

## Drive Sales with Account Engagement

**Duration: 3 Days**    **Course Code: PDX-101**    **Delivery Method: Virtual Learning**

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### Overview:

Discover how to drive more qualified leads, nurture prospects through the sales cycle, and sell more effectively using Account Engagement. In this 3-day class, our experts will show you how to design and implement marketing workflows in Account Engagement to make data-driven decisions and drive your company's business forward. Learn how to create and automate dynamic emails, generate and qualify leads, and leverage reports and data to boost sales.

### Virtual Learning

This interactive training can be taken from any location, your office or home and is delivered by a trainer. This training does not have any delegates in the class with the instructor, since all delegates are virtually connected. Virtual delegates do not travel to this course, Global Knowledge will send you all the information needed before the start of the course and you can test the logins.

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### Target Audience:

This course is designed for Account Engagement Marketers and Salesforce Administrators responsible for designing, building, and implementing marketing workflows and reports using Account Engagement. Its also for Business Users looking to learn more about Account Engagement. This course is a great foundation builder for anyone looking to take the Salesforce Pardot Specialist Certification Exam.

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### Objectives:

- **When you complete this course, you will be able to:**
  - Enable Account Engagement
  - Explain the relationship created between Account Engagement and Salesforce once Account Engagement has been enabled.
  - Generate leads with Account Engagements various lead generation tools including Forms, Landing Pages, and Custom Redirects.
  - Manage leads with Account Engagements lead management tools including Page Actions, Automation Rules, Segmentation Rules, Dynamic Lists, and Completion Actions.
  - Engage leads with Account Engagements lead engagement tools including Email, Personalization, Dynamic Content, and Engagement Studio.
  - Qualify leads with Account Engagements scoring and grading functionality.
  - Interpret data generated via Account Engagements reporting capabilities.
  - Design and execute successful end-to-end marketing workflows using Account Engagement.
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## Content:

### Course Introduction

- Review Course Objectives
- Set Learner Expectations
- Review Housekeeping Items
- Review Additional Course Resources
- Explore Course Case Study

### Salesforce Integration

- Understand the Account Engagement-Salesforce Relationship
- Sync Data Between Salesforce and Account Engagement
- Enable Account Engagement in Salesforce
- Create Custom Fields
- Review Salesforce Campaigns

### Administration

- Create an Account Engagement Dashboard
- Authenticate Your Email Sending Domain
- Sync with Third-Party Applications Using Connectors
- Restore Assets from the Recycle Bin
- Create and Assign Users and User Groups
- Understand Usage Governance

### Visitors and Prospects

- Understand Account Engagement Visitors
- Understand Account Engagement Prospects

### List Management

- Create List Types
- Organize Prospects Using Static Lists
- Test Emails Using Test Lists

### Personalization and Email Marketing

- Personalize Your Emails with HML and Advanced Dynamic Content
- Automate Email Marketing
- Create Email Templates
- See What Works Best for Your Audience Using AB Testing
- Track Email Performance Using Email Reports

### Forms and Landing Pages

- Capture Leads with Forms
- Convert Visitors to Leads Using Landing Pages
- Track Leads with Forms and Landing Page Reports
- Track Clicks Using Custom Redirects
- Create Custom Redirect Reports

### Lead Management

- Trigger Page Actions
- Automate Actions from a Marketing Element Using Completion Actions
- Create a List of Prospects and Apply a Segmentation Action Using Segmentation Rules
- Create Repeatable, Criteria-Based Automation Rules
- Create Dynamic Lists
- Choose an Automation Tool

### Lead Qualification

- Understand Prospect Scoring
- Grade Prospects Based on Profiles

### Lead Nurturing

- Build an Engagement Program
- Create Engagement Program Reports

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## Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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