



Automation Cookbook

More than 30 examples of Account
Engagement automations.

How to use this guide

This guide is intended for beginner to intermediate Account Engagement users. It's meant to provide examples and inspiration of typical automations that I see every day in Account Engagement. Good luck! -Jen Kazin



Dynamic Lists

Basic Dynamic Lists

The screenshot shows the 'Dynamic List Rules' configuration page. At the top, the 'Match type' is set to 'Match all'. Below this, a rule is defined with the following components: a trash icon, a dropdown menu set to 'Prospect default field', another dropdown set to 'State', a dropdown set to 'is', and a text input field containing 'Minnesota; Iowa; Wisconsin'. Below the rule are two buttons: '+ Add new rule' and '+ Add new rule group'. At the bottom right, there are three buttons: 'Preview', 'Run Rules', and 'Cancel'. A grey callout bubble points to the text input field with the text: 'Use semicolons to indicate different values'.

Pulls all the prospects from the states of Minnesota, Iowa and Wisconsin.

The screenshot shows the 'Dynamic List Rules' configuration page. At the top, the 'Match type' is set to 'Match all'. Below this, a rule is defined with the following components: a trash icon, a dropdown menu set to 'Prospect custom field', another dropdown set to 'Product Interest', a dropdown set to 'is', and a text input field containing 'Industrials'. Below the rule are two buttons: '+ Add new rule' and '+ Add new rule group'. At the bottom right, there are three buttons: 'Preview', 'Run Rules', and 'Cancel'. A grey callout bubble points to the 'Prospect custom field' dropdown with the text: 'Note how custom prospect field is used'.

Pulls all the prospects that have "Industrials" listed on their Product Interest custom field.

The screenshot shows the 'Dynamic List Rules' configuration page. At the top, the 'Match type' is set to 'Match any'. Below this, two rules are defined. The first rule has a trash icon, a dropdown set to 'Prospect custom field', another dropdown set to 'Product Interest', a dropdown set to 'is', and a text input field containing 'Industrials'. Below the first rule is the word 'or' followed by a horizontal line. The second rule has a trash icon, a dropdown set to 'Prospect default field', another dropdown set to 'Job Title', a dropdown set to 'contains', and a text input field containing 'VP; Vice President; CMO'. Below the rules are two buttons: '+ Add new rule' and '+ Add new rule group'. At the bottom right, there are three buttons: 'Preview', 'Run Rules', and 'Cancel'. A grey callout bubble points to the 'Match any' radio button with the text: 'Use Match Any for "OR" functionality'.

Pulls all the prospects that have "Industrials" listed on their Product Interest field OR prospects with job titles "VP," "Vice President" or "CMO."

Add everyone to a list

The screenshot shows the 'Dynamic List Rules' configuration interface. At the top, there are two radio buttons for 'Match type': 'Match all' (selected) and 'Match any'. Below this is a single rule configuration row. It starts with a trash icon and a plus sign. The rule is defined as: 'Prospect default field' (dropdown), 'Email' (dropdown), and 'is not empty' (dropdown). Below the rule row are two buttons: '+ Add new rule' and '+ Add new rule group'. At the bottom right of the interface are three buttons: 'Preview' (blue), 'Run Rules' (green), and 'Cancel' (white).

Because all Account Engagement requires that all prospects have an email address, this dynamic list will pull everyone in the database onto a list.

Unengaged prospects

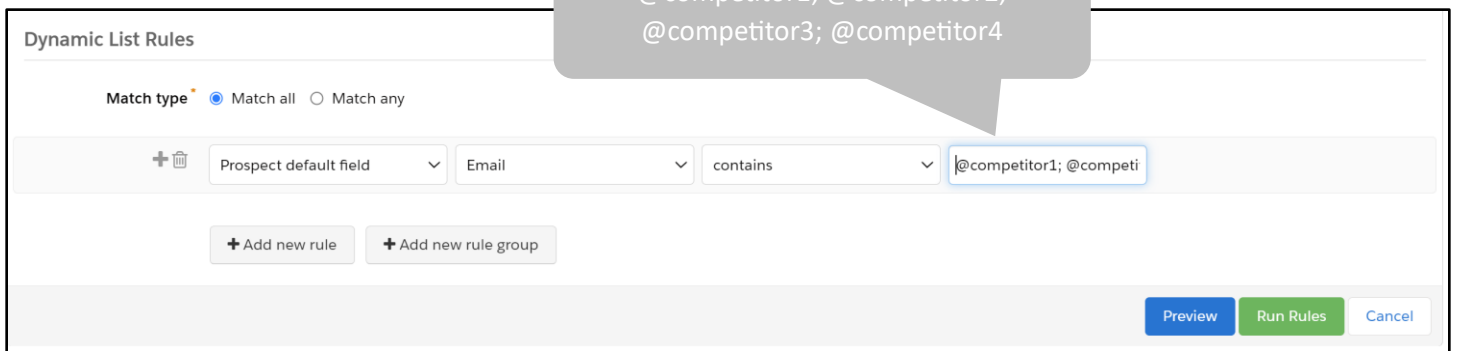
The screenshot shows the 'Dynamic List Rules' configuration interface with three rules. The 'Match type' is set to 'Match all'. The rules are connected by 'and' operators. Rule 1: 'Prospect has been emailed' (dropdown), 'at least' (operator), '1' (input), 'time(s) in the last' (operator), '365' (input), 'day(s)' (dropdown). Rule 2: 'Prospect time' (dropdown), 'created days ago' (dropdown), 'is greater than' (operator), '365' (input). Rule 3: 'Prospect time' (dropdown), 'last activity days ago' (dropdown), 'is greater than' (operator), '365' (input). Below the rules are two buttons: '+ Add new rule' and '+ Add new rule group'.

Create a dynamic list to check for inactivity. For example, use the “Prospect has been emailed,” “Prospect created” and “Prospect last activity days ago .” The last activity criteria checks for form submissions and email clicks. (Do not use email open because it is no longer a reliable email metric.)

I usually copy this list and create multiple versions for different day variations. For example, try 730 days, 365 days, or 180 days.

More examples of dynamic lists to clean your database at <https://greenkeydigital.com/database-clean/>

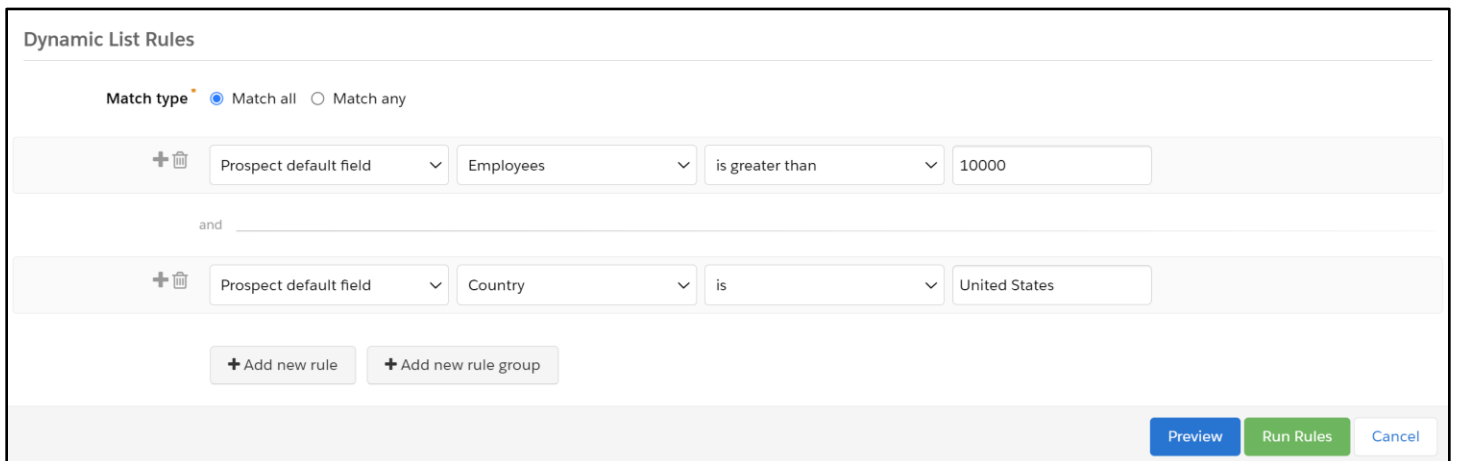
Suppression list



The screenshot shows the 'Dynamic List Rules' configuration interface. At the top, there is a 'Match type' section with 'Match all' selected. Below this, a rule is defined with the following parameters: 'Prospect default field' (dropdown), 'Email' (dropdown), 'contains' (operator dropdown), and '@competitor1; @competi' (text input). A grey callout bubble points to the text input, containing the full list: '@competitor1; @competitor2; @competitor3; @competitor4'. At the bottom of the interface, there are buttons for '+ Add new rule', '+ Add new rule group', 'Preview', 'Run Rules', and 'Cancel'.

Use this dynamic list to suppress all your competitors from getting emails. Use the operator “contains” and list the email addresses of all your competitors. If you run out of characters, you can use “Match Any” (Or) and “Add new rule” to continue.

Add dynamic list to Engagement Studio Program



The screenshot shows the 'Dynamic List Rules' configuration interface. At the top, there is a 'Match type' section with 'Match all' selected. Below this, two rules are defined and connected by 'and'. The first rule has the following parameters: 'Prospect default field' (dropdown), 'Employees' (dropdown), 'is greater than' (operator dropdown), and '10000' (text input). The second rule has the following parameters: 'Prospect default field' (dropdown), 'Country' (dropdown), 'is' (operator dropdown), and 'United States' (text input). At the bottom of the interface, there are buttons for '+ Add new rule', '+ Add new rule group', 'Preview', 'Run Rules', and 'Cancel'.

This is an example of a dynamic list that will continuously find prospects from large companies (greater than 10,000 employees), AND are from the United States. These might be high-value companies and warrant an extra email nurture.

Use this list in your Engagement Studio Program. As prospects are added to the database, the dynamic list will find them and add them to the Engagement Studio Program.

Using Rule Groups

The screenshot shows the 'Dynamic List Rules' configuration interface. At the top, the 'Match type' is set to 'Match all' (radio button) and 'Match any' (radio button). Below this, there are three rule groups. The first rule group has the condition 'Prospect assigned user' is 'Jen Kazin'. The second rule group has the condition 'Prospect default field' Job Title is 'Teacher'. The third rule group, highlighted with a red border, has the condition 'Match any' selected, and contains two rules: 'Prospect default field' State contains 'Minnesota' and 'Prospect default field' Country is 'Canada'. At the bottom of the interface, there are buttons for '+ Add new rule', '+ Add new rule group', 'Preview', 'Run Rules', and 'Cancel'.

Here, the marketer is using a Rule Group to handle a more complex dynamic list. Rule groups allow you to mix “AND” and “OR” functionality.

This dynamic list will pull prospects assigned to “Jen Kazin” with the job title “Teacher,” and are either from Minnesota or Canada.

Preference page

The screenshot shows the 'Dynamic List Rules' configuration interface. At the top, the 'Match type' is set to 'Match all' (radio button) and 'Match any' (radio button). Below this, there are two rule groups. The first rule group has the condition 'Prospect public list opt-in sta' Is not opted out and 'Preference Center - New Products & White' Choose. The second rule group has the condition 'Prospect default field' State is 'Minnesota'. At the bottom of the interface, there are buttons for '+ Add new rule', '+ Add new rule group', 'Preview', 'Run Rules', and 'Cancel'.

If you are using a preference page, you need to be using a dynamic lists for any email sends that are NOT leveraging a preference page.

For example, you have a public list called “Product News and Whitepapers” on your preference center. Now you need to send an email about a product change that only affects prospects in the state of Minnesota. You should create a dynamic list that starts with your public list and segment from there.

Sales Stage

The screenshot shows the 'Dynamic List Rules' configuration page. At the top, there's a 'Match type' section with 'Match all' selected. Below that, a rule is defined: 'Prospect custom field' is set to 'Sales Stage', which 'is' 'Prospecting'. There are buttons for '+ Add new rule' and '+ Add new rule group'. At the bottom right, there are 'Preview', 'Run Rules', and 'Cancel' buttons.

This dynamic list will populate with prospects in the Lead Nurturing stage “Prospecting.” Use this dynamic list for either an engagement studio program designed to nurture prospects, or it could be a suppression list to stop them from getting marketing emails in this lead stage.

Opportunity

The screenshot shows the 'Dynamic List Rules' configuration page for an Opportunity. The 'Match type' is 'Match all'. The main rule is: 'Prospect opportunity' related with properties to 'Opportunity'. Below this, there's a sub-section 'Match any Opportunity with properties:' with 'Match all' selected. This sub-section contains two rules: 'Prospect opportunity status' is 'Opportunity Won', and 'Prospect opportunity default' is 'closed' less than '730' days ago. There is an '+ Add new rule' button at the bottom.

Use this dynamic list to pull in Contacts linked to Accounts that have had a Closed Won Opportunity in the last 2 years.

When you go to create the dynamic list, first add this criteria:

Prospect opportunity — ‘related with properties’ — to Opportunity

Then, when the rule group opens up:

Prospect opportunity status — opportunity won

Prospect opportunity default field — closed — less than — 730 days (you have to convert the year into days)





Automation Rules



Add to campaign

Rules

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

  Prospect list is member of TSHW-20280205-invited

Actions

  Add to CRM Campaign Webinar with status



Only campaigns that are connected to a Salesforce campaign appear. To connect a campaign, go to the Campaigns tab.

This automation rule will add all the prospects from a specific list to a campaign. This could also be done with a segmentation rule if it's a "one time" request.



Assign with Salesforce active assignment rule

Rules



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

  Prospect assignment status is not assigned

and

  Prospect score is greater than 99

Actions



  Assign via Salesforce active

This automation rule will assign any prospect that is currently unassigned and has a score greater than 99.



Add to list

Rules

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

  Prospect default field is

Actions



  Add prospect to list

You can use Automation Rules to add prospects to a list. For instance, you want prospects automatically added to a list, but want prospects may be removed from the list in an engagement studio program. Or, you want to automatically add prospects to your list, but you need your public list (for preference center) to be a segmentation list.



Assign User

Rules

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

  Prospect score

Actions



  Assign via Salesforce active

Assign prospects to Sales to create a Lead. If a prospect has a score greater than 60, they will get assigned to a sales person via Salesforce active assignment rules.



Form completion with criteria

Rules



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

  Prospect form Greenkey Form was completed successfully



and

  Prospect default field State is Texas, New Mexico, Utah

Actions

  Add to CRM Campaign Webinar Responded [Refresh Data](#)

Only campaigns that are connected to a Salesforce campaign appear. To connect a campaign, go to the Campaigns tab.

  Assign prospect to user Brian Nelson

Sometimes you need to use automation rules for form completions with criteria. While conditional completion actions are great, you only get six conditions. Use automation rules for continued automation. This automation rule will run every time a form is successfully completed and the prospect is from Texas, New Mexico or Utah.

Update Lead Status to unqualified

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 student; intern; analyst

+ Add new rule + Add new rule group

Actions

+ Change prospect custom fie Lead Status unqualified

+ Apply tags unqualified add a tag

+ Add new action

Use this automation rule to change the lead status to “unqualified” for any prospects with job titles “student,” “intern,” or “analyst.” This one also tags the prospect as “unqualified.”

Send Email

Rules

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

+ Prospect form Standard Form was completed successfully

+ Add new rule + Add new rule group

Actions

+ Send prospect email Code School wk1

+ Add new action

You can send an email based on specific criteria. This automation rule will send an email once a form is completed.

Adjust Score

Rules

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

+ Prospect tag is dreamforce 28

+ Add new rule + Add new rule group

Actions

+ Adjust prospect score by +25

+ Change prospect default fie Source to Webinar

+ Add new action

If a prospect has a tag called “Dreamforce 28,” adjust score and change the Source field to “Webinar.”

Score Decay – Option 1

Repeat Rule
Allows rule to match prospects more than once.

Days before eligible to repeat rule:

Limit rule matches? No, allow unlimited matches.
 Yes, limit total matches to:

Rules

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

Prospect email opens in the last

and

Prospect time is greater than

and

Prospect time is not empty

and

Prospect score

Actions

Apply tags add a tag

Every marketer who uses scoring should have some automation in place for score decay. This automation rule will look for prospects who 1) were once active 2) opened an email in the last 30 days 3) has a score greater than 10.

This is a repeating automation rule set to run every 30 days, decreasing score by 10 points when prospects meet the criteria. The prospect score “greater than 10” prevents the automation rule from decreasing prospect scores into the negative numbers.

Note: To set “Prospect Time/Prospect was active,” choose “Last activity days ago,” and select “is not empty.” That will only look at Account Engagement prospects who were once active.

Score Decay – Option 2

Rules

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

Prospect time last activity days ago is greater than 180

Actions

Adjust prospect score to 5

Here is another style of score decay. If the prospect has been unengaged and inactive for six months, drop the score to five.

Assigned

Rules

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

Prospect assignment status is not assigned

and _____

Prospect score is greater than 99

Actions

Assign via Salesforce active

If the prospect is not assigned, but it has a score greater than 99, assign with Salesforce active assignment rules.

Data Cleaning

Rules

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

+ Prospect default field is

+ Add new rule + Add new rule group

Actions

+ Change prospect default fie to

+ Add new action

Keep your database clean! If a prospect comes into the system with Country as "United States," change it to "US."

Manage Mailability

Rules

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

+ Prospect list Choose

+ Add new rule + Add new rule group

Actions

+ Change prospect default fie to



+ Add new action

You may need correct Opted out or Do Not Email fields for a variety of reasons. Once you define the specific prospects with tags or a list, you can modify the Opted Out or Do Not Email fields.



Identify Bot Clicks

Rules

Match Type * Match all Match any
Automation Rules are retroactive and affect all prospects that meet the selected criteria.

  Prospect custom redirect Hidden Email Link was accessed

Actions

  Apply tags Potential Bot add a tag

If you are struggling with bot clicks, one consideration is a hidden link tied to a custom redirect. Create a hidden link in the email (make the link text the same color as the background). You could assume that only a bot would find the link. Create an automation rule to tag any prospects that access the link. You can consider deleting these prospects or marking them as Do Not Email. Note: One company had issues with this approach because sometimes the prospect's corporate bot clicks the hidden link and tags the prospect, blocking a real prospect from getting future emails.



Completion Actions

Assign to user and add to campaign

Completion Actions

Action: Assign to user User: Mary Paul

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

+ Add Action + Add Conditional Group

This form completion action will assign prospects to Mary Paul and add them to a campaign.

Create Salesforce task

Completion Actions

Action: Create Salesforce task

* Subject: Thank you for your interest.

* Assigned to: CRM Owner

* Priority: Normal

* Status: Not Started

Reminder (number of days from today): 5

Due (number of days from today): 30

Comments: This prospect filled out our "Interest" form. Please follow up and categorize the lead according to your interaction.

Action: Assign prospect via Salesforce active assignment rule

+ Add Action + Add Conditional Group

This form completion action will create a Salesforce task and assign the prospect to Salesforce upon form submission.

Tag the prospects and add to a list

Completion Actions

| | |
|-------------|----------|
| Action | Tags |
| Add tags | Partner |
| Action | List |
| Add to list | Partners |

+ Add Action + Add Conditional Group

This form completion action will add tag “Partner” and add to the “Partners” list upon submission.

Send Autoresponder

Completion Actions

| | |
|---------------------------|-----------------|
| Action | Template |
| Send auto responder email | Code School wk1 |

+ Add Action + Add Conditional Group

This form completion action will send an auto responder email for each form submission.

Change Source field

Completion Actions

| | | |
|----------------------------|---------------------|-------------------------|
| Action | Prospect Field Type | Value |
| Set prospect default field | Source | Spring Fling Trade Show |

+ Add Action + Add Conditional Group

This form completion action will change the Source value to “Spring Fling Trade Show” for each form submission.

Email – Any click

Completion Actions

Automatically take action when a prospect:

Opens this email

Clicks a link in this email

Which link?
Any link

Action: Add tags

Tags: Search tags...
food industry X

Action: Add to campaign

Campaign: Webinar X

Campaign Member Status: Select a campaign member status

+ Add Action

Any prospect that clicks in the email will get tagged and added to the campaign.

Email – Any click adjust score

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: +10

+ Add Action

Unsubscribes through this email

Any prospect that clicks in the email will get 10 points added to their score.

Email – Unsubscribe reason

Completion Actions

Automatically take action when a prospect:

- Opens this email
- Clicks a link in this email
- Unsubscribes through this email

| Action | Custom Field | Value |
|-----------------------------|----------------------|---------------|
| Set prospect custom field ▼ | Unsubscribe reason ▼ | Webinar Email |

[+ Add Action](#) [+ Add Conditional Group](#)

Every time a prospect unsubscribes, the system will update a custom field with the type of email that was sent. Over time, the marketer will see which emails generate the most unsubscribes. To execute this successfully, this completion action needs to be set on every email.