



## Checklist

# Creating a Pirsonal Player Project and Campaign



*This short checklist or summarized guide will help you create your first Pirsonal Player Project.*

*If you deal with saturated audiences and want them to react, Pirsonal Player will help you **evoke a reaction from each individual**, at scale, and automatically.*

*Pirsonal Player makes any video highly relevant with personalized **in-video Calls to Action**, individualized analytics and **dynamic landing pages** that play well with any digital marketing workflow so that your videos become relevant, **you improve customer experience** and increase customer engagement.*

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CEO at Pirsonal

- Define your business goals. This will determine every single detail from here. Personalized video marketing is not magic. It requires a strategy.
- Create a new Pirsonal Player Project. Go to **My Templates / Pirsonal Player**.
- On the Pirsonal Player Project page, add the project's details: Project Name (required), Description (optional), Webhook URL (optional; you'll probably use this to connect Pirsonal with your email marketing tool or similar), and select a background video.
- Regarding the background video, choose one or many **background videos**. You have two options: **1) Dynamic Media:** Use this option when the background video comes from a dynamic source. For example: You have 10 buyer personas and will assign a background video URL based on the buyer persona type. **2) Template Media:** Use this option when the background video is always the same. Example: If you want Pirsonal to host the video.
- If you haven't, add a Webhook URL to the project. To add a webhook to the Project, follow these steps: My Templates / Find your template / Click on the Action menu (three vertical dots) / Edit Project. There, add the Webhook URL in the provided field.
- Create a sample video with the Webhook URL added to the template. This will allow Pirsonal to save this information so that you can test the communication between Pirsonal and any third-party tool (for example HubSpot, Mailchimp, Google Sheets).
- It's time to determine the personalized in-video Calls to Action for the videos, and the dynamic landing page (Pirsonal Pages) assets. Remember that every single piece of content can be personalized on a contact/video basis.
- There are three different ways to create a sample video and also to run bulk or marketing automation campaigns. Choose the one that fits your needs: **1) Using our Campaign tool for CSV**, **2) Using Zapier** (+3k integrations with tools like Google Sheet, Salesforce, and Mailchimp), **3) Using Pirsonal's API**. Any of these options help you add in-video personalized Calls to Action at scale and automatically create dynamic landing pages for your contacts/videos.
- Track your campaign's success in different ways depending on your needs. **1) Intelligence:** It provides aggregated analytics (better for general overviews). **2) People:** It helps you if "John Doe" has seen the video and personalized Calls to Action (better for sales followups), **3) Videos:** Similar to People, but on a video basis instead. **4) Responses:** If you are using Pirsonal's Smart Forms, personalized web form submissions are shown in Responses on a contact basis. **5) Google Analytics:** Pirsonal can send events to your GA account for each video ID.

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