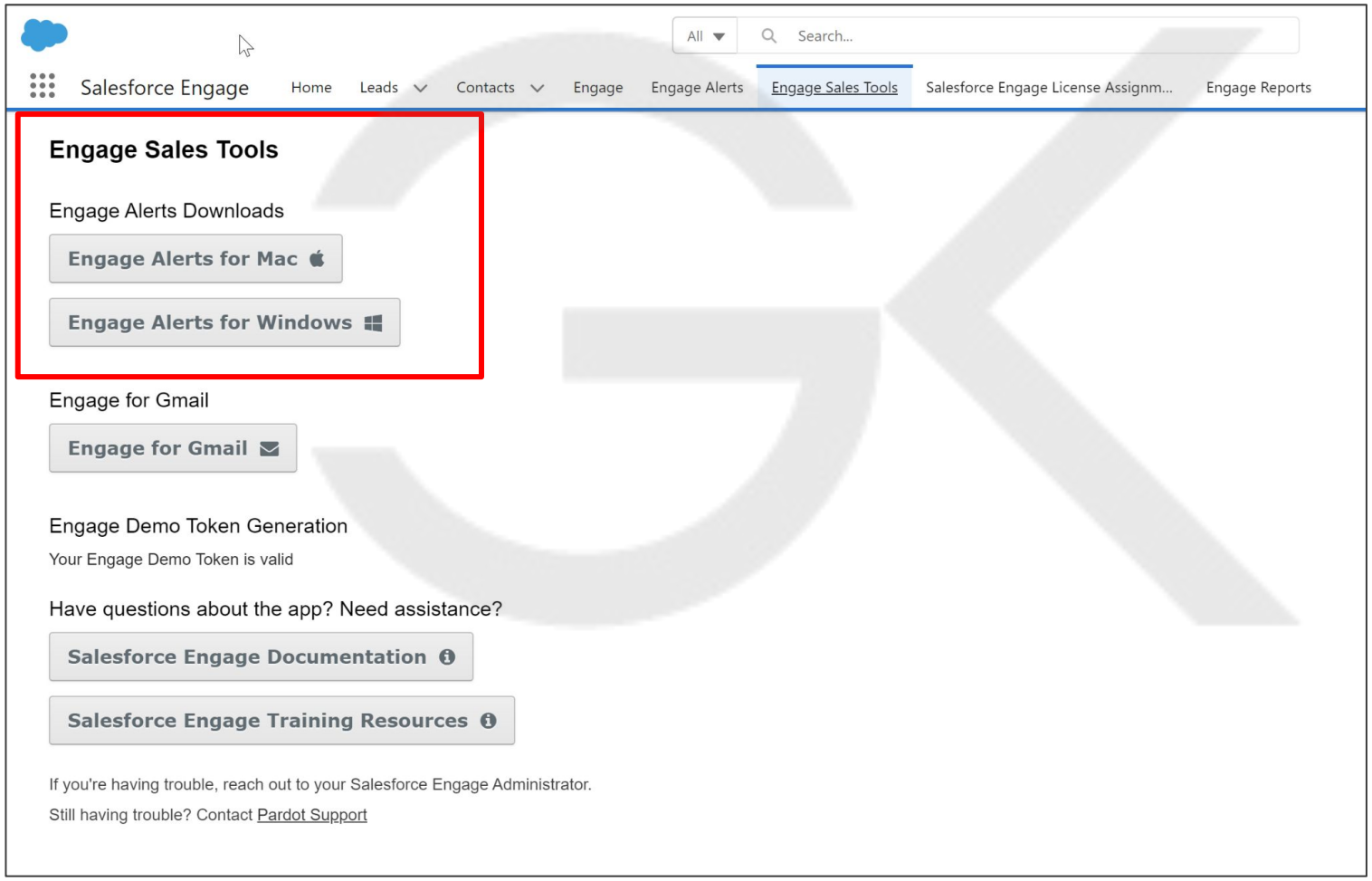


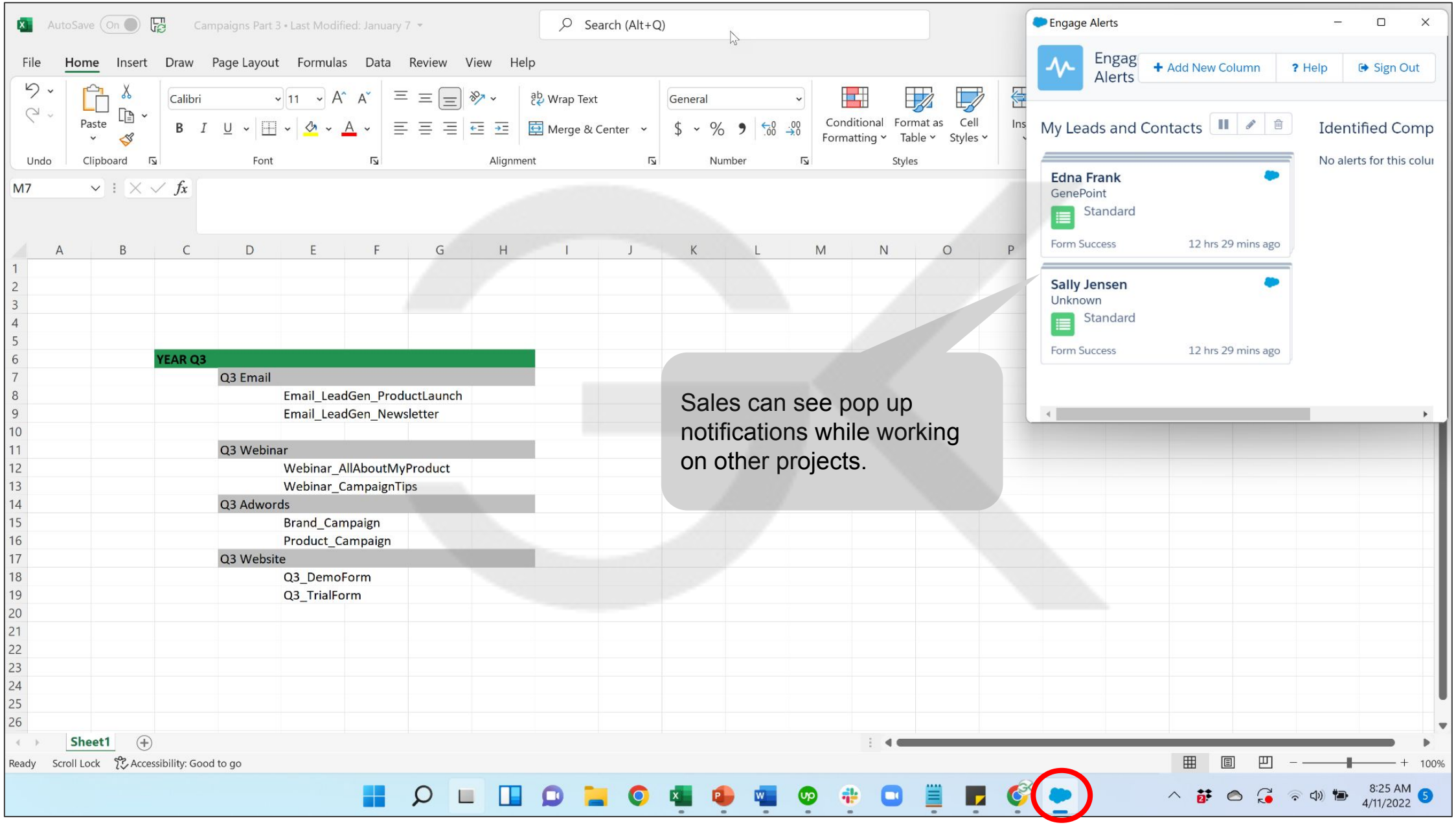
Engage Alerts Desktop

Engage Alerts Desktop lets users get real-time lead and contact activity notifications right from their desktop. It works exactly like Engage Alerts in browsers, with the benefit of popup notifications.

Source: https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_alerts_desktop.htm&type=5

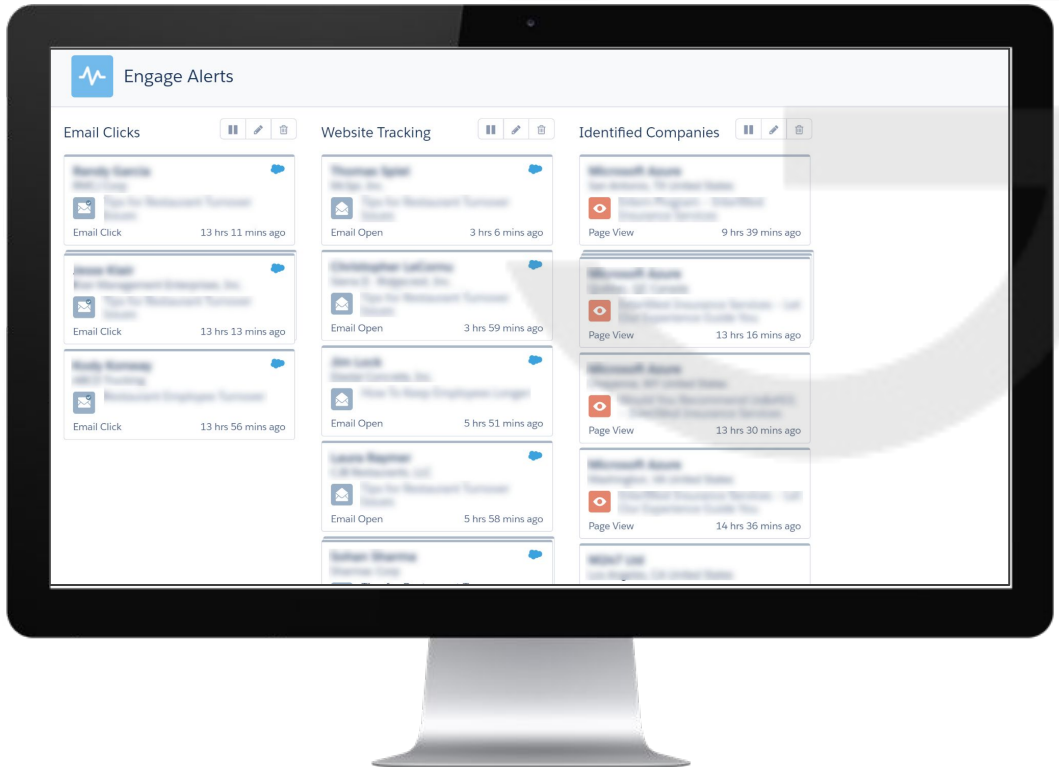
Engage Alerts Desktop




Campaigns Part 3 • Last Modified: January 7
Search (Alt+Q)
File Home Insert Draw Page Layout Formulas Data Review View Help
Wrap Text
Merge & Center
Conditional Formatting
Format as Table
Cell Styles
M7
YEAR Q3
Q3 Email
Email_LeadGen_ProductLaunch
Email_LeadGen_Newsletter
Q3 Webinar
Webinar_AllAboutMyProduct
Webinar_CampaignTips
Q3 Adwords
Brand_Campaign
Product_Campaign
Q3 Website
Q3_DemoForm
Q3_TrialForm
Sheet1
Ready
Scroll Lock
Accessibility: Good to go
Engage Alerts
Add New Column
Help
Sign Out
My Leads and Contacts
Identified Comp
No alerts for this colu
Edna Frank
GenePoint
Standard
Form Success
12 hrs 29 mins ago
Sally Jensen
Unknown
Standard
Form Success
12 hrs 29 mins ago
Sales can see pop up notifications while working on other projects.
8:25 AM
4/11/2022

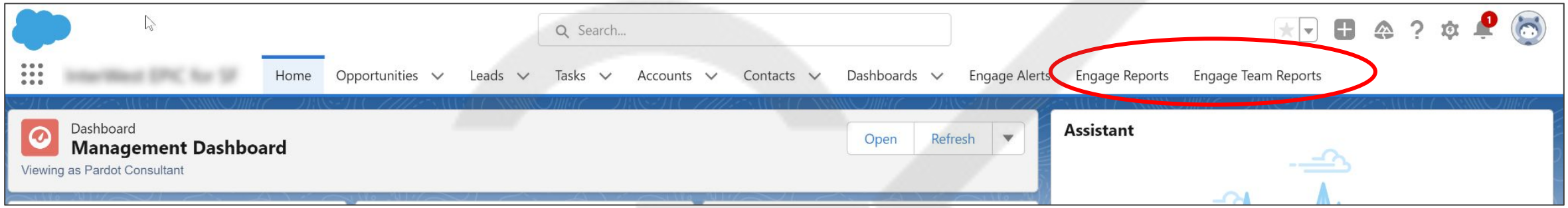
Engage to-go

Engage is available with mobile app!



Filters save across platforms.

Engage Reporting



Source:https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_reporting_user_parent.htm&type=5

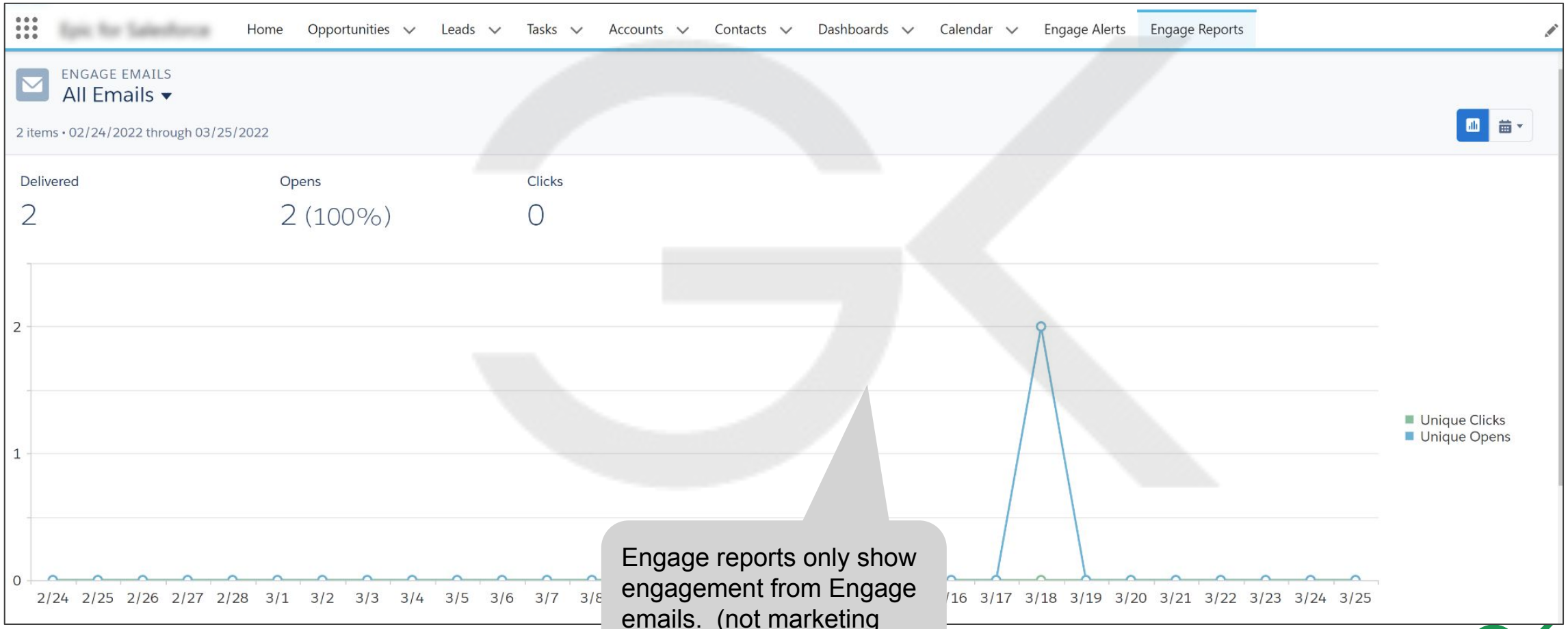
Engage Reporting

Engage Reports - Engage user can see how leads and contacts interact with their Engage emails.

Engage Team Reports - Managers can see team Engage email usage and impact.

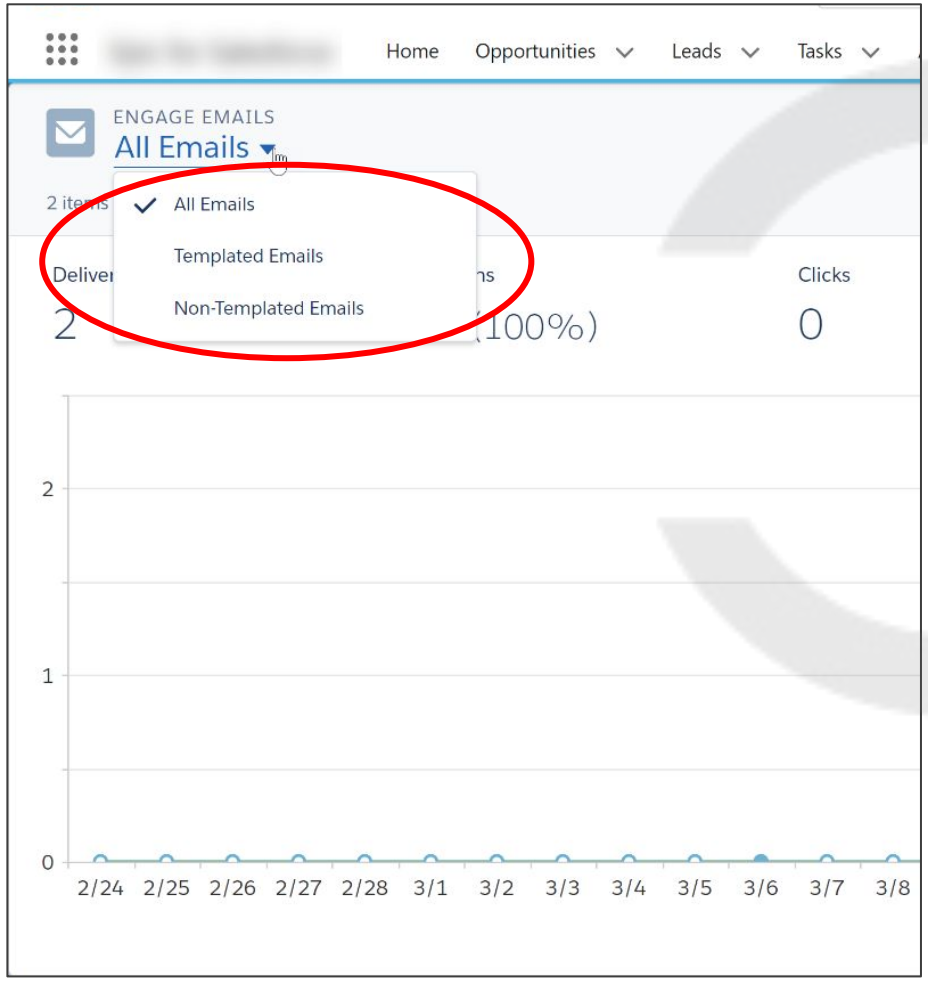
Source:https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_reporting_user_parent.htm&type=5

Engage Reports



Engage reports only show engagement from Engage emails. (not marketing emails).

Engage Reports



All Emails Filter

The All Emails filter highlights in a graph the unique opens and clicks for all emails during the period.

Templated Emails Filter

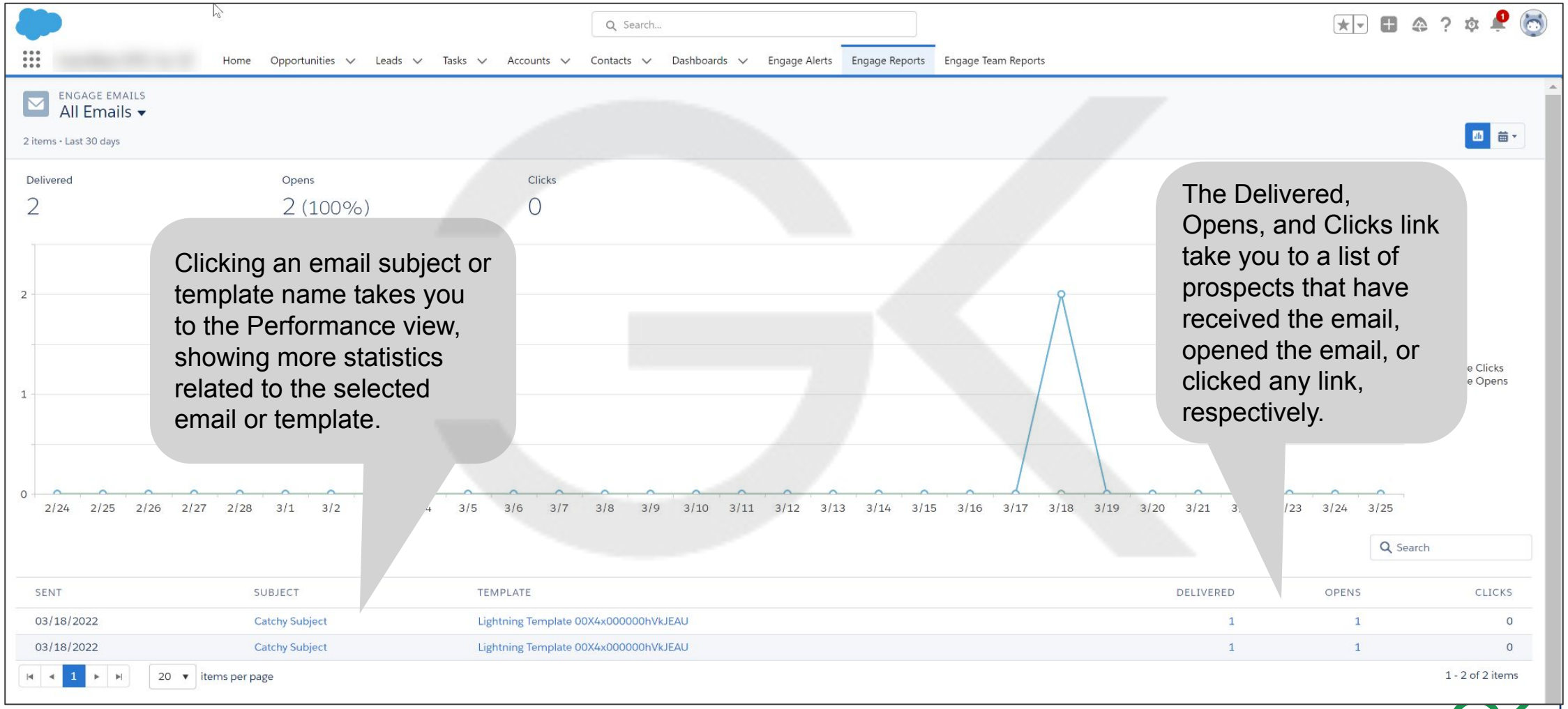
The Top Templates graph shows the top-five performing templates for the selected timeframe, based on opens.

Non-Template Emails Filter

The Non-Templated Emails graph highlights unique opens and clicks, total opens, total clicks, and the clickthrough rate for all non-templated emails during the specified period.

Source: https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_reporting_user_parent.htm&type=5

Engage Reports

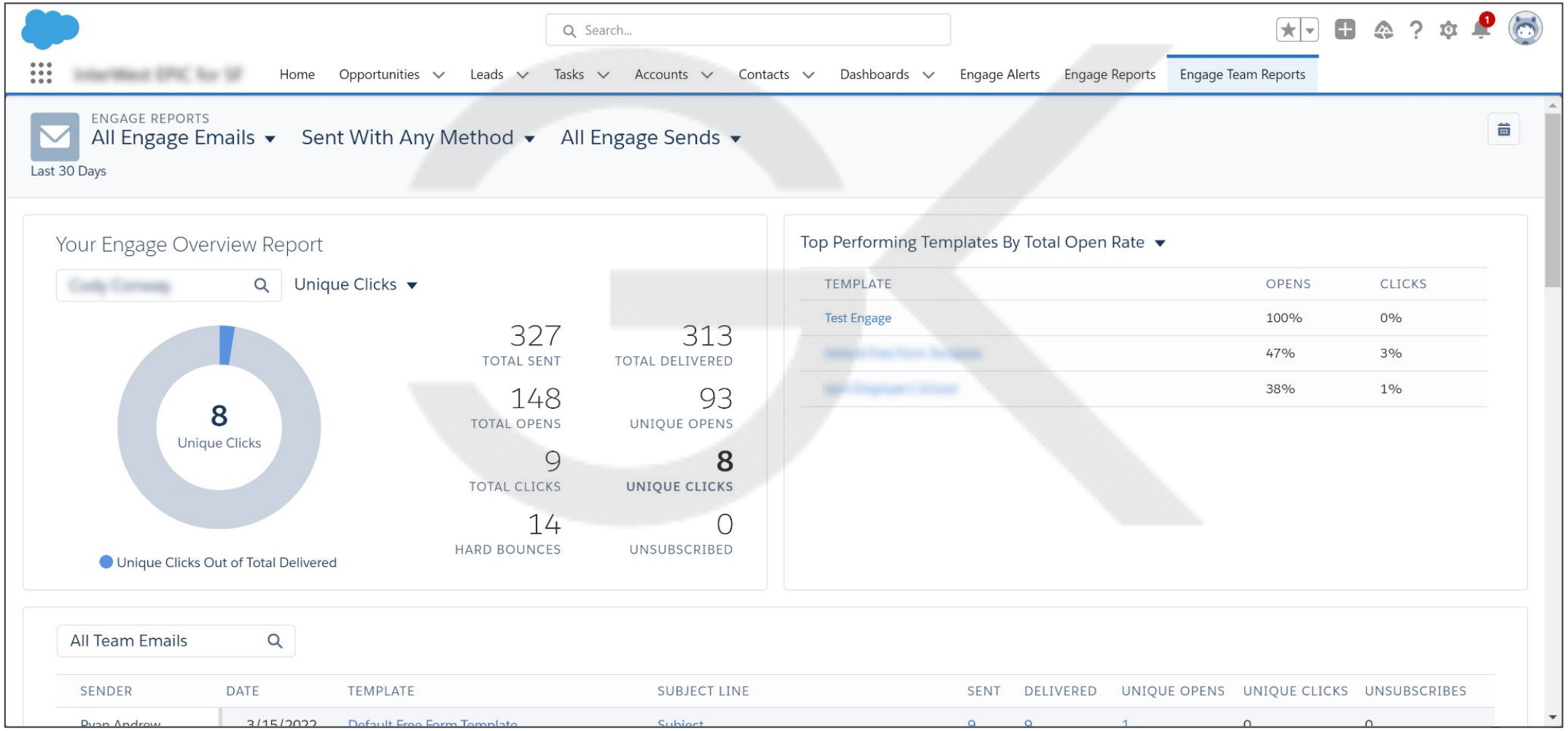


Clicking an email subject or template name takes you to the Performance view, showing more statistics related to the selected email or template.

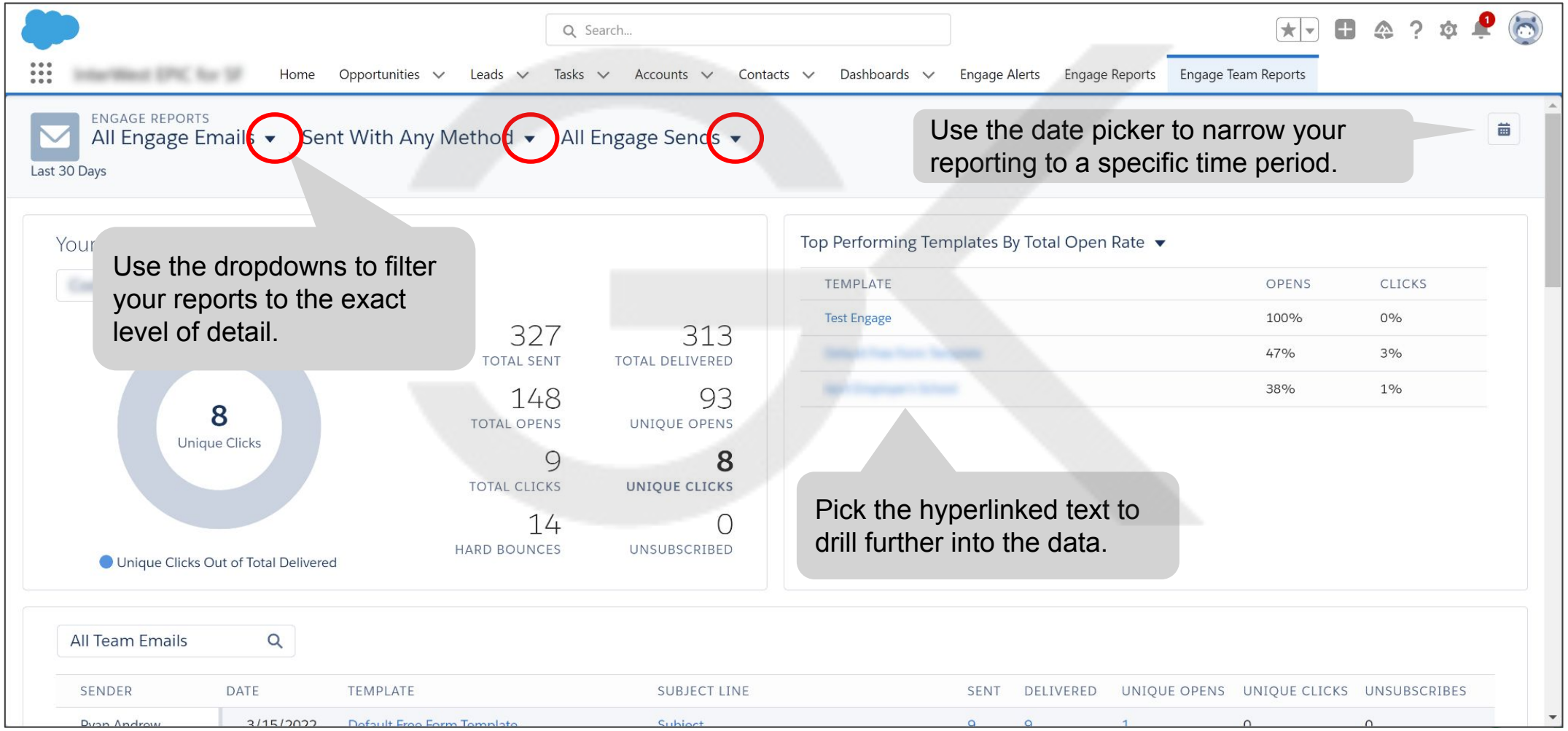
The Delivered, Opens, and Clicks link take you to a list of prospects that have received the email, opened the email, or clicked any link, respectively.

Source: https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_reporting_user_parent.htm&type=5

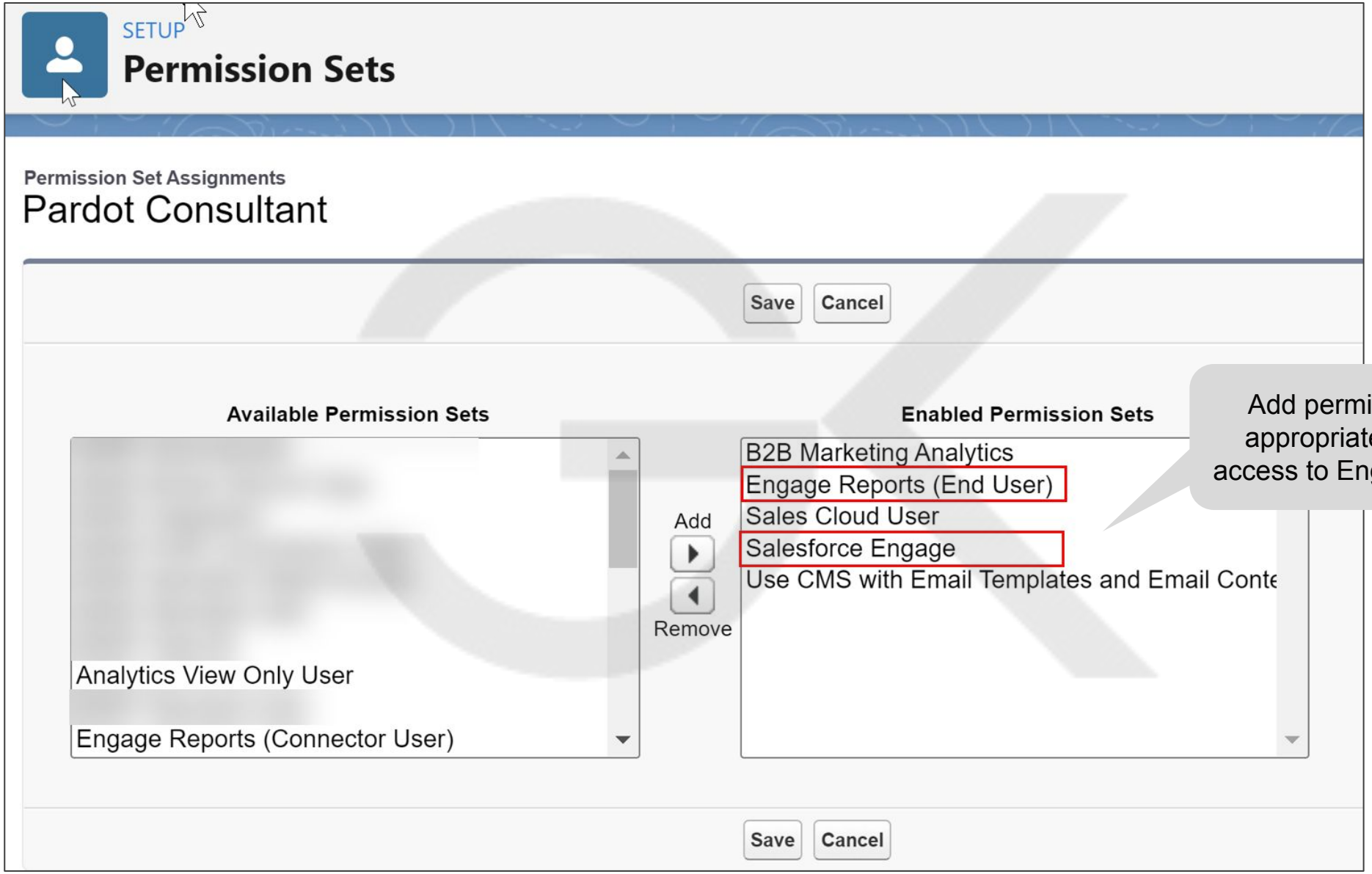
Engage Team Reports



Engage Team Reports



Source: https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_team_reports_using.htm&type=5



Add permission sets to the appropriate people to grant access to Engage Team reports.

Considerations for Engage Team Reports

- Your **user role hierarchy** in Salesforce determines what the My Team's Engage Sends filter shows. If your admin has changed sharing settings of custom objects in the Team Reports package, this filter doesn't work as expected.
- Editing or deleting reports in the Engage Reports folder breaks Engage Team reports. To customize a report, make a copy.
- You don't need an Engage license to use Team Reports.
- The Send Engage Email button works only for users with an Engage license.
- Reports data created from the team reports objects counts toward your data storage limits in Salesforce.
- The custom objects created in the Engage Team Reports package do not count toward your custom object limits for your Salesforce edition.
- The Engage Reports folder is set to private by default.
- We recommend that you assign the connector user the View Setup and Configuration permission. This permission makes it easier for our support team to troubleshoot issues.
- Template data includes only stats from Engage sends. It does not include data from other Pardot emails, such as list emails and engagement programs.
- For email unsubscribes and opt-outs, Engage Team Reports show the total number of times a prospect clicked unsubscribe or opt-out. This number can differ from Email Template Reports, which show a maximum of one unsubscribe or opt-out per prospect.

Source: https://help.salesforce.com/s/articleView?id=sf.pardot_sf_engage_team_reports_consideration.htm&type=5

Why should sales care?

BE FIRST

"**50%** of sales go to the rep that responds first."

-InsideSales.com

BE RELEVANT

"**78%** of customers expect sales representative to personalize interactions based on information from their online activities"

-IDC

BE PRODUCTIVE

"High-performing sales teams are **4.5X** more likely to have a 360 degree view of their customers than underperformers.

-Salesforce

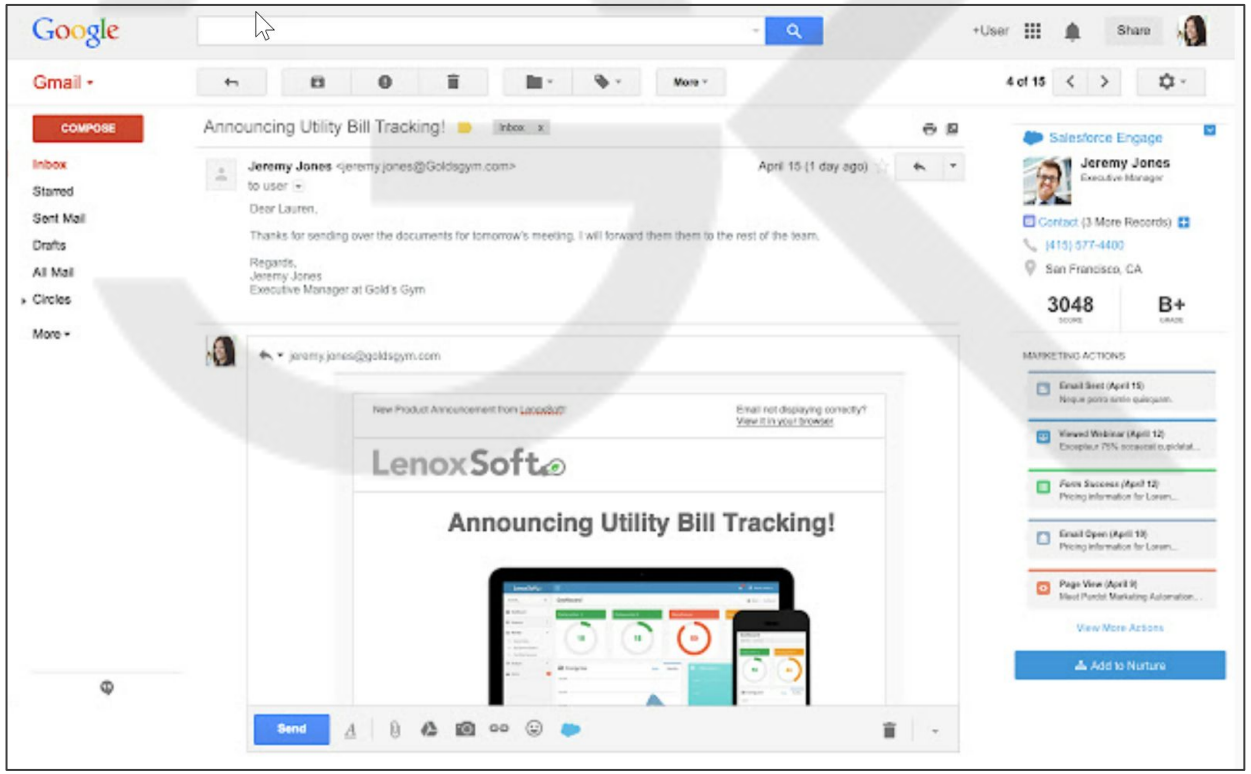
Getting Started with Salesforce Engage

1. **List Views** - Create list views that will help your team prioritize their Salesforce Engage sends. Use them to target leads, contacts, accounts or opportunities.
2. **Engage Emails** - Encourage your sales user to send their first Engage email as part of their normal routine.
3. **Engage Nurture Programs** - Set up an Engagement Studio program in Pardot that helps your sales team.
4. **Engage Reports** - Look at Engage Team reports to see what went well and what could be improved for next time.
5. **Engage Alerts** - Make sure your reps are using Alerts to prioritize prospects and gather data.

Engage for Gmail or Outlook

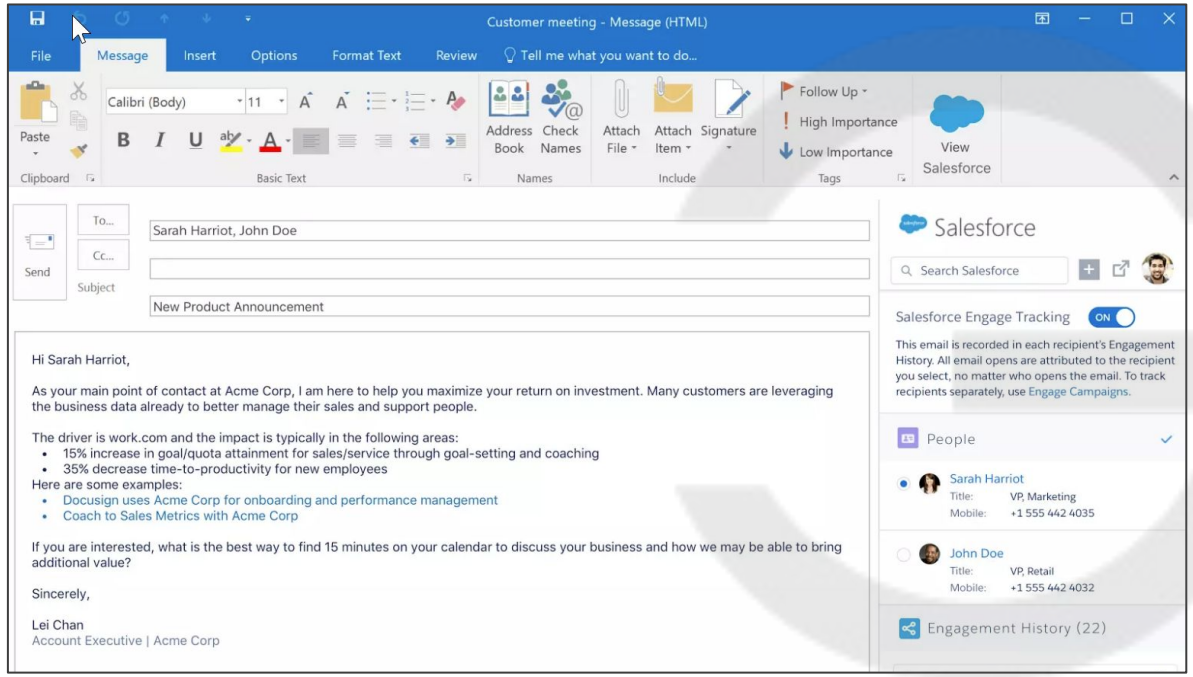
Engage for Gmail

Engage for Gmail is a Chrome extension that lets Salesforce Engage users send trackable emails directly from Gmail.



Source:

Engage for Outlook



Engage for Outlook lets Salesforce Engage users work from their inbox and track opens and sends on emails sent through Outlook.

To use Engage for Outlook, the Outlook integration must be enabled in your org, but it is supported for users on Salesforce Classic and Lightning Experience.

Source:

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Getting Started

Here are some steps to get started with Engage

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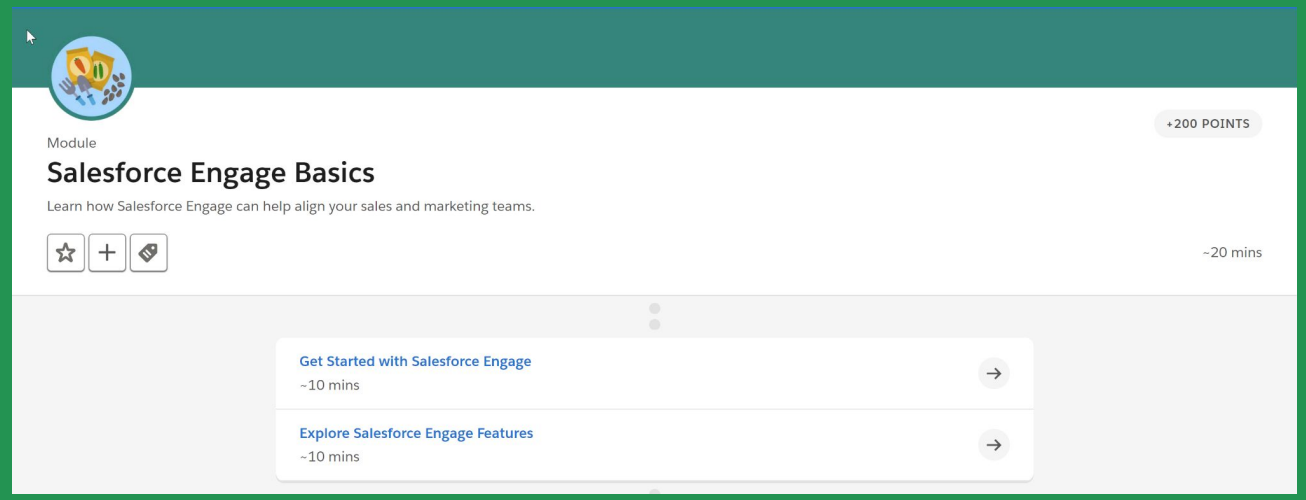
Want more?



TRAILHEAD:

https://trailhead.salesforce.com/en/content/learn/modules/salesforce-engage-basics

Engage Documentation

https://help.salesforce.com/s/articleView?id=sf.pardot_salesforce_engage.htm&type=5

SALESFORCE HELP > DOCS > MARKET TO YOUR CUSTOMERS WITH PARDOT

Salesforce Engage

Salesforce Engage lets marketing share its content with sales to boost your company's selling power. Sales reps can use marketing-approved email templates to contact prospects at the right moment and track the effectiveness of the messages in Salesforce.

REQUIRED EDITIONS

Available in: **All Pardot editions with Salesforce Engage**

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Set Up Salesforce Engage
  Configure Salesforce Engage for your company. To complete setup, you need a Salesforce admin and a Pardot admin.
- Engage Campaigns
  Engage Campaigns let you quickly send targeted emails to groups of leads and contacts, and then track engagement metrics from Salesforce.
- Engage for Gmail
  Engage for Gmail is a Chrome extension that lets Salesforce Engage users send trackable emails directly from Gmail.
- Engage for Outlook
  Engage for Outlook lets Salesforce Engage users work from their inbox and track opens and sends on emails sent through Outlook.
- Engage Alerts and Engage for the Salesforce App
  Engage Alerts and Engage for the Salesforce app are real-time services that inform you about prospect activity. Match prospects based on criteria, and display them in a card-based view. Some basic filters come predefined. However, you can create your own filters to display the most relevant prospects.
- Engage Reporting
  Engage reporting lets each Engage user track how leads and contacts interact with their Engage Campaigns. Sales managers, marketers, and admins can report on team Engage email usage and impact.

THANK YOU!

GREENKEY
DIGITAL