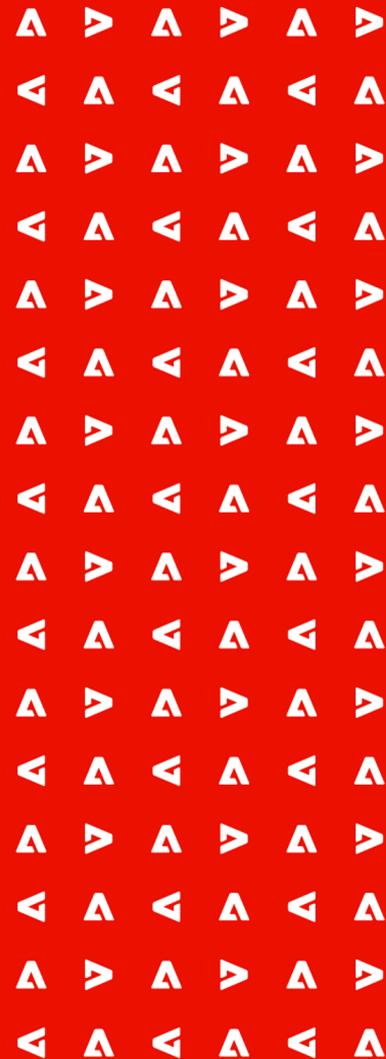


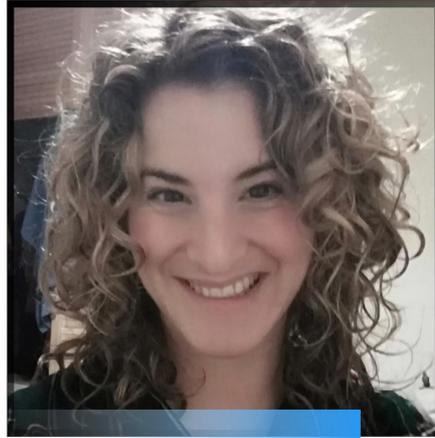


Tackling siloed channels and data with Marketo Engage & Dynamic Chat

November 2nd, 2023



Presenter introduction



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Cornerstone Ondemand

<https://www.linkedin.com/in/sarabarriuso1/>

What you will learn today

1. Easily **create Dialogues** for the primary use cases.
2. **Expand the impact of your marketing campaigns** across channels.
3. **Tips and tricks to save you time** in implementing Dynamic Chat, lessons learned along the way.
4. Showcasing success to drive organization-wide adoption.



**Delivering Cross-channel Customer
Experiences Is Made Possible**

Conversational engagement is more than a chatbot

Website

Users intentionally browse your website.

Chat

- Demand generation tool for buyers to self-serve and self-qualify.
- **Self-guided conversations** driven by website visitors.

Visitors

- **Your Prospects**
 - Seek content
 - **contact to sales**
- **Your Customers**
 - Post-sale **support**
 - **Upsell** other products

What drove my organization to adopt Dynamic Chat

- Part of our Marketo Engage subscription (and everyone's!)
- Avoid sync issues
- Seamless targeting capabilities with Marketo Engage
- Easiness of use
- Clean interface to share with stakeholders

Conversational engagement strategy by audience segment

Unknown Prospects

Goal 1: Generate new leads for sales

- **User action:** schedule a demo

Known leads/ Customers

Goal: Upsell and cross-sell

- **User action:** browse new content, schedule a demo

Prospects & Customers

Goal 1: Drive registrations for events and webinars

Goal 2: Extend marketing campaign efforts

Goal 3: Target key companies(Account-based Marketing)



Primary Use Cases

New to conversational engagement?

Start building Dialogues for these use cases:

- Catch-all Demo Dialogue
 - Account-based marketing: Targeting key accounts, e.g., buyers by industry segment
- Event/webinar registration promotion
- Extended campaign content engagement
- Customer upselling



Use case 1: A default Dialogue

Use case 1: A default Dialogue for catch-all

Goals:

- Encourage demo request submission.
- Give an initial option to all audiences.

Where to start:

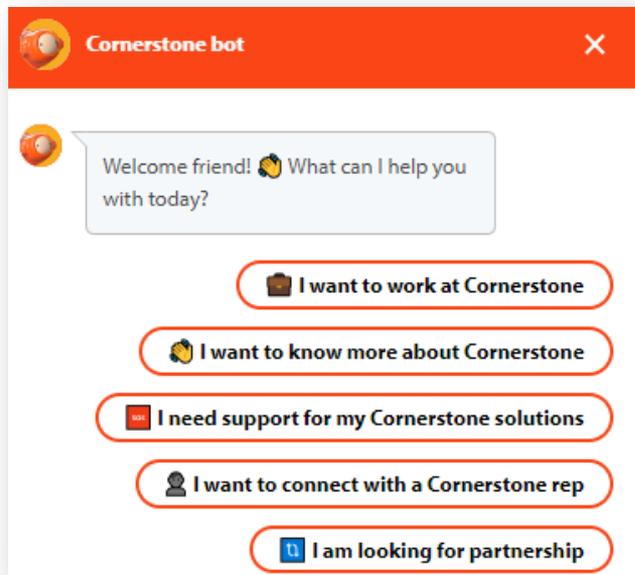
- Dive into your 'Contact Us' email inbox to identify common themes and bucket them into Dialogue options that apply to your site visitors.

What this looks like in Dynamic Chat:

- A catch-all Dialogue with 5 initial answers(suggested).

Why this works:

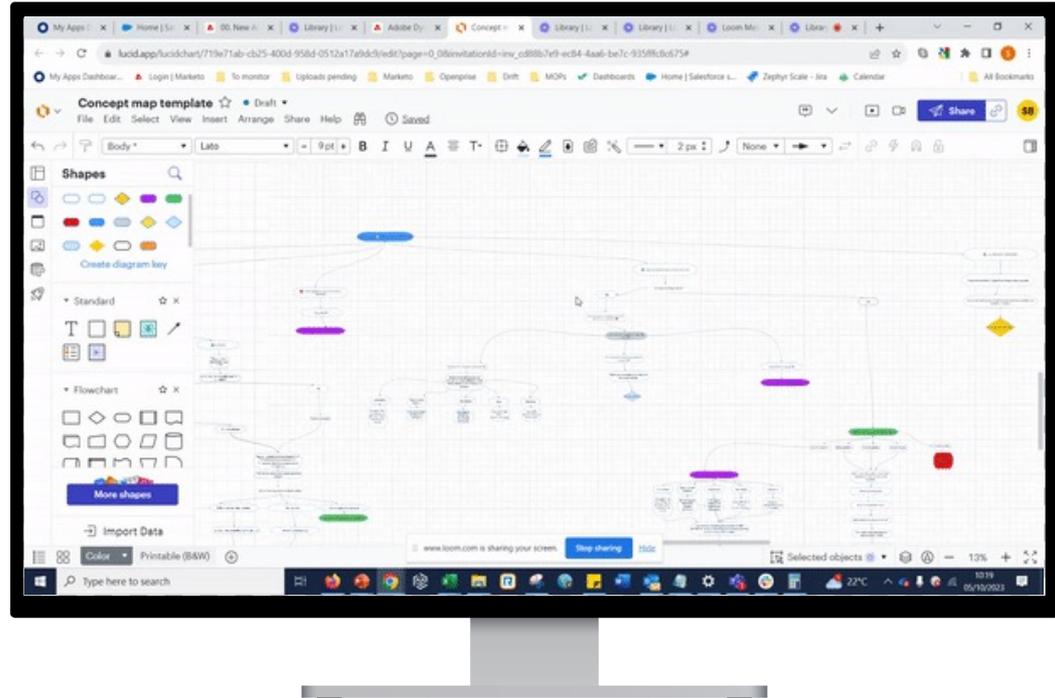
- Visitors want more info about our products [**Nurturing stage**]
- They want product support. [**Customers**]
- They want to buy/ talk to sales/demo. [**Prospects**]
- They want to partner with us. [**Partner**]
- They want to work for the company. [**Talents**]



Plot a conversation flow of a default Dialogue

Flowchart

1. Build the Dialogue as a flowchart.
2. Share it with stakeholders to collect feedback.
3. Implement feedback in the flowchart.



Demo: Create a default Dialogue in Dynamic Chat

The screenshot displays the Adobe Dynamic Chat configuration interface in a web browser. The browser's address bar shows the URL: `experience.adobe.com/#/@cornerstoneondemand/so:sonar6/dynamic-chat/dialogues/70c240a7-ef66-48db-98bc-6b6fc4fa77b4`. The interface is titled "Adobe Dynamic Chat" and shows a navigation sidebar on the left with categories like "Automated chat", "Live chat", "Generative AI", "Meetings", "Analytics", and "Configuration". The main content area is for a dialogue named "testdemo", which is marked as "Published with draft".

The configuration is divided into several sections:

- Audience:** Includes "Stream Designer" (selected), "Reports", and "Settings".
- Rules:** A search bar for "Search rules" and a dropdown for "All rules".
- Events:** A list of events to add, including "Scroll percentage", "Time on page", and "Time on site", each with a plus icon.
- Attributes:** A list of attributes to add, including "Account Industry", "Account Owner ID", "Annual Revenue", "Billing Address", and "Billing City", each with a plus icon.
- Target:** A field for "URL(s)" with the value `https://www.cornerstoneondemand.com/es/?utm_campaign=saratedemo` and a checkmark. An "Add URL" button is present.
- Attributes (Target):** A dropdown menu set to "Include all of these" with a filter for "Country" and a "Select values" button. An "Add group" button is also present.

At the bottom of the interface, there is a "Publish Changes" button and a Loom watermark: "www.loom.com is sharing your screen. Stop sharing Hide". The Windows taskbar at the bottom shows the time as 10:20 on 05/10/2023 and a temperature of 22°C.

Exercise: Create a default Dialogue in Dynamic Chat

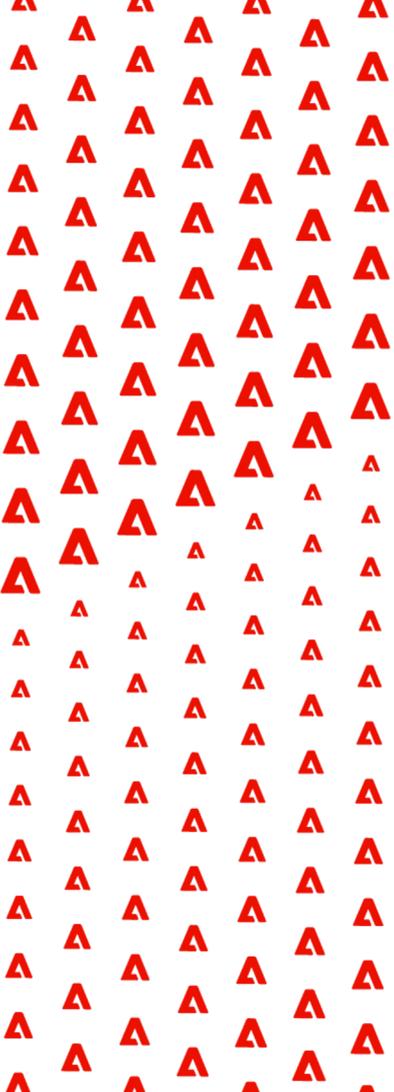
Dynamic Chat

1. Build the Dialogue and create a testing link
 2. Add a goal to track the conversions(e.g. demo request submission).
 3. Have 2-3 people test it and collect feedback
-
4. In **"Audience"**, add a web page URL in "Target" to indicate where the Dialogue will show up.
 5. In **"Settings"**, add the campaign name, description, priority, and language.
 6. Click **"Publish"**.

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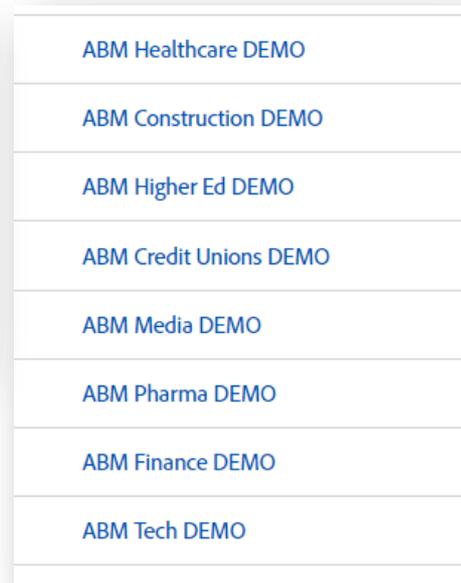
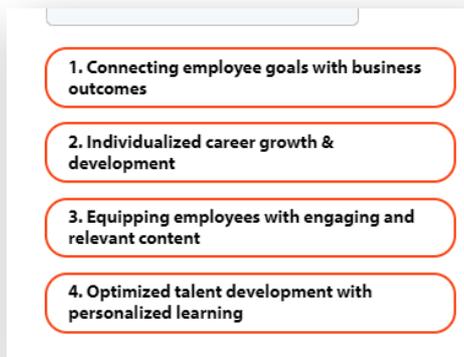
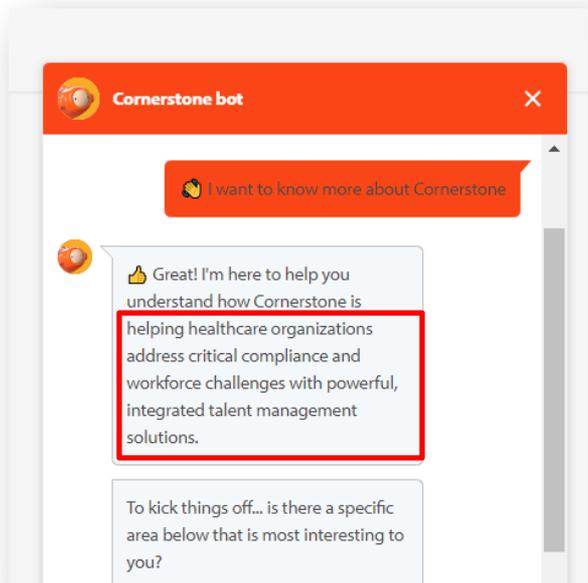
1. Create your tracking **Smart Campaign**.
 2. In **"Smart List"**, use a **"Reaches Dialogue Goal"** trigger. Use the same goal(e.g. Demo Request) you used Dialogue
 3. In **"Flow"**, include a "Chae Program Status" step to track conversion.
 4. The source will show as 'dynamicChat'. You can update the name.
-
5. Re-test your tracking Smart Campaign when it is live.

Level Up: A default Dialogue for Account-based Marketing

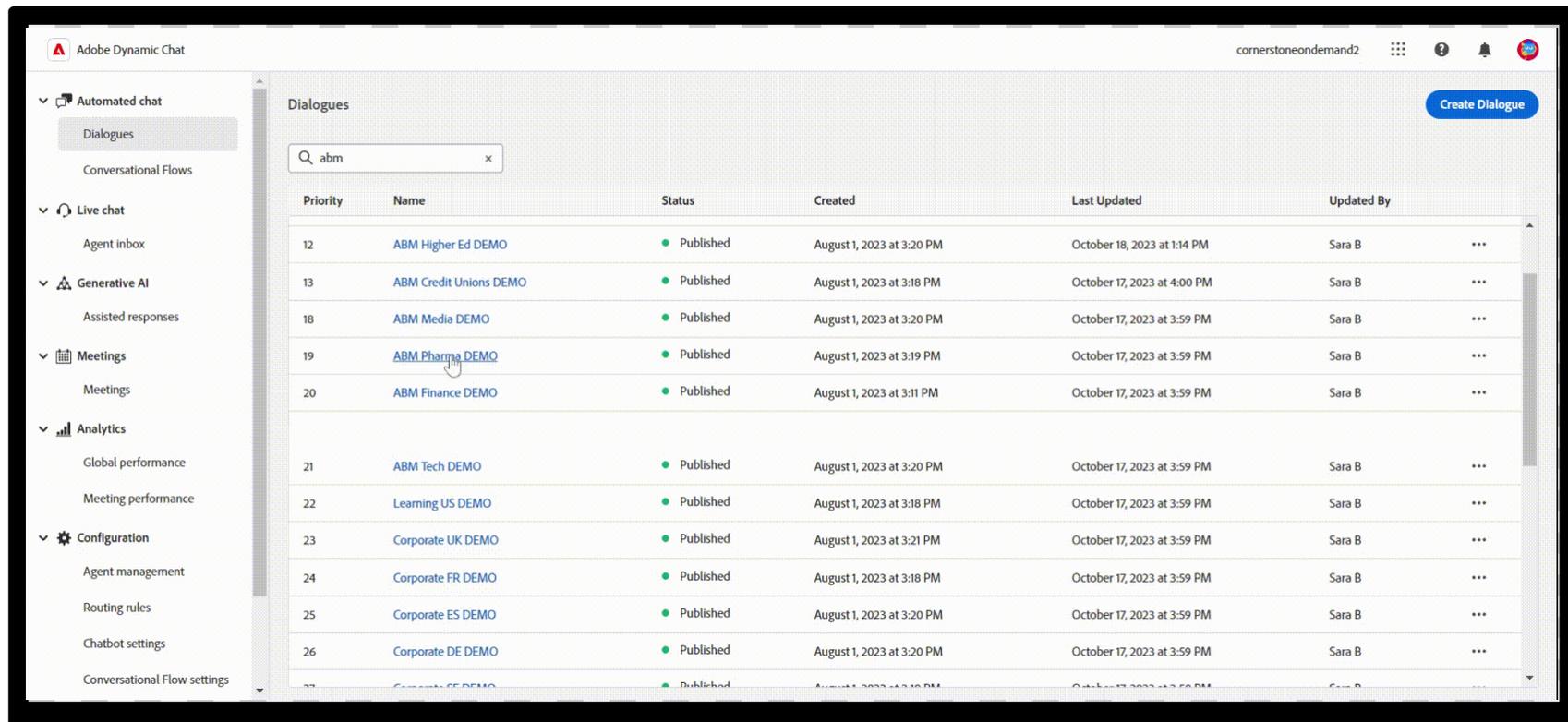


Level up: Account-based marketing Dialogue for targeted industries

Industry-targeted conversations to provide useful content to visitors.



Demo: Create a Dialogue for account-based marketing



The screenshot displays the Adobe Dynamic Chat interface. On the left is a navigation sidebar with categories: Automated chat (Dialogues, Conversational Flows), Live chat (Agent inbox), Generative AI (Assisted responses), Meetings (Meetings), Analytics (Global performance, Meeting performance), and Configuration (Agent management, Routing rules, Chatbot settings, Conversational Flow settings). The main area is titled 'Dialogues' and features a search bar with 'abm' entered. A table lists various dialogues, each with a priority, name, status, creation time, last update time, and the user who updated it. A 'Create Dialogue' button is located in the top right corner of the main area.

Priority	Name	Status	Created	Last Updated	Updated By
12	ABM Higher Ed DEMO	Published	August 1, 2023 at 3:20 PM	October 18, 2023 at 1:14 PM	Sara B
13	ABM Credit Unions DEMO	Published	August 1, 2023 at 3:18 PM	October 17, 2023 at 4:00 PM	Sara B
18	ABM Media DEMO	Published	August 1, 2023 at 3:20 PM	October 17, 2023 at 3:59 PM	Sara B
19	ABM Pharma DEMO	Published	August 1, 2023 at 3:19 PM	October 17, 2023 at 3:59 PM	Sara B
20	ABM Finance DEMO	Published	August 1, 2023 at 3:11 PM	October 17, 2023 at 3:59 PM	Sara B
21	ABM Tech DEMO	Published	August 1, 2023 at 3:20 PM	October 17, 2023 at 3:59 PM	Sara B
22	Learning US DEMO	Published	August 1, 2023 at 3:18 PM	October 17, 2023 at 3:59 PM	Sara B
23	Corporate UK DEMO	Published	August 1, 2023 at 3:21 PM	October 17, 2023 at 3:59 PM	Sara B
24	Corporate FR DEMO	Published	August 1, 2023 at 3:18 PM	October 17, 2023 at 3:59 PM	Sara B
25	Corporate ES DEMO	Published	August 1, 2023 at 3:20 PM	October 17, 2023 at 3:59 PM	Sara B
26	Corporate DE DEMO	Published	August 1, 2023 at 3:20 PM	October 17, 2023 at 3:59 PM	Sara B

Exercise: Create a Dialogue for account-based marketing

Dynamic Chat

1. Clone the “**default Dialogue**” and rename it
2. In “**Stream Designer**”, adapt Dialogue messages to the target industry (only one stream + the initial question).
3. Have 2-3 people test the Dialogue and collect feedback
4. Create a testing link and share it.
5. In “**Audience**”, add a web page URL where the Dialogue will display and update the target to the industry you want.
6. In “**Settings**”, add the campaign name, description priority, and language.
7. Click “**Publish**”.

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1. Create your tracking Smart Campaign and test the goal.
2. Re-test the tracking Smart Campaign after publishing the Dialogue.

Preview: Default Dialogue vs. account-based marketing Dialogue

The screenshot displays the Adobe Dynamic Chat Stream Designer interface. The browser address bar shows the URL: `experience.adobe.com/#/@cornerstoneondemand/so:cornerstoneondemand2/dynamic-chat/dialogues/5706f3ed-9493-4fbb-9847-94b25482a471/stream-designer`. The interface is titled "Adobe Dynamic Chat" and "cornerstoneondemand2".

Left Sidebar (Navigation):

- Automated chat
 - Dialogues
 - Conversational Flows
- Live chat
 - Agent inbox
- Generative AI
 - Assisted responses
- Meetings
 - Meetings
- Analytics
 - Global performance
 - Meeting performance
- Configuration
 - Agent management
 - Routing rules
 - Chatbot settings
 - Conversational Flow settings
 - Security settings

Main Content Area (Dialogue Designer):

Dialogues > Corporate US DEMO

Published

Audience: Stream Designer Reports Settings

Dialogue Flow:

- Start:** Question: "Welcome friend! 🤖 What can I help you with today?"
- Branching:** Two options are available:
 - A. Option:** Message: "I want to work at Cornerstone"
 - B. Option:** Question: "I want to know more about Cornerstone"
- Flow:** Both options lead to a Message: "Amazing! Here's a link to our career page".
- Final Step:** Question: "Great! I'm here to help you understand how Cornerstone makes work a place that works for everyone. Let's start with..."

Right Panel: Includes a "Restart Conversation" button and a preview of the chat message: "Welcome friend! 🤖 What can I help you with today?"



Use case 2: Event/webinar registration promotion

Use case 2: Event/webinar promotion and registration

Goal:

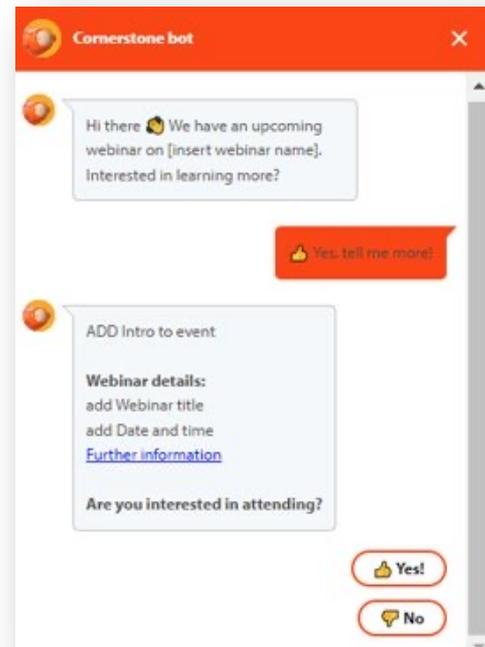
- Drive webinar & event registrations.

What this looks like in Dynamic Chat:

- Dialogue with a CTA for event/webinar registration

Why this works:

- Low lift & no extra cost involved to create promotion in Dynamic Chat.
- Show proof of Success to obtain Marketing stakeholders' buy-in.



Prep work to create a conversation of promoting event/webinar registrations

Flowchart

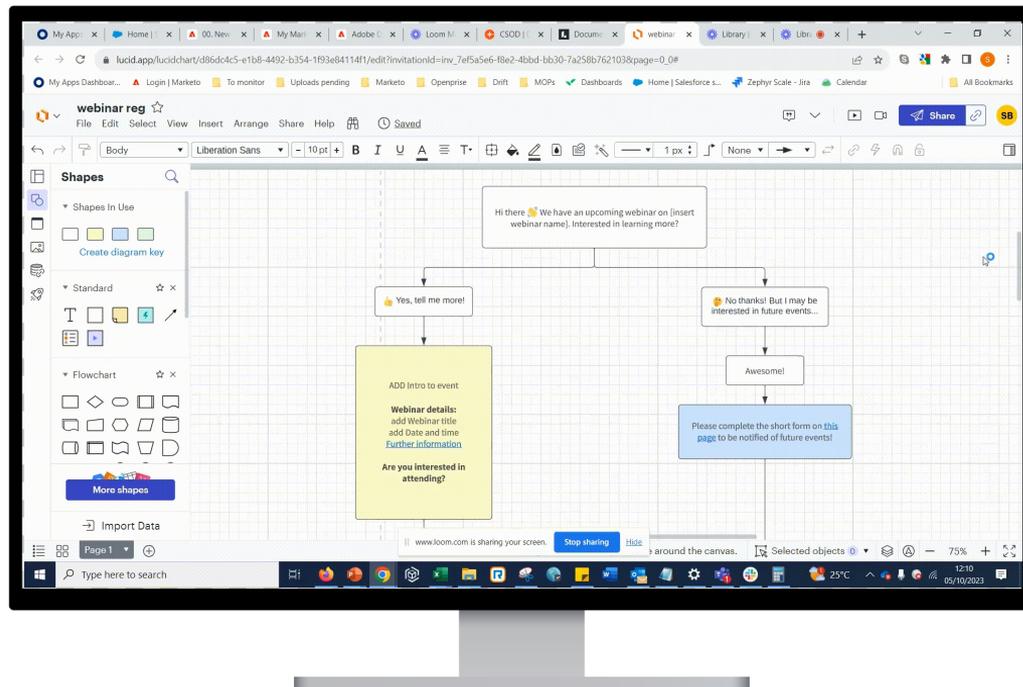
1. Build the Dialogue as a flowchart.
2. Share it with stakeholders to collect feedback.
3. Implement feedback in the flowchart.

Dynamic Chat

4. Build the Dialogue as a template.

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5. Create your tracking Smart Campaign within the webinar/event program template and test it.



Demo: Create event/webinar promotion Dialogue in Dynamic Chat

The screenshot displays the Adobe Dynamic Chat configuration interface in a web browser. The browser's address bar shows the URL: `experience.adobe.com/#/@cornerstoneondemand/sonar6/dynamic-chat/dialogues/79da9c6-f396-4455-a8e4-023391f1beaf`. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options for 'Automated chat' (Dialogues, Conversational Flows), 'Live chat' (Agent inbox), 'Generative AI' (Assisted responses), 'Meetings' (Meetings), 'Analytics' (Global performance, Meeting performance, Live chat performance), and 'Configuration' (Agent management, Routing rules, Chatbot settings, Conversational Flow settings).
- Header:** Shows 'Dialogues > testevent reg' and a 'Publish Changes' button.
- Target Section:** A 'Target' box contains a single URL: `https://www.cornerstoneondemand.com/es/?utm_campaign=sarataseventreg`. Below the URL is an 'Add URL' button.
- Events Section:** Lists three events: 'Scroll percentage', 'Time on page', and 'Time on site', each with a plus sign to add it.
- Attributes Section:** Lists five attributes: 'Account Industry', 'Account Owner ID', 'Annual Revenue', 'Billing Address', and 'Billing City', each with a plus sign to add it.
- Center:** A large empty box with the text 'Start building here. Drag and drop a field here.' and a small icon of a field.
- Bottom:** A system tray at the bottom of the screen shows the Windows taskbar with various application icons, a search bar, and system information including the date '05/10/2023' and time '12:13'.

Exercise: Create event/webinar promotion Dialogue in Dynamic Chat

Dynamic Chat

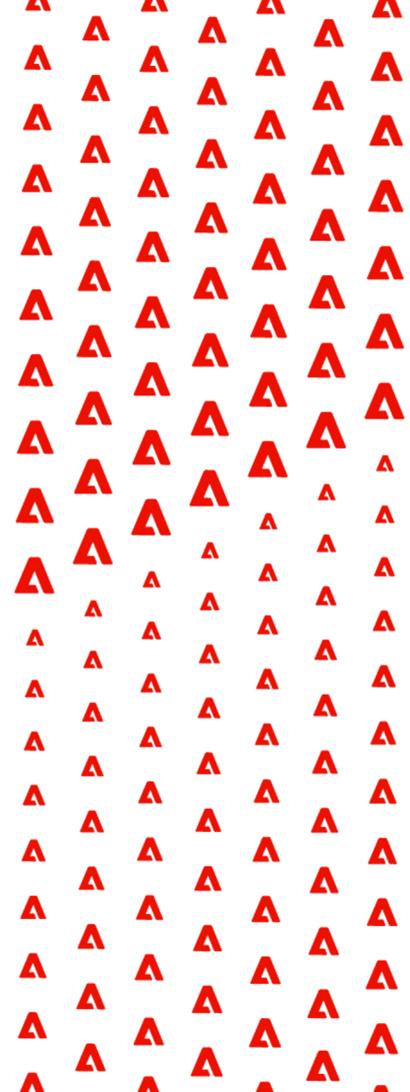
1. Clone the “**event registration**” template.
2. Copy and paste text to the Dialogue message for a new event.
3. Update **UTM parameters** used in your event link (e.g. utm_medium=website&utm_source=adobe).
4. Create a testing link, click “**Publish**”, and share it with the requestor.
5. **Peer review** and apply feedback.

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7. Add your campaign name to the **tracking Smart Campaign** within Marketo Engage and test it.

 **Pro Tip:** For ongoing campaign use, you can create an easy Dialogue template. Add the Dialogue to your MOPs request template for the stakeholders to access. Finally, if your organization targets multiple regions, you'd want to localize the Dialogue into different languages.

Level up: Register known people



Demo: Register known leads and customers without form-fill

The screenshot displays the Adobe Dynamic Chat interface within a browser window. The URL is <https://experience.adobe.com/#/@cornerstoneondemand/so:sonar6/dynamic-chat/dialogues/79da9cf6-f396-4455-a8e4-023391f11beaf/stream-designer>. The interface is titled "Adobe Dynamic Chat" and shows a dialogue named "testevent reg" which is "Published with draft".

The left sidebar contains a navigation menu with the following sections:

- Automated chat
 - Dialogues
 - Conversational Flows
- Live chat
 - Agent inbox
- Generative AI
 - Assisted responses
- Meetings
 - Meetings
- Analytics
 - Global performance
 - Meeting performance
 - Live chat performance
- Configuration
 - Agent management
 - Routing rules
 - Chatbot settings
 - Conversational Flow settings

The main workspace shows a chat flow diagram for "testevent reg". The flow starts with a "Question" node: "TESTWebinar details:TESTS Dec 2023Further informationAre you interested in attending?". It branches into two "A. Option" paths: "Yes!" and "No". The "Yes!" path leads to another "Question" node: "Is this your {{lead.leadEmail:}}?". This node also branches into "A. Option" paths: "Yes" and "No". The "No" path from the first question leads to a "Message" node: "No worries! In case your mind, here is the register!". The "Yes" path from the second question leads to a "Message" node: "www.loom.com is sharing your screen. Stop sharing Hide".

The bottom of the browser window shows the Windows taskbar with the search bar, system tray, and date/time (13:31, 05/10/2023).



Note: This feature will be soon available within one Dialogue.

Exercise: Create event/webinar promotion Dialogue in Dynamic Chat

Dynamic Chat

1. **Clone** Dialogue from the template.
2. In **Stream Designer**, after the user answers "Yes", add a question card **"Is this your email address?"**
 1. If they answer **"Yes"** – add a message card **"You will receive a confirmation email in your email with all the details"**.
 2. If they answer **"No"** – add a message card "Please fill out the form on the registration page".
3. Create a **testing link**, click "Publish", and share it with the requestor.
4. In the **Audience** tab, add [email is not empty].

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5. Add this new dialogue to the tracking Smart Campaign within Marketo Engage and test it.

Preview: Register known leads and customers without form-fill Dialogue

Sistema de gestión del talento: X

https://www.cornerstoneondemand.com/es/?utm_campaign=saratest111111

cornerstone Por qué Cornerstone Soluciones Recursos Empresa Reserve una demostración

Connect Live: ¡en tu ciudad! Inscríbese ahora

IA integrada con criterio

Proporcione a sus empleados información valiosa y experiencias personalizadas en los momentos importantes con nuestra plataforma basada en IA.

Más información Solicite una demostración

Hi there. We have an upcoming webinar on [insert webinar name]. Interested in learning more?

www.loom.com is sharing your screen. Stop sharing Hide

Type here to search

27°C 14:55 21/09/2023



Use case 3: extended campaign content engagement

A Campaign-extended Dialogue to continue conversations

Goal:

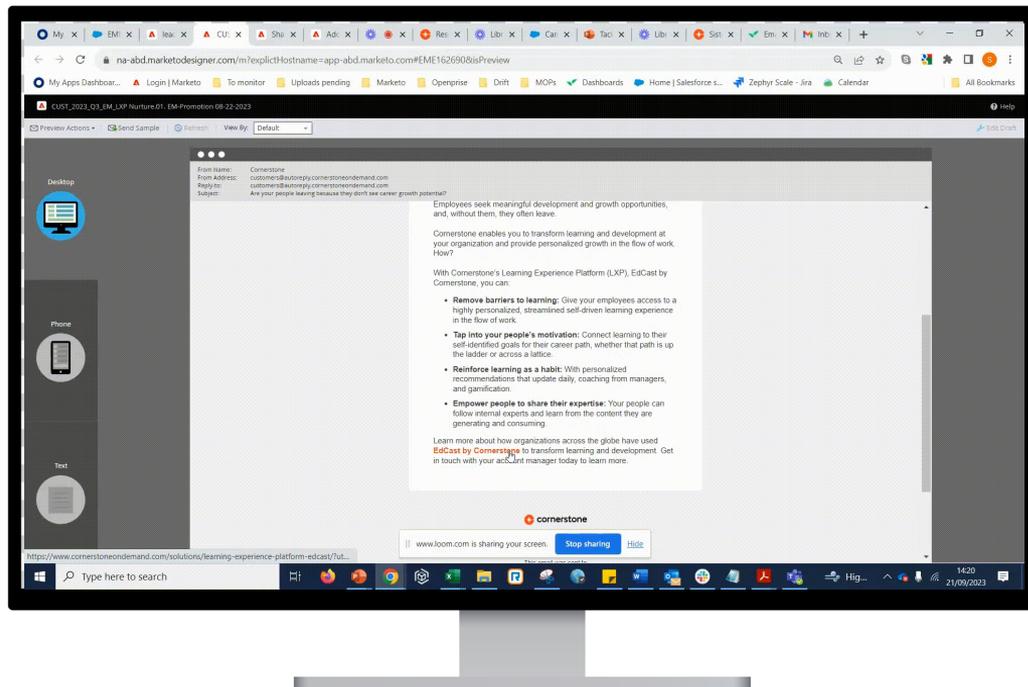
- Move leads into the marketing funnel faster

What this looks like in Dynamic Chat:

- Automation triggers: Users click on email CTA and land on the website
- Trigger conversation based on other Marketo Engage campaigns' user engagement.

Why this works:

- Upon users consume the web content, Dynamic Chat immediately provides relevant conversations to address visitors' questions.



Demo: Create a form fill conversation

The screenshot displays the Adobe Dynamic Chat Stream Designer interface. The browser address bar shows the URL: `experience.adobe.com/#/@cornerstoneondemand/so:sonar6/dynamic-chat/dialogues/f671cbb8-e9df-4ac3-a264-1229f459e649/stream-designer`. The interface includes a left-hand navigation menu with categories like Automated chat, Live chat, Generative AI, Meetings, Analytics, and Configuration. The main workspace shows a conversational flow for a dialogue named "NAM_2023_Q3_ALL_CT_THI-". The flow starts with a "Start" node leading to a "Question" node with the message: "Hi there! We just released a free assessment on talent health to help you better understand your ta...". This question node has two options: "A. Option" leading to a "Message" node with "Yes, tell me more!" and "B. Option" leading to a "Message" node with "No thanks, I want to learn more about Cornerstone". From the "Yes, tell me more!" message, the flow goes to another "Message" node: "Amazing! Once you've answered the questions, you will immediately receive your results, along with tallo...". From the "No thanks, I want to learn more about Cornerstone" message, the flow goes to a "Question" node: "Great! I'm here to help you understand how Cornerstone makes work a place that works for everyone. Let's start wit...". A separate message box on the right shows a preview of the initial question: "Hi there! We just released a free assessment on talent health to help you better understand your talent program's maturity level. Do you want to see how your talent strategy stacks up?".

Exercise: Create a form fill conversation

Dynamic Chat

1. Clone an existing Dialogue(e.g. default Dialogue)
2. Generate new leads for your campaign(in this example, Talent health index survey) via the following touchpoints:
 - Email + CTA
 - Social
 - *Dynamic Chat: asset promotion*
 - *Dynamic Chat: thank you page demo?*
 - *Dynamic Chat retargeting: Pop up if users return within 45 days*



Actionable Recipes for A Quick Start

Actionable Tips to meet you on your journey

1. Tips to help you drive adoption organization-wide

2. Tips for implementation and reporting

3. Tips to save you time as you continue building

Advocating Conversational Engagement to Drive Organization-wide Adoption

Getting started: Create the first default Dialogue

- Next, share the preview link with stakeholders. Let them see it and play around with it to provide feedback.

Refresh the conversations: Involve key stakeholders to review existing conversations

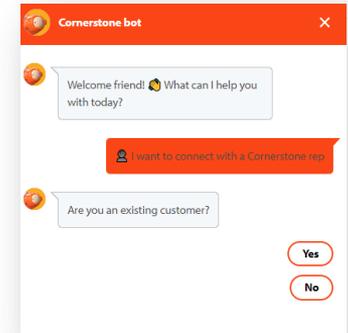
- Stakeholders: “Well...It works. Why change the conversation? Why review it?”
- You: “Content needs to be refreshed yearly to avoid being still. We can validate the relevancy by running A/B tests.”

Creating more Dialogues for new use cases

- Interview stakeholders about their goals and provide solutions based on Dynamic Chat’s capabilities.
- Show stakeholders examples of previous Dialogues/use cases.

Advocate new automation strategy and collaboration process

- Driving changes across the organization takes time.
- Repeat, repeat, repeat...and let the seed grow.



Tips of Managing Stakeholders

Communicate changes, explain benefits, and show stakeholders the new application.

- Answer questions and concerns

Demonstrate the impact of using conversational engagement.

- Provide updates on new Dialogues to show success
- Create a **success board** for your new events.

Word of mouth will do the rest for you.

	Registrations
_Edcast__Uniting in Growth	1
EXE	2
_EXE	2
_AZSurvey2022	31
_Content_Investment_Trends	4
Edcast_Uniting in Growth	5
Edcast_Uniting in Growth	5
Ondemand_Edcast_Uniting in Growth	0
_Content_Investment_Trends	1
Edcast_Uniting in Growth	2
_Content_Investment_Trends	11
_Edcast__Uniting in Growth	4
_EE_Content_Investment_Trends	5
_Donald_Taylor_Marc_Ramos	12
_BenWhitter_EX	17
_SMB_Notion_Star	4
_DEMO_Coffee_breaks_with_Cornerstone	22

Made my day. I got on our company web minutes ago and Bot informed me there upcoming event in my area. Next was a you interested?" As I have not seen this before I told to myself - lets check this, interested". Afterwards I was moved to the registration page and did register myself have realized this is the Content Investment Trends Webinar - that I am going to present on October 20th together with our Content Expert Anja Schröder. So never thought before I will register to this event that way - but since we have first attendee (myself) - feel free to register yourself and join us on October 20th at 10:00 CET. Will do our best to make it highly informative, engaging and fun. Looking forward meeting you there. #event #webinar #content #Cornerstone #LearningTrends

Visit: https://lnkd.in/dddKCH_n

Übersetzung anzeigen

The Telly ROI AWARDS

Reporting Success

Impact of the Default Dialogue for the Past 6 Months

 **1 day**

Significantly decreased
SLA build & QA time

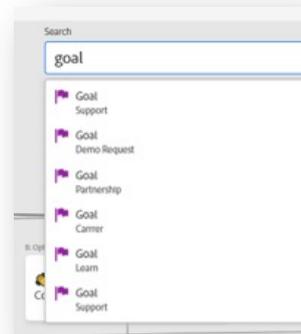
+417



Demo requests generated

+18

Marketing email subscribers



67

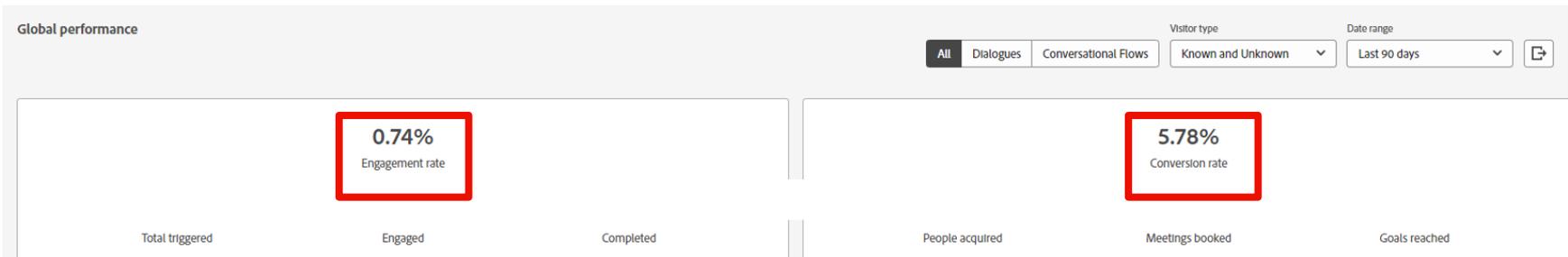
New emails acquired
from site visitors

98

Customers were helped
with questions

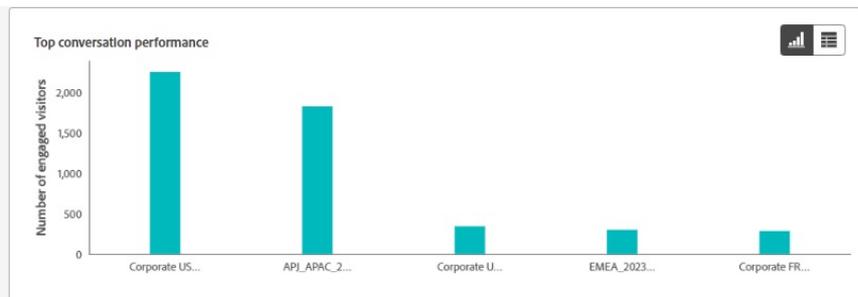


Positive feedback from
internal stakeholders



Top page performance

Page	Number of engaged visitors
https://www.cornerstoneondemand.com/	496
https://www.cornerstoneondemand.com/solutions/learning-and-de...	77
https://www.cornerstoneondemand.com/client-privacy-policy/	67
https://www.cornerstoneondemand.com/au/privacy-policy/	54
https://www.cornerstoneondemand.com/client-cookie-policy/	50



Prework Tips for Getting Started with Dynamic Chat

- Start plotting that use case on a **flowchart**.
- Install the **codes** on all web pages.
- Add a new lead **source**.
- Build new **Dialogues** and test them on a live web page.

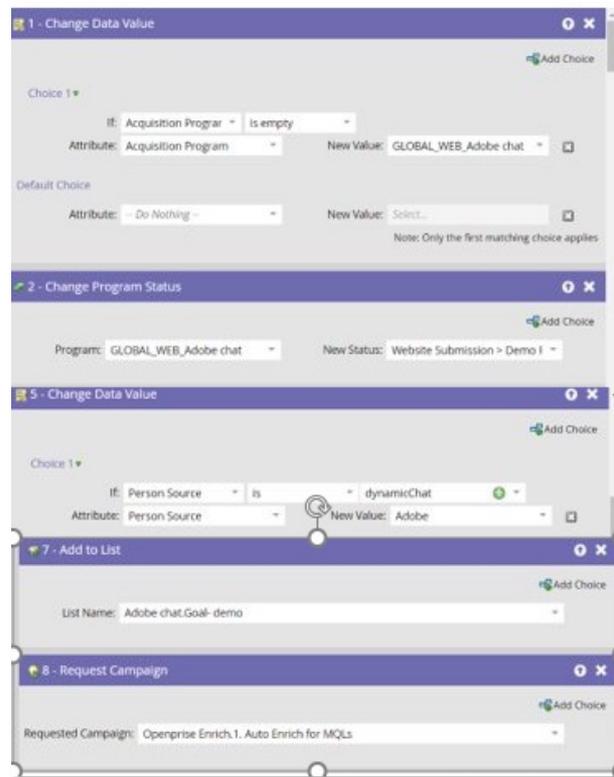
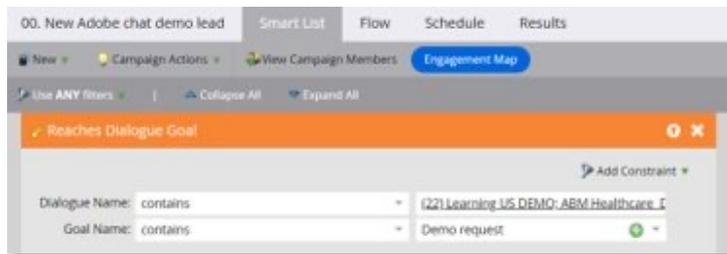
 **Pro Tip:** If you are migrating from another provider to Dynamic Chat, make sure you download all Dialogues and reports from the previous provider and add JavaScript codes from the previous provider and Adobe.



Integrating with Marketo Engage programs

Tracking in Marketo Engage

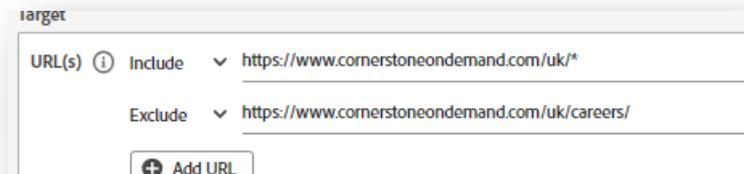
1. Create a **new program** and configure the Salesforce campaign sync (if applicable).
2. In the **Smart Campaign** tab, include a trigger “Reaches Dialogue Goal” containing your goal(e.g. Demo Request).
3. In the **Flow** tab, add the “Change Program Status”
4. Add **scoring** for the goal demo.
5. Add an **Interesting Moment step** (if applicable).



Driving Efficiency in Building Conversations

Dialogue Targeting

- Place the default Dialogue site-wide.
- Place Dialogues on the web pages with the most traffic (Google Analytics).
- Exclude irrelevant web pages from targeting such as the Careers section.



Driving Efficiency in Building Conversations(cont.)

Data Housekeeping

- Store & display values that are useful by using picklists and editing display & stored values.
- Don't ask visitors for a value you already have in the database. *Review: Register known leads and customers without form fill.*
 - Skip if value is already in database.

Chatbot Message

T T T T | 🔗 🗑️ {}

How many employees does your company have in total?

Text Entry Pick List

Options (6 of 250)

- 1-50
- 50-350
- 350-700
- 700-2500
- 2500-5000
- 5000+

Placeholder

Add placeholder text

Skip if value is already in database Overwrite existing value

Question

Chatbot Response

T T T T | 🔗 🗑️ {}

👋 Great! I'm here to help you understand how Cornerstone makes work a place that works for everyone. Let's start with a quick question... which of the following is the most challenging for your

User Responses

- Getting employees to engage with o...
- Retaining employees
- Finding and onboarding new talent
- It's all hard

Map response to attribute

Drift_value_hook

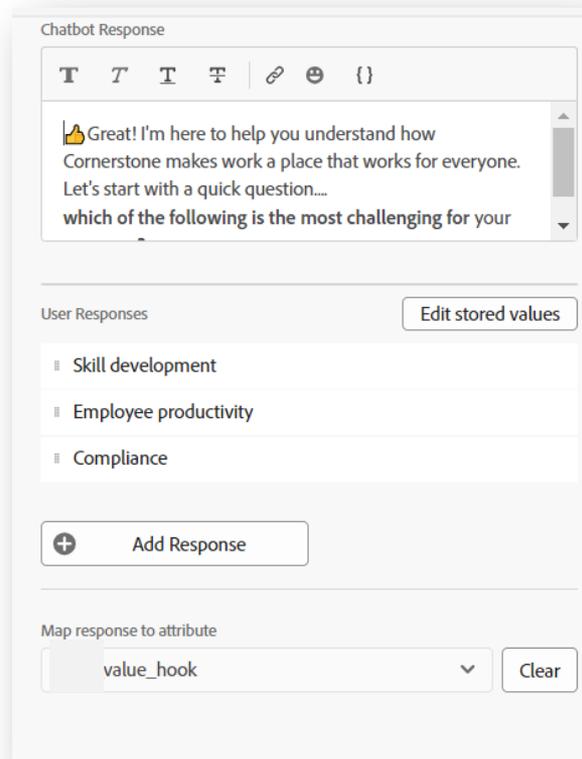
Edit stored values

Display Value	Stored Value
<input type="text" value="1] Getting employees t..."/>	Enter value
<input type="text" value="2] Retaining employees"/>	Enter value
<input type="text" value="3] Finding and onboar..."/>	Enter value
<input type="text" value="4] It's all hard"/>	Enter value

Driving Efficiency in Building Conversations(cont.)

Tracking

- Store key answers in an attribute.
- Always use UTM parameters in your links.
- *Reminder: The Marketo Engage tracking campaign for the 'chat' channel activity will only be retained for a rolling period of 90 days past the activity date.*



The screenshot shows a configuration window for a chatbot response. At the top, it is titled "Chatbot Response". Below the title is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, link, unlink, and code. The main text area contains the following content: "👋 Great! I'm here to help you understand how Cornerstone makes work a place that works for everyone. Let's start with a quick question... which of the following is the most challenging for your". Below the text area is a section labeled "User Responses" with an "Edit stored values" button. This section contains a list of three items: "Skill development", "Employee productivity", and "Compliance". At the bottom of this section is an "Add Response" button with a plus icon. Below the "User Responses" section is a "Map response to attribute" section with a dropdown menu currently showing "value_hook" and a "Clear" button.



New features for integrating with Marketo
Engage programs

Demo: Conversational Forms to trigger alert emails

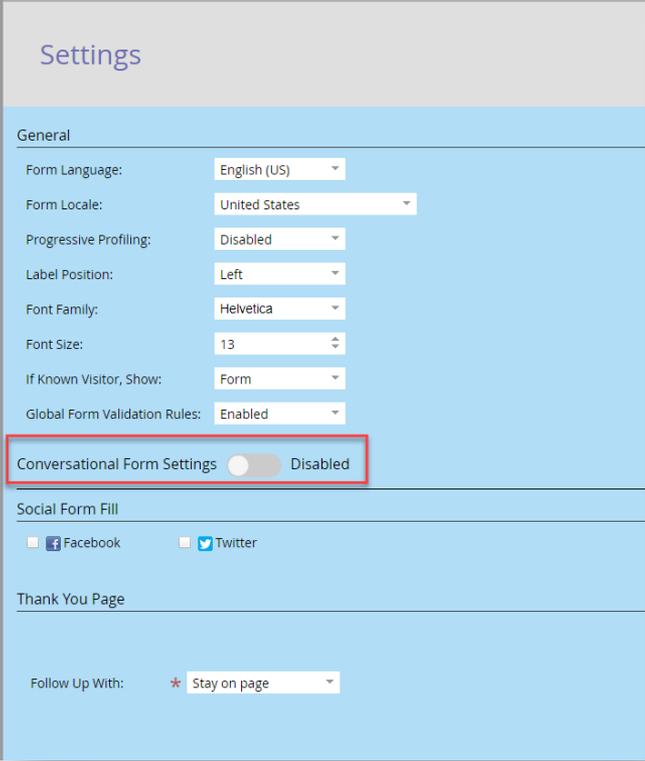
The screenshot displays a web form builder interface for a form titled "Chat Program Whitepaper Form". The interface is divided into three main sections:

- Left Navigation Panel:** Contains three steps: 1. Field Details (highlighted in blue), 2. Form Settings, and 3. Finish.
- Field Details View:** Shows a preview of the form with four input fields: "First Name", "Last Name", "Company Name", and "Email Address". A "Submit" button is located below the "Email Address" field.
- Properties Panel:** A configuration sidebar on the right with a "Delete" button at the top. It includes the following settings:
 - Label:** First Name
 - Field:** First Name
 - Field Type:** Text
 - Label Width:** (dropdown)
 - Field Width:** (dropdown)
 - Instructions:** (text input)
 - Hint Text:** (text input)
 - Default Value:** (text input)
 - Validation Message:** Standard
 - Max Length:** 255
 - Behavior:**
 - Is Required:** (checkbox, unchecked)
 - Visibility Rules:** Disabled
 - Form Pre-fill:** Enabled
 - Mask Input:** Disabled

Exercise: Configure a conversational form

Marketo Engage:

1. Navigate to the Form Settings and click the slider under the “Conversational Form Settings” header to enable the Conversational Form.
2. Add your Form to the Marketo Engage landing page and approve it.
3. Create a Smart Campaign containing a trigger for each of your Dialogue goals.
4. In the **Flow** tab, add the ‘Change Program Status’ flow step with the program you are working in and set the new Status to your goal.
5. Add the ‘**Change Score**’ flow step to include your score value. E.g. Score: `mkto_Behavior`; Value: +10.
6. In the **Schedule** tab, activate the Smart Campaign.



The screenshot displays the 'Settings' page for a form in Marketo Engage. The page is divided into several sections: General, Social Form Fill, and Thank You Page. The 'General' section includes dropdown menus for Form Language (English (US)), Form Locale (United States), Progressive Profiling (Disabled), Label Position (Left), Font Family (Helvetica), Font Size (13), If Known Visitor, Show (Form), and Global Form Validation Rules (Enabled). The 'Conversational Form Settings' section is highlighted with a red box and shows a slider control that is currently set to 'Disabled'. The 'Social Form Fill' section has checkboxes for Facebook and Twitter. The 'Thank You Page' section has a dropdown menu for 'Follow Up With' set to 'Stay on page'.

Trigger campaign targeting to send alerts(cont.)

Marketo Engage: Create an alert email for the Sales team.

1. Create an email named "Meeting Scheduled Alert".

From:	L710 Marketo
From Address:	l710@marketo.com
Reply-to:	l710@marketo.com
Subject:	Meeting Scheduled Alert

Meeting Scheduled Alert

One of your leads or contacts has scheduled a meeting through Dynamic Chat. Please follow up with the SDR/BDR if necessary:

Lead Name: {{lead.First Name}} {{lead.Last Name}}

Page Booked On: {{trigger.Page URL}}

Meeting Booked With: {{trigger.Agent Email}}

Meeting Date: {{trigger.Scheduled For}}

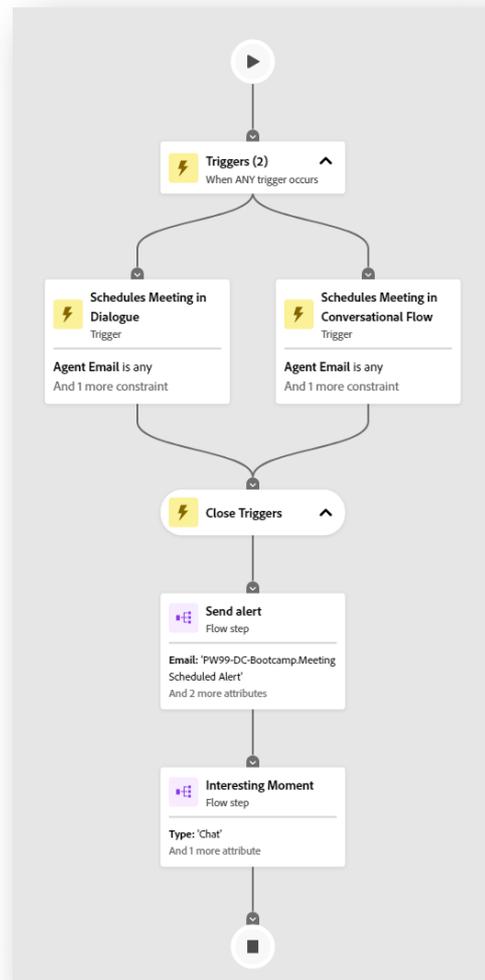
Link to Lead in Marketo

{{SP_Send_Alert_Info:default=Favorite Customer Chat}}

Trigger campaign targeting to send alerts(cont.)

Marketo Engage: Create an alert email for the Sales team.

2. Add the “Schedules Meeting in Dialogue” and “Schedules Meetings in Conversational Flow” triggers.
3. Change “Agent Email” to “is any”.
4. Add the “Page URL” constraint. Set it to “contains” and the program prefix as the value.
5. In the Flow step, add the “Send Alert” flow step and select the “Meeting Scheduled Alert” email in your program.
6. Add the “Interesting Moment” flow step, set the Type to “Chat”, and set the description to something descriptive.
7. In the Schedule tab, activate the Smart Campaign.



Take The Next Step Today.

1. Log into Adobe Dynamic Chat by clicking on the Dynamic Chat tile on the My Marketo page.
2. In Dynamic Chat/Integrations, initiate sync between Dynamic Chat and Marketo Engage.
3. In Dynamic Chat/Stream Designer, create a Dialogue and publish it.
4. In Marketo Engage, create a Smart Campaign to include a trigger “Reaches Dialogue Goal” containing your goal(e.g. Demo Request).
5. Turn on Conversational Flow settings in Marketo Form Settings.

Key Takeaways



Draft your conversational flow in visual flow charts.



Create a default Dialogue as soon as you start building in Dynamic Chat.



Continue the conversations post-content engagement by triggering Marketo Engage program targeting.



Reporting success with a success board to update stakeholders and advocate more use cases.



Trigger campaign targeting by creating a Smart Campaign that contains a “Trigger Dialogue Goal” flow step.

Appendix

- [Product tour of Dynamic Chat](#)
- [Setup and install your chatbot](#)
- [Activate your Marketo Integration with Dynamic Chat](#)
- [Conversational Forms](#)
- [Use cases of Dynamic Chat](#)
- [FAQs of Dynamic Chat](#)
- [How to Write Engaging Dynamic Chat Dialogues?](#)

