

A Step Too Far?

Pardot & Contacts to Multiple Accounts

Advanced | Admin



Matt Lincoln
DELIVEROO



Agenda

What is Contacts to Multiple Accounts in Salesforce?

How does C2MA cause challenges with the Pardot data model?

Potential workarounds and solutions





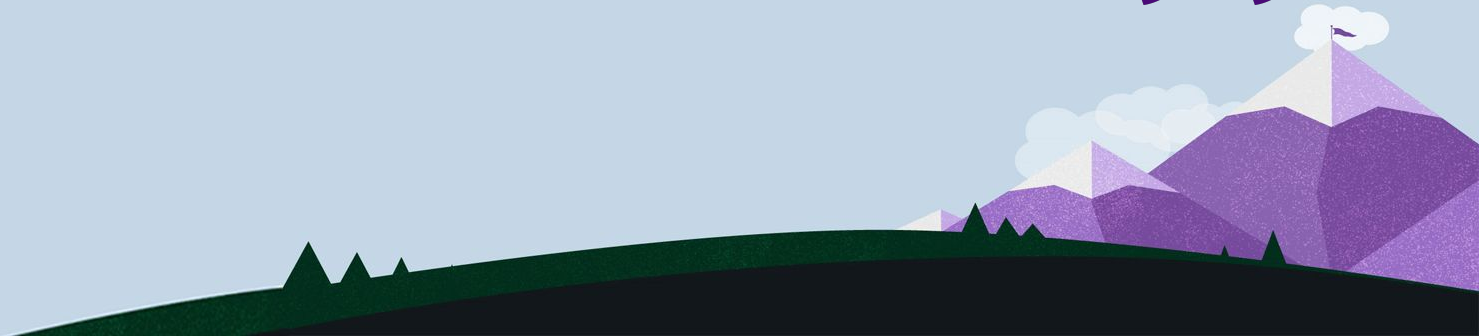
What is Contacts to Multiple Accounts in Salesforce (C2MA)?

“

Wearing more than one hat

*To hold or function in more than one
position or role simultaneously*

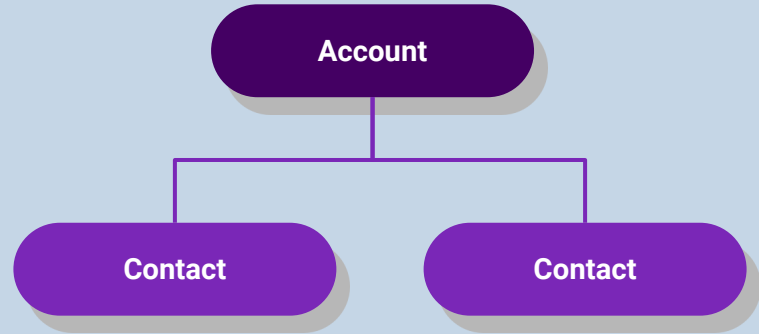
”



Salesforce Default Model...

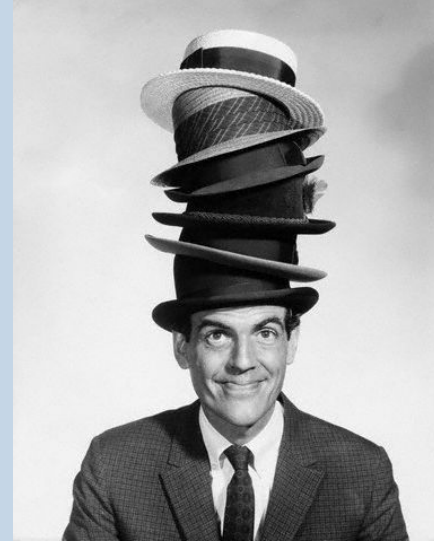
Each Contact can be associated with one Account

Accounts can have many Contacts



But what about...

- Employees who work at more than one company?
- Consultants who work for several companies?
- Entrepreneurs who own more than one business?
- People who are part of more than one membership organisation?
- People who donate to multiple charities?



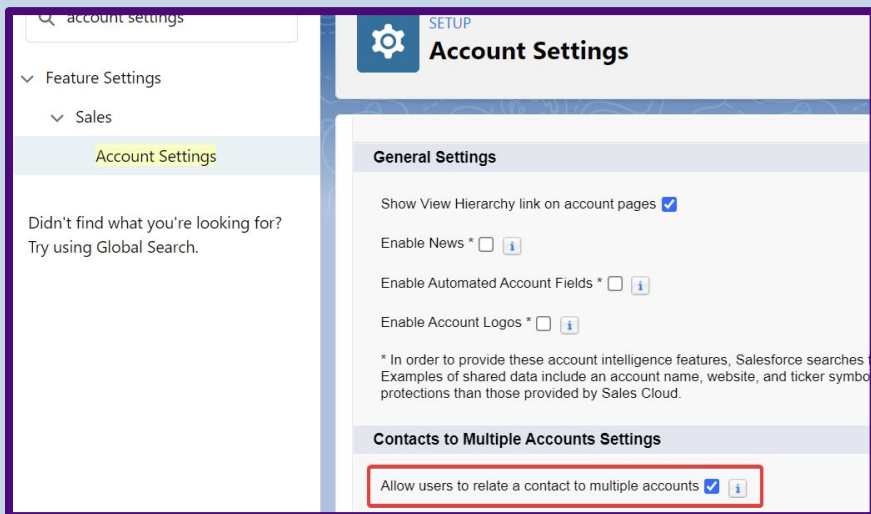
Case Study

Deliveroo, Online Food & Grocery Ordering & Delivery

- Contacts are typically Restaurant/Grocery Store Owners / Managers
- A businessperson frequently owns multiple different sites or businesses
- Accounts represent Sites, but also the Companies who operate those Sites



Enabling C2MA



The screenshot shows the Salesforce 'Account Settings' page. The left sidebar contains a search bar with 'account settings' and a navigation menu with 'Feature Settings', 'Sales', and 'Account Settings' (highlighted). The main content area is titled 'Account Settings' and includes a 'General Settings' section with three checkboxes: 'Show View Hierarchy link on account pages' (checked), 'Enable News' (unchecked), and 'Enable Automated Account Fields' (unchecked). Below these is a note about account intelligence features. The 'Contacts to Multiple Accounts Settings' section contains one checkbox: 'Allow users to relate a contact to multiple accounts' (checked), which is highlighted with a red rectangular box.

Feature Settings → Sales → Account Settings →
Allow users to relate a contact to multiple accounts



C2MA in Salesforce

[Implementation guide](#)

Contact

Contact
Ms. Ashley James

Related Accounts (2)

Acme Corporation
Direct:
Roles: Influencer

United Oil & Gas, UK
Direct:
Roles: Decision Maker

[View All](#)

Account

Account
Acme Corporation

Related Contacts (3)

John Dodge
Account Name: Burlington Textiles Corp of America
Title: Chairman
Email: jdodge@example.com

John Smith
Account Name: Acme Corporation
Title: Consultant
Email: jsmith@acme.com

Ashley James
Account Name: United Oil & Gas, UK
Title: VP, Finance
Email: ajames@uog.com

Related **Details**

Account Contact Relationship Information

Account	Roles
United Oil & Gas, UK	Decision Maker
Contact	Active
Ashley James	<input checked="" type="checkbox"/>
Direct	End Date
<input checked="" type="checkbox"/>	Start Date

Contact
Ms. Ashley James

Related Accounts (2) [Add Relationship](#)

Account Name	Direct	Roles
Acme Corporation	<input type="checkbox"/>	Influencer
United Oil & Gas, UK	<input checked="" type="checkbox"/>	Decision Maker

[View All](#)

Contact
Ms. Ashley James

Phone (2) [▼](#) Email [ajames@uo](#)
+44 191 4956203

Related **Details** **News**

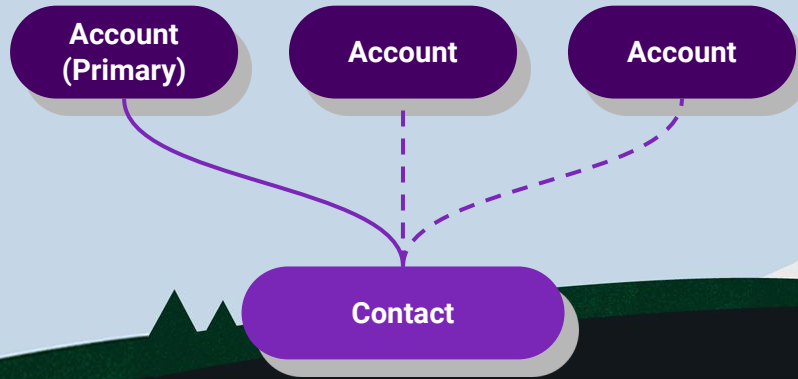
Contact Owner
[Salesforce Admin](#)

Name
Ms. Ashley James

Account Name
[United Oil & Gas, UK](#)

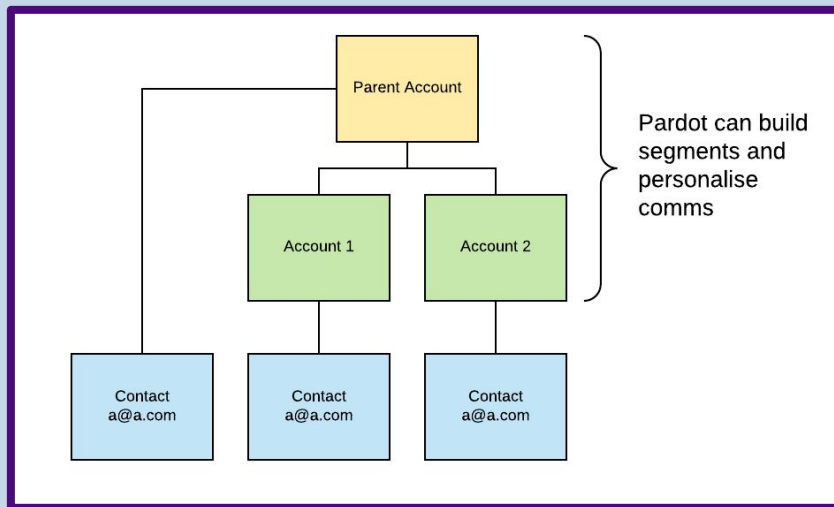
Title
VP, Finance

Department

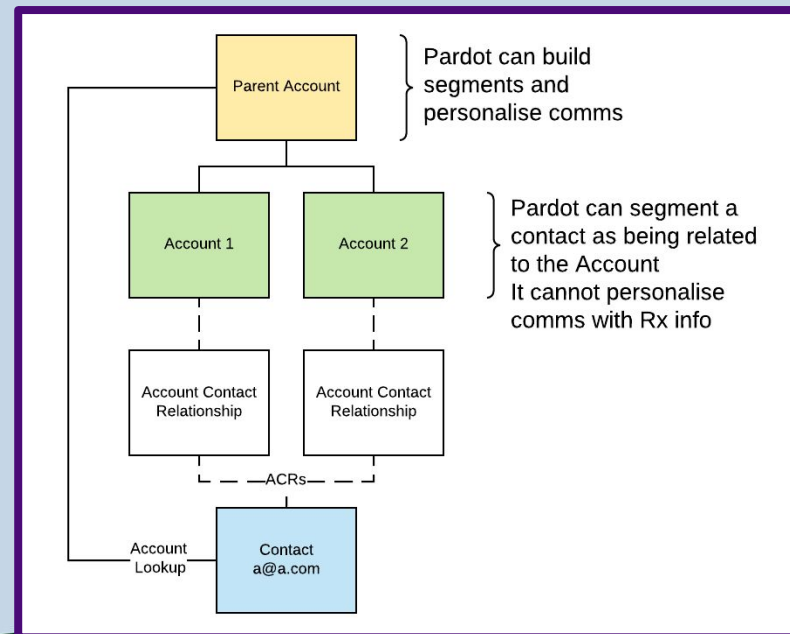


Data Structures

C2MA Disabled



C2MA Enabled



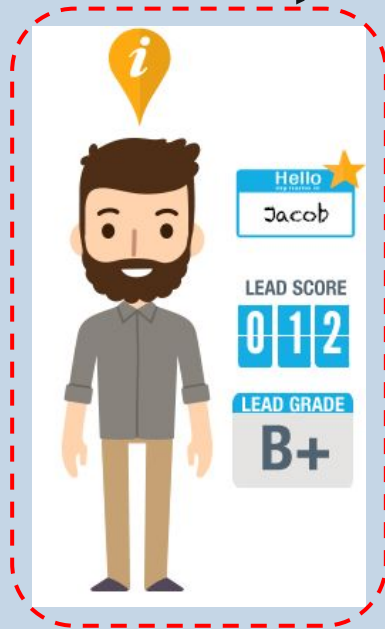
Demo!





How does C2MA relate to the Pardot data model?

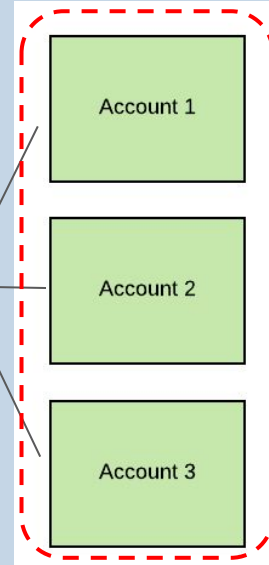
The 'Prospect' model limitations



Traditional B2B
Marketing to Decision
Makers



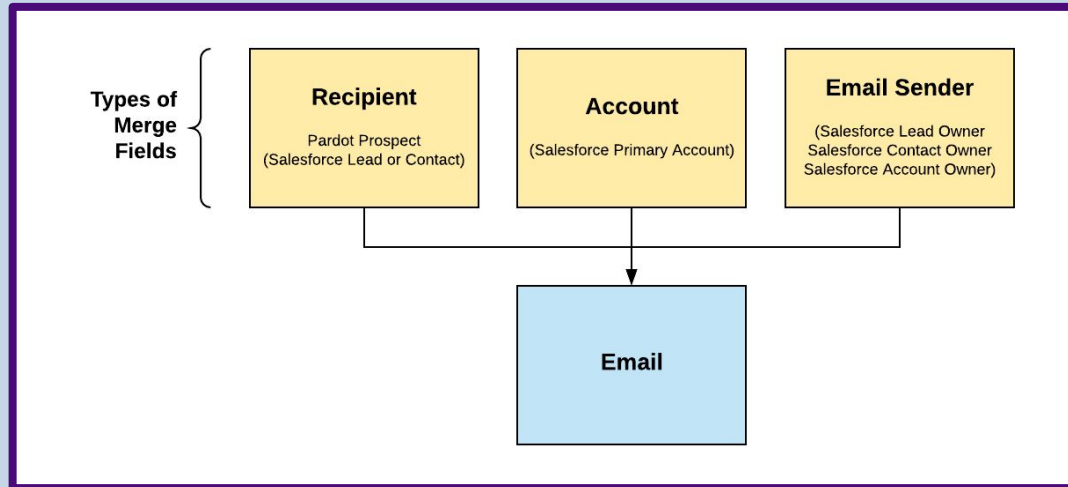
C2MA



What if we want to do
separate marketing
targeting and messaging in
the context of each
account a Prospect is
related to?

The 'Prospect' model limitations

Personalisation Options





Challenges, limitations and potential workarounds

salesforce pardot

Search

Deliveroo

HOME > ADMINISTRATION

Custom Objects

[+ Add Custom Object](#)

NAME	PLURAL NAME	DISPLAY FIELD	CRM OBJECT	ACTIONS
Account Contact Relationship	Account Contact Relationships	Account	AccountContactRelation	

Dynamic List Rules

Match type Match all Match any

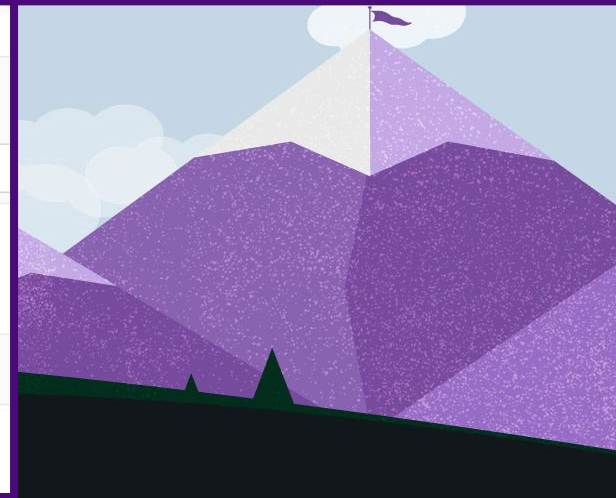
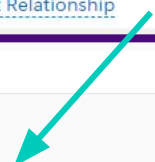
Prospect custom object

Match prospects related with properties to Account Contact Relationshipsi by Contact

Match any Account Contact Relationship with properties:

Match all Match any

[+ Add new rule](#)



The 'Prospect' model limitations

How to send a Pardot Email with Multiple Line Items

It is impossible to send a Pardot email that has a list of related records... or is it?

In this session, we will uncover strategies to send a Pardot email with multiple line items. We'll walk through a hypothetical use case at a realty company by going step-by-step through an email build. The email will send prospects many personalized property listings that may interest them.

Date	October 29, 2021
Time	12:35 pm ET – 1:15 pm ET
Skill Level	◆ Advanced
Learning Track	Tech

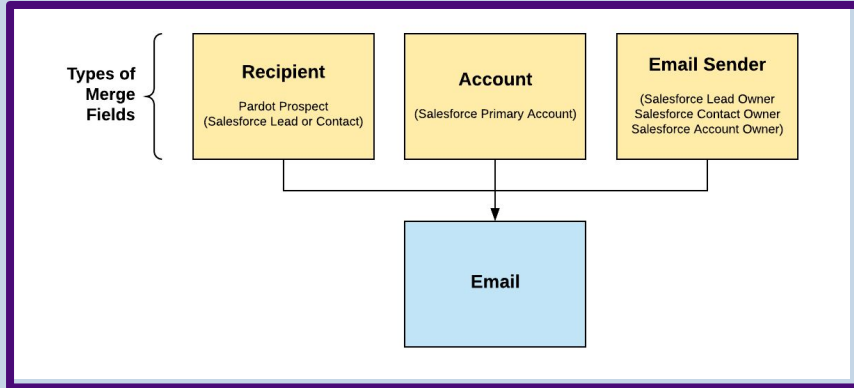
API & INTEGRATION

AUTOMATIONS

FEATURES & FUNCTIONS

<https://pardreamin.com/course-video/how-to-send-a-pardot-email-with-multiple-line-items/>

Data Structures



**Pardot -
Personalisation of
Emails only based on
Primary Account**

The screenshot shows the 'Data Designer' interface in Pardot. It displays a relationship diagram where 'Contact Key' is linked to 'Dummy cont...' and 'New Journey...'. Below this, two data extension lists are shown:

- Data Extension: Dummy Contacts**
 - ContactKey
 - Accountid
 - CreatedById
 - Description
 - Email
 - FirstName
 - HasOptedOutOfEmail
 - Id
 - LastModifiedtyId
 - LastName
 - MailingCounty
 - MasterRecordId
 - OwnerId
 - ReportsTold
- Data Extension: New Journey - Ju...**
 - CampaignMemberr:Id
 - CampaignMemberr:Commo...
 - CampaignMemberr:Commo...
 - CampaignMemberr:Commo...
 - MemberRecordType

**Marketing Cloud - Custom Data
Extensions and Data
Relationship Model**

Salesforce for Marketing - MM - Some Sales Interventions

Mid volume, where some sales intervention is need to help convert or aid the sale
1:Many sales rep

Marketing Cloud
is your
advertising & web personalisation
engine

Pardot
is your
lead nurture & lead
management engine

Marketing Cloud
is for
ongoing communications &
cross channel personalisation

Awarenes

Education

Solicitation

Acquisition

Onboarding

Retention

Digital Marketing Suite:

Audience Management
Advertising
Web Personalisation

Advertising, Social & Interaction Studios

Automation & Lead Generation:

Lead Nurturing
Lead Management

Pardot, Sales Cloud

Digital Engagement Suite:

Journey Management
Cross Channel Personalisation
Orchestraton & Activation

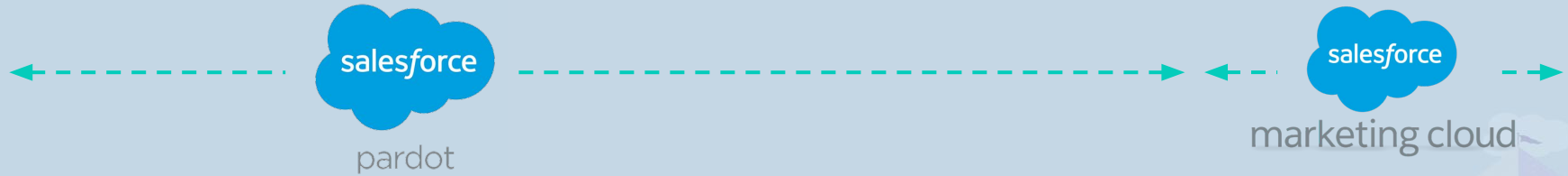
*Email, Mobile, Social, Ads & Interaction Studios
Communities*

Prospect

Lead

Opportunity

Customer Account



More Resources

[Video: Should I turn on Contacts to Multiple Accounts?](#)

[Salesforce Help: Contacts to Multiple Accounts](#)

[Salesforce Ben: Contacts to Multiple Accounts](#)



Thanks for listening!



mattlincoln pardotmatt

You can find me on the social media links above!



Thank You To Our Sponsors

TITLE SPONSORS



SERCANTE

PLATINUM SPONSORS



feedotter

SAASCEND



terminus



GetFeedback™



QUALIFIED

GOLD SPONSORS

velir

THE SPOT
FOR PARDOT by SERCANTE

SILVER SPONSORS

FIONTA

CLOUDTEGIC