



Engagement Studio Implementation Guide

Salesforce, Winter '22



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WELCOME TO ENGAGEMENT STUDIO

Engagement Studio is a lead-nurturing engine. It uses a flow builder to help you see and build intelligent, automated programs that engage your prospects at every step of their customer journey.

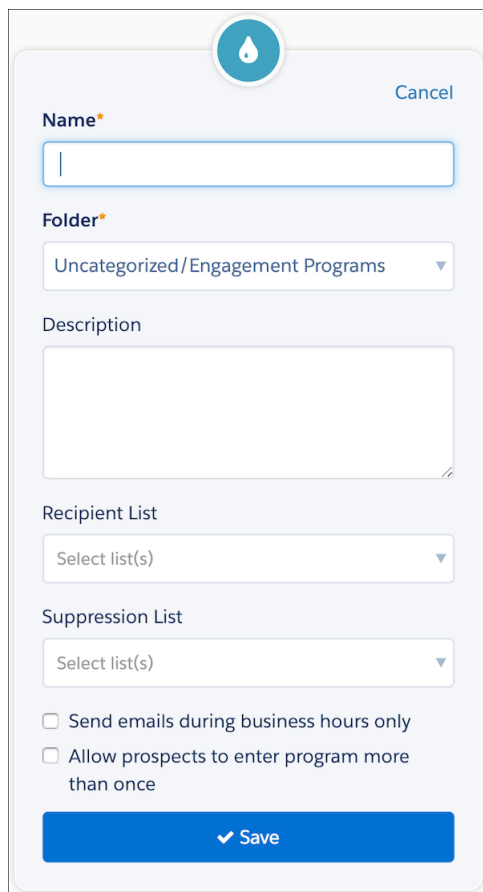
EDITIONS

Available in: All Pardot Editions

CREATE ENGAGEMENT PROGRAMS

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

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



The screenshot shows a modal dialog box for creating an engagement program. At the top left is a blue circular icon with a white drop symbol. At the top right is a 'Cancel' link. The form contains the following fields and options:

- Name***: A text input field with a cursor.
- Folder***: A dropdown menu currently showing 'Uncategorized / Engagement Programs'.
- Description**: A large text area for entering a description.
- 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
- A blue 'Save' button with a white checkmark icon.

4. Choose a folder.
5. Click **Recipient Lists** and choose a list.
6. Save the program.
7. From the Build tab, use the **+** icons to add steps.


EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To create an engagement program:

- Pardot Administrator or Marketing role

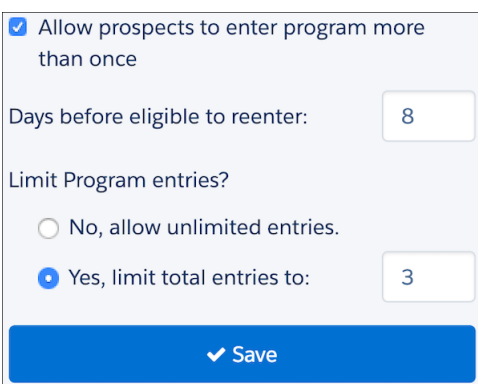
 **Note:** Engagement programs offer several optional settings. Choose whether to exclude suppression lists, send during business hours, and allow prospects to enter a program more than one time. You can also add a description, which prospects can't see.

Click the **Test** tab to test your program logic. When you're finished testing, click **Start** to begin the program.

Let Prospects Repeat a Program

While you build a new engagement program, choose whether to let prospects repeat the program. You can change an existing program to let prospects enter more than once, but you can't change that setting after the program is resumed.

1. Open an engagement program, or create one.
2. On the Start step, select **Allow Prospects to enter program more than once**.



3. For days before eligible to reenter, enter a whole number.
4. Choose whether to allow unlimited entries to the program or to limit the number of entries.
5. Save your changes.

Considerations for Repeating Programs

When you allow prospects to reenter an Engagement Studio program, keep these considerations in mind.

Settings and Reporting

- Use whole numbers (1–365) for the number of days before a prospect is eligible to reenter.
- Use whole numbers for the total number of entries.
- You can have up to 10 scheduled and active repeating programs at a time.
- After you set a program to allow reentry and start or resume it, you can't turn off the setting. Specific reentry settings can be changed.
- To see how many prospects have completed a program and are eligible to repeat, review the Start and End steps. When your program is set to unlimited entries, these metrics don't appear.
- Engagement Studio tooltips show the total number of times that prospects have completed a step. For example, if 5 prospects have entered a program twice, the tooltip shows 10.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To allow prospects to repeat a program:

- Pardot Administrator or Marketing role


EDITIONS

Available in: All Pardot Editions

Pausing and Resuming

If you pause an engagement program and change the reentry settings, the program honors the new settings for prospects who are already working through the automation.

- When you decrease the waiting period, prospects who are on the End step and meet or exceed the new setting can repeat immediately.
- When you increase the waiting period, prospects who are on the End step must wait longer to meet the new criteria.
- When you decrease the entry limit, prospects on the End step who meet the lower limit stay on the End step. They are no longer eligible to reenter the program.
- When you increase the entry limit, prospects on the End step who reached the previous limit are eligible to reenter the program immediately.

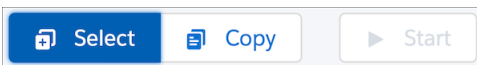
 **Note:** If you pause an engagement program and don't edit the reentry settings, the original wait times are honored. It's possible for a prospect to wait longer or skip a step, depending on when the program was paused.

Copy and Paste Engagement Program Steps

Reuse your favorite steps with copy and paste tools on the Engagement Studio canvas.

To copy steps on the Engagement Studio canvas, enter Select mode and choose what you want to copy.

1. Click **Select** in the toolbar.



2. Select up to 10 consecutive steps in the program.
3. Click **Copy**.
4. Click where you want the steps to appear, and select **Copied Steps**.

A valid selection includes no more than 10 consecutive, connected steps that appear in the body of the program. You can copy an End step, but make sure that you test thoroughly before starting your program.

Copied steps remain on your clipboard until you copy something else or end your editing session.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To copy and paste steps in an engagement program:

- Pardot Administrator or Marketing role and users with the Create permission in Engagement Studio

TEST ENGAGEMENT PROGRAMS

Engagement Studio's interactive testing experience takes you through your program steps, and helps you make sure that your program works as you intend. We recommend testing your programs before you start them. Adjust any steps that don't work the way you expect, and be sure that your program is perfect before you send the first email.

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.

When you're satisfied with your tests, click the **Start** button to begin the program.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To test an engagement program:

- Pardot 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.

1. Open the 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 restart the program.

EDITIONS

Available in: All Pardot Editions

USER PERMISSIONS

To edit an engagement program:

- Pardot Administrator or Marketing role

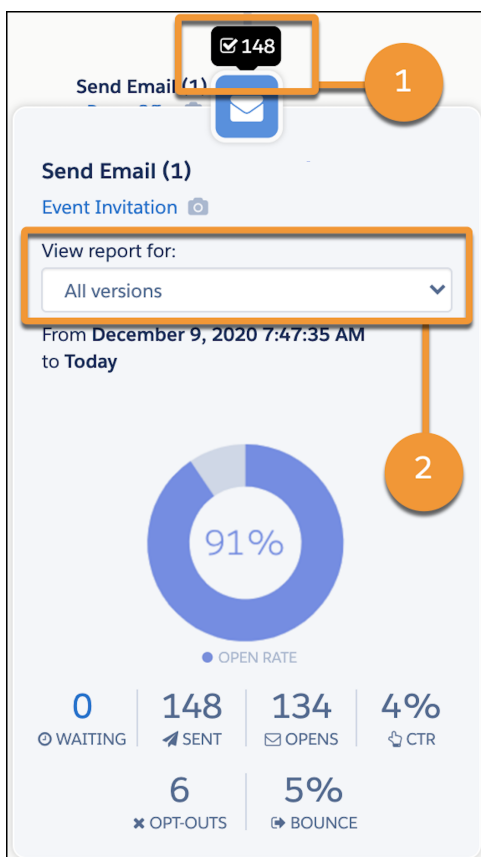
ENGAGEMENT PROGRAM REPORTING

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.

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).

EDITIONS

Available in: All Pardot Editions



On the toolbar, click **Tools** to download a CSV export file. 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 statistics for a specific time frame. When you filter by date, the tooltip and exports show only the activities that occurred during that time frame.

Example: On the canvas, Tamara sets a custom date range of Tuesday through Friday. When she opens the report card for a send email step, the statistics show 0 email sends. She realizes that this step schedules emails to send on Mondays only, so the filtered card can't show them. She resets the date filter to include Monday, and the email sends appear.

More About Metrics

- A step's metrics don't include information associated with 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 frame. 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.
- Open and click-through rate metrics are based on delivered email values. These formulas match the calculations used in other email reports.

ENGAGEMENT PROGRAM CONSIDERATIONS

Before you use or change an engagement program, keep these considerations in mind.

EDITIONS

Available in: All Pardot Editions

List and Prospect Changes

- If a prospect is removed from a list that a program uses, 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.
- If a prospect opts out of a list used for a program, they still move through the program, but don't receive program emails. If a prospect is on multiple lists feeding a program, the prospect could still receive emails. They must opt out of all lists feeding the program to stop receiving email.
- You can add prospects to a running engagement program regardless of where other prospects are in the program. Every time you add a prospect to the engagement program's recipient list, the new prospect starts at the beginning.
- When no new prospects are added to or processed in a program for 30 days, it becomes inactive. To find inactive programs, filter the Engagement Program list by the View dropdown. Knowing which programs are unused can help you plan your next marketing step or keep your program list tidy.
- When you merge prospects, you choose a primary prospect record. When merged prospects are members of the same engagement program, it's possible for one to skip steps or move through the same step twice. The new primary prospect restarts a program from the step that any of its merged prospects touched most recently.
- When you add prospects to an engagement program list from Salesforce, the prospect starts at the beginning of the program.

Email Changes

- To send a series of emails without checking for clicks or performing other actions, add Send Email actions without other triggers, actions, or rules.
- To add emails or steps to an engagement program at any time, pause and edit the program. Changes don't affect prospects retroactively. Prospects only experience edits to steps they haven't reached yet.

Limitations

- You can have up to 10 scheduled and active repeating programs at a time.
- For best performance, limit your program to fewer than 300 steps.
- Program steps don't inherit settings from previous steps. For example, if your program includes a Send Email action followed by an Email Open trigger, you must select the email template in both steps.
- Your edition determines how many engagement programs can run at one time.
 - Pardot **Growth** Edition: 20
 - Pardot **Plus** Edition: 100
 - Pardot **Advanced** Edition: 200

- If your form is on a Pardot landing page, a form view or submission doesn't satisfy a form trigger. Use a landing page trigger instead.
- Pardot's drip and engagement programs allow one prospect per email address per program. This limitation ensures that an email address associated with multiple prospects doesn't receive more than one copy of the same email.
- A single rule step can evaluate up to five conditions.

Engagement Program Step Types

Engagement programs are made up of steps that serve different purposes. Triggers wait for prospect actions. Rules define paths based on prospect criteria. Actions do something to prospect records.

When you add more than one step of the same type to a program, the canvas label adds a number. For example, if you send a few emails, you see Send Email, Send Email (1), and Send Email (2). The numbering occurs on all types of triggers, rules, and action steps. The numbers are added when you create the step, and they don't change when you add or remove adjacent steps.

EDITIONS

Available in: All Pardot Editions

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 Pardot 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.

Action	What It Does
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-Pardot connector.

Engagement Program Triggers

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

EDITIONS

Available in: All Pardot 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 Pardot landing pages, 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.
File Download	Checks for download of non-image Pardot 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. When a rule includes more than one condition, it's considered a Complex Rule.

EDITIONS

Available in: All Pardot Editions

Rule Definitions

Rule	Defines paths based on...
Assigned Salesforce Queue	a 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	a prospect's grade.
List	a prospect's list membership.
Prospect Custom Field	a prospect's custom field value.
Prospect Default Field	a prospect's default field value.
Score	a prospect's score.
Prospect Tag	a prospect's tags.
Salesforce Campaign	a prospect's Salesforce campaign membership.
Salesforce Campaign Status	a prospect's Salesforce campaign status.
Prospect Email Status	a prospect's email status: opted out, do not email, hard bounce detected, soft bounce detected.
Pardot Campaign	a prospect's Pardot campaign membership.
Salesforce Status	a prospect's Salesforce status is Lead, Contact, or Deleted.

How Does Time Work in Engagement Studio?

Wait periods let you hold prospects on a step until a specified time has elapsed, or a specific action occurs within a period. The way wait periods function in a program depends on whether the step is a trigger, action, or rule type, and whether a prospect is removed and readded to recipient lists.

EDITIONS

Available in: All Pardot Editions

Time Settings in Engagement Program Steps

You can configure time settings that control how long a prospect waits on a step before moving on. The time settings and results vary for each step type.

EDITIONS

Available in: All Pardot Editions


Actions

Time Setting	Engagement Studio applies the action...
Immediately	when the prospect lands on the step.
Wait	when the specified wait time has elapsed.
On Date (Send Email actions only)	on the specified date. Prospects who arrive on the step after that date skip the step.

Rules

Time Setting	Engagement Studio evaluates the criteria...
Immediately	when the prospect lands on the step.
Wait	when the specified wait time has elapsed.

Triggers

Time Setting	Engagement Studio holds prospects...
Wait up to a maximum of	<p>up to the wait time specified. When the trigger criteria is met during that time, the prospect continues on the Yes path immediately. When the trigger criteria isn't met, the prospect is moved to the No path after the specified time elapses.</p> <p> Note: Prospects who met these trigger criteria at any time after joining the program also continue on the Yes path immediately after reaching a step with this setting.</p>
Wait	for the entire wait time specified. After the time elapses, all prospects move to the appropriate paths, based on their activity.



Example: An email link click trigger step is set to wait up to a maximum of three days. A prospect landed on the trigger step at 3:01 PM on a Monday. In this case, the trigger listens for an email link click between 3:01 PM Monday and 3:01 PM Thursday.



Example: A trigger step is set to wait for 3 days. A prospect landed on the trigger step at 3:01 PM on a Monday. In this case, the program waits until Thursday at 3:01 PM to send the prospect down the yes or no path of the trigger.

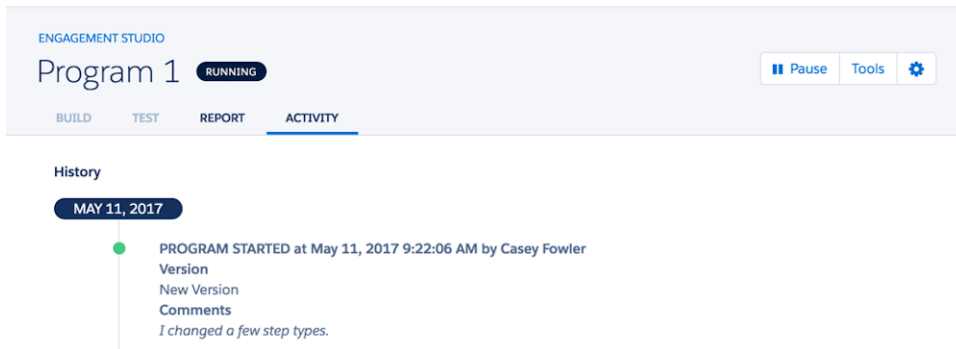
Engagement Program Versions

When an engagement program is paused and restarted, Pardot creates a version of the engagement program. Each version has a unique name, and you can add comments about it.

Creating a version doesn't restart prospects from the beginning, but versions can help you understand the value of small changes to of program steps. Click an edited step to see versioned report data. To view all version details, open the program's Activity tab.

EDITIONS

Available in: All Pardot Editions



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 Pardot 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 [Pardot Lead Nurturing](#) modules in Trailhead.
- Browse the [Pardot Customer Hub](#) for quick links to additional resources.
- Post questions in the [B2B Marketing Automation Trailblazer Community](#).
- Join [Ask a Pardot Expert](#) sessions.
- Check out [Common Engagement Studio templates](#) for advanced program ideas.
- Pardot Premier customers can ask their specialist for the [How to: Pardot: Use Engagement Studio Accelerator](#).