Automation Cookbook

More than 30 examples of Account Engagement automations.

How to use this guide

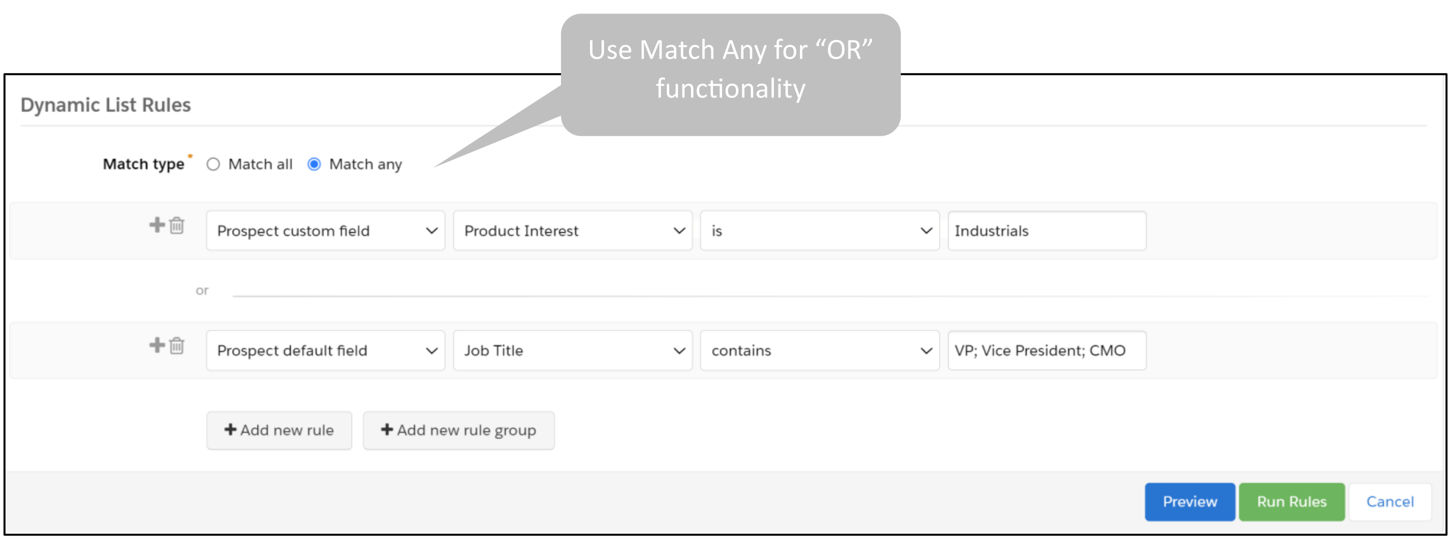
This guide is intended for beginner to intermediate Account Engagement users. It’s meant to provide examples and inspiration of typical automations that I see every date in Account Engagement. Good luck! -Jen Kazin

Dynamic Lists

Basic Dynamic Lists

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

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

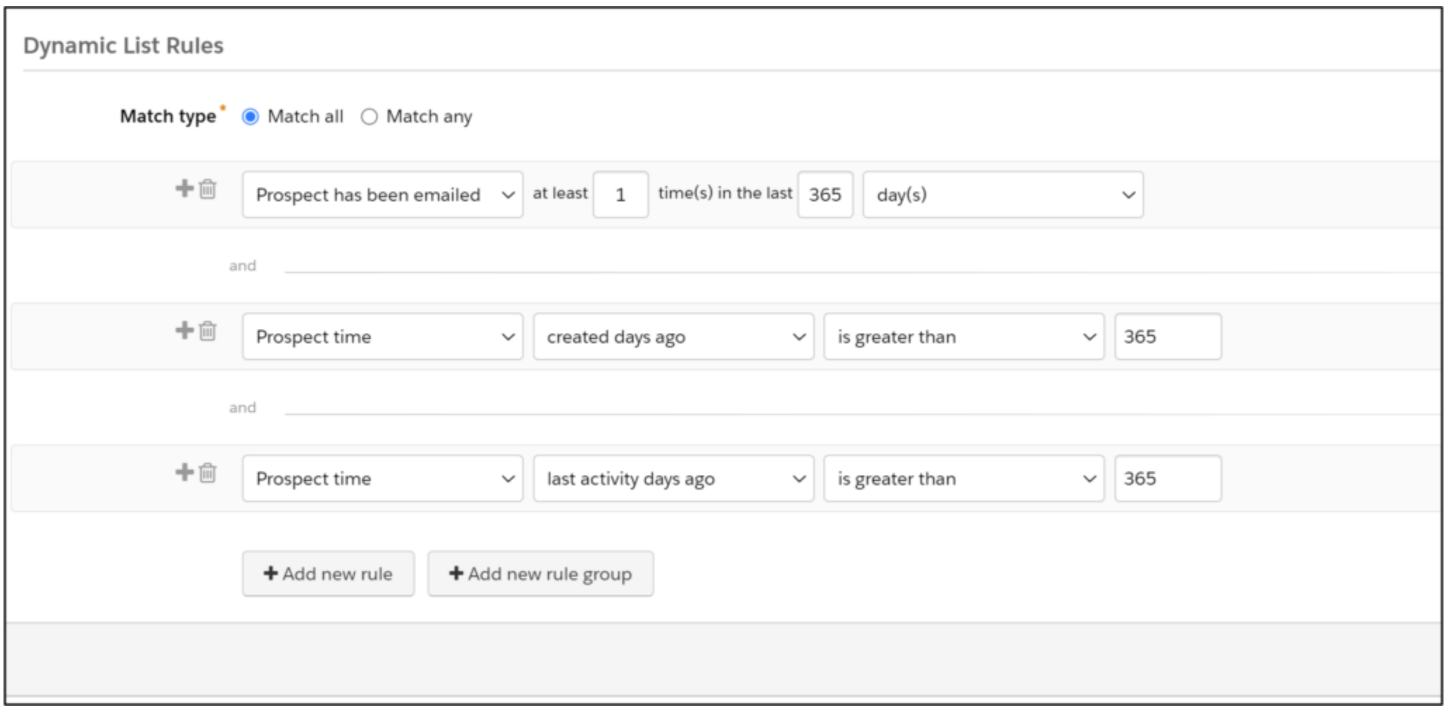


Pulls all the prospects that have “Industrials” listed on their Product Interest field <u>OR</u> prospects with job titles “VP,” “Vice President” or “CMO.”

Add everyone to a list

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

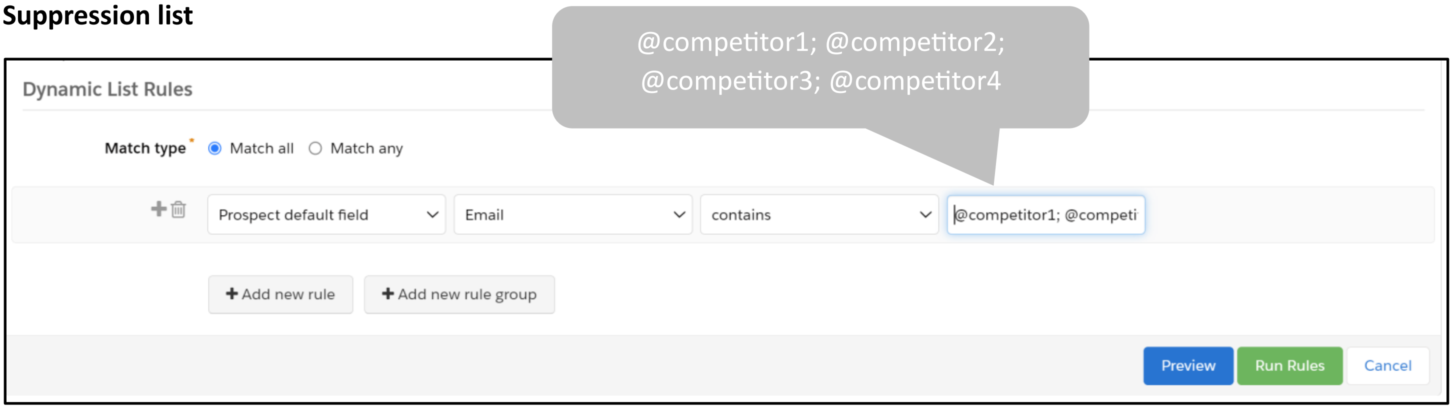


Create a dynamic list to check for inactivity. For example, use the “Prospect has been emailed,” “Prospect created” and “Prospect last activity days ago .” The last activity criteria checks for form submissions and email clicks. (Do not use email open because it is no longer a reliable email metric.)

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

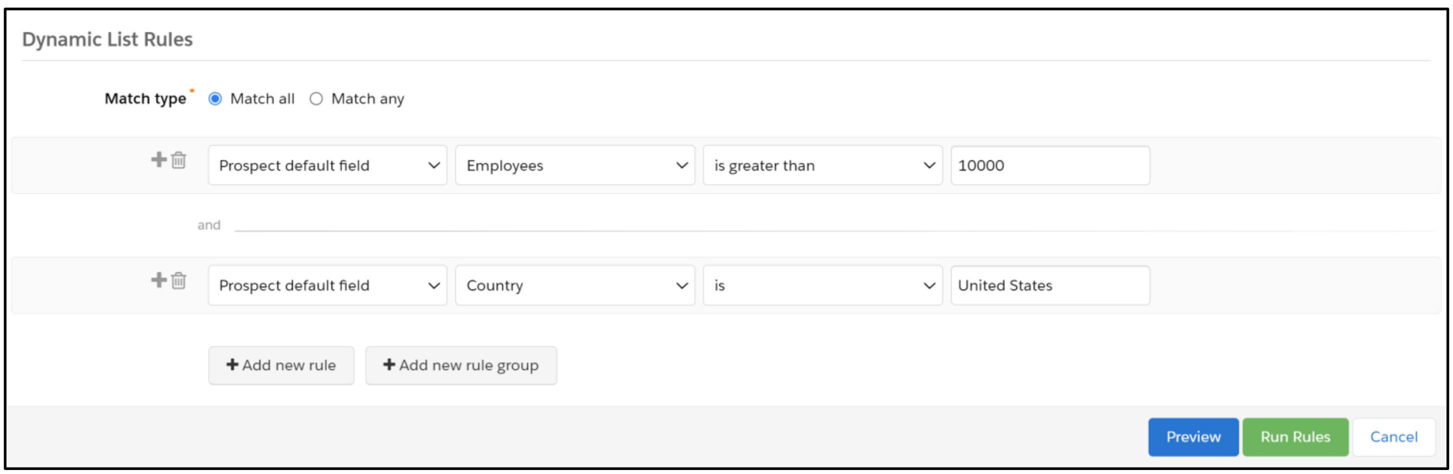
More examples of dynamic lists to clean your database at https://greenkeydigital.com/database-clean/

Suppression list



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.

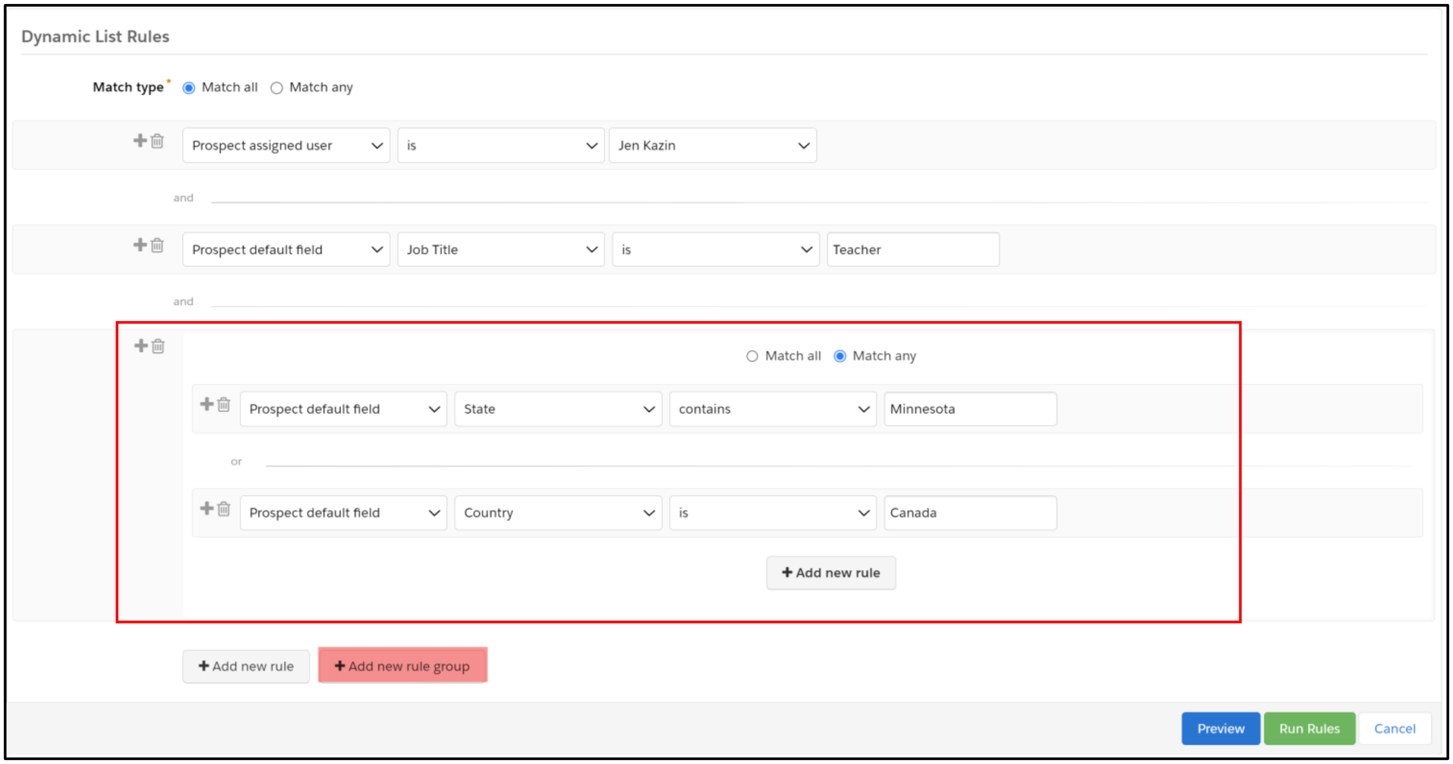
Add dynamic list to Engagement Studio Program



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.

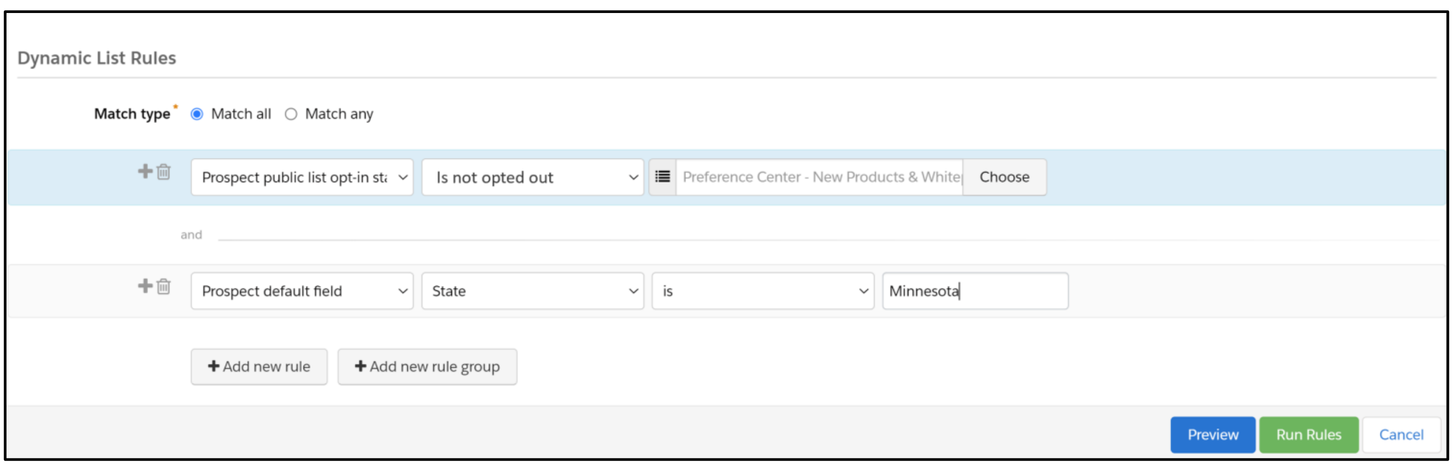
Using Rule Groups



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.

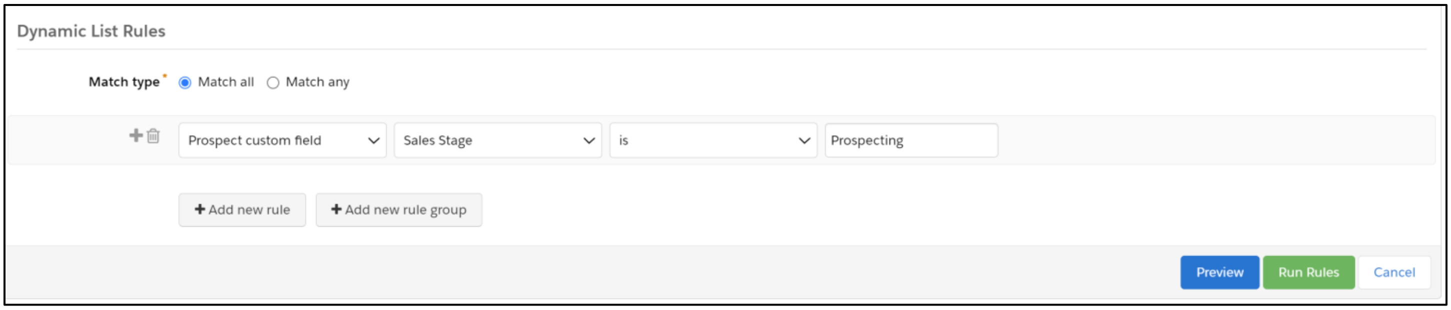
Preference page



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.

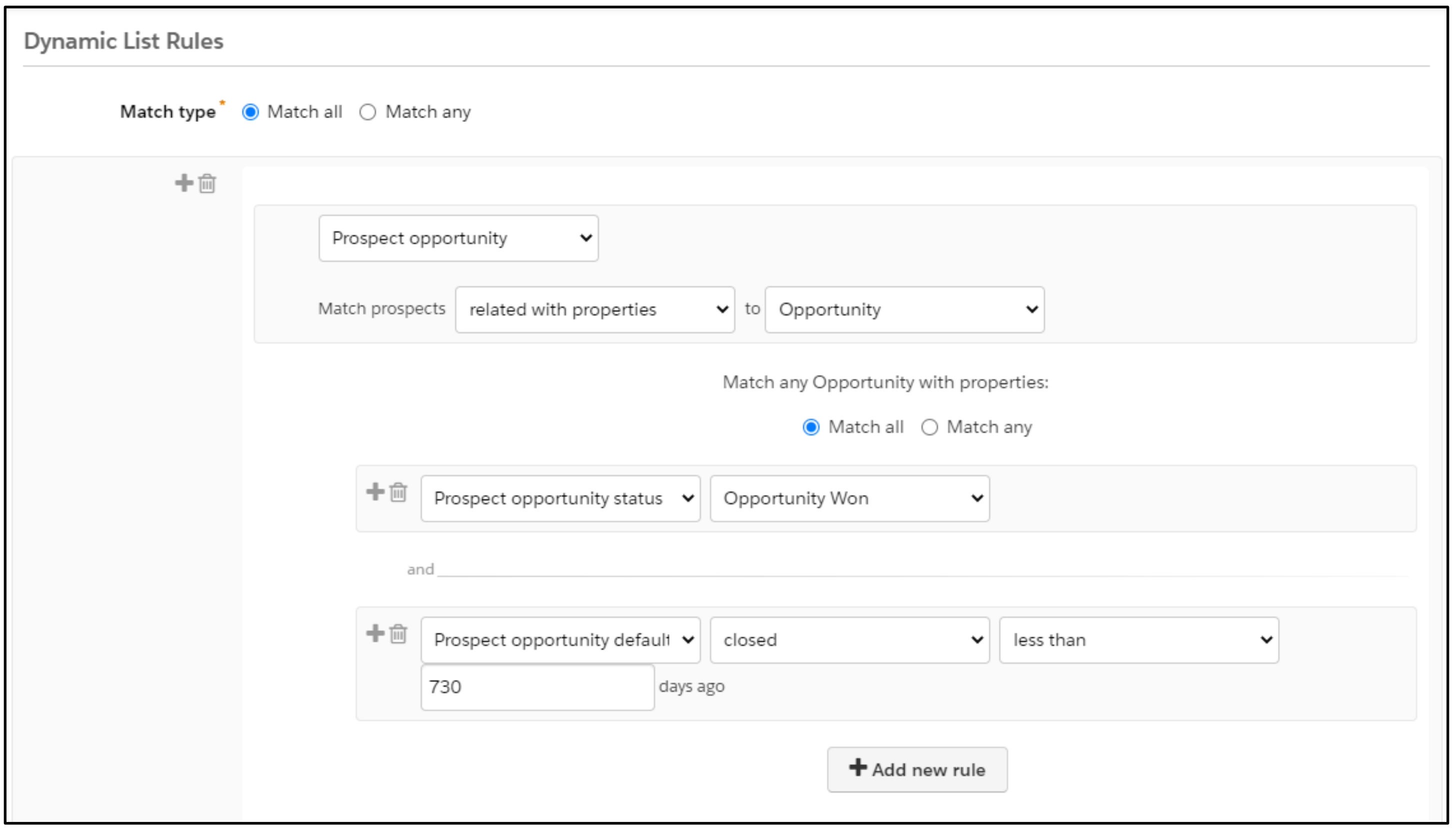
For example, you have a public list called “Product News and Whitepapers” on your preference center. Now you need to send an email about a product change that only affects prospects in the state of Minnesota. You should create a dynamic list that starts with your public list and segment from there.

Sales Stage



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



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

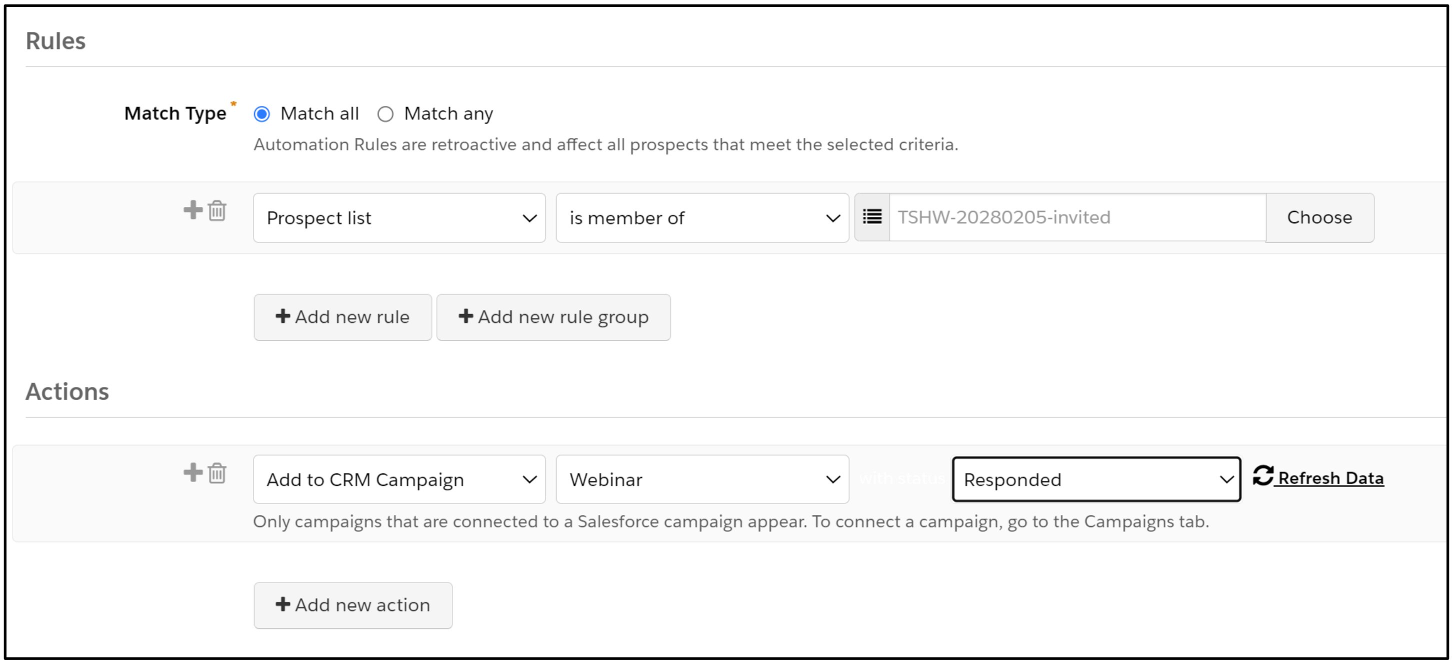
Then, when the rule group opens up:

Prospect opportunity status — opportunity won

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

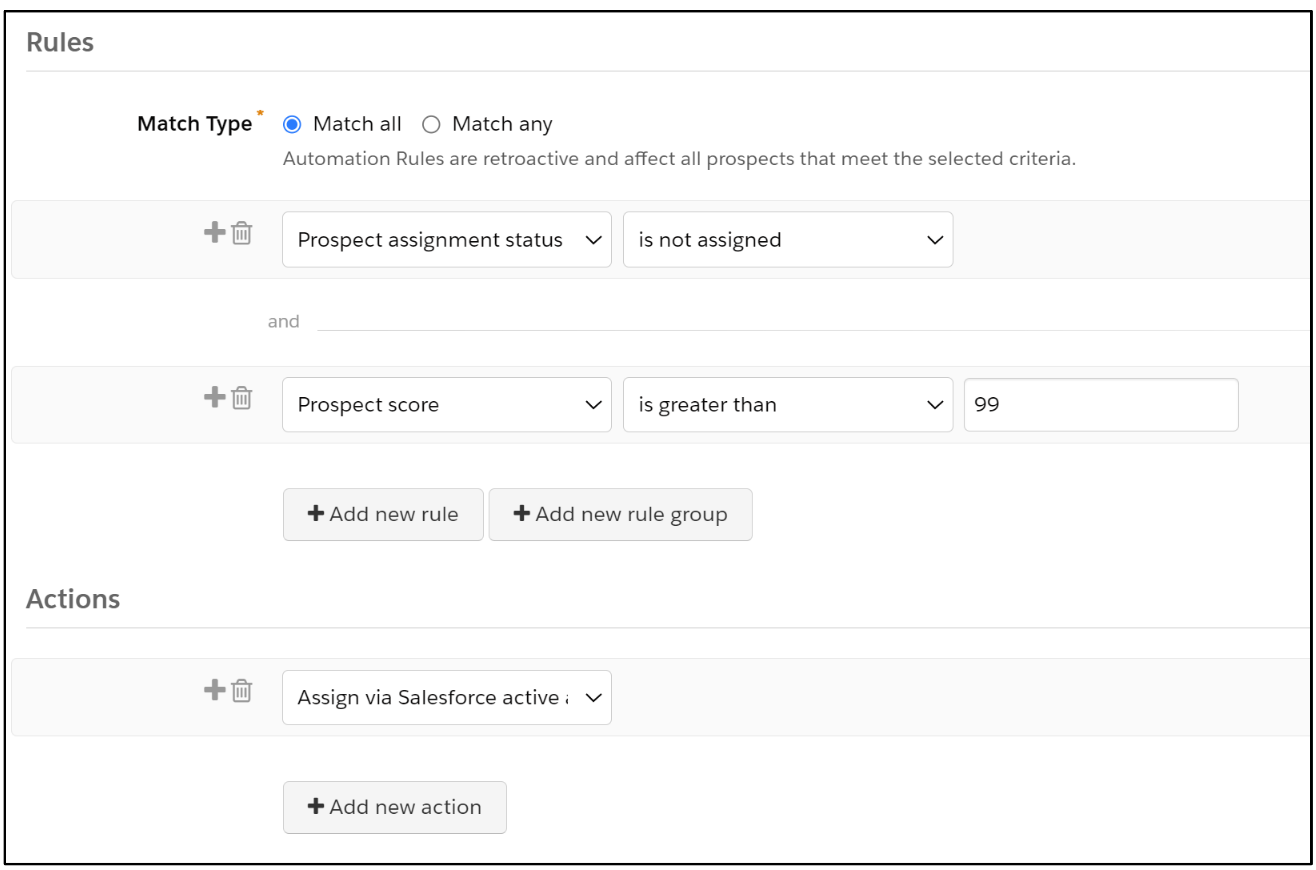
Automation Rules

Add to campaign



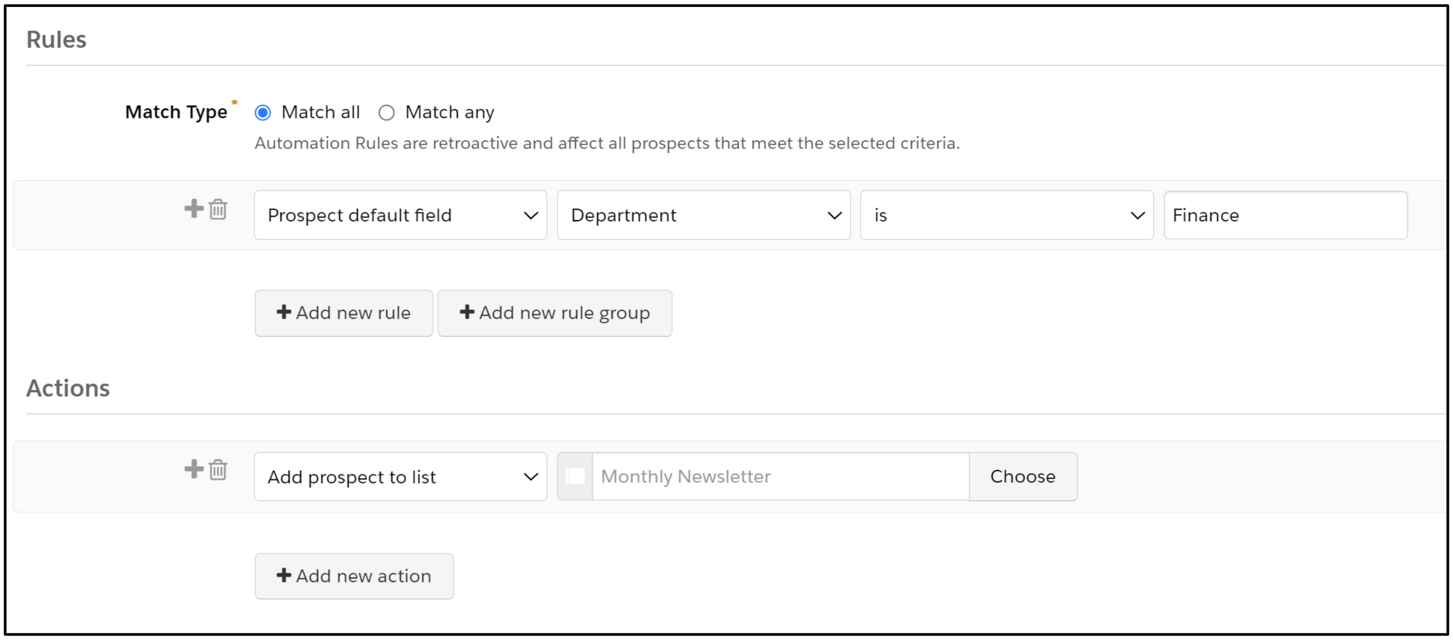
This automation rule will add all the prospects from a specific list to a campaign. This could also be done with a segmentation rule if it's a "one time" request.

Assign with Salesforce active assignment rule



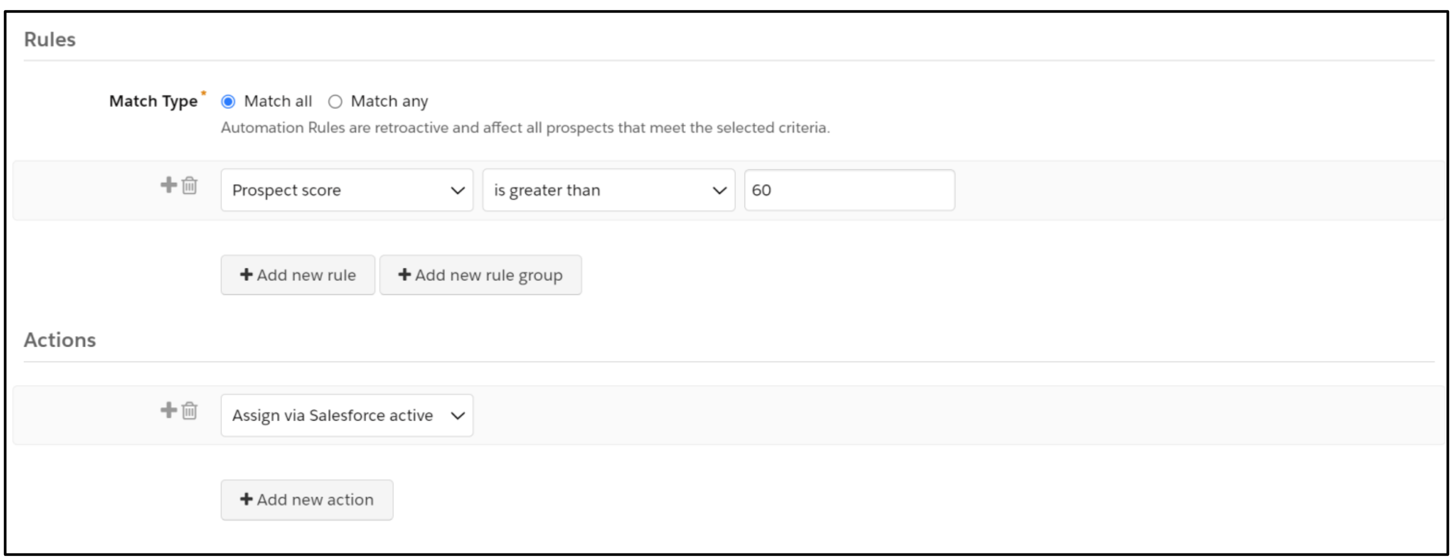
This automation rule will assign any prospect that is currently unassigned and has a score greater than 99.

Add to list



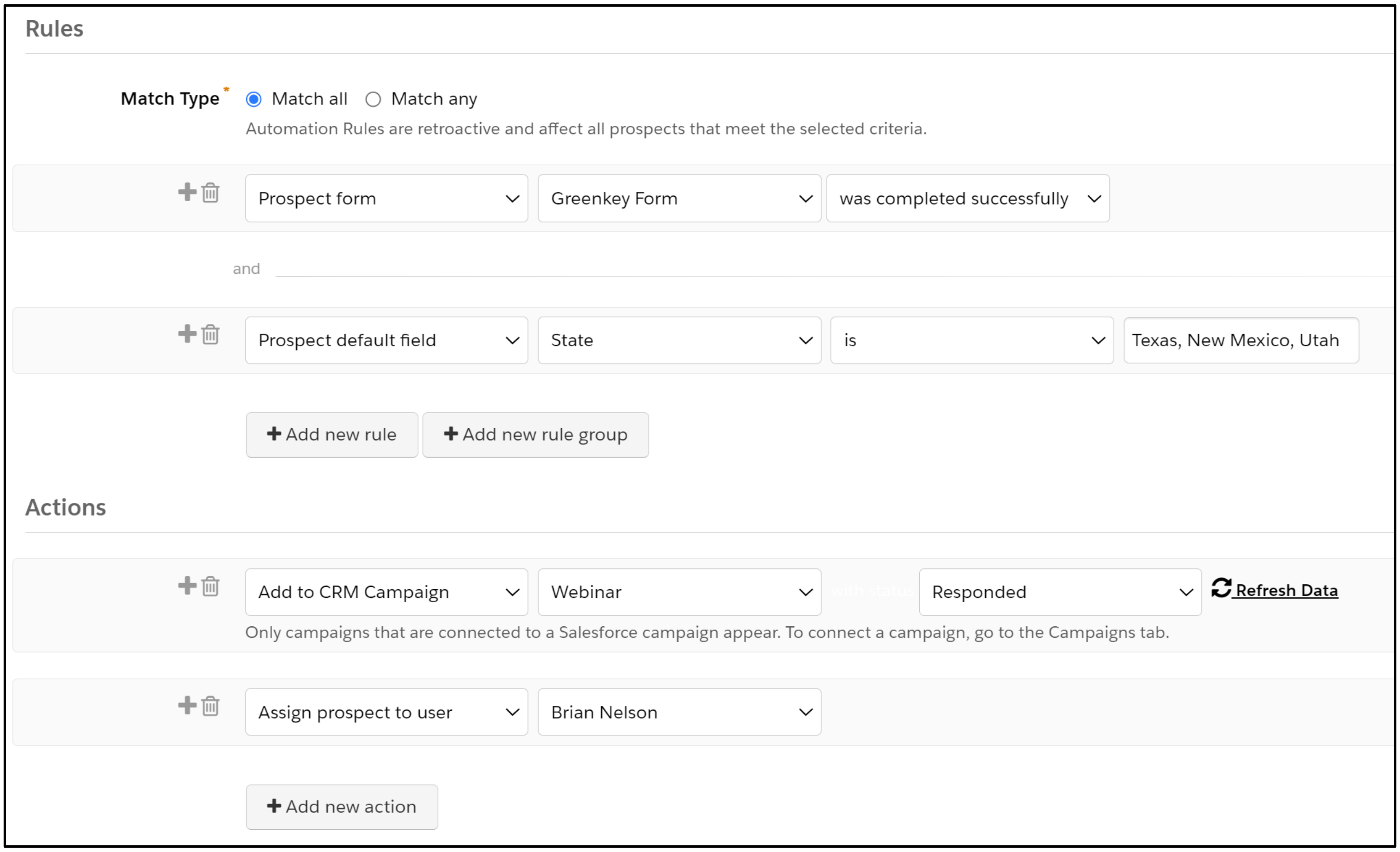
You can use Automation Rules to add prospects to a list. For instance, you want prospects automatically added to a list, but want prospects may be removed from the list in an engagement studio program. Or, you want to automatically add prospects to your list, but you need your public list (for preference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

Assign User



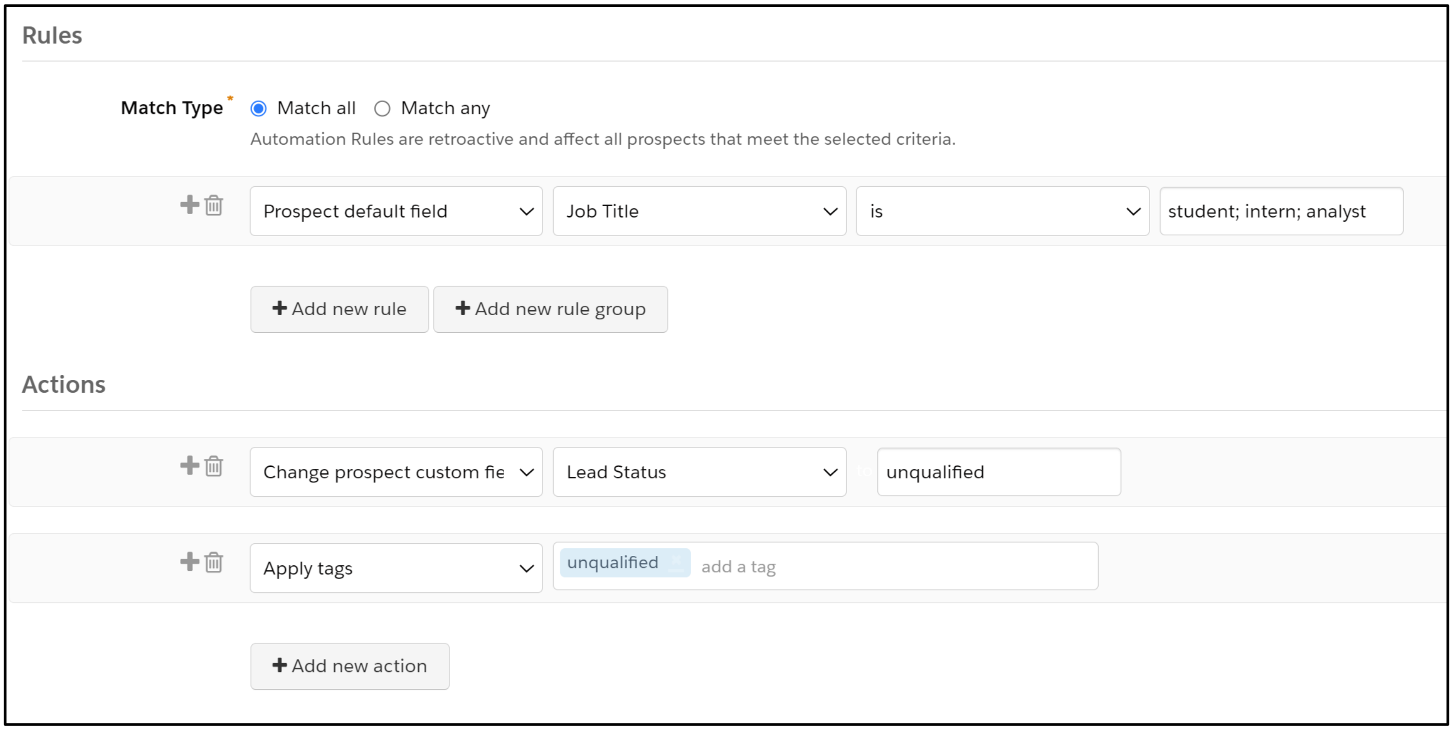
Assign prospects to Sales to create a Lead. If a prospect has a score greater than 60, they will get assigned to a sales person via Salesforce active assignment rules.

Form completion with criteria



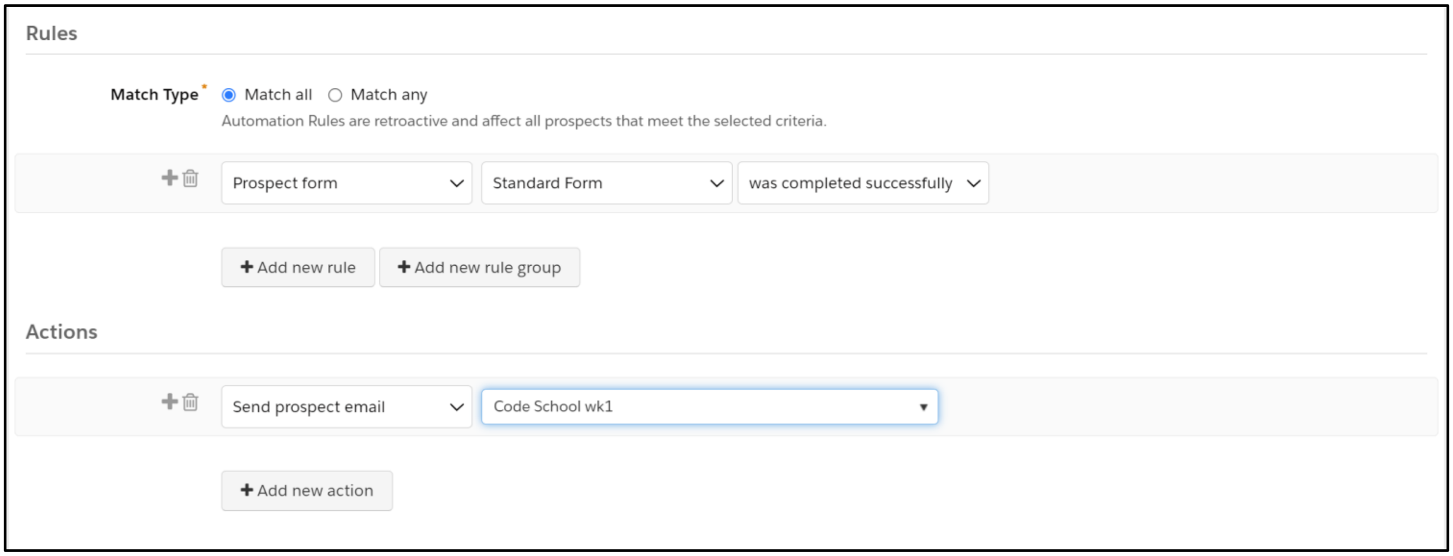
Sometimes you need to use automation rules for form completions with criteria. While conditional completion actions are great, you only get six conditions. Use automation rules for continued automation. This automation rule will run every time a form is successfully completed and the prospect is from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

Update Lead Status to unqualified



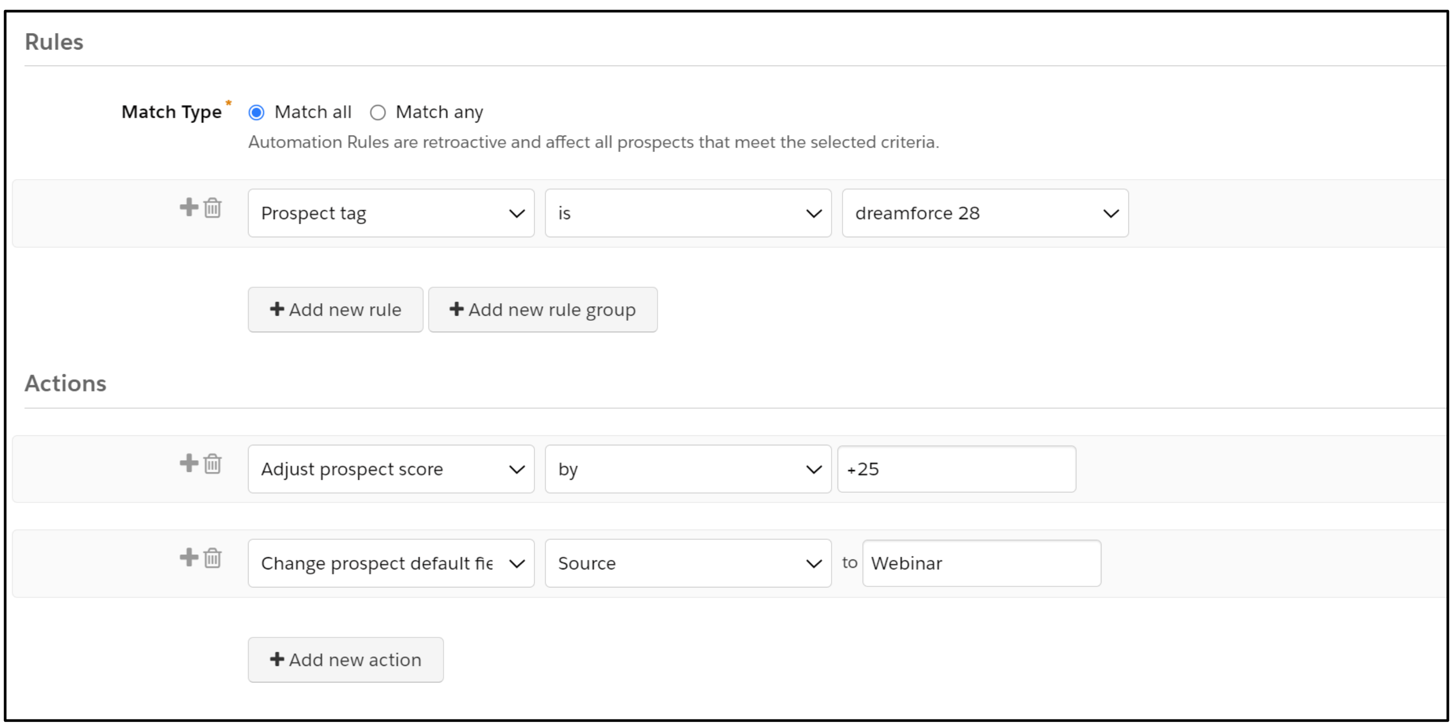
Use this automation rule to change the lead status to “unqualified” for any prospects with job titles “student,” “intern,” or “analyst.” This one also tags the prospect as “unqualified.”

Send Email



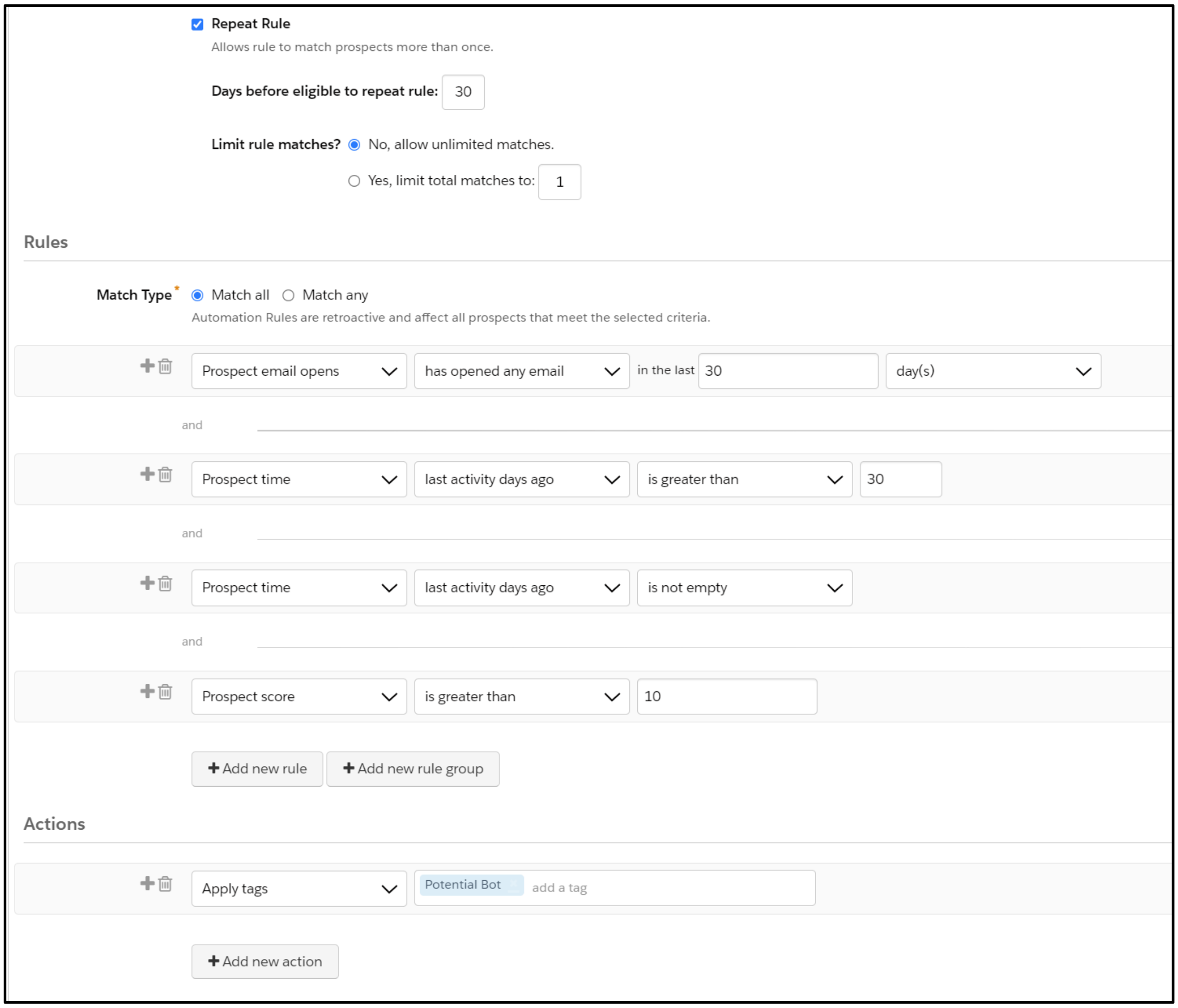
You can send an email based on specific criteria. This automation rule will send an email once a form is completed.

Adjust Score



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

Score Decay – Option 1

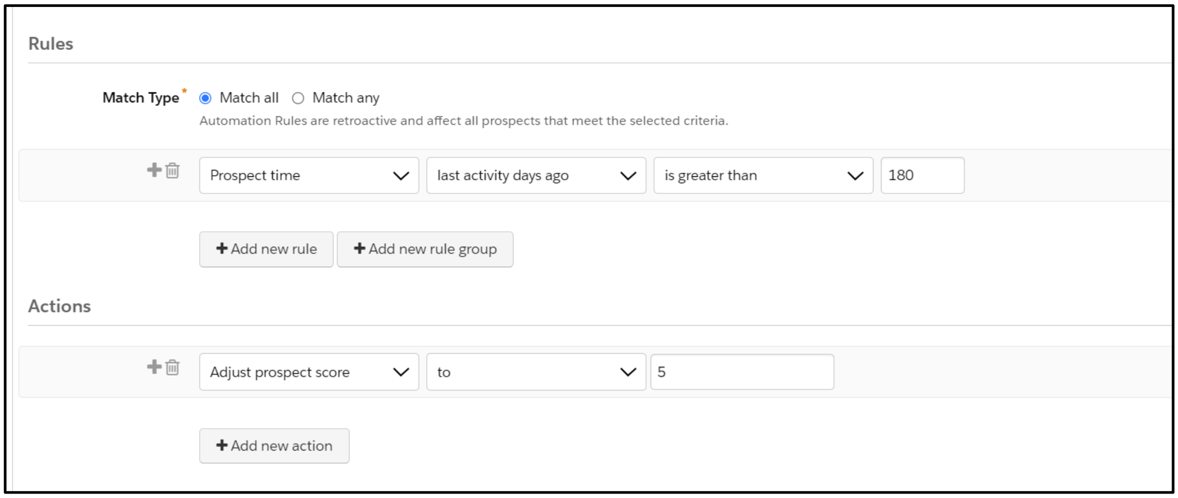


Every marketer who uses scoring should have some automation in place for score decay. This automation rule will look for prospects who 1) were once active 2) opened an email in the last 30 days 3) has a score greater than 10.

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.

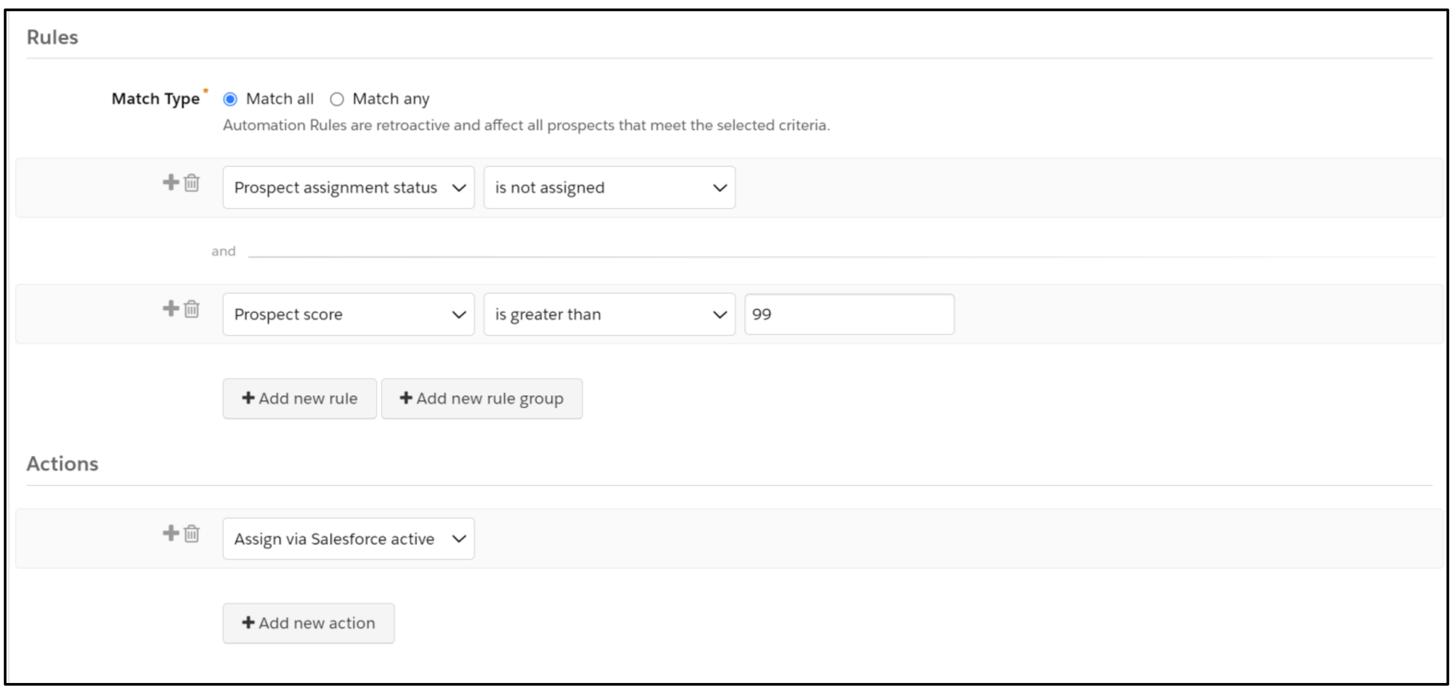
Note: To set "Prospect Time/Prospect was active," choose "Last activity days ago," and select "is not empty." That will only look at Account Engagement prospects who were once active.

Score Decay – Option 2



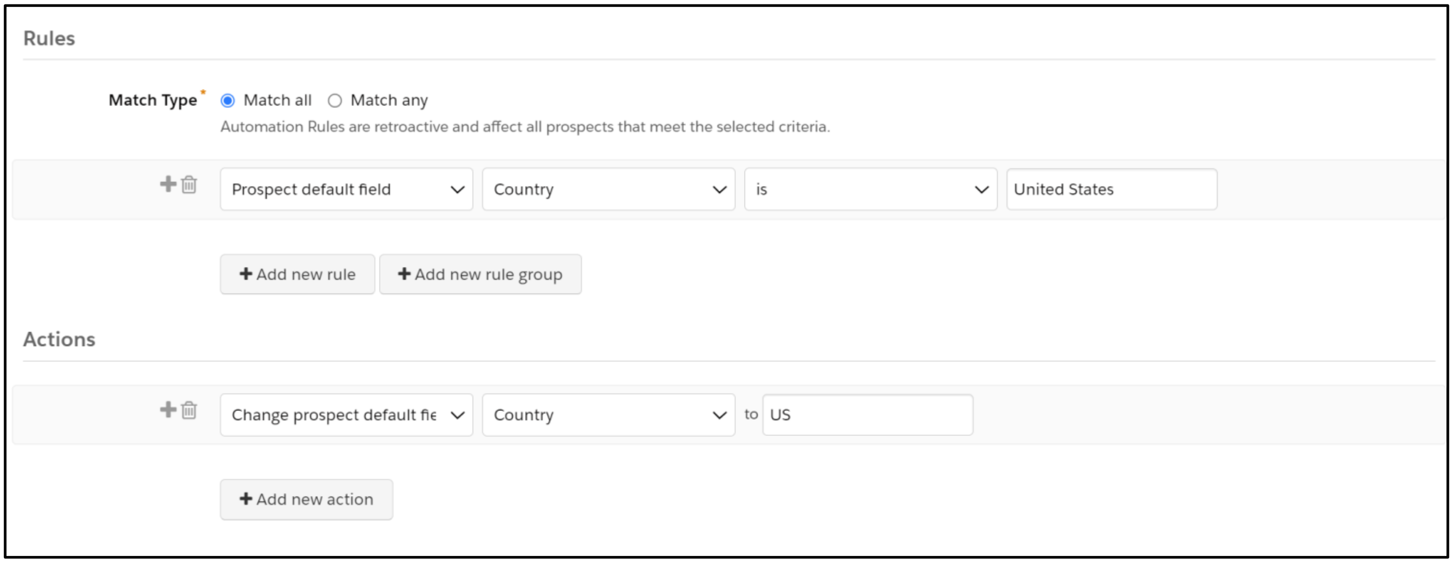
Here is another style of score decay. If the prospect has been unengaged and inactive for six months, drop the score to five.

Assigned



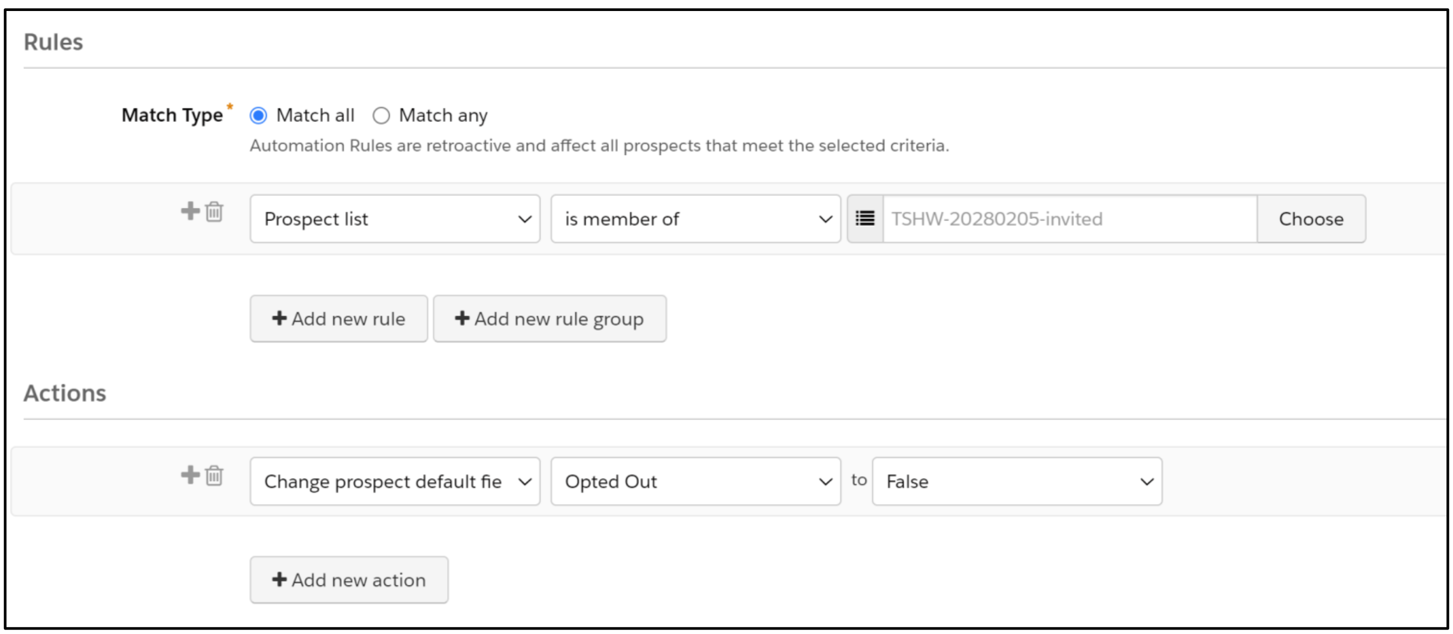
If the prospect is not assigned, but it has a score greater than 99, assign with Salesforce active assignment rules.

Data Cleaning



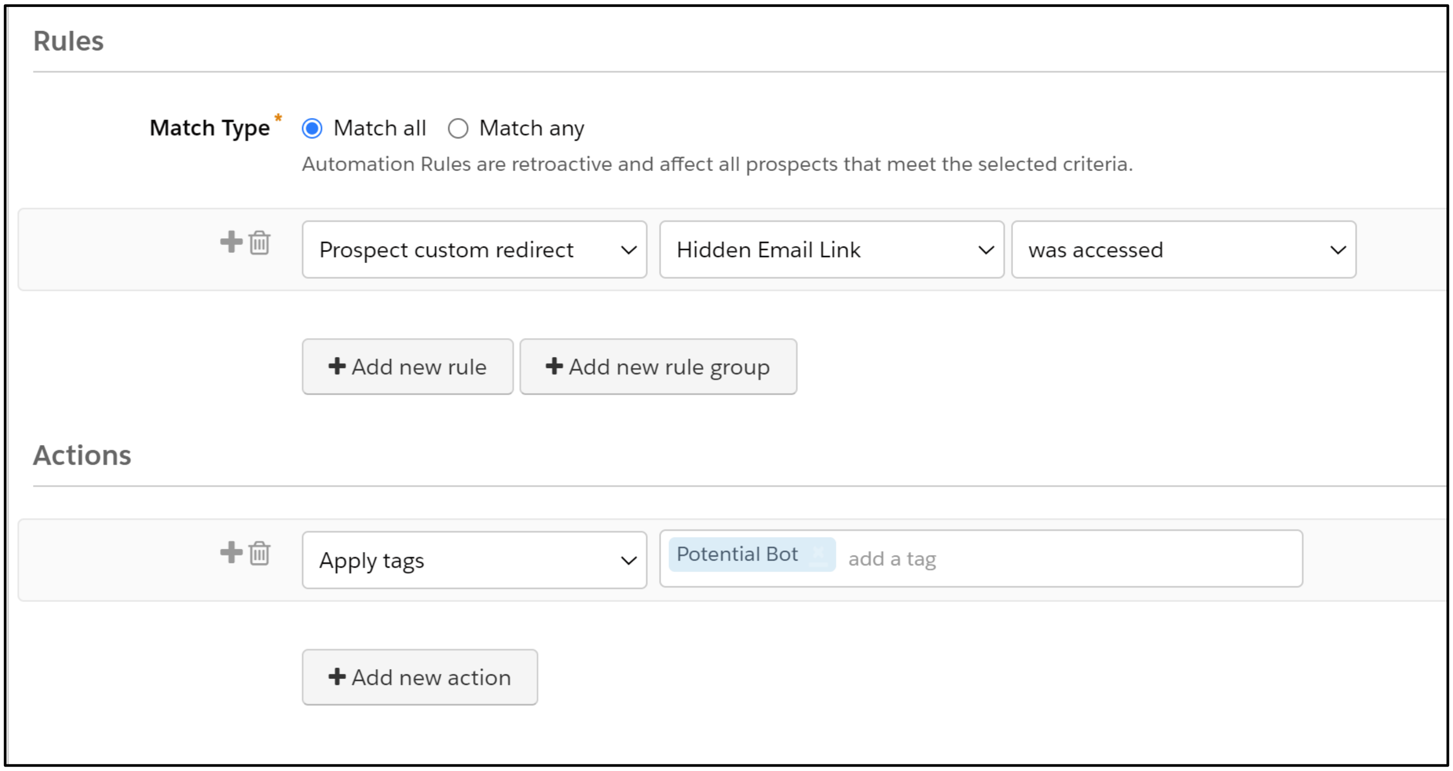
Keep you database clean! If a prosect comes into the system with Country as “United States,” change it to “US.”

Manage Mailability



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.

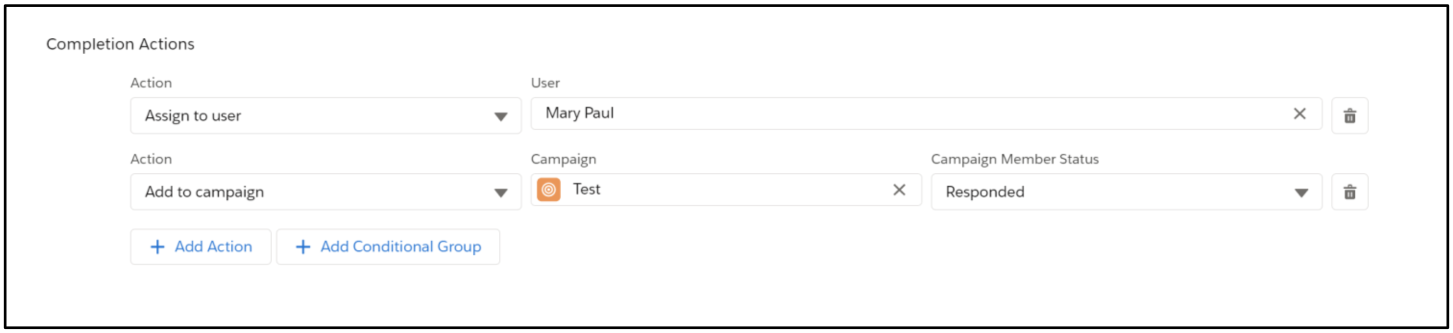
Identify Bot Clicks



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.

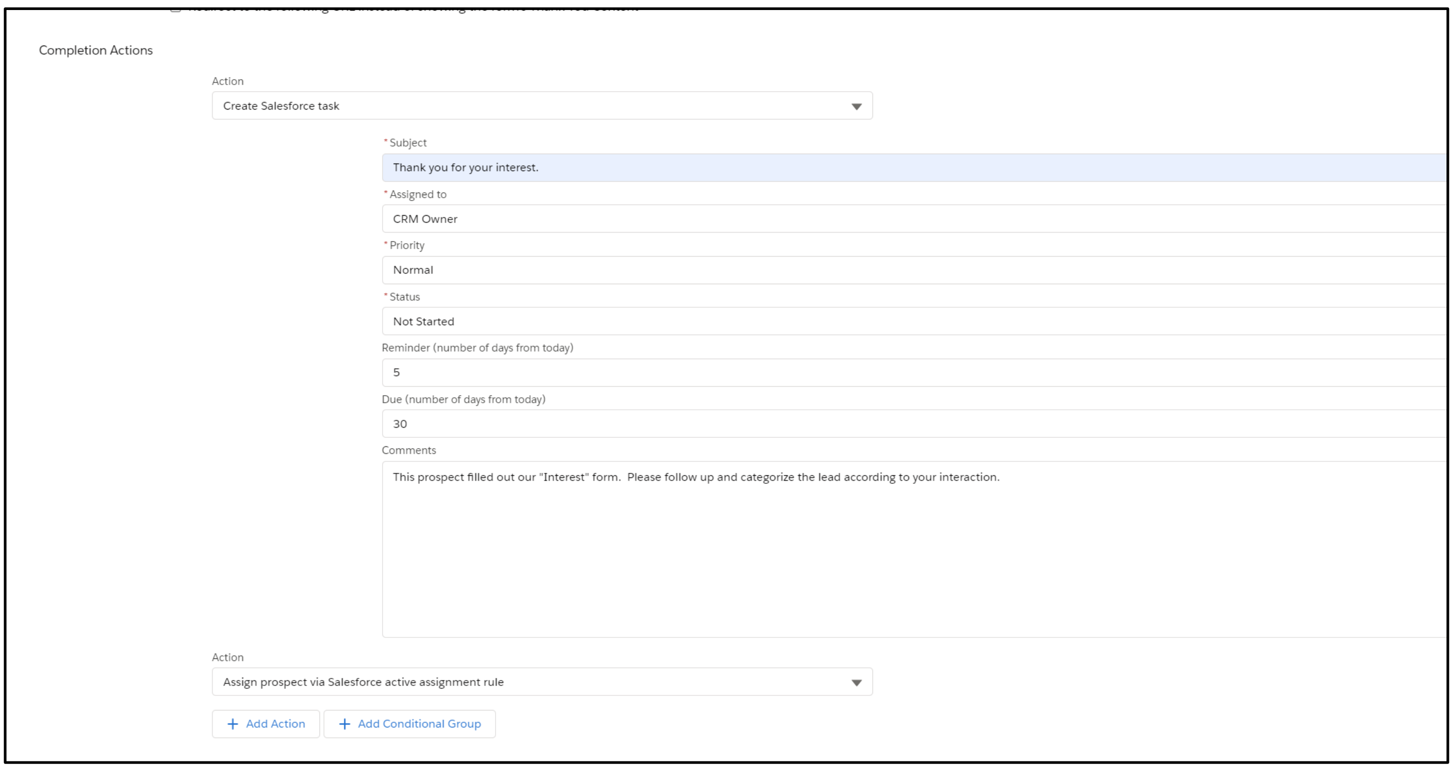
Completion Actions

Assign to user and add to campaign



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

Create Salesforce task



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

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

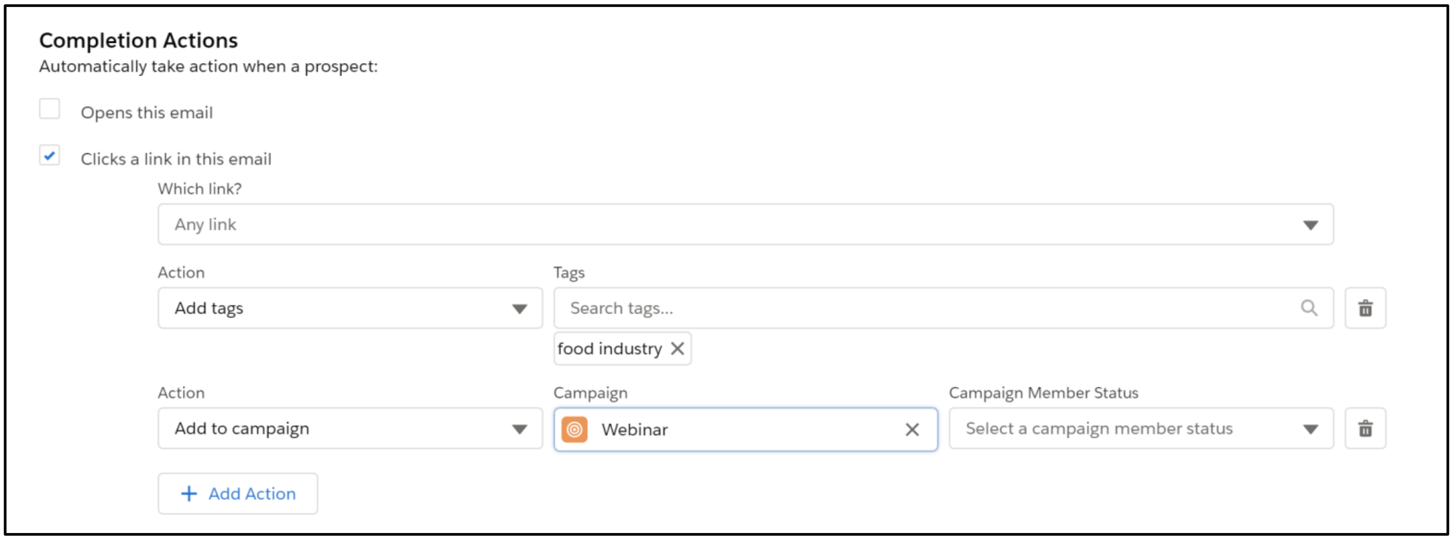
Send Autoresponder

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

Change Source field

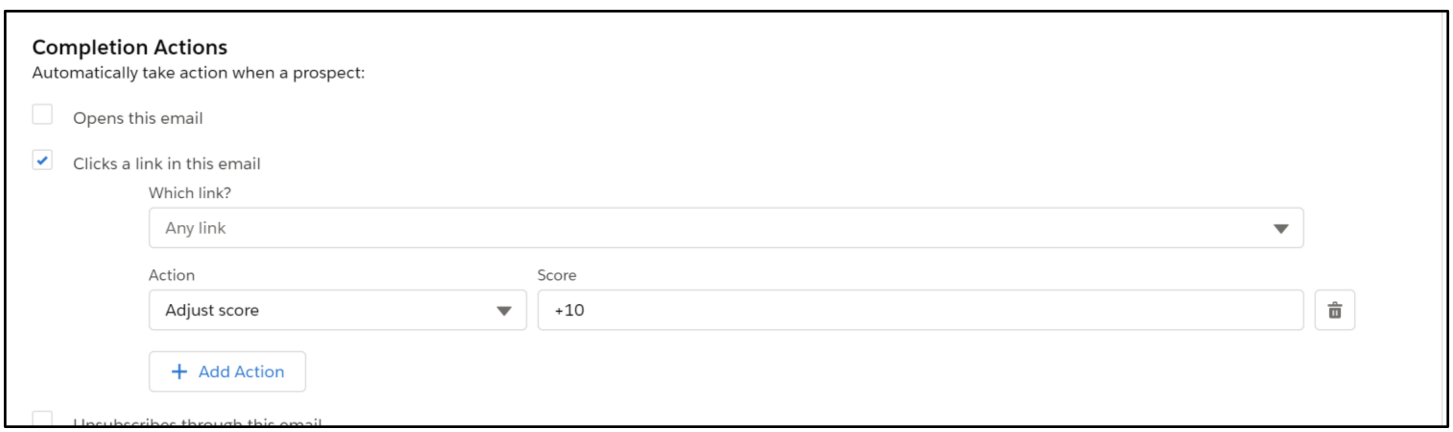
This form completion action will change the Source value to “Spring Fling Trade Show” for each form submission.

Email – Any click



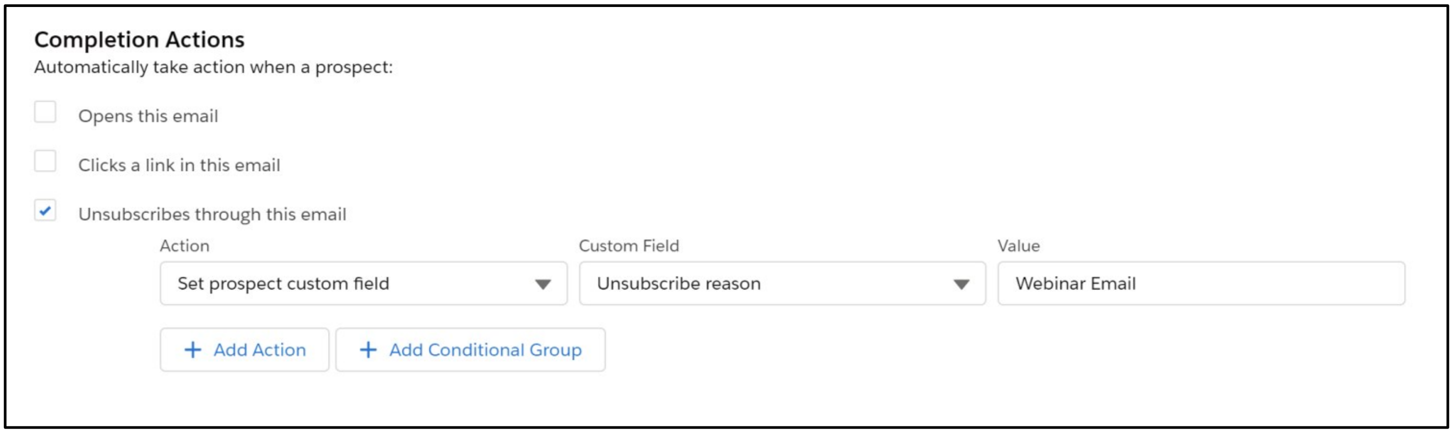
Any prospect that clicks in the email will get tagged and added to the campaign.

Email – Any click adjust score



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

Email – Unsubscribe reason



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.