

Pardot

Automation



Implementation Guide

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INTRODUCTION

Strategy Mapper's Pardot Automation feature allows you to set up Drip campaigns in Pardot using Strategy Mapper's Actionable Intelligence, Giving you accurate and relevant intelligence to nurture those valuable opportunities you need to close.

This manual will guide you through the basics of how to integrate Pardot and Strategy Mapper.

SALESFORCE INSTALLATION

Add the Pardot App to your Salesforce Org

- Use the link below to guide you through this process.

<http://help.pardot.com/customer/en/portal/articles/2213578-pardot-appexchange-package-download-and-release-history>

Update the Opportunity Layout

- Make sure the PardotAutomation field is on your opportunity layout while testing. After you are sure everything is working fine, you will probably want to remove this field so that it is not manually edited.

Status	Working	
Status	Working	
Status	Working	
Score	33	
Solution Score	100	
Created By	Dev User, 12/11/2015 8:12 PM	Last Modified By Dev User,
Description	They are looking for a sales enablement solution that is 100% native to Salesforce.	
PardotAutomation	Teams Not Practicing Sales Methodology,Low usage of Salesforce,Digitization/Marketing Automation	

https://help.salesforce.com/htviewhelpdoc?err=1&id=customize_layoutcustomize_pd.htm&siteLang=en_US

CONNECTOR CONFIGURATION

Connect your Salesforce connector in Pardot

- Use the link and example below to guide you through this process.

[Home](#) / Administration

Connectors

 The following LinkedIn Social Posting connectors must be re-verified before messages can post: Joseph Dindinger.

[+ Add Connector](#)

Name	Category	Vendor	Username	Verified	Updated 	Actions
salesforce.com	CRM	salesforce.com 	dev@mmfierce.dev1		Mar 28, 2016 11:43 AM	
LinkedIn	Social Posting	LinkedIn 	Joseph Dindinger	Not verified (verify now)	Nov 19, 2015 7:26 AM	
Twitter	Social Posting	Twitter 	ToAFinish		Jun 23, 2015 12:37 PM	
912-253-3671	Paid Search	Google AdWords 	joseph@toafinish.com		Jun 23, 2015 12:36 PM	
Google Analytics	Other	Google Analytics 	N/A		Jun 22, 2015 10:48 PM	

<http://help.pardot.com/customer/portal/articles/2128445-setting-up-the-salesforce-connector>

Customize the Pardot/Salesforce Connector

- Check the box that allows you to auto import Leads and Contacts into Pardot from Salesforce. If you choose not to automate Leads or Contacts then you'll need to 1) add them manually using the “[Send to Pardot](#)” button or 2) import them.

Customize Connector Preferences

☒ Automatically create prospects in Pardot if they are created as a Lead or Contact in salesforce.com

Default Campaign

High rep turnover - losing deals ⬆

<http://help.pardot.com/customer/portal/articles/2128368-salesforce-connector-optional-settings-reference>

SALESFORCE CONFIGURATION

Adding an Actionable Intelligence PardotLink

Strategy Mapper needs to be configured with the pieces of Actionable Intelligence that you will want to send to Pardot. Here is how you do that:

- 1) From within Salesforce, click on the "All Tabs" link and choose the "PardotLinks" tab.
- 2) Press the "New" button and select one piece of Actionable Intelligence at a time that you want to configure, as in the screenshot below. (Only Pain Points, Strengths, and Customer Initiatives are supported at this time.)

The screenshot shows a Salesforce configuration window for adding an Actionable Intelligence PardotLink. At the top, there are three buttons: "Save", "Save & New", and "Cancel". Below this is a red header bar labeled "INFORMATION". The main area contains several configuration options:

- Actionable Intelligence Type:** A dropdown menu with "Pain Points" selected.
- Actionable Intelligence Value:** A dropdown menu with "Not collecting KPIs" selected.
- Industry Filter (Optional):** A dropdown menu with "--None--" selected.
- Account Type (Optional):** A dropdown menu with "--None--" selected.
- Product (Optional):** A dropdown menu with "GenWatt Propane 1500kW" selected.
- Country (Optional):** A dropdown menu with "United States" selected.
- State (Optional):** A two-column list. The left column lists "Missouri", "Montana", "North Carolina", "North Dakota", and "Nebraska". The right column is titled "Chosen" and lists "Alabama", "Louisiana", and "Mississippi".
- Only My Opportunities:** A checkbox that is currently unchecked.

At the bottom of the window, there are three buttons: "Save", "Save & New", and "Cancel".

Sending Actionable Intelligence to Pardot

Going forward, when you are entering supported Actionable Intelligence, you will see a checkbox that allows you to add the current record into the Pardot Automation. If you uncheck the Pardot? checkbox, you can add a piece of Actionable Intelligence without notifying the Pardot Automation.

Actionable Intelligence

SaveCancel

Actionable IntelligenceCustomer RequirementsCompetitorsPain PointsStr

Pain Points

New

Pain Points	Low usage of Salesforce	⬇	Pardot? ☒	⊗
Pain Points	High rep turnover - losing deals	⬇	Pardot? ☒	⊗
Pain Points Free Form				

New

SaveCancel

PARDOT CONFIGURATION

Create a custom Opportunity field in Pardot

- Use the example below to create your custom Opportunity field (TextArea) named PardotAutomation in Pardot

Name	Type	CRM Field	Updated At
PardotAutomation	Textarea	PardotAutomation__c	Apr 6, 2016 2:09 PM

Edit Custom Field

Name *

Type *

Custom Field ID *

salesforce.com Field Name

☐ Keep this field's type and possible values (for dropdowns, radio buttons, checkboxes) in sync with the CRM.

☐ Required

☐ Record and display multiple responses (useful for fields that are set to always be displayed like reporting issues)

☐ Use pre-defined values (for checkboxes, radio buttons, drop downs, and multi-selects)

http://help.pardot.com/customer/en/portal/articles/2125853-creating-custom-fields?b_id=11139

Create a Campaign

- These campaigns will be associated with Actionable Intelligence (Pain Points, Strengths, Customer Initiatives) in Strategy Mapper

<http://help.pardot.com/customer/portal/articles/2125816-creating-campaigns>

Create a Segmentation List

- You will create Segmentation Lists for each piece of Actionable Intelligence (Pain Points, Strengths, Customer Initiatives) you'd like to automate emails for.

http://help.pardot.com/customer/en/portal/articles/2128397-creating-lists?b_id=11139

- Below is an example of Actionable Intelligence such as “High rep turnover – losing deals” which is an option under Pain Points.

List Information

Name *

High rep turnover - losing deals

Folder *

/Uncategorized/Lists

Choose

Tags

add a tag

Email Test List

☐

Email Test lists are exclusively used for internal tests, and will be limited to 100 prospects.

Archive Date

YYYY-MM-DD



Archive Date is only used for sorting and doesn't affect module usage

Public list

☐

Display this list in the email preference center

CRM Visible

☒

Allow prospects to be assigned to this list from a CRM

Update List

Cancel

Create your Automation Rule

- This rule will pull your Opportunity's Actionable Intelligence into the proper Segmentation List. You'll create a rule for each Actionable Intelligence.

http://help.pardot.com/customer/en/portal/articles/2128566-creating-automation-rules?b_id=11139

Example Rule Criteria:

Rules	
Relation group	Match prospects that have any opportunities with properties: Match all • Prospect opportunity custom field: Prospect opportunity custom field PardotAutomation contains 'High rep turnover - losing deals'

Create a Drip Campaign

- You can also create a Drip Campaign for each piece of Actionable Intelligence.

http://help.pardot.com/customer/en/portal/articles/2133407-creating-drip-programs?b_id=11139