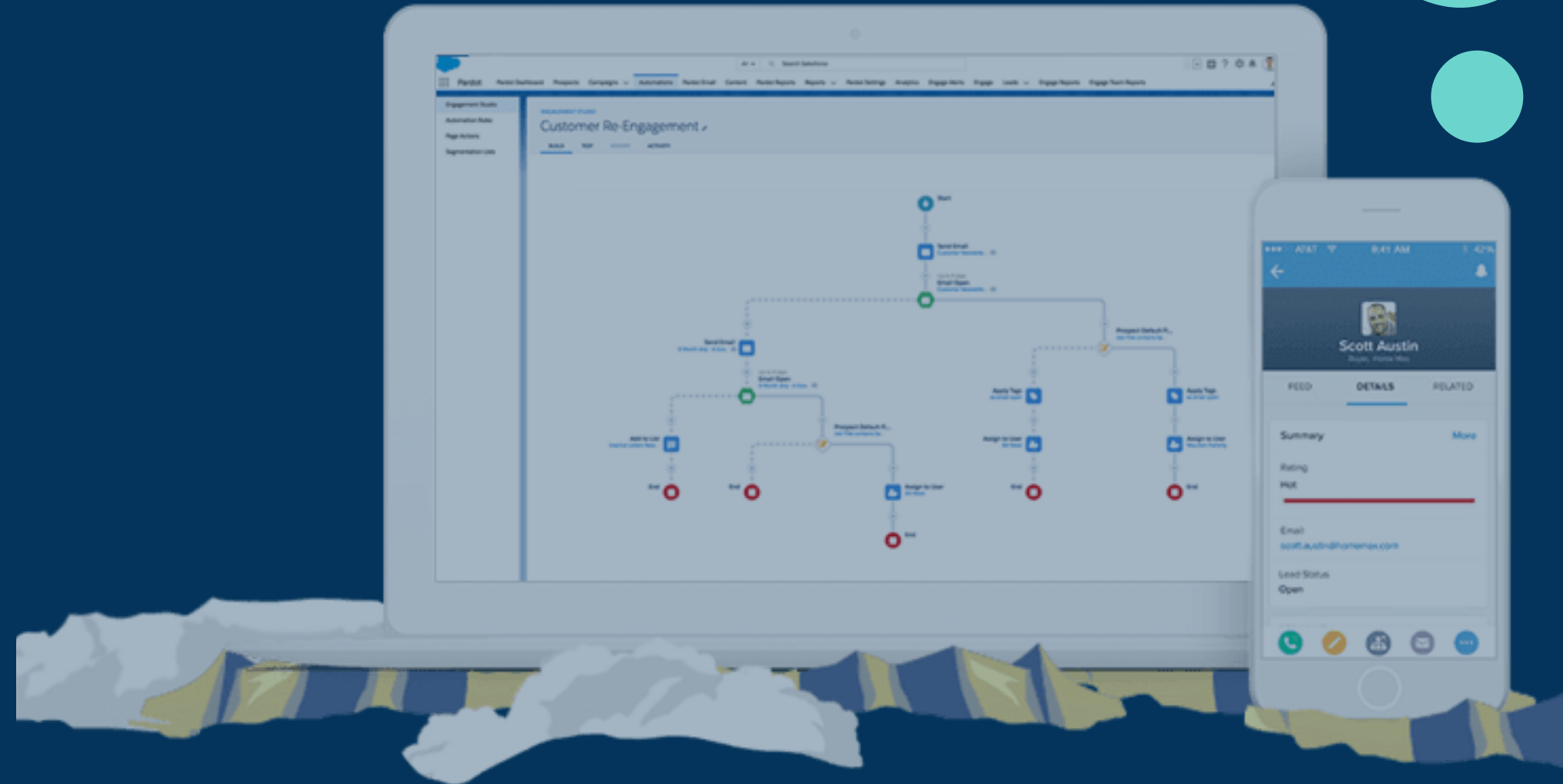


ENTERPRISE QUICK START

GET YOURSELF UP AND RUNNING
IN NO MORE THAN 4 WEEKS TIME

BEGIN WITH US



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OUR METHODOLOGY & APPROACH

Our definitive approach and agile methodology makes the project execution error free. We define requirements meticulously even the granular ones, that are easier to understand by your non- technical team members.

REQUIREMENT UNDERSTANDING

Meticulous

STATEMENT OF WORK

Definitive

NEXT STEPS



STEP 1

DISCOVERY

Kick off call to go through Implementation checklist.

STEP 3

DEPLOY

Thorough check by our intense testing process

STEP 2

BUILD

Account configuration, content library, automations, data import...

STEP 4

COMPLETE

Get your application solution blueprint



ACCOUNT CONFIGURATION

TECHNICAL SET UP

- Support for your implementation of web tracking, email authentication, and vanity domain).
- Modify existing Salesforce configuration (Leads, Contacts, Accounts and Opportunities).
- Modify page layouts for above mentioned Salesforce objects.
- Install Pardot application in your Salesforce Sales Cloud deployment including custom buttons.
- Install and configure your Salesforce Connector along with up to 3 additional Pardot Connectors (Google Analytics/ AdWords and Social)

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STANDARD PROFILE MANAGEMENT



- Create Pardot users, assign roles, enable single sign-on.
- Create and map custom Pardot Prospect fields and map to Salesforce objects.
- Create and map custom Pardot account fields and map to Salesforce objects.

ACCOUNT CONFIGURATION

ADVANCED FORMS & PROGRESSIVE PROFILING

- Create 2 Pardot form to be used on Pardot landing pages or non-Pardot landing pages.
- Create progressive profiling Pardot form.
- Set up hidden form fields from the default value (if needed).
- Set up advance forms if needed (like pre-populate fields based on previous answer).
- 1 Form handler to integrate with your existing website form

LEAD SCORING

- Identifying your key scoring fields based on the demographic variables that are most important to your sales team.
- Developing the right values and point scores for each set of criteria.
- Getting continued insight from your sales team



CONTENT & AUTOMATIONS



AUTOMATION & SEGMENTATION

- Identify Your Core Segments, Such as Prospects, Customers, Competitors, Partners, And More.
- Target and filter your outbound campaigns by location, industry, and other criteria.
- Building your target lists for email sends.
- Dynamic list, to automate your more often segmentation.
- Automation rules, to match your business process (Up to 5).

CONTENT & AUTOMATIONS

CREATIVE ASSETS BUILDING

- Configure 2 template based landing page (Stock Template Only).
- Configure 4 emails with Pardot email (Stock Template Only) Configuring custom data extension to store data.

DRIP MARKETING CAMPAIGNS

- Configure 1 Engagement Studio Program Template (client to provide content and assets; max 10 steps).



DATA IMPORT TERMS

DATA TERMS

We propose a joint data mapping approach as described below:

- Client will provide an initial extract of client's subscriber data which is said to be their marketing list. It should include Subscription status (Active/Unsubscribes)
- Our team will then review client's data and will suggest the best practices to use that data in Sales Cloud.

DATA TRANSFORMATION

- The client team will transform client's data into the correct format as defined in the templates for upload into Sales Cloud objects.
- The client team will also perform de-duplication such that the data is ready for load into data extension.

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DATA LOAD



- Once client's data is transformed into the correct format,
we will import it into Sales Cloud objects.
- For quality assurance purposes, we will first complete a mock conversion, followed by the final conversion. (Iterations maximum 2)
- Once the data load is complete, we will work with the client team to assure data quality by running key data metrics.

OTHER TERMS

TRAINING

- Onboarding Training – 2-hour training session via web conference.
- If you request, we will record the training sessions and provide you with access.

ADDITIONAL TERMS

- The implementation price does not include the Salesforce license fees.
- The implementation is based on features of Salesforce which are generally available
- 1 week backup support limited to the scope of implementation and no new development or change request
- None of the scoped items in this package is replacable with any other scope that is not mentioned in this document.

EXCLUDED SERVICES

- This service does not include data cleansing, data loading or transformation services.
- Services not specifically identified above are not included in this quick-start service.
- Custom development of triggers, Visualforce pages, Sites and Flows.
- High end automation process and custom object relationships
- Additional support services can be purchased separately for data administration, custom CRM configuration, custom development, additional training.

WHO WE ARE

ATH Infosystems is a Specialist Solutions Reseller and Services Company. We specialise in ERP, CRM, Marketing Automation and Internet of Things. ATH is a Salesforce partner. We also work with several software vendors such as Microsoft, AWS and Google.

ATH is a next-generation global Information technology company that helps enterprises grow their businesses for the digital age. Our technology products and services are built on innovation from skilled and certified resources, with a world-renowned management idea, a great culture of ingenuity, and a persistent focus on customer relationships.

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The logo for ATH Infosystems is displayed on a dark blue circular background. The letters 'ATH' are in a large, bold, white sans-serif font, with a small orange horizontal bar positioned above the 'I'. Below 'ATH', the word 'Infosystems' is written in a smaller, white, lowercase sans-serif font.

ATH
Infosystems