
Engagement Studio Implementation Guide

Salesforce, Summer '23



CONTENTS

Nurture Leads with Engagement Studio	1
Considerations for Using Engagement Studio	1
How Engagement Studio Works	2
Engagement Studio Overview	2
Engagement Program Steps	3
How Wait Periods Work in Engagement Programs	5
Engagement Studio FAQ	6
Build Engagement Studio Programs	8
Create Engagement Programs	8
Add Steps to an Engagement Program	9
Test and Start Engagement Programs	9
Edit Engagement Programs	10
Let Prospects Repeat Engagement Programs	10
Engagement Program Reporting	11
Tips, Tricks, and Next Steps	12

NURTURE LEADS WITH ENGAGEMENT STUDIO

Engagement Studio programs are completely customizable so you can tailor the prospect experience to generate the most promising leads for your sales team. Build, test, and report on powerful engagement programs that let you target prospects based on behavior and critical qualifying values. Provide a personalized experience for your prospects, and turn them into marketing-qualified leads.

EDITIONS

Available in: All Account Engagement Editions

 **Note:** Prefer a different style of learning? Check out resources like Trailhead modules and expert coaching.

- Trailmix: [How to use Engagement Studio](#)
- Trailmix: [How to use Automation Tools](#)

Considerations for Using Engagement Studio

When working with Engagement Studio programs, keep these considerations in mind.

EDITIONS

Available in: All Account Engagement Editions

- Your edition determines how many engagement programs can run at one time.
 - Account Engagement **Growth** Edition: Up to 20 total engagement programs and up to 10 repeating programs.
 - Account Engagement **Plus** Edition: Up to 100 total engagement programs and up to 10 repeating programs.
 - Account Engagement **Advanced** Edition Edition: Up to 200 total engagement programs and up to 10 repeating programs.
 - Account Engagement **Premium** Edition Edition: Up to 200 total engagement programs and up to 15 repeating programs.
- For best performance, limit your program to fewer than 300 steps.
- Engagement programs are considered inactive when no new prospects are added or moving through the program for 30 days. To view inactive programs, use the filter on the engagement program list view.
- To target prospects who fill out a form embedded on a landing page, use a landing page trigger step.
- Engagement Studio doesn't allow more than one prospect with the same email address in a single program. This limitation is in place to avoid sending the same email to a single address multiple times.
- A single rule step can evaluate up to five conditions.
- Steps in engagement programs don't share or inherit settings. For example, if you have a Send Email action and an Email Open trigger for the same email, select the email on each step.
- Only one user can edit an engagement program at a time. If you want to access a program that's locked for editing, contact the user editing the program or ask your Account Engagement admin to end the editing session. Engagement programs that are locked for editing are released after 15 minutes of inactivity.
- To ensure a prospect receives the email from an email send step, avoid adding subsequent actions that change their mailability status.

How Engagement Studio Works

Engagement Studio programs consist of conditional steps that define the prospect journey. You choose which recipient lists you want to use for a program, build your program according to your marketing plan, and then let Engagement Studio do the heavy lifting for you. Engagement programs can be paused or edited at any time.

EDITIONS

Available in: All Account Engagement Editions

Engagement Studio Overview

Engagement Studio is a robust lead nurturing tool in Account Engagement, which you can adapt to your needs. Here's an overview of how engagement programs work and how to work with them.

EDITIONS

Available in: All Account Engagement Editions

Recipients

When starting a new program, you fill in basic program information and select at least one recipient list. You can use multiple lists with a single engagement program. When you add new prospects to a program recipient list, they start the program from the beginning. You can add new prospects to the program at any time without affecting other prospects in the program.

Step Types

There are three types of steps available in engagement programs:

- **Triggers:** wait for prospect actions.
- **Rules:** define paths based on prospect criteria.
- **Actions:** do something to prospect records.

Wait Periods

When you add or edit a program step, you can hold prospects there for a specific period of time before moving them to the next step. On trigger steps, you can instead choose to hold prospects for a maximum period of time. Holding for a maximum period of time means that if the trigger occurs, the prospect moves to the next step immediately.

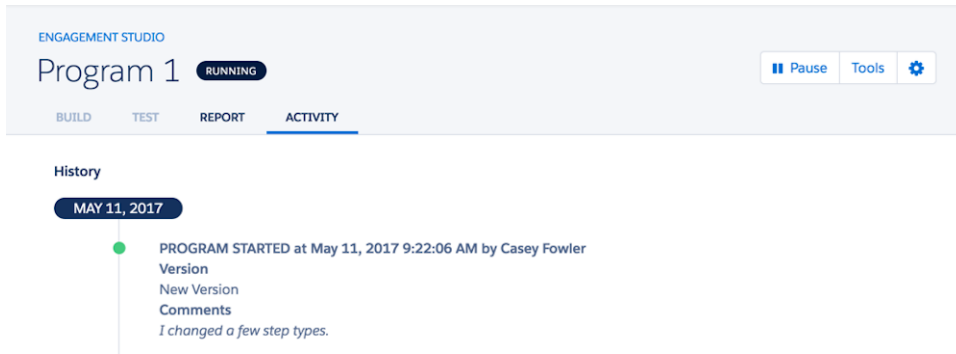
Pausing and Editing Programs

You can pause or make changes to your engagement programs at any time. Programs must be paused before you edit them. Changes to steps only affect prospects who land on those steps in the future. If a prospect is waiting on a step when a program is paused, the wait period is paused as well. When the program resumes, the prospect finishes the wait they're on before moving to the next step.

Only one user can edit an engagement program at a time. If you want to access a program that's locked for editing, contact the user editing the program or ask your Account Engagement admin to end the editing session. Engagement programs that are locked for editing are released after 15 minutes of inactivity.

Versioning

Engagement programs have built-in version control. When a user pauses and restarts a program, Account Engagement saves a version of the program from before the pause. Versions can help you see the impact of small changes to your programs so you can evolve your marketing strategy accordingly.



Engagement Program Steps

Engagement programs are made up of steps that serve different purposes. There are three basic types of steps: trigger steps, rule steps, and action steps.

EDITIONS

Available in: All Account Engagement Editions

Engagement Program Triggers

In an engagement program, use trigger steps to define paths based on prospect actions.

EDITIONS

Available in: All Account Engagement Editions

Trigger Definitions

Trigger	What It Does
Email Open	Checks for an HTML email open.
Email Link Click	Checks for link clicks in an email. Choose to trigger on a specific link or any link.
External Activity	Checks for a specific prospect activity that occurs in a third-party app. This trigger requires Marketing App Extensions to be configured in Salesforce Marketing Setup.
Form	Checks for a form view or submission. Choose to trigger on a specific form or any form. To trigger by forms on an Account Engagement landing page, use the Landing Page trigger.
Landing Page	Checks for a landing page submission. Choose to trigger on a specific landing page or any landing page.
Custom Redirect Click	Checks for a custom redirect click. Choose to trigger on a specific custom redirect or any custom redirect.

Trigger	What It Does
File Download	Checks for download of non-image, hosted content files. Choose to trigger on a specific file or any file.

Engagement Program Rules

In an engagement program, rule steps define criteria-based paths for prospects. A single rule step can evaluate up to five conditions.

Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

EDITIONS

Available in: All Account Engagement Editions

Rule Definitions

Rule	Path Based On
Assigned Salesforce Queue	Prospect's assigned Salesforce queue.
Assigned User	The user that the prospect is assigned to.
Assignment Status	Whether a prospect is assigned or not.
Grade	Prospect's grade.
List	Prospect's list membership.
Prospect Custom Field	Prospect's custom field value.
Prospect Default Field	Prospect's default field value.
Score	Prospect's score.
Prospect Tag	Prospect's tags.
Salesforce Campaign	Prospect's Salesforce campaign membership.
Salesforce Campaign Status	Prospect's Salesforce campaign status.
Prospect Email Status	Prospect's email status: opted out, do not email, hard bounce detected, soft bounce detected.
Pardot Campaign	Prospect's Account Engagement campaign membership.
Salesforce Status	Prospect's Salesforce status is Lead, Contact, or Deleted.

Engagement Program Actions

In an engagement program, action steps do something to prospects, such as sending them an email or changing a field value.

EDITIONS

Available in: All Account Engagement Editions

Action Definitions

Action	What It Does
Add to List	Adds the prospect to a list you select. Can be used to add prospects to another engagement program's recipient list.
Add to Salesforce Campaign*	Adds the prospect to a Salesforce campaign. You can select which Salesforce campaign and status to give the prospect.
Adjust Score	Adjusts the prospect score by a selected amount or to a designated number.
Apply Tags	Applies tags to a prospect.
Assign to Group	Assigns the prospect to a user group.
Assign to User	Assigns the prospect to a user.
Assign to Salesforce Active Assignment Rule*	Assigns the prospect to an active Salesforce assignment rule. Salesforce takes the prospect and creates a lead, and then assigns it based on your Salesforce assignment rule.
Create Salesforce Task*	Creates and assigns Salesforce tasks.
Change Prospect Field Value	Clears or changes a prospect field value.
External Actions*	Triggers an external action to execute a task outside of Account Engagement.
Notify User	Notifies a user of a prospect action. You can select the assigned user or a specific user.
Remove from List	Removes the prospect from the list you select.
Remove Tags	Removes tags from a prospect.
Send Email	Sends the selected email template to a prospect.

* Requires a verified Salesforce connector.

How Wait Periods Work in Engagement Programs

When you add or edit a program step, you can choose to hold prospects there for a specific period of time before moving them to the next step. How wait periods function in a program depends on whether the step is a trigger, action, or rule.

EDITIONS

Available in: All Account Engagement Editions

Wait Options

The options available for waits depend on the type of step you're working with. Action and rule steps can be evaluated immediately or after a specific period of time. For email send actions only, you can specify the date that you want the email to be sent. If no date is specified, the email is scheduled to send immediately when the prospect lands on the step.


Triggers wait for a prospect to take action, so you have the option to set a specific wait time or a maximum wait time. If the trigger occurs within a specific wait time, Engagement Studio still waits the full time before moving the prospect to the next step. If the trigger occurs during a maximum wait time, the prospect moves to the next step as soon as the trigger is met.

This table defines the different wait period options and shows which steps each is available for.


Wait Option	Available In	Evaluates
Immediately	Action Steps, Rule Steps	When the prospect lands on the step.
Wait	All Steps	After the specified amount of time.
Up to a max of	Trigger Steps	After the specified amount of time. If the trigger is met during the wait, the prospect moves to the next step immediately.
On date	Send Email Action Step Only	On the specified date. If the prospect lands on the step after the specified date, the email isn't sent to them and they move to the next step.

Pausing Engagement Programs


If a prospect is waiting on a step when a program is paused, the wait period is paused as well. When the program resumes, the prospect finishes the wait they're on before moving to the next step. This example shows how this logic works.

 **Example:** A prospect lands on an email send action step with a five-day wait period. On day two of the wait, you pause the program for three days. When you resume the program, the prospect still has the remaining three days of their original wait period to go before the email sends to them.

For date-based wait periods on email send actions, waiting prospects don't receive the email at all if the program is in a paused state on the date specified. When the program resumes, they move to the next step. This example shows how this logic works.

 **Example:** A prospect lands on an email send action step, scheduled to send on May 6. You pause the program from May 4 to May 10. Because the program is paused on the scheduled send date, the prospect moves to the next step when the program resumes and they don't receive the May 6 email at all.

If a wait time is removed while the program is paused, prospect activity is evaluated from the time the prospect landed on the trigger step to the amount of time the program was paused. Depending on the circumstances, waiting prospects can automatically be sent down the "no" path for the trigger action when the program is resumed. This example shows how this logic works.

 **Example:** A prospect lands on a trigger step, clicks the trigger link after three hours, and enters a five-day wait. You pause the program, remove the wait time, then resume the program after one hour. The system evaluates the prospect's activity for only the first hour after they land on the trigger step because that's how long the program was paused for. The waiting prospect didn't take any action during the first hour, so they're sent down the "no" path for the trigger action.

Engagement Studio FAQ

Review frequently asked questions about Engagement Studio.

What happens if I remove a prospect from a program list?

EDITIONS

Available in: All Account
Engagement Editions

If a prospect is removed from a list that a program is using, that prospect stops moving through the program. If you remove a prospect from a program's recipient list, and then add the prospect back later, they start where they left off in the program.

What happens if a prospect opts out of a list that a program is using?

Opt-out status only applies to marketing emails. If a prospect opts out of a program list, they move through the program but don't receive emails from that program. However, if the prospect is on multiple lists used for the same program, they could still receive program emails.

Can I merge two prospects in the same program?

Yes, but there are some things to note. When you merge prospects, you choose a primary prospect record. When merged prospects are members of the same engagement program, the new primary prospect starts from the step that any of its merged prospects touched most recently. Depending on the most recent touchpoint, it's possible for the primary prospect to skip steps or move through the same step twice.

What if a waiting prospect is suppressed or removed from a list?

Prospects on a step with a wait who are either suppressed or removed from a list are removed from the program. If a prospect is added back to the list or is no longer suppressed, they go to the next step at the originally scheduled date and time.

What happens to prospects that are waiting on a step when a program is paused and the step is deleted?

When the program resumes, the prospect is immediately moved to the next step in the program.

Is it possible for a prospect to land on a step with an email scheduled for a date that has passed?

Yes. For example, if a prospect is added to a list feeding an older engagement program. If a prospect lands on an email step scheduled for a date that passed, the email step skips them and doesn't send. They immediately move to the next step in the program.

Can I add prospects to an active program?

Yes. You can add prospects to a running engagement program at any time. When you add a prospect to the program list, they start the program at the beginning.

Can I change the list for an engagement program?

Yes. However, make sure that the program is actually running and isn't still starting up. When you start a program, there's an initial "starting" state. Changing lists while the program is in the process of starting can cause prospects to be removed by mistake or skip steps.

How do scheduled sends work with sending emails only during business hours work?

Prospects are sent the email at the start of business hours for the program's time zone on the scheduled date. Prospects that arrive on the step after the end of business hours on the scheduled date are skipped and don't receive the email.

How do waits work with sending emails only during business hours?

When you customize business hours for sending email, wait periods still count each day. If a wait period expires outside of business hours, the email sends at the next available time. For example, if email A sends on Wednesday, and Email B has a three-day wait, the wait ends on a Saturday. Email B sends when business hours resume on Monday.

I just want to send a series of emails to my prospects. Can I do that?

Yes. You can use Engagement Studio to send a simple series of emails, without branching paths based on engagement or other prospect criteria. Build a program made up of only Send Email action steps. You can set a cadence for your emails, or choose the exact dates for each email send.

Why can't I select my Custom Field for use in the Engagement Studio Program?

The Custom Field of type CRM User is available in other automations but not in Engagement Studio Programs.

Build Engagement Studio Programs

Before you begin working with programs in Engagement Studio, review our content on how Engagement Studio works and come up with a plan for your engagement programs. You can pause and edit running programs at any time to adjust your steps or program settings.

Create Engagement Programs

After you segment your audience and finalize the content that drives your marketing, you're ready to create an engagement program.

1. Open Engagement Studio.
 - In Account Engagement, select **Marketing** and then select **Engagement Studio**.
 - In the Lightning app, select **Automations** and then **Engagement Studio**.
2. Click **+ Add Engagement Program**.
3. Enter a name for internal use.

The screenshot shows a modal form for creating an engagement program. At the top right is a 'Cancel' link. The form contains the following elements:

- Name***: A text input field.
- Folder***: A dropdown menu currently showing 'Uncategorized / Engagement Programs'.
- Description**: A large text area for entering details.
- Recipient List**: A dropdown menu with 'Select list(s)'.
- Suppression List**: A dropdown menu with 'Select list(s)'.
- Two checkboxes:
 - Send emails during business hours only
 - Allow prospects to enter program more than once
- Save**: A blue button with a checkmark icon.

4. Choose a folder.

EDITIONS

Available in: All Account Engagement Editions

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To create an engagement program:

- Account Engagement Administrator or Marketing role

5. If needed, enter a description for internal use.
6. Click **Recipient Lists**, and select a list. You can also select a suppression list to exclude from your program.
7. Save the program.

After you save your program settings, you're ready to add steps and build out your prospect paths.

Add Steps to an Engagement Program

After you create an engagement program, you can add as many steps and branching paths as you need. For best performance, we recommend capping your programs at a maximum of 300 steps.


1. Open Engagement Studio.
 - In Account Engagement, select **Marketing** and then select **Engagement Studio**.
 - In the Lightning app, select **Automations** and then **Engagement Studio**.
2. Open the program that you want to work with. If you're editing an existing program, click **Pause**.
3. Select the **Build** tab.
4. On the program canvas, use the + icon to add steps.
5. Select a step type, such as Action. Then, select an option for that step type, such as Assign to User.
6. Fill in the required fields, and then click **Save**.

To save time, copy and paste the steps you've created that you want to repeat. Click **Select**, choose the steps you want, and then click **Copy**. To add the steps, select **Copied Steps**.

An engagement program can have up to 10 copied steps.

Test and Start Engagement Programs

Engagement Studio includes a robust testing experience that lets you navigate steps and preview associated assets. Make sure that your program flows and works as you intended, and make needed adjustments before you start the program.

 **Important:** Warnings on engagement programs are dismissible. If you receive a warning, carefully review the steps in question to make sure that your program is set up correctly.

1. From the program, click the **Test** tab.
2. To move through the steps, follow the prompts.
3. To restart from a step or preview assets, select one in the log.
4. When you're satisfied with your tests, click the **Start** button to begin the program.

Return to your program at any time to check reporting, pause and edit, or check the status of prospects in the program.

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To create an engagement program:

- Account Engagement Administrator or Marketing role

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To test an engagement program:

- Account Engagement Administrator or Marketing role

Edit Engagement Programs

Pause and edit engagement programs to adjust step settings, delete or add steps, update recipient lists, and make other changes. When you resume the program, it picks up where it left off.

1. Open an engagement program, and click **Pause**.
2. Click the **Build** tab.
3. Edit and test your program.

When you're done editing and testing your program, click **Start** to resume the program.

EDITIONS

Available in: All Account Engagement Editions

USER PERMISSIONS

To edit an engagement program:

- Account Engagement Administrator or Marketing role

Let Prospects Repeat Engagement Programs

Remind prospects of recurring events, renewals, and other activities with repeating engagement programs. Allowing prospects to enter a program more than once simplifies your workflow and saves you the time of rebuilding duplicate programs.

All the standard considerations for using engagement programs apply to programs that are repeatable. Here are a few additional considerations for working with repeating programs:

- You can have up to 10 scheduled and active repeating programs at a time.
- After you start a repeatable program, you can't change it back to a one-time program. However, you can edit the reentry settings.
- For programs with limited entries, the start and end steps show you how many prospects completed the program and are eligible to reenter.
- The tooltips show the total number of prospects who completed steps and doesn't account for repeat prospects. For example, if 5 prospects enter a program twice, the number would be 10.
- When you edit reentry settings for an active program, the new settings apply to prospects currently in the program. For example, if you decrease the max entry limit, prospects on the end step who meet the new limit aren't eligible to reenter.

To make a program repeatable, select **Allow prospects to enter a program more than once** when you create or edit a program. Use only whole numbers for the days before eligible to reenter setting, and if you limit total program entries.

EDITIONS

Available in: All Account Engagement Editions

Allow prospects to enter program more than once

Days before eligible to reenter:

Limit Program entries?

No, allow unlimited entries.

Yes, limit total entries to:

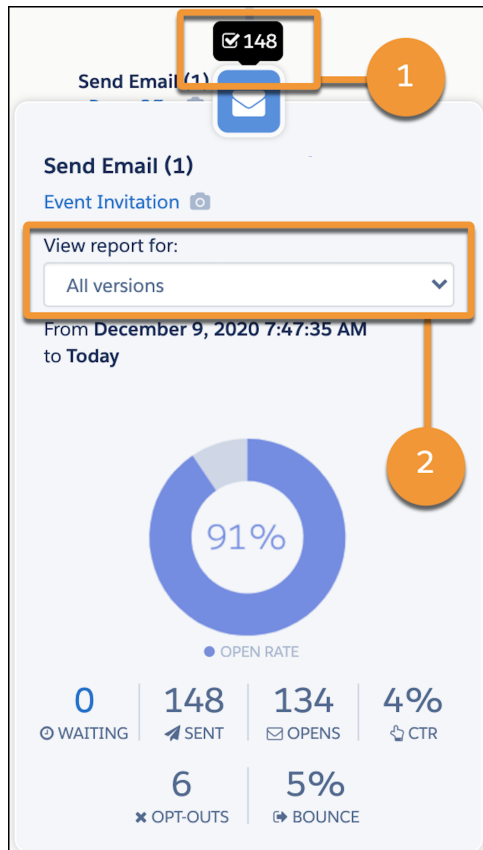
[✔ Save](#)

Engagement Program Reporting

To gauge how well your engagement program nurtures your prospects, review program metrics in the Report tab of a running or paused program. Tools are available in the toolbar, the canvas, and on individual cards.

EDITIONS

Available in: All Account Engagement Editions



Each step of your program shows a tooltip with high-level metrics based on prospects who have completed the step. To access more detailed metrics, click the step to open its Report Card. The Report Card shows basic metrics including the number of prospects queued on the step (1). To see only a specific version of your engagement program, select one from the report view dropdown (2).

To download your program report as a CSV, click **Tools** and then **CSV Export**. The export contains all versions of your program, including the total number of prospects started and completed, percentage completed, step type, step name, and asset name.

On the canvas, you can set a date filter to show data for a specific time frame. When you filter by date, the tooltip and exports show only the activities that occurred during that time.

Here are a few additional things to note about step metrics in Engagement Studio reports.

- Metrics don't include information for prospects who are currently waiting on that step.
- When you filter by date, the tooltip and exports show only the activities that occurred during that time. For example, you set a date range of Tuesday through Friday to see how prospects engaged with an email you sent on Monday. The statistics show 0 email sends because emails were sent only on Monday, and the report shows the number of opens from Tuesday through Friday.
- Like other email reports in Account Engagement, open and click-through rates are based on delivered emails.

Tips, Tricks, and Next Steps

Now that you're familiar with all the things Engagement Studio can do, here are a few best practices to keep things running smoothly. Additional resources are available to continue your learning and optimize your marketing automation strategy.

EDITIONS

Available in: All Account Engagement Editions

Tips and Tricks

- Avoid zero-day waits. A zero-day wait is processed immediately, which for many actions is too fast! To make sure that prospects have time to interact with your assets, allow a wait period of at least one day.
- Don't start a program with a trigger step. It's possible to start your program with a trigger step, but you miss some prospects that way. Triggers listen only for activity after a prospect joins a program. We recommend that you start with an action, such as an email send, to get prospects into the program. Then, add your triggers.
- Avoid bottlenecks. Set a reminder to check your reports regularly. Steps in your program can underperform for various reasons, such as the settings for each step or the email content you share. Don't be afraid to make small adjustments to your program over time.

Next Steps

- Test your knowledge with [Engagement Studio \(Lightning\)](#) and [Account Engagement Lead Nurturing](#) modules in Trailhead.
- Browse the [Account Engagement Customer Hub](#) for quick links to additional resources.
- Post questions in the [B2B Marketing Automation Trailblazer Community](#).
- Join [Ask an Expert](#) sessions.
- Check out [Common Engagement Studio templates](#) for advanced program ideas.
- Premier Success customers can ask their specialist for the Expert Coaching Session [How to: Account Engagement: Use Engagement Studio](#).