

Introduction to Content Playlists

Content Playlists are engaging digital Experiences that marketers can use to deliver tailored selections of content assets to target audiences. You can activate Content Playlists behind any click or CTA on any channel to drive increased engagement per visit and pair with form strategies where needed for marketing program objectives.

If you are already familiar with PathFactory [Templated Experiences](#), which are made up of a Landing Page that can also include an associated Content Page., then you will recognize Content Playlists as appearing very similar in look and functionality. The only difference is that Content Playlists can be created and activated independently from an associated Landing Page Experience.

Powered by content assets and [Collections](#) (Manual or Smart) in your Content Library, Content Playlists provide a highly customizable content consumption experience. Like Templated Experiences, they incorporate rules-driven content recommendations, parameter-based asset ordering, and AI-driven recommendations to dynamically adjust and present content based on individual visitor behavior and preferences.

Depending on marketing and content strategy objectives, you can leverage Content Playlists to create compelling and effective Experiences for target audiences and use cases. Whether you are looking to share industry insights, customer success stories, thought leadership, or training materials, Content Playlists offer an engaging format that can be tailored to meet a wide variety of marketing objectives and visitor preferences.

In this article, we will guide you through the step-by-step process of creating and using Content Playlists. We will cover setting up your Playlist and adding content assets, configuring display options, and leveraging advanced features like AI-driven recommendations.

Below is a basic example of a completed Content Playlist. But, as you'll learn in this tutorial, you can make Content Playlists look however you want, to align with your brand and style guidelines.

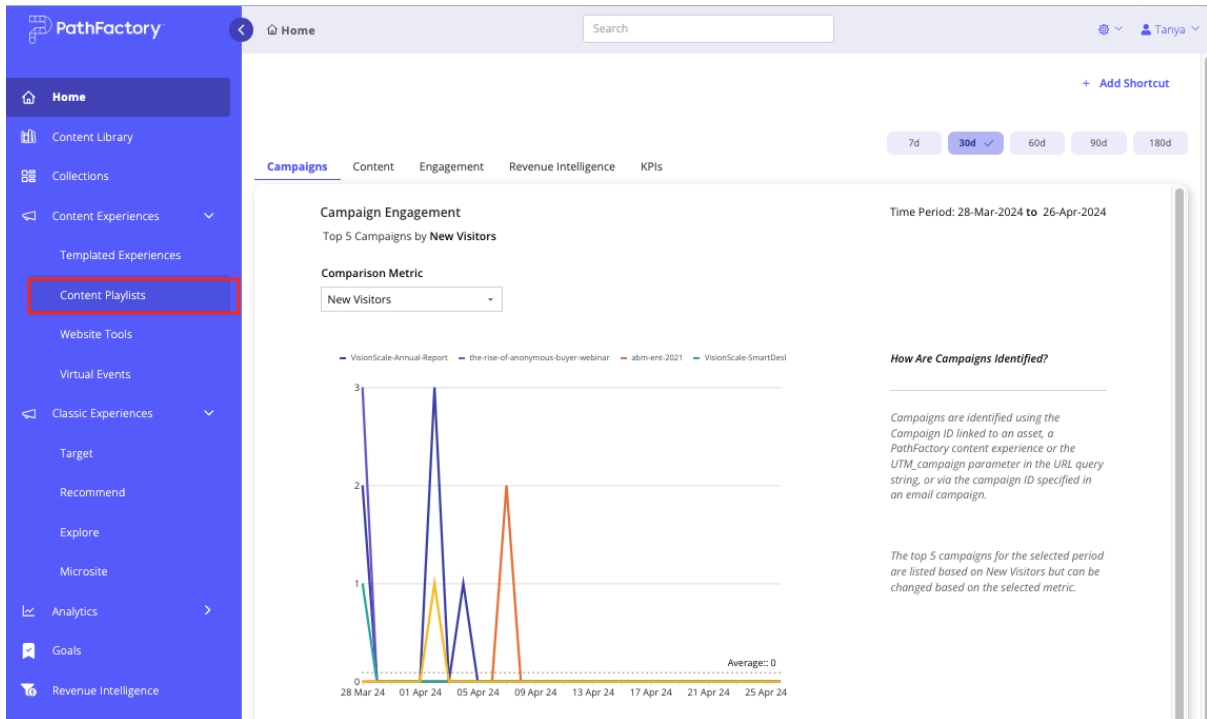


How to Create Content Playlists

Follow the steps below to create and configure a Content Playlist.

Step 1: Create the Content Playlist File

1. On the left menu panel, select **Content Playlists** as highlighted in the screen capture below.



2. On the main Content Playlists view, select **Create Experience**.

The screenshot shows the 'Content Playlists' management interface. On the left is a sidebar with navigation icons. The main area has a top bar with a search field and a 'Create Experience' button (highlighted with a red box). Below this is a 'Hide Folders' section with a '+ Add Folder' button and a list of folders: 'Root' (12 items) and 'Sandbox' (0 items). The central part of the interface is a table listing various content playlists.

<input type="checkbox"/>	Experience Name	Type	Date Published	Last Updated	Added By	Folder
<input type="checkbox"/>	Sample Smart Playlist	Content Playlist	2024-04-19 8:17 am	2024-04-26 12:20 pm	carly	Root
<input type="checkbox"/>	ABC 123	Content Playlist	2024-04-11 4:29 pm	2024-04-18 3:05 pm	Tanya	Root
<input type="checkbox"/>	No Header CP Test	Content Playlist	2024-04-18 3:00 pm	2024-04-18 3:05 pm	Tanya	Root
<input type="checkbox"/>	test	Content Playlist	2024-03-05 1:17 pm	2024-03-05 1:24 pm	katyfarrell	Root
<input type="checkbox"/>	CLONE for QA -LinkedIn CP no form strategy	Content Playlist	2024-01-25 5:42 pm	2024-02-28 3:46 am	TimBC	Root
<input type="checkbox"/>	LinkedIn CP	Content Playlist	2023-12-01 5:13 am	2024-02-15 11:42 am	mohit_shah	Root
<input type="checkbox"/>	CLONE for QA -VisionScale Web Overlay ABM FinServe CP No Form Strategy	Content Playlist	2024-01-25 5:44 pm	2024-01-25 5:44 pm	TimBC	Root
<input type="checkbox"/>	VisionScale Web Overlay ABM FinServe CP	Content Playlist	2023-12-06 11:19 pm	2023-12-06 11:21 pm	tim_internal	Root
<input type="checkbox"/>	VisionScale Web Overlay CP	Content Playlist	2023-12-06 11:04 pm	2023-12-06 11:05 pm	tim_internal	Root
<input type="checkbox"/>	AI-Demo-Manual-Coll	Content Playlist	2023-12-04 4:18 pm	2023-12-04 4:21 pm	nat	Root
<input type="checkbox"/>	PPC CP	Content Playlist	2023-12-01 5:41 am	2023-12-01 5:41 am	mohit_shah	Root
<input type="checkbox"/>	LinkedIn V2 CP Version	Content Playlist	2023-11-29 3:26 pm	2023-11-29 3:39 pm	tim_internal	Root

At the bottom, there is a pagination bar showing 'Previous', '1' (selected), 'Next', and '50 per page'.

- On the **Create Content Playlist Experience** menu, fill in the displayed fields. The fields **Theme** and **Experience Name** are marked with an asterisk as they are required. To ensure you have all editing options available, please use a Theme that is version 4.0 or higher. The Content Playlist you are creating in this step will inherit the branding and layout from the Content Page Template that is associated with that Theme.

Notes: If you plan to share the completed Content Playlist later on, ensure you select **Active** in the **Status** field (as opposed to **Sandbox**). You cannot change the Status after you have created the Content Playlist.

Create Content Playlist Experience

Experience Details

Content Page Template

Details

Status

Active

Theme *

Vision Scale

Experience Name *

Content Playlist April 2024

Parent Folder

Root

Template Name

Your Company Name

Primary CTA

Secondary CTA

This is only a representation and not the actual preview of your template.

Cancel

Submit

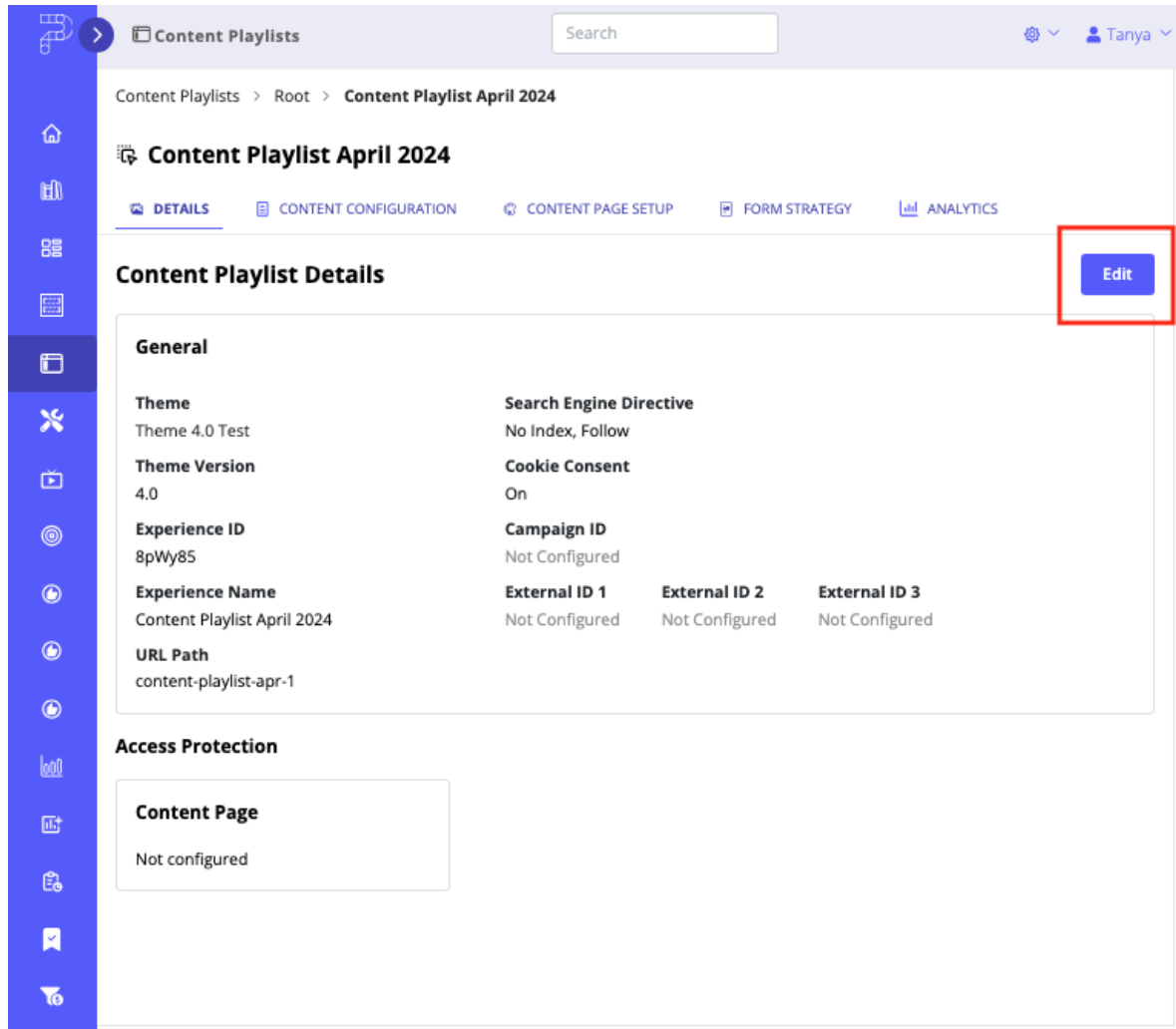
< Previous 1 Next >

50 per page

- When you have completed the fields, click **Submit**. To exit this process without saving, select **Cancel**.

Step 2: Select Configurations in the Details Tab

On the **Details** tab you can set up the External ID, Campaign ID, and Access Protection. Click the Edit button, highlighted in the screen capture below, to modify the settings on this tab.



1. You can add a Campaign ID to group the Content Playlist with other Content Playlists you are creating for a single campaign. Campaign ID enables you to aggregate multiple PathFactory Experiences under a single campaign, which you can leverage in your other data systems.
2. You can enhance tracking capabilities among a number of platforms by adding up to three **External IDs** to each content asset. In the most basic terms, External IDs make it easier for you to route leads generated from form submissions to the proper internal teams, and provide credit to the original content asset when a lead is generated in PathFactory. You can also use External IDs to track specific elements such as verticals, personas, geographic locations, or products.

You can even group content assets by applying the same External ID to them. These fields allow you to connect visitor data with other systems, primarily for better attribution, to understand which activities or content assets are effective in influencing sales and

conversions.

To learn about what External IDs are and how to use them, read [Adding External IDs and External ID Overrides to Content Experiences](#).

3. You can toggle on **Cookie Consent**. To use this feature, you must have Cookie Consent enabled and set up for your organization. To find out more, read the article, [How Do I Set Up Cookie Consent?](#)
4. You can set up the **Search Engine Directive** to choose how to direct search engine crawlers when they find your Content Playlist. To see the definitions of search engine directives, read [Definitions of the Search Engine Options in PathFactory](#).
5. You may provide or prevent access to the Content Playlist in the **Access Protection** section. You can create groups and allow them access to the Content Playlist. To begin, select a **Protection Type – Email** or **None**. If you select **Email**, your viewers will see a prompt to submit their email for verification before they are granted access to this Content Playlist. If you select **None**, your viewers will not need any special access to view this Content Playlist.

Note: If you choose no protection, and do not add Allowed Groups or Disallowed Groups, all viewers will be able to see this Content Playlist. By adding Allowed Groups and Disallowed Groups, you are providing access for specific audience groups.

- For the **Allow Groups** list, click the arrows to select the groups for which you want to provide access to this Templated Experience. These are groups that you or someone else within your organization has created.
- Do the same for the **Disallow Groups** if needed. You can choose to add groups to Allow Groups or to Disallow Groups, or both.

Note: To find out how to set up and manage groups of users for Access Protection, read the article, [Access Protection Setup and Configuration](#).

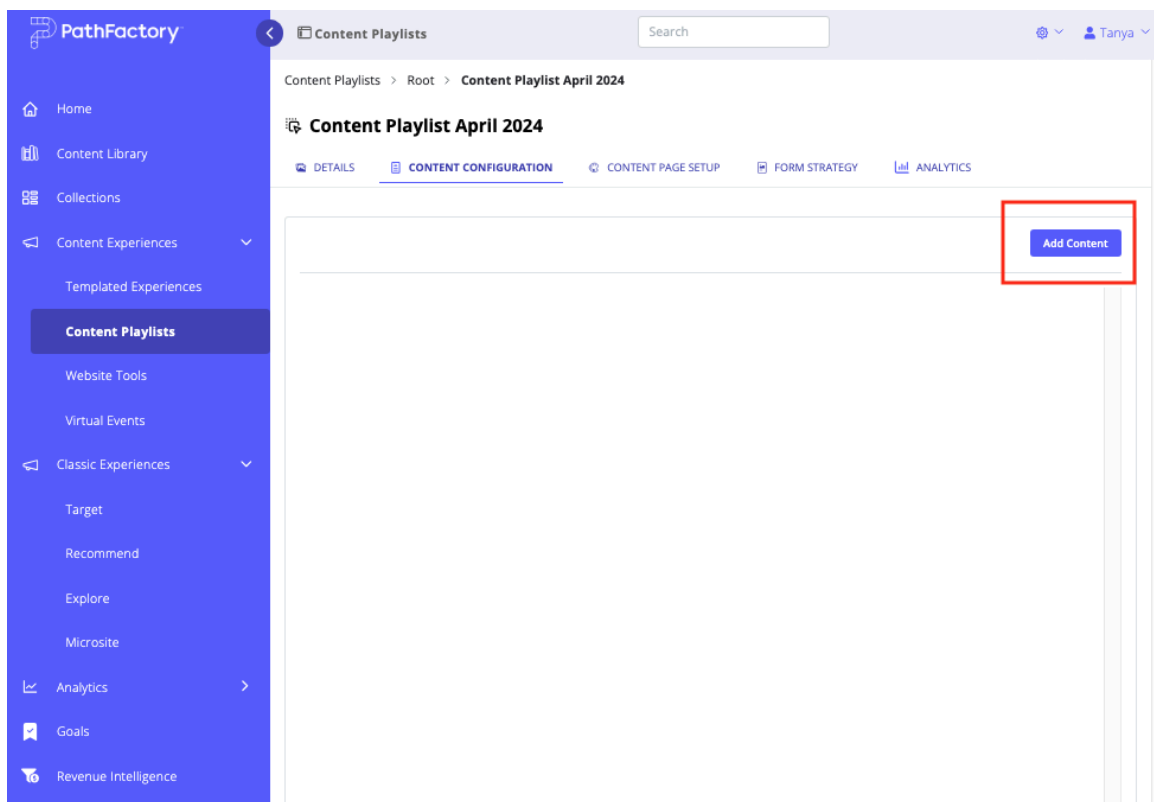
When you are finished adjusting these settings, lock in your changes by clicking Save. Otherwise, click Cancel.

Step 3: Select Assets or a Collection for Your Playlist in the Content Configuration tab

Once you've finished filling out the fields on the Details tab, it's time to add content assets to your Content Playlist.

On the Content Configuration tab you'll add and sort the content assets in the form of [Collections](#) or individual content assets that you want to include in your Content Playlist. To add content assets, follow the steps below.

1. Select the **Add Content** button.



2. The **Insert Assets** menu appears. To add specific content assets one-by-one, select the **Content Library** radio button. To add a Collection, select the **Collections** radio button.

Insert Assets

Content Library

Collections

Search by Collection Name

Filters

All

Manual

Smart

Track

Collection Name	Description	Type	Updated	Assets
AI-Demo-Manual-Coll	Manual collection for the AI Demo test	MANUAL	Dec 4, 2023	16
AI-Demo-Smrt-Coll	Test for AI recommendations	SMART	Apr 22, 2024	23
All Video Track-target		TRACK	Nov 29, 2023	6
Ascent Demo 1		TRACK	Mar 20, 2024	5
Carly - Sample Smart Collection	Smart Collection of Assets	SMART	Apr 19, 2024	38
Clone for QA 2 no form strategy		TRACK	Mar 8, 2024	10
Clone for QA 3 no Form Strat		TRACK	Feb 1, 2024	8
Clone for QA 4 no form strategy		TRACK	Jan 25, 2024	5
Clone for QA no Form Strat		TRACK	Jan 25, 2024	10
Clone for QA no Form				

<<

Previous

1

2

3

4

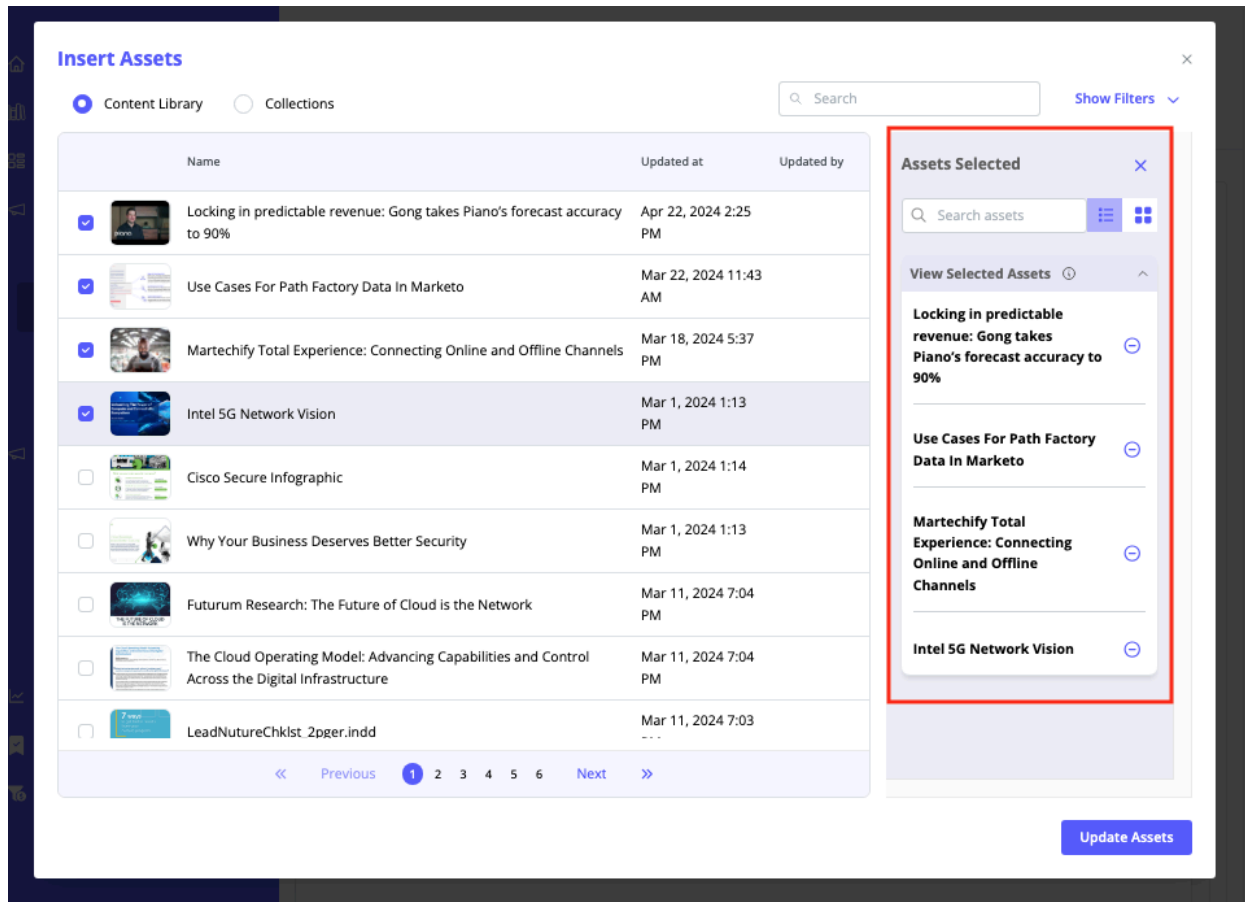
Next

>>

Save

- If you select the **Content Library** option, follow the prompts to add the content assets individually. You'll notice on the right side panel the assets you have selected are listed there. You may view them in a grid format, which displays a thumbnail of the asset, and you can search within those assets for a word that appears in an asset's title.

To delete an asset you have added, either de-select its associated checkbox, or click the minus (-) sign to delete it from the list.



4. When you are finished adding assets, click **Update Assets**. To select different content assets later on, return to the Content Configuration tab and repeat this process.

5. If you are adding a Collection to the Content Playlist, select a Collection to view its content assets. You'll notice that there is a column that lists the number of content assets in each Collection and a quick pane to edit the content asset's attributes. Both of these features are shown below, highlighted in red.

Track Collections are created automatically from Target and Recommend tracks. These tracks, which are predefined content pathways designed to guide visitors through a series of content assets, are converted into Track Collections when a customer upgrades to the latest version of PathFactory. This ensures that existing customers retain all the work and information they have done so far and can reuse Track Collections multiple times, just like any other Collection type in PathFactory. **If you are a new PathFactory**

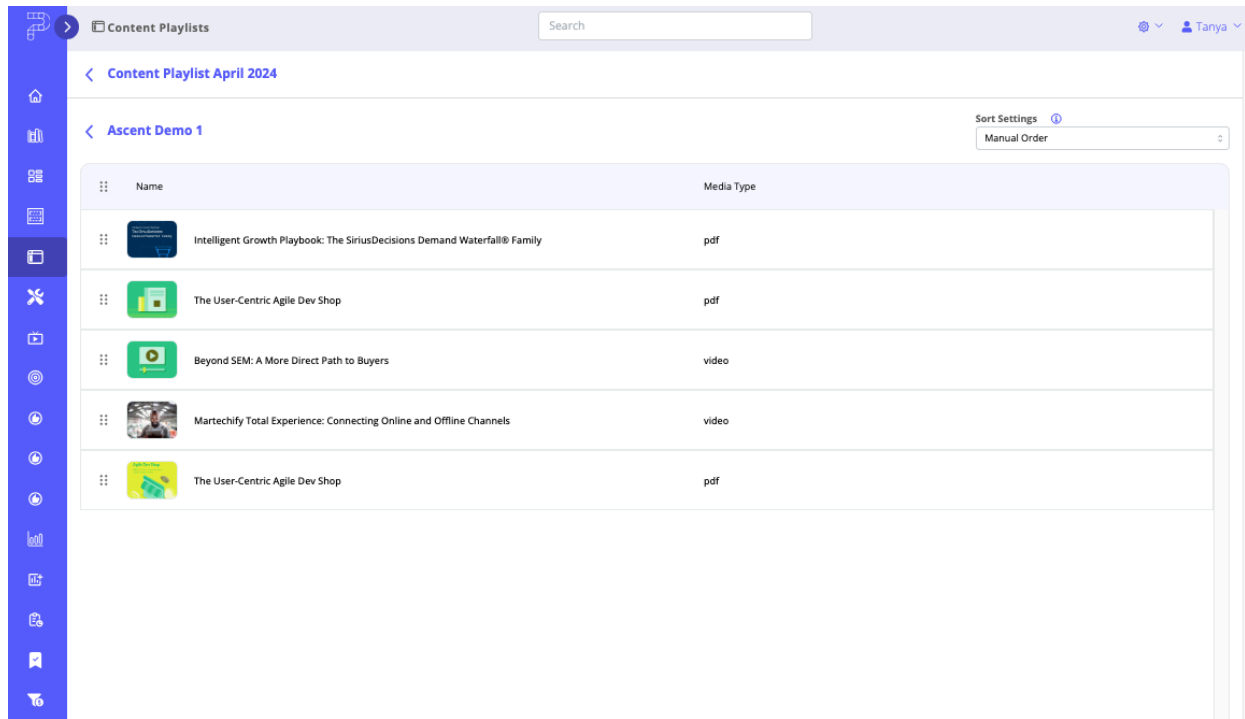
user (starting in 2024 or later), your organization, Track Collections will not apply to you.

Note: You may add individual content assets OR one Collection to the Content Playlist, but not both.

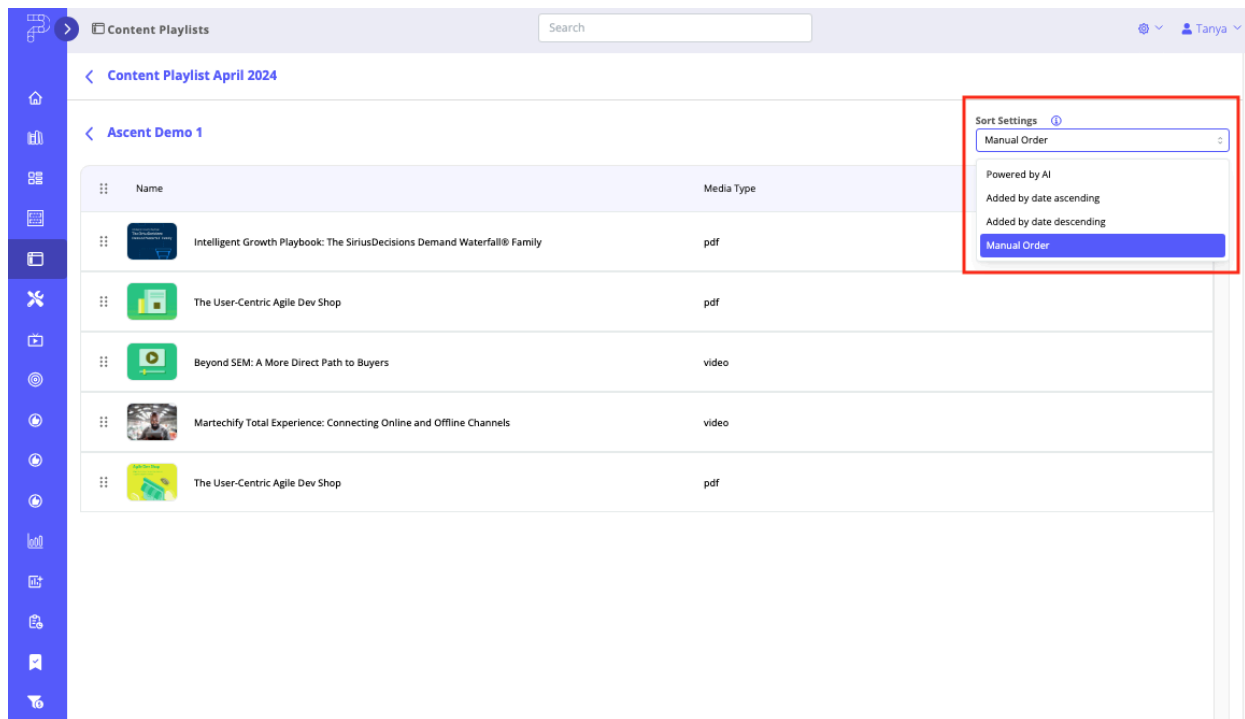
The screenshot shows the 'Insert Assets' dialog box. It has a search bar at the top right labeled 'Search by Collection Name'. Below the search bar, there are two radio buttons: 'Content Library' (unselected) and 'Collections' (selected). On the left, there is a 'Filters' sidebar with buttons for 'All', 'Manual', 'Smart', and 'Track'. The main area displays a table of collections. The 'Assets' column is highlighted with a red box. On the right, there is a preview of a collection titled 'Ascent Demo 1' with a search bar and a list of assets. A red box highlights the 'Assets in Collection' section in the preview. At the bottom right, there is a 'Save' button.

Collection Name	Description	Type	Updated	Assets
All Video Track-target		TRACK	Nov 29, 2023	6
Ascent Demo 1		TRACK	Mar 20, 2024	5
Clone for QA 2 no form strategy		TRACK	Mar 8, 2024	10
Clone for QA 3 no Form Strat		TRACK	Feb 1, 2024	8
Clone for QA 4 no form strategy		TRACK	Jan 25, 2024	5
Clone for QA no Form Strat		TRACK	Jan 25, 2024	10
Clone for QA no Form Strategy		TRACK	Mar 13, 2024	12
Demo delete me		TRACK	Apr 22, 2024	5
Display_ABM_1to1_Explore		TRACK	Jan 25, 2024	16
Display_ABM_1to1_Track-recommend		TRACK	Nov 29, 2023	13

6. To change the sort order of content assets, drag and drop individual assets to the order you want them presented.
7. To modify the sort order in bulk, click the Collection's or content asset's edit icon. An editing menu opens.



8. Here you'll notice there is a Sort Settings dropdown list with a few different options.



9. For Collections, you have three sorting options for ordering the content asset display:

- **Powered by AI** - This sorting option uses artificial intelligence algorithms to order content assets based on relevance or predicted visitor preferences. AI sorting enhances the user experience by presenting the most pertinent content at the top of the list, facilitating efficient discovery.

These AI-driven recommendations are powered by a hybrid recommender system that considers three key factors below.

- Current session engagement with content
- Historical engagement from past sessions with more emphasis on recent activities (with a maximum history cutoff of 15 days)
- The behavior of similar visitors within the organization, known as a normative profile.

In the absence of similar visitor data, the system defaults to general trending data, referred to as the average profile.

- **Added by date ascending** - This sorting option arranges content assets in chronological order based on the date they were added to the Content Library, starting from the earliest or oldest addition. For example, use this option if the content assets are part of a series or a timeline-based sequence.
- **Added by date descending** - This sorting option arranges content assets in reverse chronological order based on the date they were added to the Content Library, starting from the most recent addition and descending towards older assets. Selecting this option typically places the newest content assets at the beginning of the Collection.

Note: The sorting option you select directly influences how visitors will view the content. For instance, if you sort a Collection by AI, visitors will see the content in this AI-determined order when they access the Content Playlist via a shared link. Likewise, if you organize content assets in descending order, visitors will encounter the assets in this same descending sequence.

10. When you are satisfied with the Collections you have included in the Content Playlist, click **Save**. To cancel without saving, click on the **X** in the top right corner of the menu to close it.
11. After you have added content assets or a Collection to your Content Playlist, you can edit their appearance and other attributes, to get the desired effect.
12. If you'd rather select different content assets to include with the given Content Play, click Edit Content.
13. A menu appears for you to select the content assets you want from the ones available in your organization. If you are adding individual content assets, the newly selected ones will

be appended to the current list of individual content assets. If you add a Collection, the newly selected Collection will replace the current one.

14. When you are finished adding your edits and you're ready to add the content assets to the Content Playlist, click **Update Assets** for individual content assets. To add a new Collection to the Content Playlist, click **Save**. To cancel without saving, click the **x** icon on the top right of the menu to close it.

15. You are now returned to the main **Content Configuration** tab.

In the next step, you're ready to customize the layout and appearance of the Content Playlist.

Step 4: Add Dynamic Personalization to the Page Template or Content Playlist

In this step, you have the option to add dynamic personalization to the Template or Content Playlist. Dynamic Personalization enables specific elements of a PathFactory content Experience template to automatically update based on the visitor's interactions or demographic data. This feature enables components such as call-to-action (CTA) buttons, text, images, and videos to adapt in real-time, ensuring that the content each visitor sees is tailored to their current engagement and background. To learn about PathFactory's Dynamic Personalization feature and how to apply it to a Content Playlist, follow the detailed steps outlined in the guide, [Guide to Using PathFactory's Dynamic Personalization Feature for Content Experiences](#).

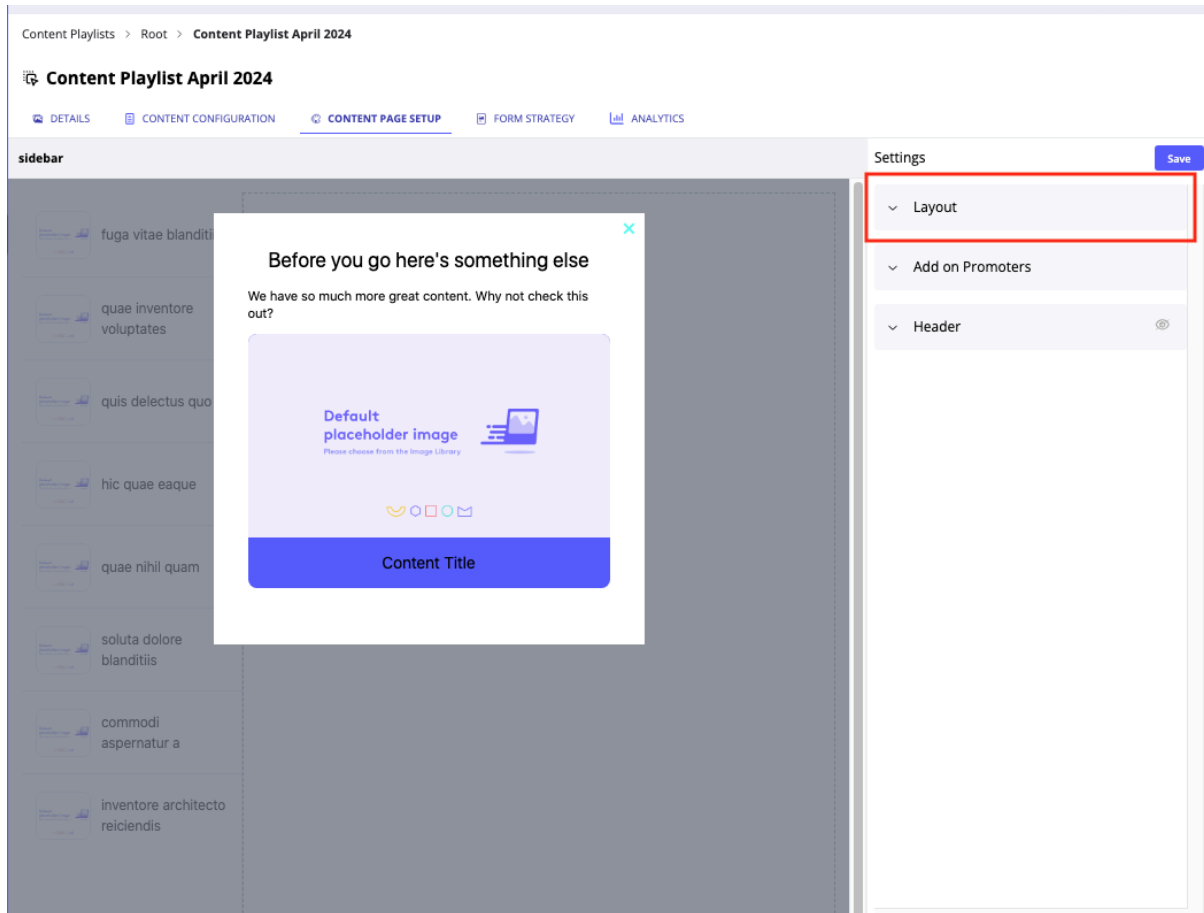
This article also demonstrates how to share links to Experiences that are tailored for both known and unknown visitors, ensuring personalized and effective content delivery to your audiences.

Step 5: Customize Layout and Promoters on the Content Page Setup Tab

Once you've completed adding dynamic personalization, if you chose to do so, the next step is to customize the layout, and add inactivity or exit promoters, to further encourage visitor engagement and conversion.

To customize the appearance of the Content Playlist, follow the steps in this below.

1. To begin customizing the appearance of a Content Playlist, expand the **Layout** menu.



2. On the **Layout** menu you can edit the setup of the Content Playlist including sidebar position, the Template being used to create the given Content Playlist, adding a logo (and setting its pixel size), and setting up which navigation you want to display: account logo, filters, and pagination.

Layout

Content Page Layout

sidebar

Content Page Template

sidebar_default_template

Sidebar Position

Left

Logo

No image selected.

Choose ImageRemove

Logo Size (pixels)

10

Logo Navigation URL

☐ Enable the Account logo

☐ Show Filters

☐ Enable Pagination

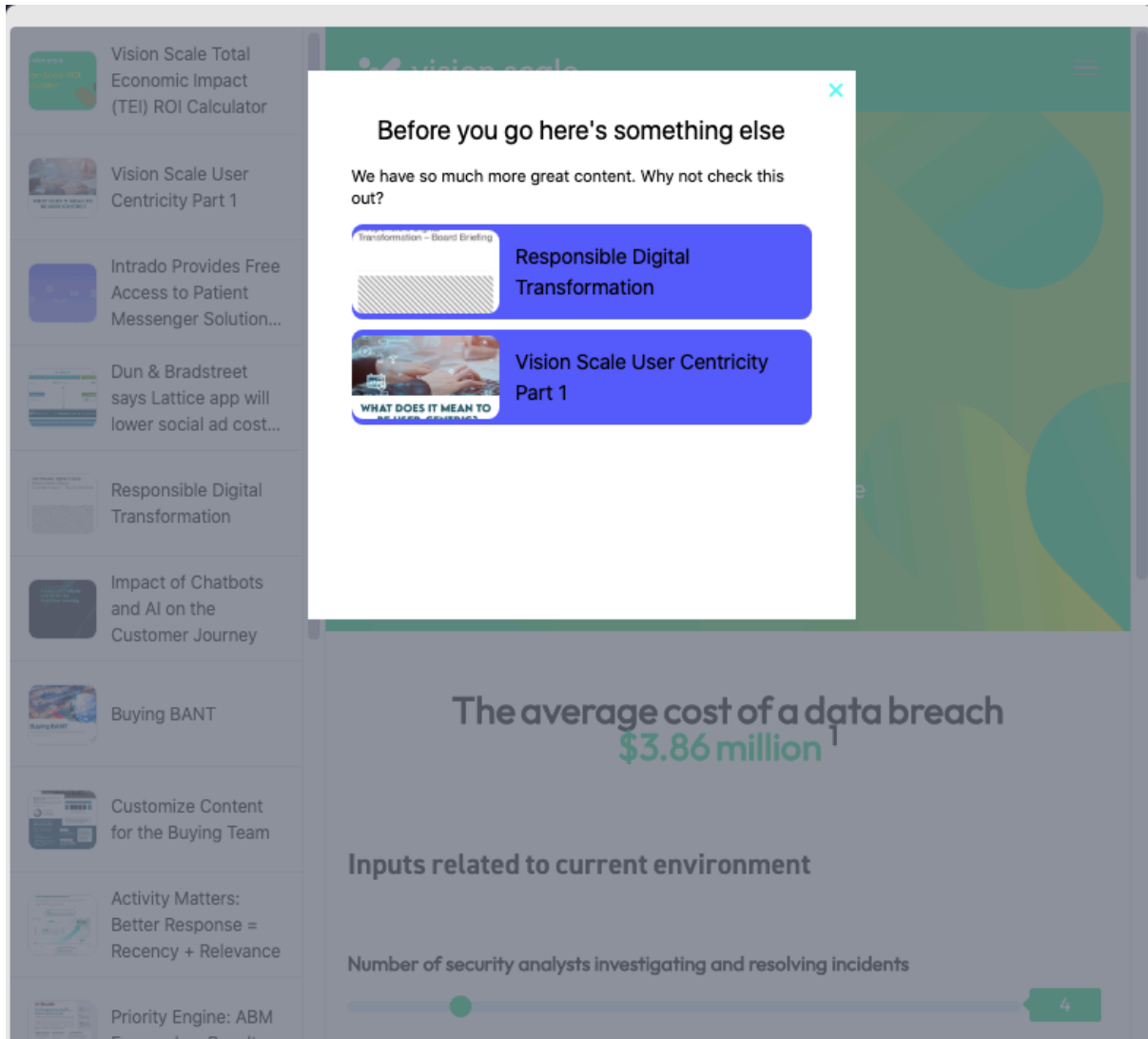
External Code

External code may have been configured in Theme Settings. Please preview the experience to ensure no code conflict takes place.

☐ Autoplay videos

This toggle overrides the autoplay settings and videos will autoplay on mute. Some exceptions apply due to browser restrictions. See [documentation](#) for details.

- On this tab you may also set up **Add On Promoters** for **Inactivity** and **Exit**. These re-engagement promoters help keep your visitors engaged when their browser window is idle or they navigate to a different browser tab. Below is an example of an Exit Promoter with suggested content assets to read. To find out more details about Promoters, read [How to Add Promoters to Content Experiences](#).



4. To set up video content to play automatically, activate the toggle labeled **Autoplay videos**, as highlighted in the screen capture below.

Layout

Content Page Layout

Content Page Template

Sidebar Position

Logo
 No image selected.

Logo Size (pixels)

Logo Navigation URL

☐ Enable the Account logo
☐ Show Filters
☐ Enable Pagination

External Code

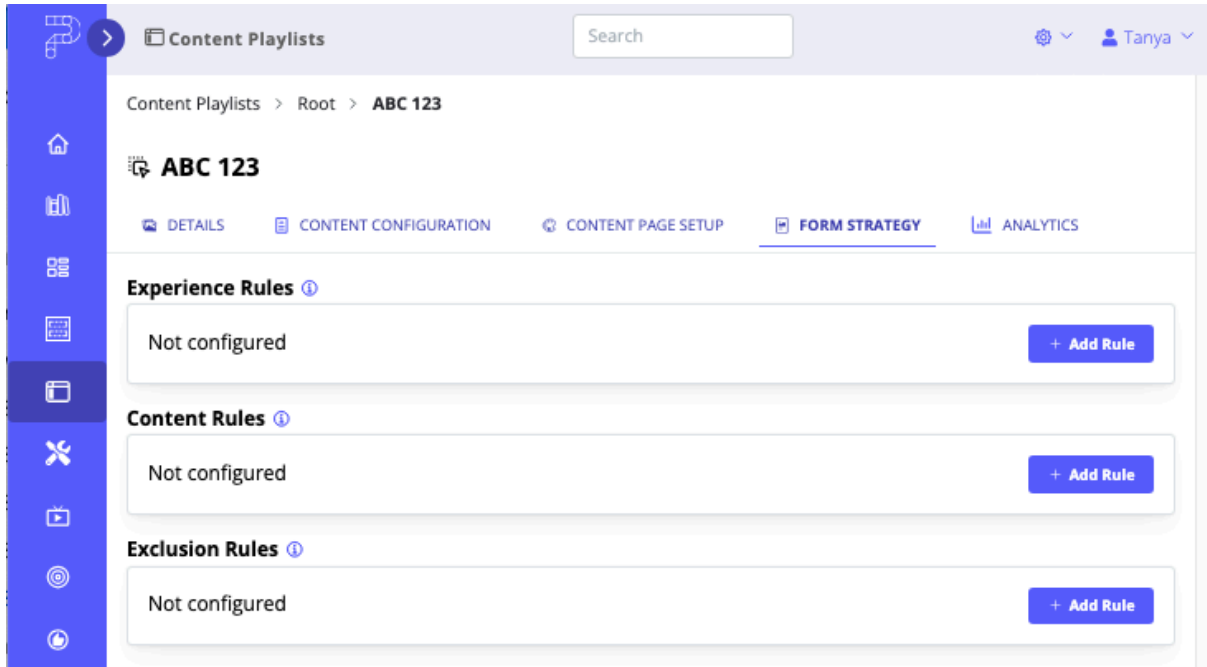
External code may have been configured in Theme Settings. Please preview the experience to ensure no code conflict takes place.

☐ Autoplay videos
 This toggle overrides the autoplay settings and videos will autoplay on mute. Some exceptions apply due to browser restrictions. See [documentation](#) for details.

5. To display to visitors how many content assets are included in the given Content Playlist, activate the toggle **Enable Pagination**. This feature enhances a visitor's experience by providing transparency and context, helping visitors understand the scope and extent of the content available within the playlist at a glance.
6. You may choose to display or hide the Header. To toggle the Header section on or off, click its associated eye icon. If you choose to display the Header you can then customize its appearance using the available editing menus.
7. After you have concluded your editing, click **Save** at the top of the panel.

Step 6: Set Up Forms in the Form Strategy Tab

Next, set up rules for your content by selecting the Form Strategy tab.



For detailed instructions and definitions about the three types of rules (Experience, Content and Exclusion), read the article [Using Forms in Templated Experiences & Content Playlists](#).

Step 7: Track Content Playlist Engagement in the Analytics tab

Once you've activated your Playlist and start driving engagement, you can visit the Analytics tab to track performance. To learn more about analytic reports, read [Creating, Analyzing & Sharing Reports for Templated Experiences and Content Playlists](#). An example of the Visitors and Accounts tab within Analytics is displayed in the screen capture below.



Acme Content Playlist

DETAILS CONTENT CONFIGURATION CONTENT PAGE SETUP FORM STRATEGY ANALYTICS

VISITORS & ACCOUNTS CONTENT PERFORMANCE FORM PERFORMANCE

Visit Date: 01/01/2024 - 05/29/2024
Email Domains Exclusion: Select values
Account Exclusion: Select values
Visitor Exclusion: No Yes
Bot Exclusion: No Yes

Summary

There were 26 accounts who visited your content in the specified period, of which 23 (88.46%) were new accounts
Specifically, there were a total of 328 sessions, from 107 visitors - for a total engagement time of 06:38:23

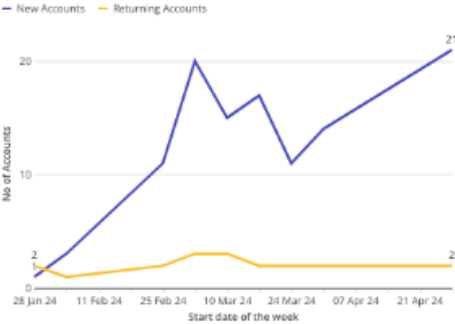
New Accounts
23
N/A vs Previous Period

Returning Accounts
3
N/A vs Previous Period

New Visitors
105
N/A vs Previous Period

Returning Visitors
2
N/A vs Previous Period

Trend in Accounts Over Time



Trend in Visitors Over Time



All Accounts Data

New/Returning Account	Account Name	First Visit Date	Last Visit Date	No of Visitors	Known Visitors	Unknown Visitors	No of Visits	% Eng
New	Undefined	01 Feb 2024	02 May 2024	30	0	30	30	
	acme.com	05 Feb 2024	04 May 2024	7	7	0	31	
	globex.com	29 Feb 2024	04 May 2024	5	5	0	20	
	initech.com	29 Feb 2024	02 May 2024	4	4	0	14	
	ios.com	05 Feb 2024	01 May 2024	4	4	0	15	
	piet.com	04 Mar 2024	01 May 2024	4	4	0	15	
	dunder.com	29 Feb 2024	04 May 2024	4	4	0	15	
	duff.com	29 Feb 2024	02 May 2024	4	4	0	16	
	centric.com	04 Mar 2024	04 May 2024	4	4	0	10	
	umbrella.com	04 Mar 2024	01 May 2024	3	3	0	10	
	undefined.com	05 Feb 2024	04 May 2024	3	3	0	11	