Understanding the Flow: Marketing to Sales
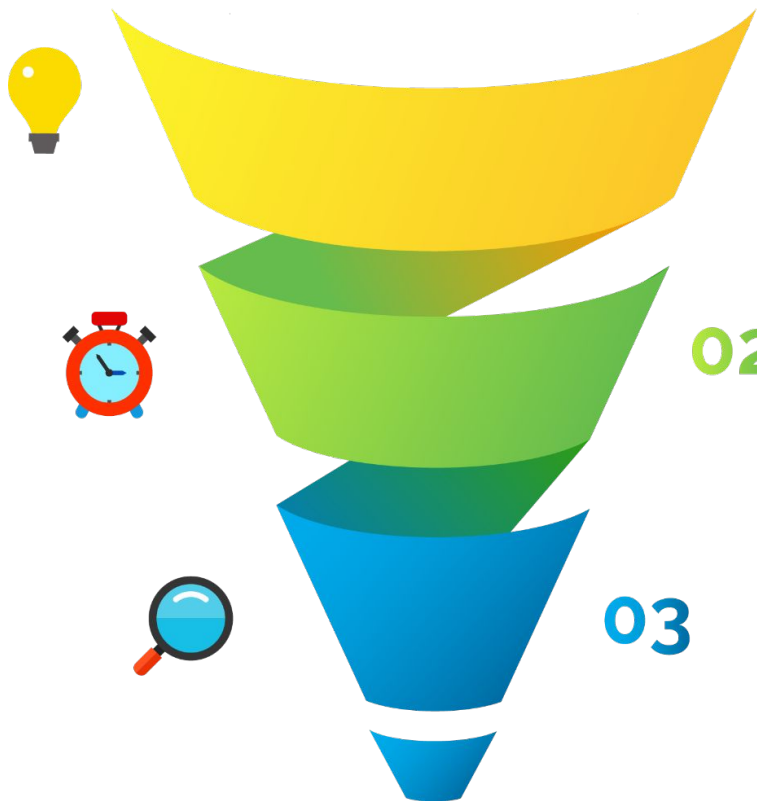
Attract and acquire leads 01
by SEO, paid search, social media & blogging

Engage and nurture leads 02
by hosting web content and capturing lead information via forms

Filter leads as qualified for sales 03
and finally acquire them as customers

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The Journey: From Prospect to Lead

Alex Googles "fundraising nonprofits in New York" and clicks through to a blog post on an nonprofit organization website

with an embedded form that asks visitors to sign up for monthly newsletters to share what's happening within and around their organization.

Alex signs up for the newsletter

In Pardot he is:
- Created as a prospect
- Signed up for the newsletter
- Given a score of 20 for submitting the newsletter form

Alex receives the monthly newsletter and clicks through an article

In Pardot:
- His preferences are recorded
- He receives a score of 15 for clicking on an email link

Alex continues to browse relevant content on the nonprofit organization website

Meanwhile in Pardot:
- He is being scored based on his activities/behavior on the website
- He is also being constantly tracked and his preferences are being recorded based on his engagement (for better segmentation & running highly targeted campaigns)

Sarah gives Alex a call to follow up on Alex's interest on associating with the organization

while the data continues to flow bi-directionally between Pardot & Salesforce so that all the records are up-to-date and Sarah can refer to all the information and get content before talking to Alex.

Alex is created as a lead in Salesforce

and a task is created for Sarah, one of the sales reps, to follow with Alex about the nonprofit organization initiatives, its mission, and what exactly it does, that would interest Alex more towards donation.

Alex receives an email asking if he would be interested to contribute to the community. He opens it and fills out a form showing his interest in the matter.

In Pardot:
- He receives a score of 50 for submitting the form and showing his interest
- This triggers an automation that pushes the prospect to Salesforce
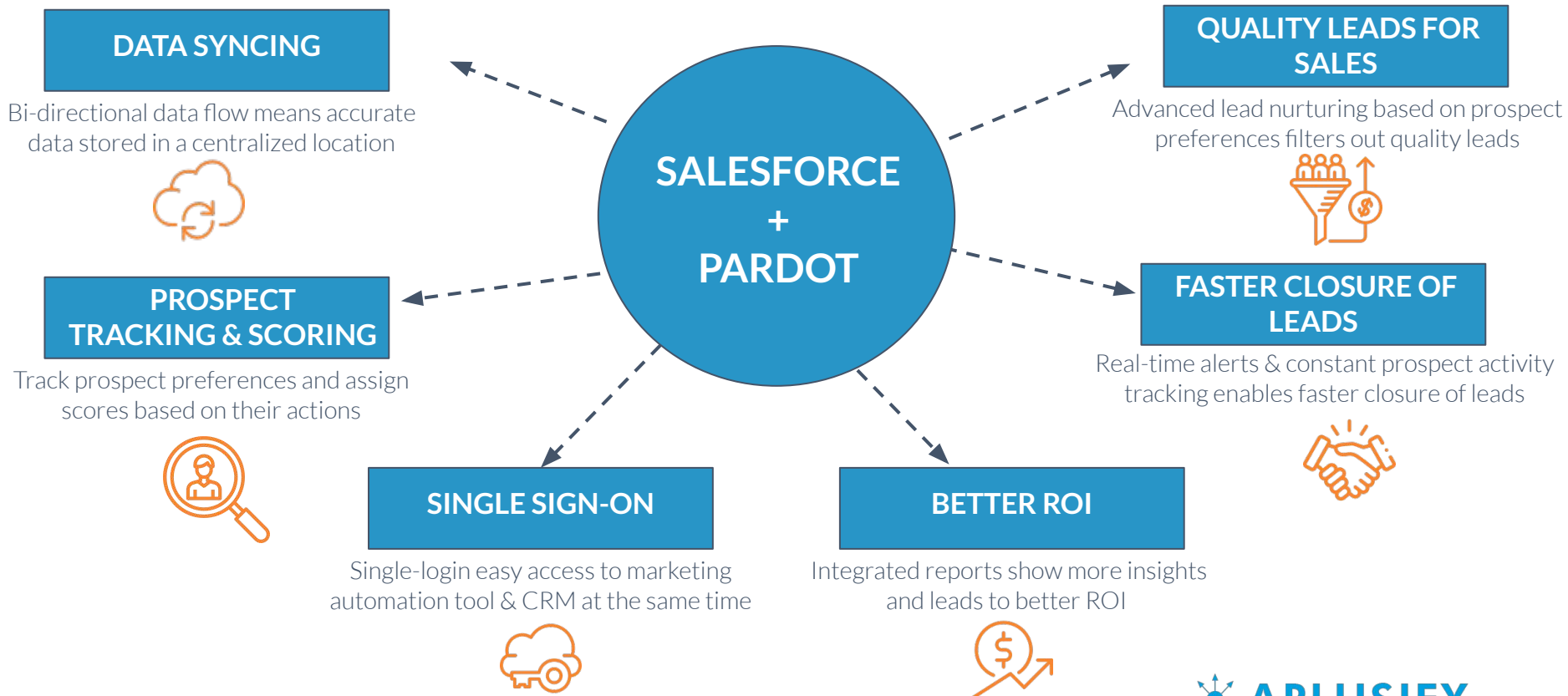
Alex is redirected to a gated content where he fills up a progressive form to download a resource he wants (say a PDF)

Via Pardot:
- Alex receives an auto-responder email with a link to download the resource/content
- He receives a score of 30 for submitting the form to access the content

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Benefits of Integrating Salesforce with Pardot

DATA SYNCING

Bi-directional data flow means accurate data stored in a centralized location

QUALITY LEADS FOR SALES

Advanced lead nurturing based on prospect preferences filters out quality leads

SALESFORCE + PARDOT

PROSPECT TRACKING & SCORING

Track prospect preferences and assign scores based on their actions

FASTER CLOSURE OF LEADS

Real-time alerts & constant prospect activity tracking enables faster closure of leads

SINGLE SIGN-ON

Single-login easy access to marketing automation tool & CRM at the same time

BETTER ROI

Integrated reports show more insights and leads to better ROI

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3 Scenarios While Syncing Data

Data only in CRM (Salesforce)
This will happen when Salesforce is already in use and Pardot is just implemented

Data only in Pardot
Pardot is already in use and Salesforce is just implemented

Data both in Salesforce and Pardot
Both in use but are silo systems

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The Salesforce-Pardot Integration Checklist

Key factors to consider for a successful implementation

Getting a Buy-in from the business users

Ensuring that prospects' field mapping is done correctly

Making sure that data cleansing is carried out in both Salesforce and Pardot before the integration

Enabling the Pardot Lightning app and Single Sign-On (SSO)

Carrying out rigorous user-testing before going live with the integration

Training client staff on using the integration efficiently to make the most out of it

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Campaign Report

REPORT: ENGAGEMENT METRICS ON LANDING PAGES
Pardot Landing Pages

Total Responses in Campaign	Total Total Form Submissions	Total Unique Form Submissions
379	2,147	2,074

Name ↑		Responses in Campaign ①	Total Form Submissions ②	Unique Form Submissions ③	Form Submission Rate ↓ ④
▭ ░░░░ ░░ ░░░░░░ (1)		0	5	4	27.78%
Subtotal		0	5	4	27.78%
▭ ░░░░ ░░░ ░░░░ ░ ░░░░░░ (1)		0	127	126	18.57%
Subtotal		0	127	126	18.57%
▭ ░░░░ ░ ░░░░░░ ░ (1)		7	32	31	6.63%
Subtotal		7	32	31	6.63%
▭		0	120	103	35.50%
Subtotal		0	120	103	35.50%
▭ ░░░░░ ░░ ░ ░░░░░░░░ (1)		0	9	9	2.88%
Subtotal		0	9	9	2.88%
▭ ░░░░░░ ░ (1)		0	57	57	29.38%
Subtotal		0	57	57	29.38%
▭ ░░░░░░░░░░░					
Subtotal					

Report that shows the performance of different campaigns in terms of lead engagement

1. "**Responses in Campaign**" - how many leads/contacts are part of a campaign

2. "**Total Form Submissions**" - number of times the form on the landing page was submitted

3. "**Unique Form Submissions**" - number of unique individuals who submitted the form

4. "**Form Submission Rate**" - % of people who submitted the form out of everyone who viewed

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Email Report

Report: Engagement Metrics on List Emails
New Report

Total Records	Average Open Rate	Maximum Open Rate	Minimum Open Rate	Average Unique Click Through R...
279	17.11%	64.86%	0.00%	10.85%

	Name	Open Rate ↓	Subject
1		64.86%	Save the Date
2		64.57%	Don't forget to register for your webinar!
3		63.89%	
4		62.50%	Thanks for Attending
5		62.50%	
6		61.54%	
7		60.00%	
8		60.00%	
9			

Report that shows the performance of different emails that are sent to the leads

1. "**Open Rate**" - % of people who have opened an email out of everyone who have received it

2. "**Subject**" - the subject line of emails with respect to different email campaigns

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