

Engagement Studio vs. Flows



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Credentials

- [Salesforce Marketing Champion](#)
- [Salesforce Partner](#)
- [Top Contributor on Trailblazer Community](#)



Disclaimers:

I could be wrong...

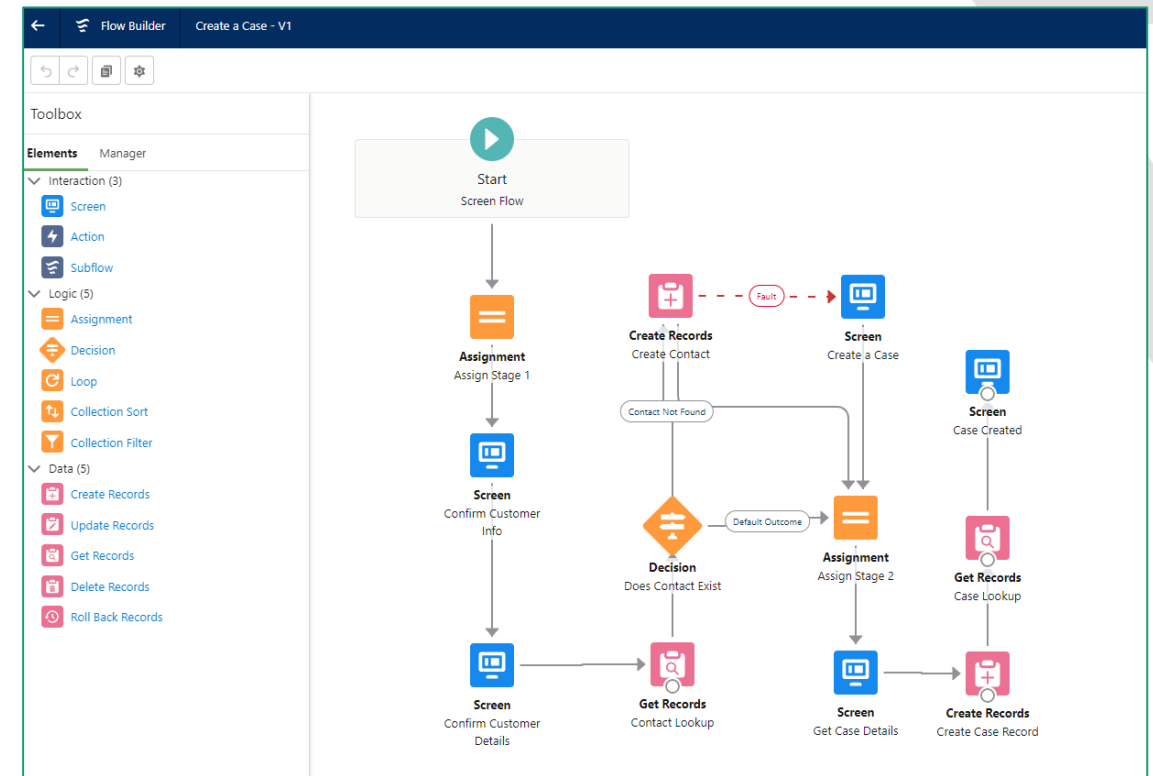
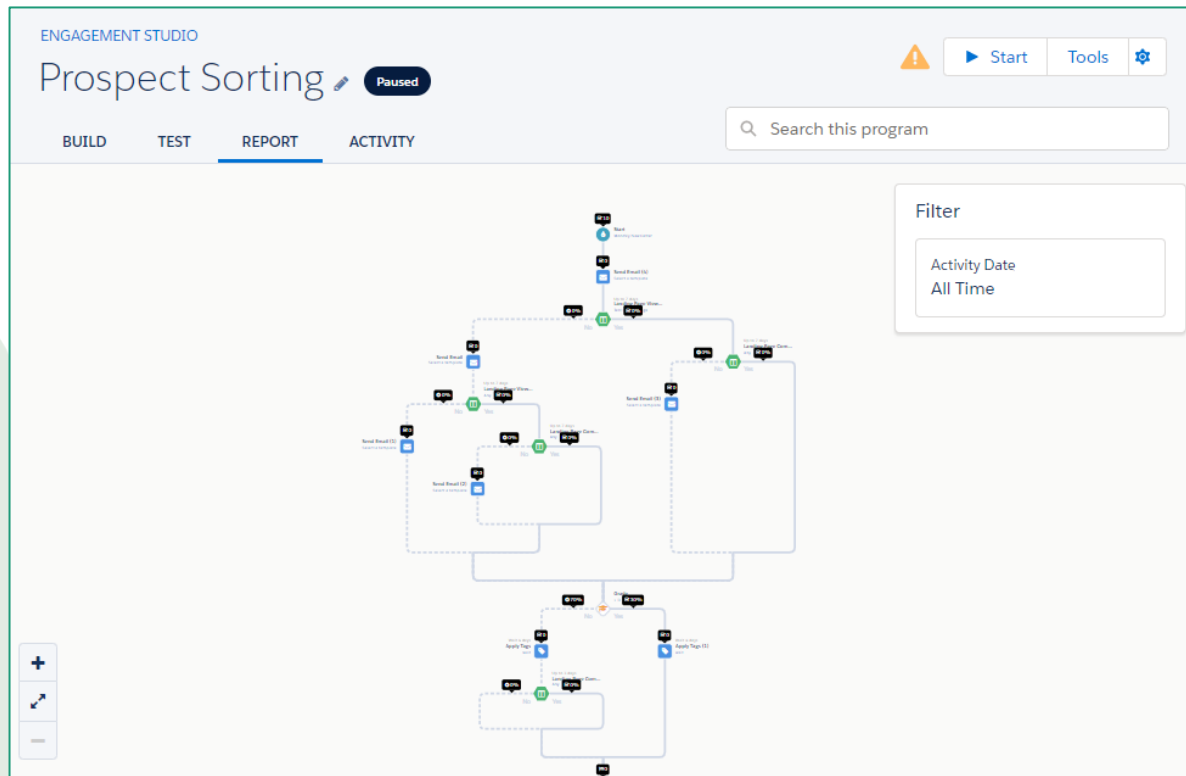
I could misspeak...

Things could change...

Test everything...

I'll probably say Pardot 100x

Engagement Studio vs Salesforce Flows



Tools for Multistep Automations



Why are we talking about this?



Engagement studios don't have to send email...



A Quick Comparison

Engagement Studio

- Account Engagement Only
- Learning Curve: Easy
- Static or Dynamic Start/Stops
- Sending Pardot Emails
- Logical Actions based on field values
- Run and Run and Run (Days)

Flows

- Salesforce “all platform”
- Learning Curve: Harder
- Planned Executions
 - Record Change Triggered
 - Time Triggered
 - “Interview” Triggered
 - “Invoked” by something else
- Run and Done (Milliseconds)

Engagement Studio

- Any AE Marketing user can create, regardless of SF profile
- Drag and drop and pretty easy to understand logical rules.

is empty

Is Blank?

PROSPECT CUSTOM FIELD

Prospect custom field

Favorite Fruit

is

Apples

+ Add Condition

Evaluate when?

☒ Immediately

☐ Wait

Save

Yes/No Path

Flows

- Administrator or high level permission set required.
- Clicks, not code, but a LOT MORE like programming.

Operator

Value

Is Null

{!\$GlobalConstant.True}

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER +

OUTCOME DETAILS

*Label

No

*Outcome API Name

NoChannelExist

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource

Broadcast Topic Collaboration Rooms from GetBr...

Operator

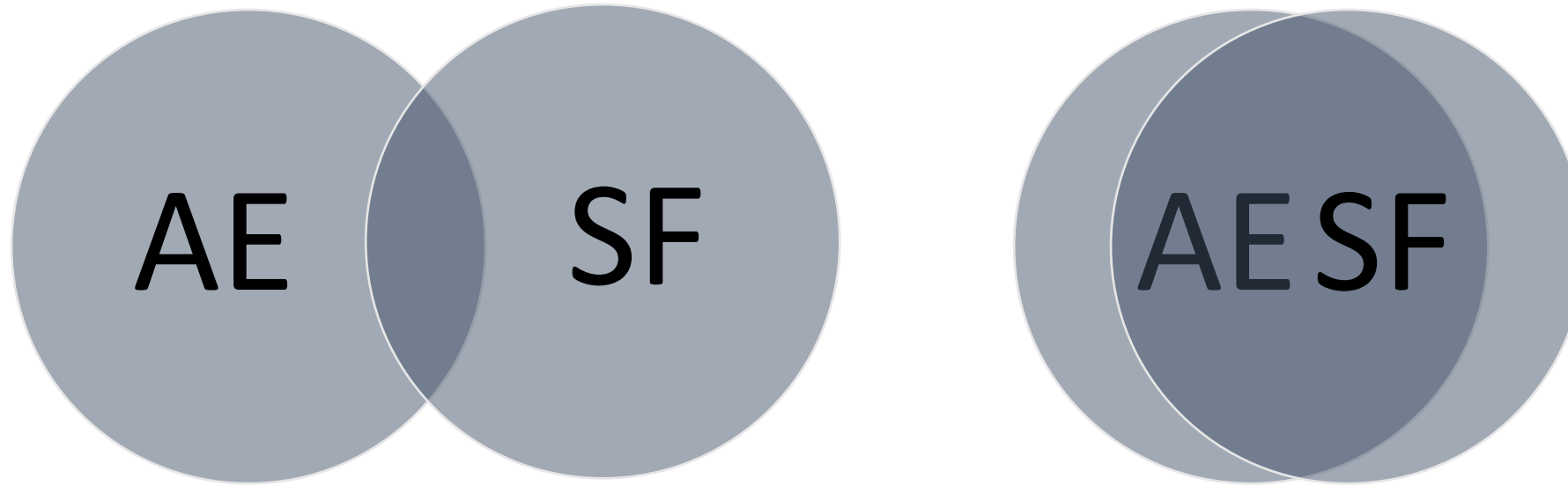
Is Null

Value

True

+ Add Condition

Q: What's your Org Overlap?



Q: What's the *timing or time horizon*?

- Pre-Salesforce Sync = Engagement Studio
- Continuous or Long Term Operation = Engagement Studio
- Quick field updates (*speed*) = Flow
- Scheduled Batch Operation = Flow

Q: Where's the interaction coming from?

- Engagement Studio are often* best when it's used to observe and act on external actions or the immediate result of an external action (forms, form handlers, page actions, etc.)
- Flows are often* best when used to action on changes in internal information. (record updates, related object updates)

*All good Marketers know we do not live in a world of absolutes!



3 C's of Engagement Studio Data Actions

- Count
 - Increment Field Values
 - Add to Scores (Standard and Scoring Categories)
- Compare
 - Branch logic based on field values
 - Watch until something happens
- Change
 - Modify values based on behavior
 - Track or watch behavior and adjust a field

3 C's of Flow Actions (In relation to AE)

- Calculate/Concatenate:
 - A fixed value in place of a formula field.
 - Combine information from multiple fields into another field
 - Transform data and rewrite it into the same field
- Copy:
 - A value in one field to another field.
 - A value from a related object to the Lead/Contact
- Create:
 - Related Objects (Contact Roles, Accounts as Campaign Members)

Key things Engagement Studio can do that Flows Cannot

- See and take action on Email Link Clicks
- Listen for AE Actions (Forms, downloads, etc)
- Use Tags
- Adjust Scores or Scoring Categories
- Measure/report cumulative statistics on itself
- Take actions before records are put in Salesforce
- Send Pardot Emails in a cadenced sequence
- Run continuously
- Alter Leads AND Contacts in a single step
- “Hold/Stage” prospects indefinitely

Key things Flows can do that AE Cannot

- Write to Accounts, Opportunities, Related and Custom Objects
- Copy something from one field to another
- Transform data (easily)
- Create new campaigns (automatically)
- Write to the *notes* field (automatically)
- Internal Looping– update multiple records
- Schedule a recurring action
- Create a *custom* Task
- Change Record Ownership once assigned

Tags: An underutilized AE-only resource

- Tags can be used to:
 - Call automations from within an ES
 - Call automations from a completion action
 - Pause an ES. (tag="wait")
 - Sequence automations or ES programs
 - Control list memberships that starts or stops an ES

Automation Concepts for Engagement Studio

- Sorting and routing of batch inbound leads (events)
 - Staging and grouping according to characteristics
 - Sequencing based on onsite grading
 - Variable messaging based on prior statuses
- Flexible bypassing of auto-assignment rules
 - Using alternate Queues
 - Vacation coverage
 - Temporary program
 - Testing alternatives

Automation Concepts for Engagement Studio

- Flexible Rules-based attribution based on hidden form fields.
 - Prior to sync into salesforce– setting initial values or standardizing based on UTM's
 - “Fixing” Pardot’s automatic (but useful) Lead Sources
- Rules based setting of preferences
 - Language based preference center lists
 - Timed Entry/Exit from Suppression lists (Only email me 1x per month)
- Batching large sends
 - Prioritization customers vs leads
 - Randomizing sends for testing content

Automation Concepts for Flows

- Triggered actions for when leads are *converted*
- Moving data from related objects to leads and contacts
- Opportunity Contact Role Assignment
- Converting formula field values to fixed values (renewal countdowns)
- Flow Interviews with branching logic
- Reassign records with AE Interaction owned by inactive owners

Is a Flow interview the same as a Form?

Form Triggered ES

- Form or Form Handler is on an external site or community
- The Engagement studio can run continuously
- Initial and subsequent actions are tracked as history

Interview Triggered Flow

- “Form” is inside Salesforce
- Actions can affect multiple objects or create objects

FFA vs After Save (Record triggered Flow)

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

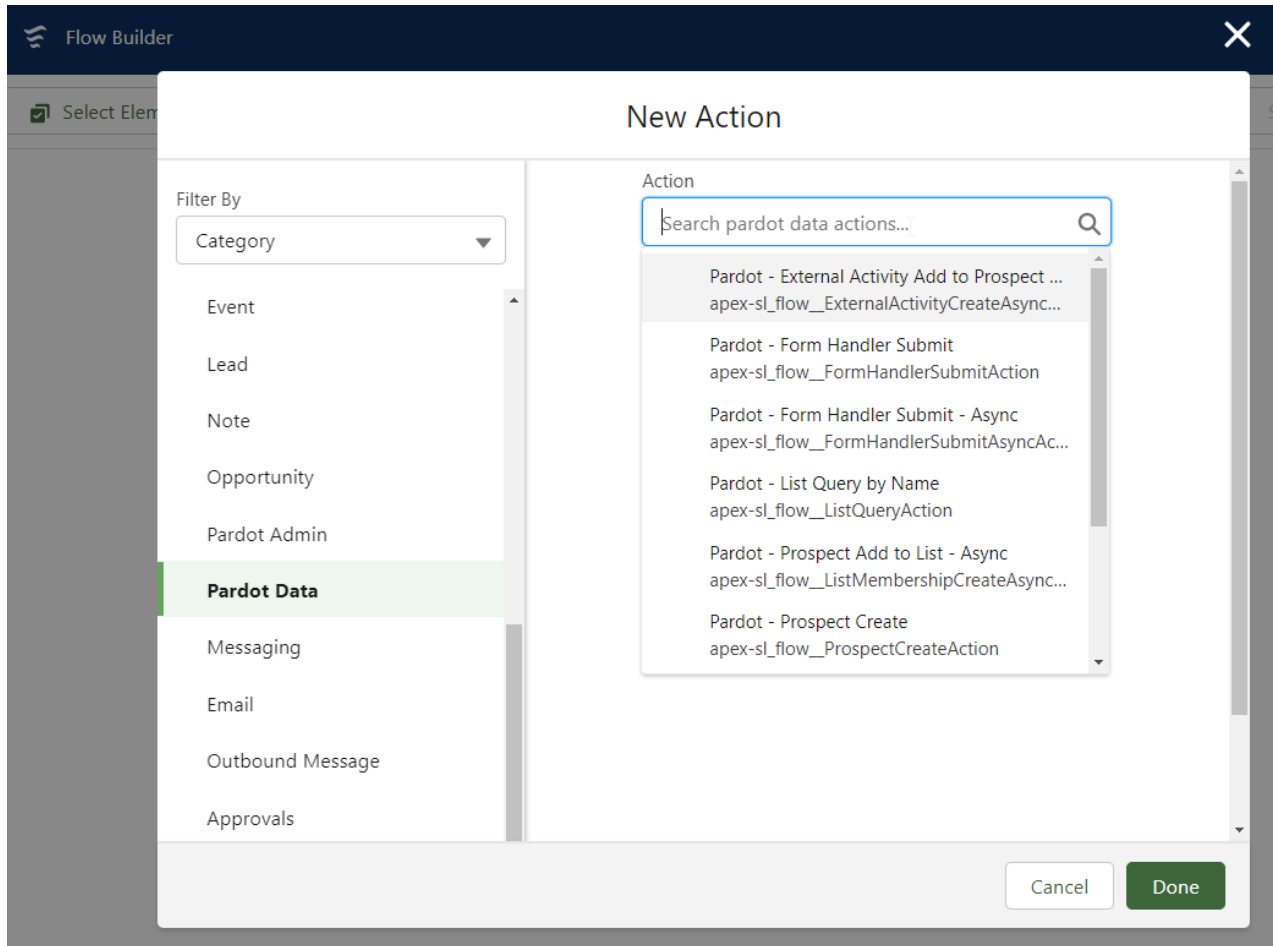
Many can operate on the same Object with minimal impact

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Careful how many per Object

Flow Actions for Pardot by Sercante Labs

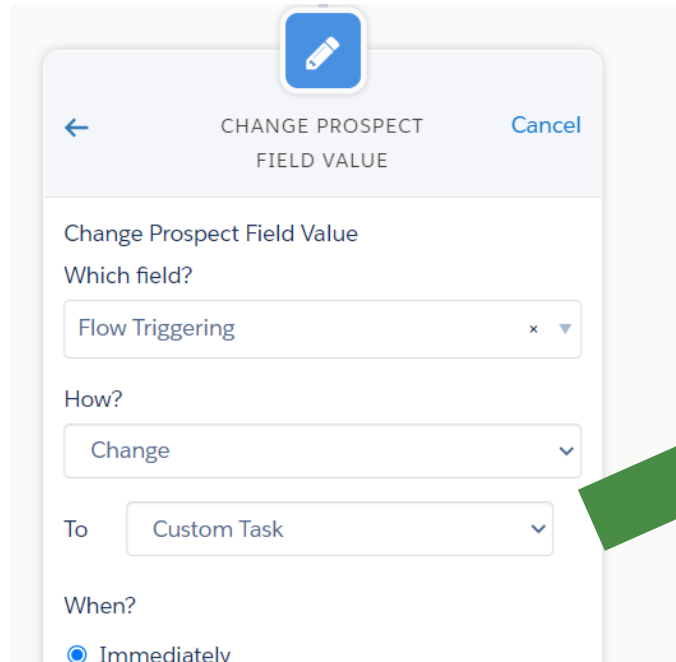


[Get It Now](#)

Use it in a Flow Interview!
Use it in a Record Triggered Flow!
Use it in a Scheduled Flow!

Other Multistep Automation Tricks

Chaining Engagement Studio to a Flow



CHANGE PROSPECT FIELD VALUE

Change Prospect Field Value

Which field?

Flow Triggering

How?

Change

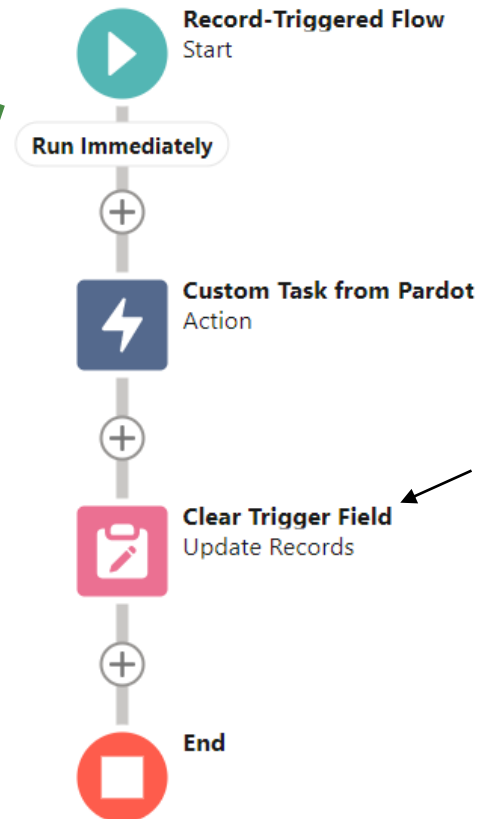
To

Custom Task

When?

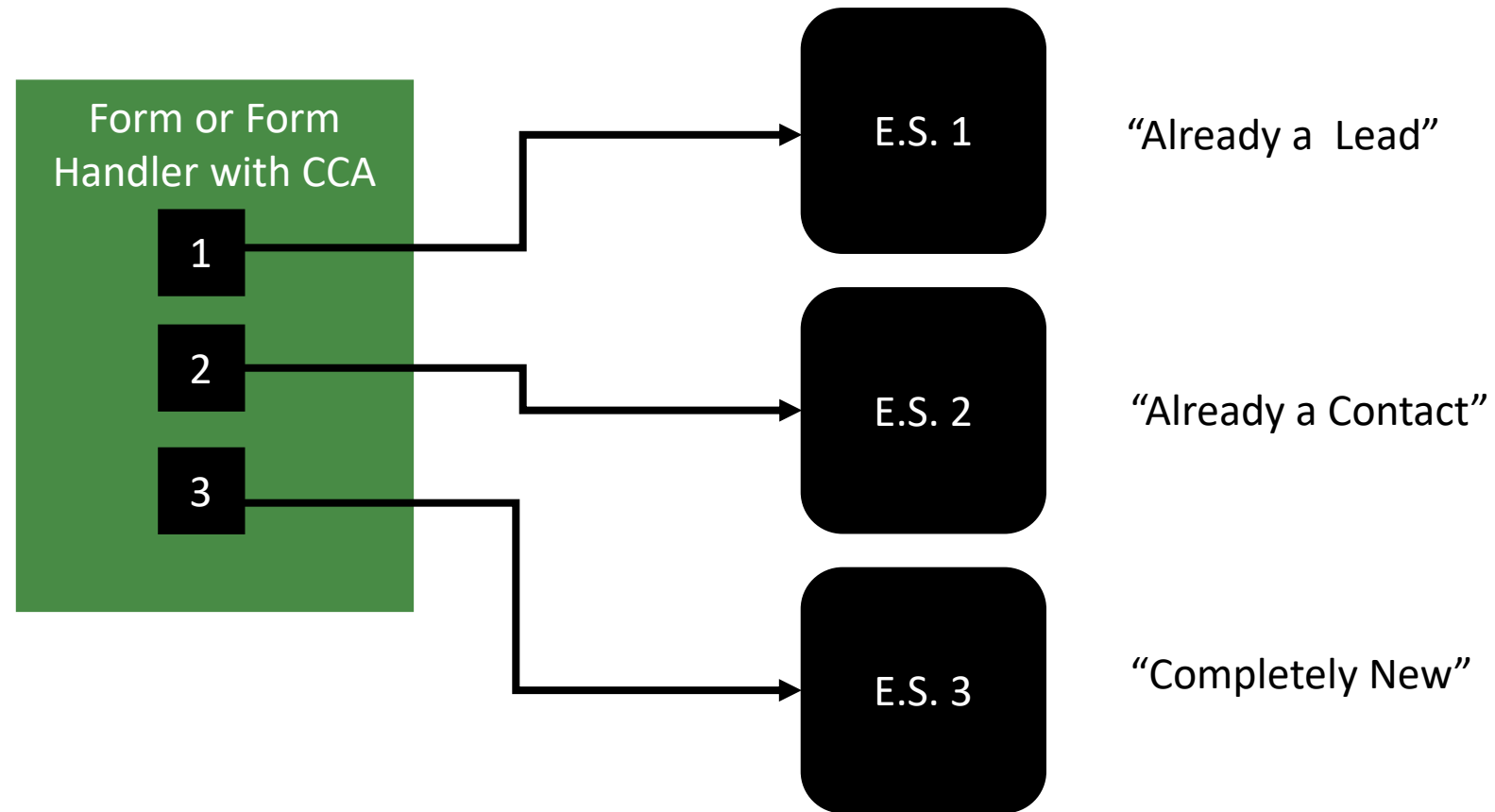
☒ Immediately

Hidden Field
"Flow Triggering"



Caution!!
Pardot does not like to update null values!
Beware of endless loops

Chaining CCA to ES



CCA Rules: 1/6/15

0

1+6 Groups,
1 Condition Per Group

1

4

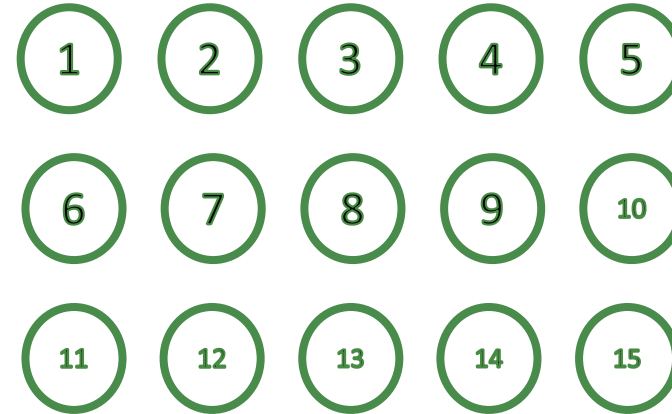
2

5

3

6

15 Rules



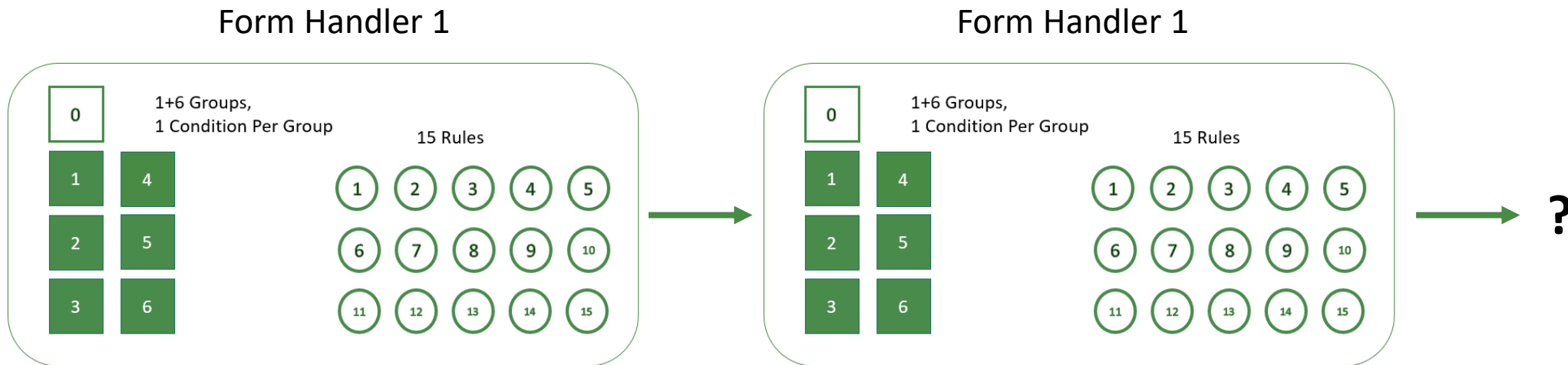
Order of Operations: *Irrelevant... (!)*

“Completion actions don’t execute in a defined order. To build a sequential prospect experience, use an Engagement Studio program.”

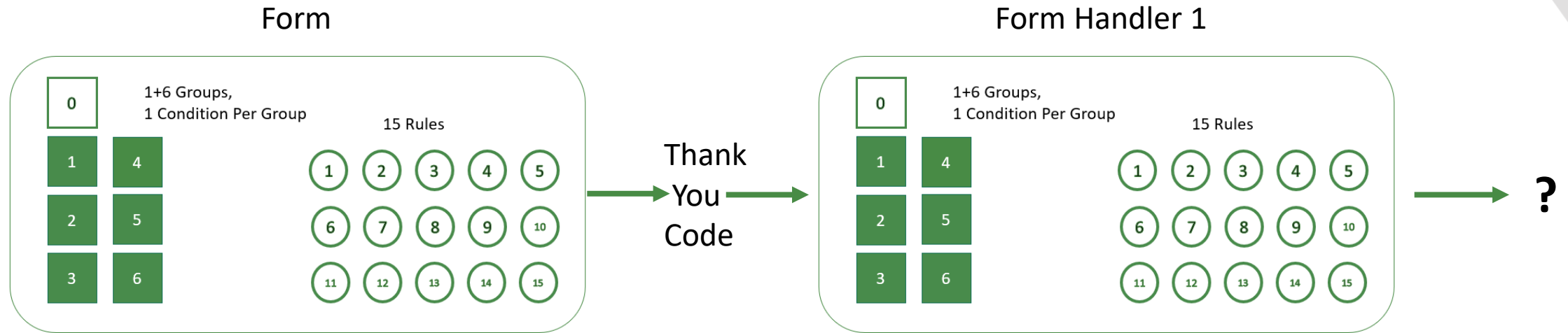
A Powerful Multiplier

- ✓ Enable data forwarding to the success location

Chaining Form Handlers...



Chaining A Form to a Handler...





**UnFettered
Marketing**

THANK YOU!
Questions, Comments or Inspiration Time



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