

CASE STUDY

LeadingAge

Connecting with members in a critical time: streamlining member communications with Pardot

Goals

Implement a modern, intuitive marketing automation solution to boost member engagement.

LeadingAge collaborates closely with its 5,000 members and partners on applied research, advocacy, education, and community-building initiatives spanning the full range of aging and disability services as it works to be the trusted voice for aging in the United States.

Fíonta began working with LeadingAge in 2018, and the organization engaged with us again when it needed to communicate with members more effectively during the Covid-19 public health crisis that disproportionately affected seniors.



We'll work with them again and again. Sophisticated marketing tools are only valuable when they're leveraged in smart, strategic ways. Fíonta's deep product knowledge and great client service were exactly what we needed to ensure a smooth transition from Marketo to Pardot.

Susan Donley

*Senior Vice President,
Marketing and Communications
LeadingAge*

Challenges

Overly complicated tool no longer fulfilled LeadingAge's requirements.

- LeadingAge's legacy marketing automation solution was hard for staff to use and no longer met the organization's growing needs for mass email management.
- The legacy solution was not well integrated with LeadingAge's core Salesforce Constituent Relationship Management (CRM) solution, resulting in issues with sync between the two platforms and record duplication.
- Reports were difficult to access, making ROI on marketing efforts harder to determine.



Pardot emails help support LeadingAge's member communications.

Solutions and Results

Pardot powers strategic marketing efforts across teams, leading to increased engagement.

Collaboration

LeadingAge and Fíonta worked collaboratively to surface all potential uses for Pardot, define project priorities, and plan for integration with the core Salesforce CRM.

Personalized Communication

Fíonta created customized templates for various marketing assets and provided tailored Pardot training, allowing the LeadingAge team to hit the ground running with Pardot.

Integration

Pardot is now in use by several teams across the organization, and seamless integration with Salesforce means that staff have new confidence in their clean data.

Ease of Reporting

All data and engagement efforts are now effortlessly tracked to Contacts and Campaigns, and LeadingAge staff can easily report on and analyze marketing ROI using Pardot's native reporting functionality.

Featured Product



FÍONTA

Technology as a
force for change.

info@fionta.com | 202 296-4065

www.fionta.com