





**First-Party Tracking  
&  
What You Need To Do In Pardot**





# Welcome to the Twin Cities and New Delhi Pardot User Groups!

- Agenda
  - What are first-party and third-party cookies
  - What you need to do in Pardot to switch to first-party tracking
  - How to test your first-party tracking
  - How tracking works in Pardot
  - Scenarios
  - Local artist - @elevenex11



# Trailblazer COMMUNITY GROUPS



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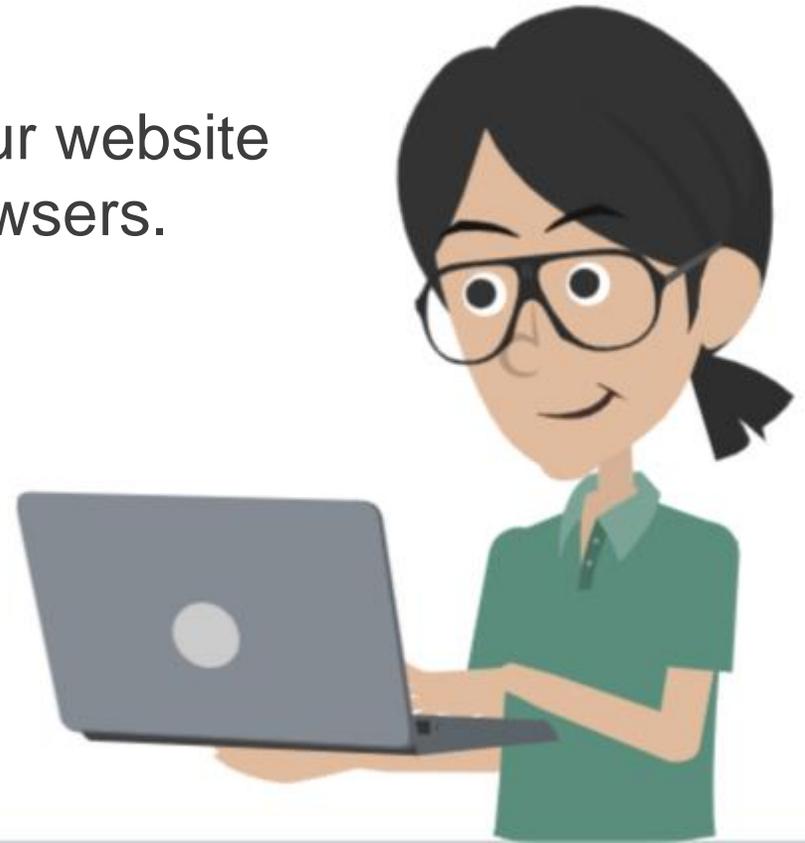


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# What's a cookie?

A cookie is a small piece of data from a website that is stored on a user's computer when they browse the web. Cookies let websites identify you.

Pardot tracks visitor and prospect activities on your website and landing pages by setting cookies on their browsers.



# What's the difference between a first-party and third-party cookie?

- First and third-party cookies both track user behavior. They have similar purposes but are collected and used in different ways.
  - **First-Party Cookies** are created by the website you are visiting directly. They allow website owners to collect analytics data, remember language settings, and perform other useful functions that help provide a good user experience.
  - **Third-Party Cookies** are created by the website other than the one you are visiting directly, hence the name third-party. They are used for cross-site tracking, retargeting and advertising.

**FIRST-PARTY COOKIE**

firstbrand.com



**THIRD-PARTY COOKIE**

video.com



## FIRST-PARTY COOKIE

firstbrand.com



Generally considered  
good

Provides a better user  
experience



## THIRD-PARTY COOKIE

video.com



Mainly used for tracking  
and online-advertising

Allow for cross-site  
tracking

# TEST YOUR KNOWLEDGE

If you're on acme.com website, and the conversational marketing application (chat) adds a cookie to your computer, what kind of cookie is it?

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# Privacy concerns with third-party cookies



- Shopping experiences where a product “follows you around” online. Users essentially lose their anonymity and become identifiable.
- Cross-site request forgery where entities use third-party cookies to gain unauthorized access to systems.

# Google Chrome Announcement



“Users are demanding greater privacy--including transparency, choice and control over how their data is used--and it’s clear the web ecosystem needs to evolve to meet these increasing demands.”

Building a more private web: A path towards making third party cookies obsolete  
Tuesday, January 14, 2020

<https://blog.chromium.org/2020/01/building-more-private-web-path-towards.html>

# Google Chrome Announcement



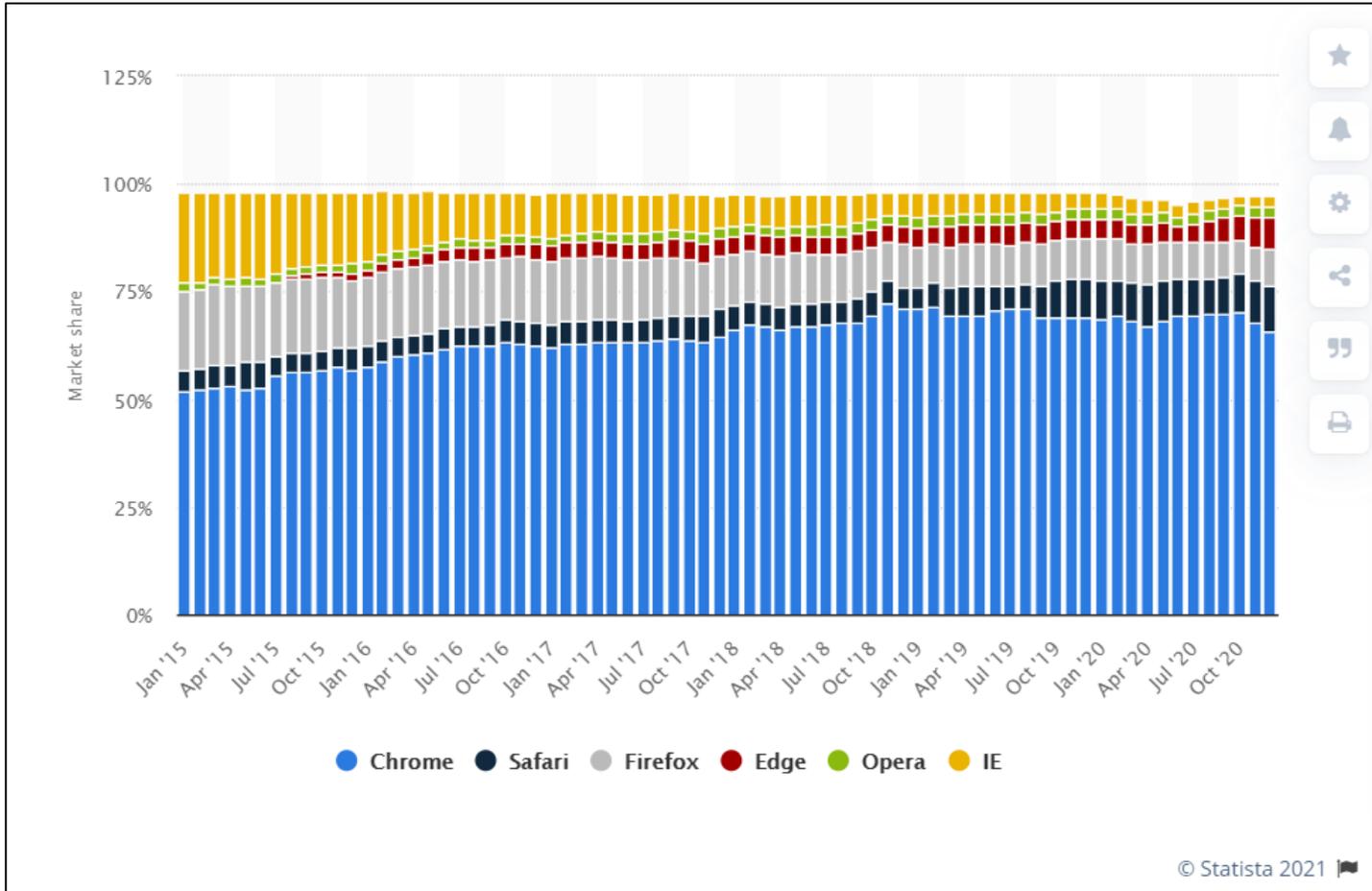
“...Privacy Sandbox can sustain a healthy, ad-supported web in a way that **will render third-party cookies obsolete**. Our intention is to do this within two years.”

Building a more private web: A path towards making third party cookies obsolete  
Tuesday, January 14, 2020

“A year ago we announced our intention to **phase out third-party cookies** and replace them with new browser features...”

Privacy Sandbox in 2021: Testing a more private web  
Monday, January 25, 2021

# Global market share of internet browsers from January 2015 to December 2020



Safari & Firefox have prohibited third-party cookies since 2013

Dec '20	
• Chrome	65.96%
• Safari	10.43%
• Firefox	8.39%
• Edge	7.43%
• Opera	2.59%
• IE	2.54%



# Guess what? Pardot uses third-party cookies

- Pardot currently uses third-party cookies to track across multiple website domains.
- Pardot is taking a step towards more responsible marketing with first-party tracking enhancement that became generally available (GA) in Spring '21 release.
- While we are talking about Pardot today, think of other applications used in your company that may rely on third-party tracking.

# How do I know that I have an issue?

- It's hard to detect a problem!
  - Reporting numbers may look incorrect

## PARDOT FORMS

### First-Party Tracking Enabled & Tracking Alignment

803 Views  
675 Submissions

Pardot will always create a prospect. It's about what activity and how much activity will be tied to that prospect.

### First-Party Tracking Not Enabled and/or No Tracking Alignment

27 Views  
675 Submissions



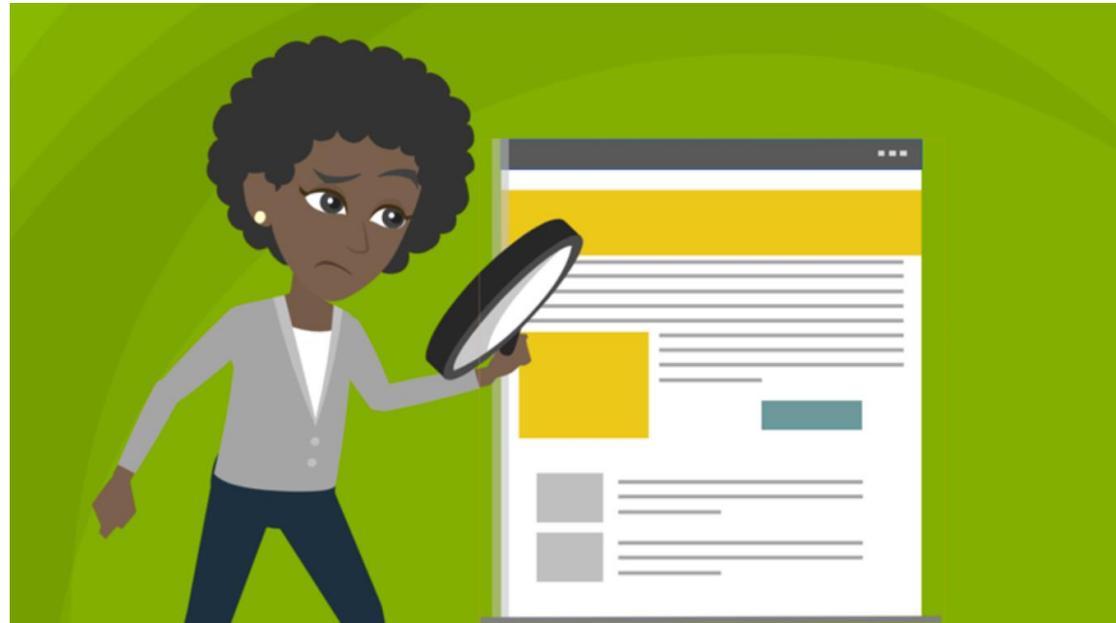
# What happens if I don't upgrade to first-party tracking?

- Delaying the switch to a first-party context has consequences:
  - Web engagement will be less trustworthy
  - Visitors may not be created or orphaned
  - Page views may not track as you expect
  - Engagement data will be missing for personalization
  - Marketing attribution will be affected for page views

# Reference blog

Confused by First-Party Tracking? No More!

[bit.ly/PardotFirst-Party](https://bit.ly/PardotFirst-Party)



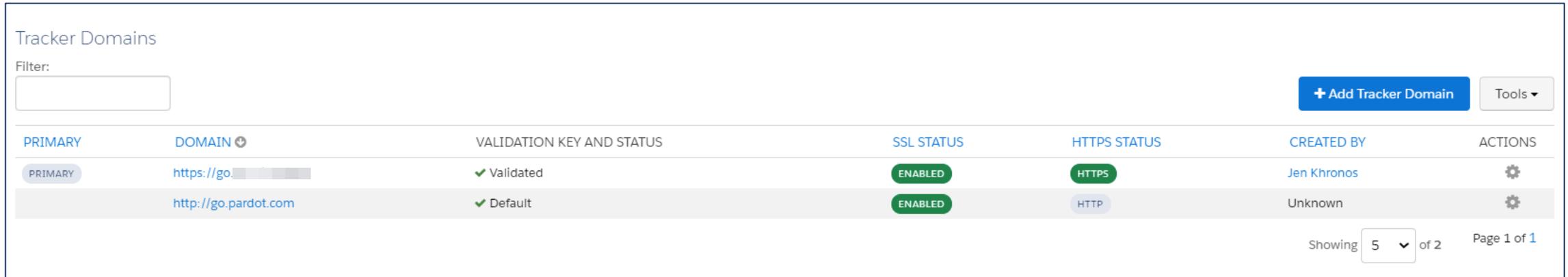


**Christopher Cornett**  
Sr. Product Manager



# So...what do I need to do?

First, go to Pardot Settings / Domain Management to see your tracker domains



The screenshot shows the 'Tracker Domains' management interface in Pardot. It includes a filter input field, a '+ Add Tracker Domain' button, and a 'Tools' dropdown. The main table lists domains with columns for Primary status, Domain name, Validation Key and Status, SSL Status, HTTPS Status, Created By, and Actions. Two domains are listed: one with a masked domain name and 'Validated' status, and another for 'http://go.pardot.com' with 'Default' status. The bottom right shows 'Showing 5 of 2' and 'Page 1 of 1'.

PRIMARY	DOMAIN	VALIDATION KEY AND STATUS	SSL STATUS	HTTPS STATUS	CREATED BY	ACTIONS
PRIMARY	https://go.██████████	✓ Validated	ENABLED	HTTPS	Jen Khronos	⚙️
	http://go.pardot.com	✓ Default	ENABLED	HTTP	Unknown	⚙️

Make a list of your tracker domain(s) and website(s)

Item	
1.Tracker domain	
2.Website	

# Alignment is critical!

Check that your tracker domain aligns with your website

Item	#1	#2	#3
Tracker domain	go.firstbrand.com	go.firstbrand.com	info.secondbrand.com
Website	firstbrand.com	secondbrand.com	secondbrand.com
Tracking Alignment	<b>YES</b>	<b>NO</b>	<b>YES</b>
Result	Visitor created	No visitor created	Visitor created

# Let's go through a scenario...

Item	
Tracker Domain	go.firstbrand.com
Website	firstbrand.com

## Scenario:

Company has one tracker domain and one website.

Both are aligned to firstbrand.com.

## What to do:

This is the simplest scenario.

Edit the tracker domain and assign the correct campaign.

Update website with new website tracking code.

# We have tracking alignment. Now what?

## Steps to switch to first-party tracking

1) Go to your Pardot account settings, select “Edit” and enable First-Party Tracking.

First-Party Tracking

- Use first-party tracking
- Use third-party cookies with first-party tracking
- Use third-party tracking

You can toggle settings on/off.

It's like connected campaigns that you can enable/disable.

# Steps to switch to first-party tracking

2) Go to Pardot Settings > Domain Management. On the tracker domain, click the gear to Edit. Set the default campaign.

The screenshot displays the 'Tracker Domains' management interface. At the top, there is a 'Filter:' input field, a '+ Add Tracker Domain' button, and a 'Tools' dropdown menu. Below this is a table with columns: PRIMARY, DOMAIN, VALIDATION KEY AND STATUS, SSL STATUS, HTTPS STATUS, CREATED BY, and ACTIONS. A single row is visible for the domain 'https://go.demo.pardot.com', which is marked as 'PRIMARY', 'Default', 'ENABLED', and 'HTTPS'. The 'ACTIONS' column for this row contains a gear icon, which is circled in red. Below the table is an 'Edit Tracker Domain' modal. This modal contains a 'Domain' field with the value 'go.demo.pardot.com' and a 'Default Campaign' dropdown menu currently set to 'Choose a Campaign'. At the bottom of the modal are 'Update Tracker Domain' and 'Cancel' buttons.

PRIMARY	DOMAIN	VALIDATION KEY AND STATUS	SSL STATUS	HTTPS STATUS	CREATED BY	ACTIONS
PRIMARY	https://go.demo.pardot.com	✓ Default	ENABLED	HTTPS	Unknown	

# Steps to switch to first-party tracking

3) Remove the old tracking code on your website and replace it with the new code provided in the tracking code generator. Make sure you add the tracking domain code to the correct website.

Tracking Code Generator

Tracker Domain: go.demo.pardot.com

Override Default Campaign: test jen

Choose Clear

Tracking Code

```
<script type='text/javascript'>
piAId = '167533';
piCId = '15119';
piHostname = 'go.demo.pardot.com';

(function() {
  function async_load(){
    var s = document.createElement('script'); s.type = 'text/javascript';
    s.src = ('https:' == document.location.protocol ? 'https://' : 'http://') + piHostname + '/pd.js';
    var c = document.getElementsByTagName('script')[0]; c.parentNode.insertBefore(s, c);
```

Copy javascript code and paste it before the close body tag on your HTML pages.

You MUST remove the old tracking code. Having both the old & new code may negatively impact your tracking.

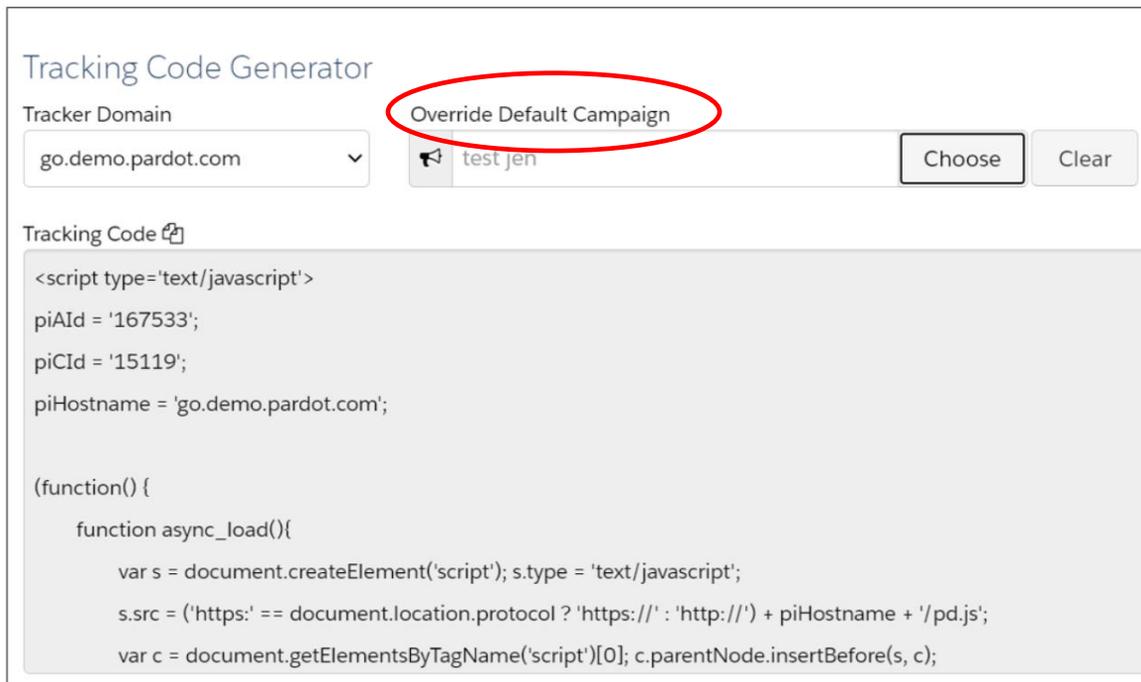
You can search for “pi.pardot.com” in your website to find the old tracking code and ensure it’s removed.

# Want to change the campaign on your tracker domain?

No problem.

You may want a specific campaign tied to track web activity.

For example, you have an annual event, and you want website activity tied to it. In the Domain Management setting, you can override the default campaign and select a different campaign.



Tracking Code Generator

Tracker Domain

go.demo.pardot.com

Override Default Campaign

test jen

Choose Clear

Tracking Code

```
<script type='text/javascript'>
piAId = '167533';
piCId = '15119';
piHostname = 'go.demo.pardot.com';

(function() {
  function async_load(){
    var s = document.createElement('script'); s.type = 'text/javascript';
    s.src = ('https:' == document.location.protocol ? 'https://' : 'http://') + piHostname + '/pd.js';
    var c = document.getElementsByTagName('script')[0]; c.parentNode.insertBefore(s, c);
```

One note of caution here. Once you take this step, if you ever want to replace the campaign, it will require you to replace the tracking code.

# Warning! Make sure you add the correct code

**GO HERE!**

Pardot Settings > Domain Management

The screenshot shows the 'Tracking Code Generator' interface. It has a 'Tracker Domain' dropdown menu with 'go.turmtlde.com' selected. To the right is an 'Override Default Campaign' section with a 'Choose a Campaign' input field, a 'Choose' button, and a 'Clear' button. Below this is a 'Tracking Code' text area containing the following JavaScript code:

```
<script type='text/javascript'>
piAId = '680623';
piCId = "";
piHostname = 'go.turmtlde.com';

(function() {
  function async_load(){
    var s = document.createElement('script'); s.type = 'text/javascript';
    s.src = ('https:' == document.location.protocol ? 'https://' : 'http://') + piHostname + '/pd.js';
    var c = document.getElementsByTagName('script')[0]; c.parentNode.insertBefore(s, c);
```

**DON'T GO HERE!**

Pardot Campaigns > View Tracking Code

The screenshot shows the 'Website Tracking' interface. It includes a heading 'Website Tracking' and a sub-heading 'Copy and paste this Javascript code right before the close body tag on your HTML pages.' Below this is a text area containing the following JavaScript code:

```
<script type="text/javascript">
piAId = '680623';
piCId = '40474';
piHostname = 'pi.pardot.com';

(function() {
  function async_load(){
    var s = document.createElement('script'); s.type = 'text/javascript';
    s.src = ('https:' == document.location.protocol ? 'https://' : 'http://cdn') +
'.pardot.com/pd.js';
```

```
<script type='text/javascript'>
piAId = '680623';
piCId = "";
piHostname = 'go.greenkeydigital.com';
```

The code is different

```
(function() {
  function async_load(){
    var s = document.createElement('script'); s.type =
```

```
<script type="text/javascript">
piAId = '680623';
piCId = '40474';
piHostname = 'pi.pardot.com';
```

```
(function() {
  function async_load(){
    var s = document.createElement('script'); s.type =
```

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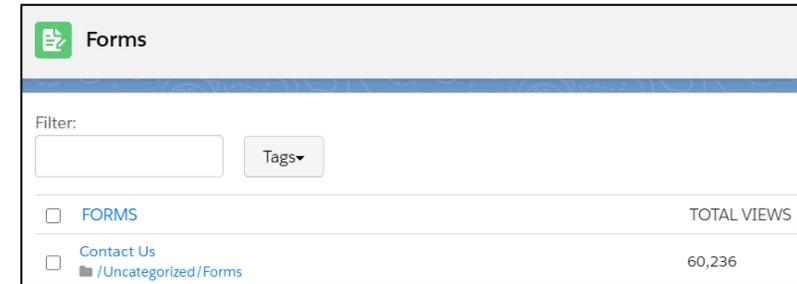
# Steps to move to First-Party Tracking

4) Keep “Use 3rd party tracking” checked. When your code is updated, uncheck “Use third-party tracking” and “Use third-party cookie with first-party tracking.”

- |                      |   |
|----------------------|---|
| First-Party Tracking | <input checked="" type="checkbox"/> Use first-party tracking                          |
|                      | <input checked="" type="checkbox"/> Use third-party cookies with first-party tracking |
|                      | <input checked="" type="checkbox"/> Use third-party tracking                          |

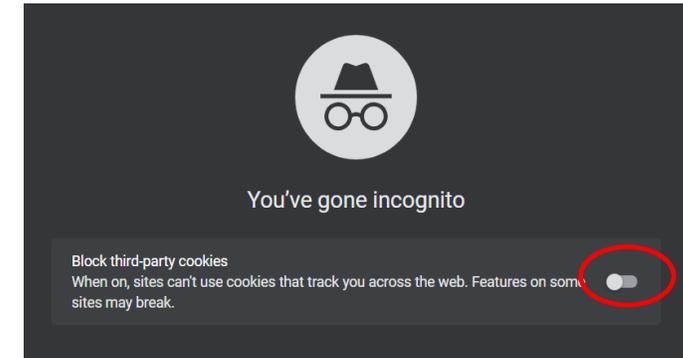
# How can I test my first-party tracking?

1. Take note of the current number of views on a Pardot form.

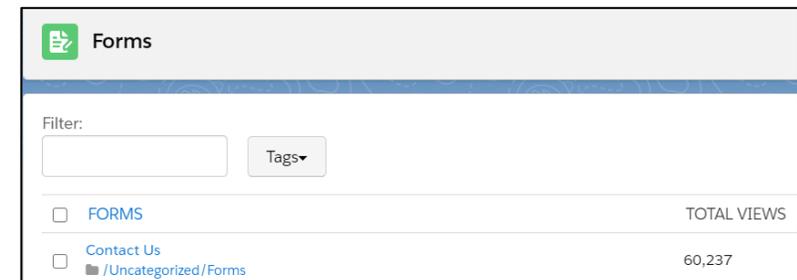


Filter:	Tags	TOTAL VIEWS
<input type="checkbox"/>	FORMS	
<input type="checkbox"/>	Contact Us /Uncategorized/Forms	60,236

2. In Google Incognito mode (Select “Block third-party cookies”), go to your website and fill out a form.



3. Check that the views increased by one.  
(This may take a couple of hours.)



Filter:	Tags	TOTAL VIEWS
<input type="checkbox"/>	FORMS	
<input type="checkbox"/>	Contact Us /Uncategorized/Forms	60,237

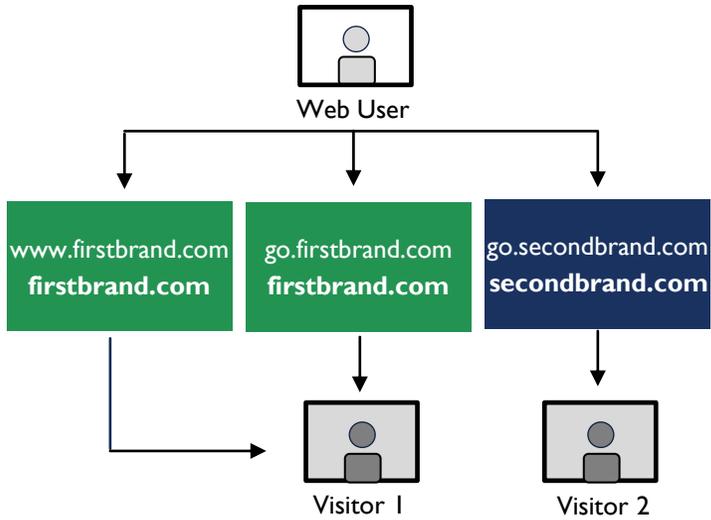


# So, we talked about tracking alignment, but let's dig deeper into how tracking works...

Tracking coverage is a bit more complicated than tracking alignment, and it's also more important.

Since third-party cookies are no longer available, you'll only be able to anonymously track a visitor across your sub-domains. However, if your web user chooses to identify themselves on multiple websites, then you'll be able to see their full engagement.

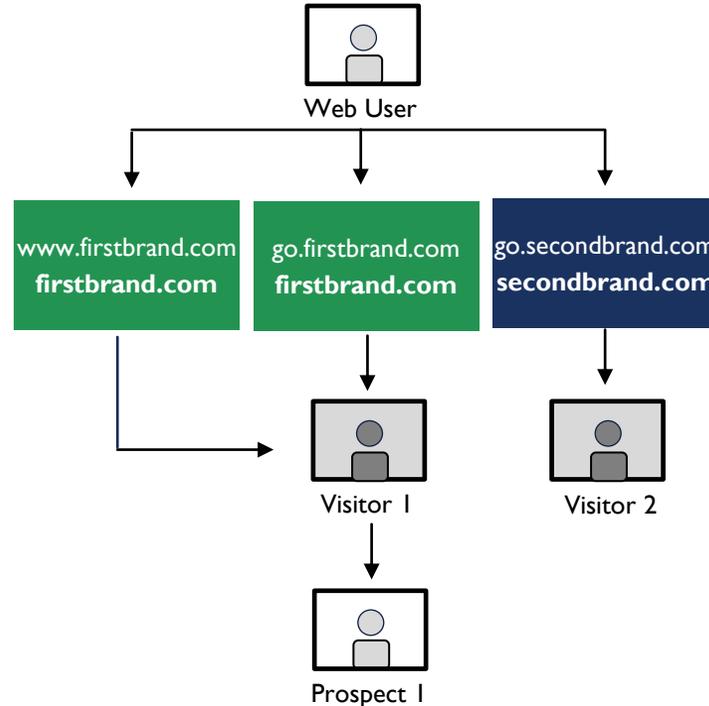
# 1.



The web user decides to visit three of your websites across two branded domains. Since two of these websites are hosted on “firstbrand.com”, the visits are linked to “Visitor 1”.

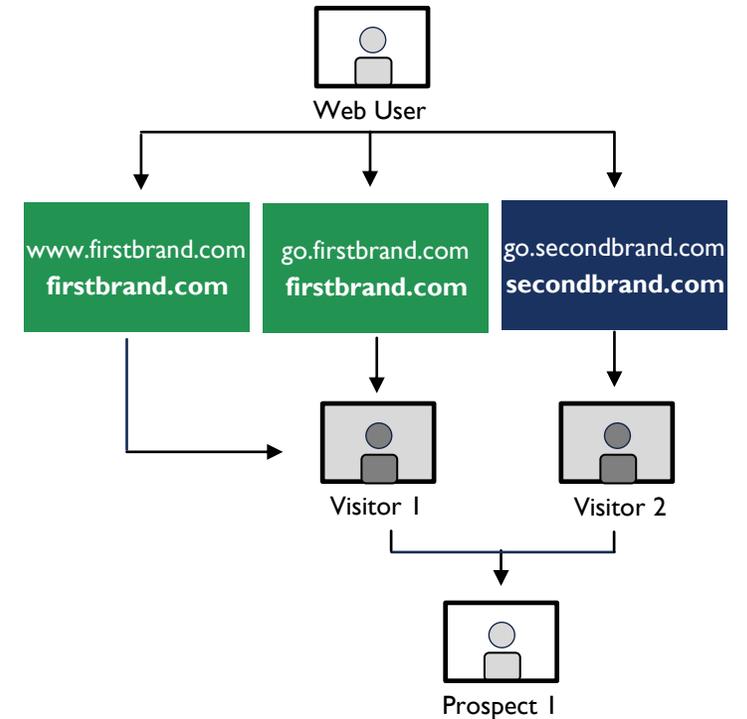
The visit to “secondbrand.com” is then linked to “Visitor 2,” because there are no third-party cookies to link them together.

# 2.



In the second visit, the web user decides to fill out a form on “www.firstbrand.com.” This results in the web user becoming a prospect and “Visitor 1” activity is linked to “Prospect 1.”

# 3.



In the third visit, the web user fills out a form on “go.secondbrand.com” using the same information. With this information, precious data from “Visitor 1” and “Visitor 2” are then linked to “Prospect 1.”



**Are you following me?**

**Let's go through some examples...**



# Scenario#2

Item		
Tracker Domain	go.firstbrand.com	
Website	firstbrand.com	help.firstbrand.com

## Scenario

Company has ONE tracker domain, and TWO websites (one website is a subdomain).

The “help” site has their company service information.

## What to do:

No need for change.

The company can have one tracker domain and it will track across both websites.

# Scenario#3

Fun fact: You can have up to 20 tracker domains in Pardot

Item		
Tracker Domain	go.firstbrand.com	
Website	firstbrand.com	secondbrand.com

## Scenario

Company has one tracker domain, but TWO websites.

Company wants to track website activity on both websites.

## What to do:

The company would want to set up a tracker domain for secondbrand.com to track anonymous visitors.

However, if a prospect fills out forms on **both** websites, the company will see their prospect's full engagement.

The important takeaway is that a prospect needs to fill out a form on each website to see website tracking.

# Scenario#4

Item		
Tracker Domain	go.firstbrand.com	go.firstbrand.io
Website	firstbrand.com	

## Scenario

Company has TWO email domains and TWO tracking domains.

The .io domain is used for marketing emails.

Company has ONE website.

## What to do:

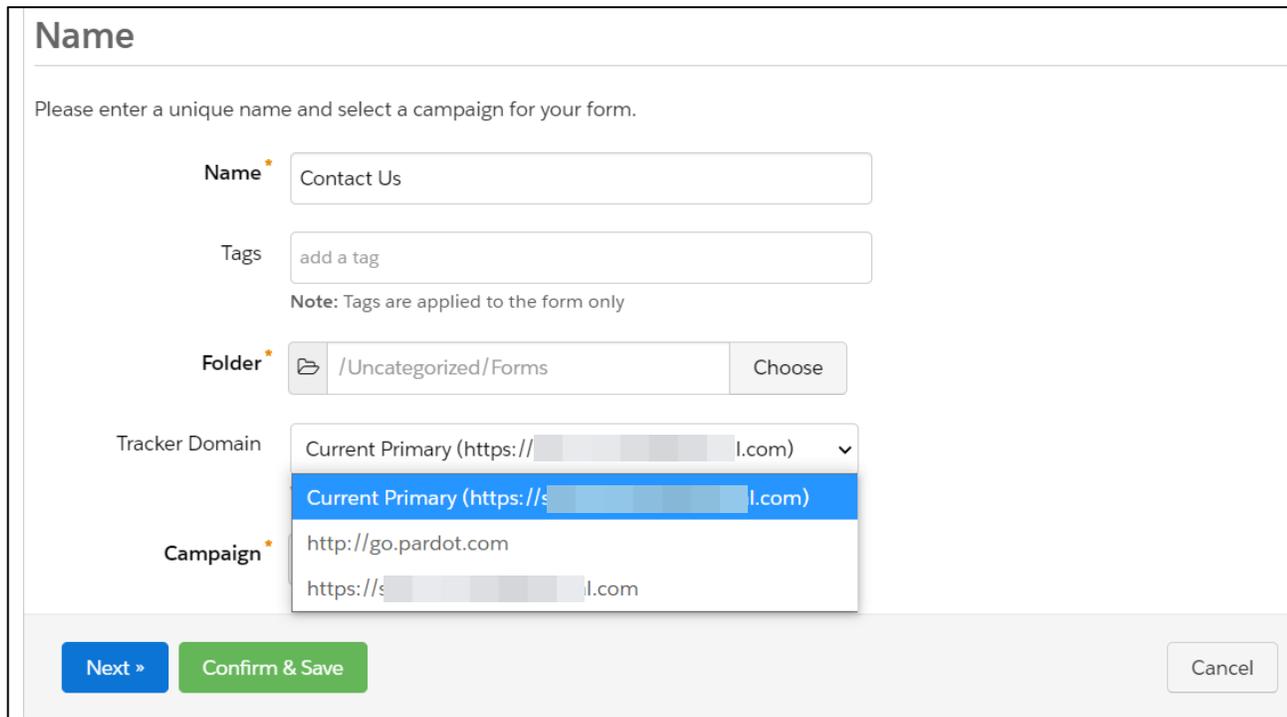
Company can still send out emails from firstbrand.io (based on sender email), but the company needs to align the assets.

The marketer needs to pick the tracker domain go.firstbrand.com to match the website.

\*\*The risk is that sending emails with different links could raise potential phishing flags.

# Make sure that your Pardot assets have the correct tracker domain!

- THIS IS IMPORTANT!
- Critical to have domain alignment everywhere.



**Name**

Please enter a unique name and select a campaign for your form.

**Name \***

**Tags**

Note: Tags are applied to the form only

**Folder \***

**Tracker Domain**

- Current Primary (https://[redacted].com)
- Current Primary (https://[redacted].com)
- http://go.pardot.com
- https://[redacted].com

**Campaign \***



# Summary

- Align your tracker domain(s) to your website(s)
- If you have multiple websites, consider using subdomains
- Ensure that you remove all the old tracker domain code
- Test your website tracking with Google Incognito *without* third-party cookies
- Make sure that your marketers use the correct tracker domain on their Pardot marketing assets (if applicable)
- Switch to first-party tracking before the end of 2021



# Trailblazer COMMUNITY GROUPS





# Thank you!

