

Engagement Program Outline Template

WHAT ARE ENGAGEMENT PROGRAMS?

PRE-LAUNCH CHECKLIST:

- ☐ AUDIENCE — Who should be getting this communication?
- ☐ GOAL — What is the goal of the program? To nurture new leads, get webinar attendees, schedule a meeting?
- ☐ CONTENT — Is there content that can be used for the engagement program? (i.e. blog posts, whitepapers, infographics, landing pages, forms, etc.)
- ☐ START & END DATE — When should this program begin? Should it be stopped at any time or do you want it to continuously run and be able to add more prospects to it?

LAUNCH CHECKLIST:

- ☐ Recipient List — Dynamic or Static list
- ☐ Suppression List — Should prospects be removed from this Engagement Program?
- ☐ Campaign Set-up — This is a Pardot function to group similar marketing efforts to one “campaign” folder to track ROI
- ☐ Engagement Program Email Templates — These email templates make up an Engagement Program
- ☐ Pardot Landing Pages & Forms — Are these prospects being pushed to other assets for conversion?
- ☐ Engagement Program Workflow — This is the different yes and no paths prospects can take if they meet specific criteria (i.e. Opened Email #1)

EMAIL #1

Subject Line:

Body:

Hi %%first_name%%,

Best regards,
(Sales Rep)

EMAIL #2

Subject Line:

Body:

Hi %%first_name%%,

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Best regards,
(Sales Rep)

EMAIL #3

Subject Line:

Body:

Hi {{first_name}},

Best regards,
(Sales Rep)

EMAIL #4

Subject Line:

Body:

Hi {{first_name}},

Best regards,
(Sales Rep)

Workflow Sample

COMMON ENGAGEMENT PROGRAMS

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