

# KeyNode Solutions

## Pardot Training Schedule

<p>01-Training:</p> <p>Segmentation / List (Dynamic/Static) – 60 Min</p>	<p>02-Training:</p> <p>Email Creation Testing Sending – 90 Min</p>	<p>03-Training:</p> <p>Forms / Landing Pages – 90 Min</p>
<ul style="list-style-type: none"> <li>● Creating Campaign(s) in Name Only</li> <li>● Mapping a Salesforce Field to Pardot</li> <li>● Creating List (Dynamic vs Static)</li> <li>● Prospects <ul style="list-style-type: none"> <li>○ Importing-Add to List</li> <li>○ Segmentation Rules</li> <li>○ Table Action to Create/Add Prospect to Test List</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Navigating Email Menu - Differences Between Templates, Template Drafts and Email Drafts</li> <li>● Creating Email Template</li> <li>● Testing a Template</li> <li>● Publishing Templates</li> <li>● Using Templates to Create a List Draft Email</li> <li>● Sending an Email</li> </ul>	<ul style="list-style-type: none"> <li>● Creating a Form <ul style="list-style-type: none"> <li>○ Creating Custom Fields</li> <li>○ Adding Fields to a Form <ul style="list-style-type: none"> <li>■ Depended Fields</li> <li>■ Progressive Profiling</li> </ul> </li> <li>○ Very Basic Formatting</li> <li>○ Completion Actions (Automation)</li> </ul> </li> <li>● Landing Page GUI Editor</li> <li>● A Brief Look at Custom Layouts.</li> </ul>
<p>Before this session, you should prepare by knowing which fields in Salesforce contain the data you want to use the filter on</p>	<p>If possible, please provide email examples 2-3 days before this session and access to previous tools such as:</p> <ul style="list-style-type: none"> <li>● Mailchimp</li> <li>● HubSpot</li> <li>● Marketo</li> <li>● Eloqua</li> <li>● Constant Contact</li> </ul>	<p>If possible, please provide URLs from your website that have active forms you would like to create 2-3 days before this session. You'll also need to provide landing page examples</p>

<p>04-Training:</p> <p>Engagement Studio – 60 Min*</p> <p>*More time is required if you would like to build one together.</p>	<p>05 -Training:</p> <p>Scoring / Grading – 60 Min*</p> <p>*More time is required if you skipped Session 1</p>
<ul style="list-style-type: none"> <li>● <i>Engagement Studio (EG)</i></li> <li>● <i>Creating basic setup</i> <ul style="list-style-type: none"> <li>○ <i>Assign segmentation list</i></li> <li>○ <i>Set up of email timing/when to send</i></li> </ul> </li> <li>● <i>Workflow canvas</i></li> <li>● <i>Program Logic</i> <ul style="list-style-type: none"> <li>○ <i>Actions</i></li> <li>○ <i>Triggers</i></li> <li>○ <i>Rules</i></li> </ul> </li> <li>● <i>Program Logic-Time</i> <ul style="list-style-type: none"> <li>○ <i>Wait</i></li> <li>○ <i>Wait up to</i></li> <li>○ <i>On specific date</i></li> </ul> </li> <li>● <i>EG test tool</i></li> <li>● <i>EG report canvas</i></li> <li>● <i>Deploying</i></li> <li>● <i>Tips and tricks</i></li> </ul>	<ul style="list-style-type: none"> <li>● <i>Scoring</i> <ul style="list-style-type: none"> <li>○ <i>Explanation of Scoring</i></li> <li>○ <i>How to modify the default model</i></li> <li>○ <i>Aging rules</i></li> </ul> </li> <li>● <i>Grading</i> <ul style="list-style-type: none"> <li>○ <i>Explanation of Grading</i></li> <li>○ <i>How to customize categories used</i></li> <li>○ <i>Manually change a prospect's grade</i></li> <li>○ <i>How to write Automation rules to grade prospects</i></li> </ul> </li> </ul>
	<p>Grading is often related to what some may call Demographics or Personas. If you are going to grade on Job Titles, you need to supply the list of titles you want matched. The following buckets can be changed but are the default buckets.</p> <p>Matching:</p> <ul style="list-style-type: none"> <li>● Company Size (2/3 letter)</li> <li>● Industry (2/3 letter)</li> <li>● Location (2/3 letter)</li> <li>● Job Title (2/3 letter)</li> <li>● Department (2/3 letter)</li> </ul>

**Contact us today!**  
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