

# Case Study - Regional User Enablement

## Summary

This multinational asset management firm uses Pardot to market to their audiences in 26 regional business units. Nebula have worked with this organisation since their initial implementation of Pardot to onboard regional users and to provide strategic guidance to the central marketing team. Over the last three years, we have continued to drive marketing automation innovation from the central team and support users across the regional offices. We have helped to drive adoption of the platform whilst maintaining centralised process management and governance procedures in a heavily regulated environment.

## Key Figures

Number of Pardot Users:	599
Nebula team members:	9
Project started:	April 2019
Number of Business Units	26

## Highlights

- ❖ Close communication between MA sprint team, Central Marketing and regional users to ensure global alignment.
- ❖ Leading solution design and implementation for global Preference Management redesign.
- ❖ Supporting a large team of regional marketing users with day-to-day platform support through the helpdesk.
- ❖ Building highly customised and interactive marketing insight dashboards using Tableau CRM.
- ❖ Establishing platform usage guidelines and governance documentation to accommodate a highly regulated industry.
- ❖ Developing and building a custom Engagement History component to enhance sales enablement across multiple territories.
- ❖ Providing ongoing training for new and advanced users, with sessions to accommodate multiple countries and time zones.
- ❖ Best-practice guidance on asset design and deploying centrally designed campaign templates across multiple Business Units.