



## **CLIENT**

The client is a Software Developer Company for Insurance & Mortgages.

## **SOLUTION**

Pardot: Form Handler, Engagement Program, Prospect Custom Fields.

## **INDUSTRY**

Software Development

## **CHALLENGE**

The client has a trial license of their product and came to Vimera with the request to implement a marketing automation solution to improve their trial license subscriptions strategy and to engage prospects in the marketing program once the prospect requests a trial license. Our consultants suggested implementing Pardot.

## **SOLUTION**

The Vimera team has configured Pardot implementation to improve engagement strategy with prospects. There is a form on their website to install a trial version of the product. The prospect filled out the form, and clicked on submit button, this action triggered a downloading of software, and then the information has been redirected to the form handler to Pardot with subscriber information.

Form handler contained a completed action to add prospects to a list. After Pardot, this prospect has been added to a specific list. This list is the source for the engagement program.

Those prospects who have gotten to this list, are added to the engagement program and follow it only once. The idea was to send different automated emails based on this solution.

Pardot's default fields don't capture the prospect data and to manage in-depth and full life-cycle prospect tracking the Vimera team has created prospect custom fields.

## **RESULTS**

### **Enhanced engagement strategy**

Now the client has a Pardot which provides a prospect's engagement program and as a result improved the strategy engagement

### **prospects**

### **Boosted strategy**

The client has improved a nurture program by creating emails campaigns with an engagement program

### **nurturing**

### **leads**