

SESSION:

Business Units and Pardot Sandbox: Lessons Learned



Business Units and Pardot Sandbox: Lessons Learned

Advanced | Admin



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At BrandED we deliver relevant, experiential education, taught by industry leaders from iconic global brands, attracting the best and brightest students in art, media and culture.

With locations in New York and London, and partnerships in China, Korea and Mexico, BrandEd seeks to understand the passions of a new generation of students and help transform those passions into meaningful and fulfilling career trajectories.

Outline

Agenda

Pardot Sandbox

Pardot Business Unit

Takeaways/Resources

How we got here?

Multiple
Salesforce
Orgs

Pardot
account
revamp

Shared
Services
Model

Digital
Innovation

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@PARDREAMIN

Pardot Sandbox

The "brand ed" logo is positioned in the bottom right corner. It consists of the word "brand" in a white, lowercase, sans-serif font above the word "ed" in the same font. The background behind the text is a stylized landscape with purple mountains, a white flag on a peak, and a dark green foreground with silhouettes of trees and a hill.

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Pardot Sandbox

Full Salesforce
Sandbox

Uninstall and
delete B2BMA
package

Install Pardot
Sandbox
package

Configure the
sandbox and
permissions



Configuration

You cannot do this

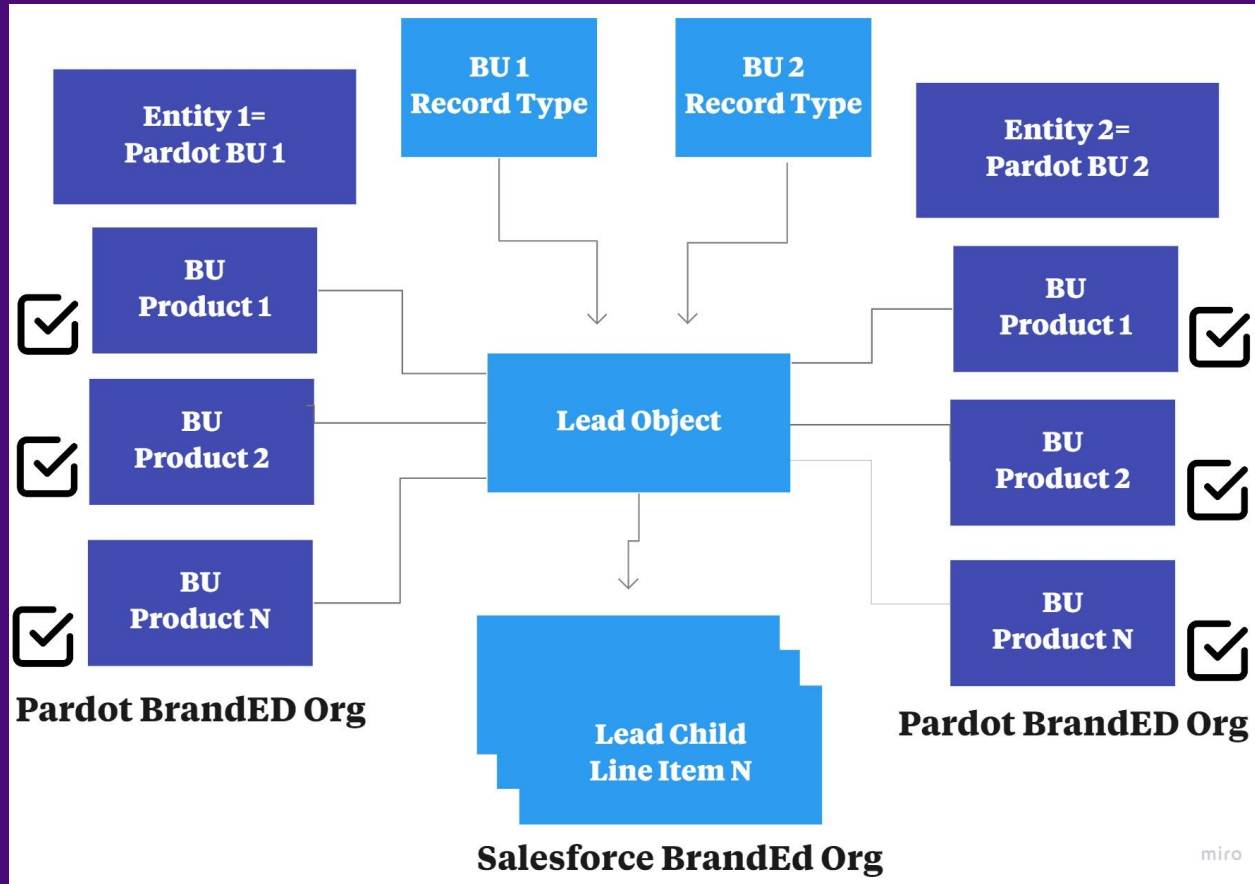
- Test email sending
- Implement Salesforce Engage
- Experiment B2B Marketing Analytics

You must do this

- Manually re-create the configuration (no change sets)
- Pardot Advanced or higher

Business Units

Problem Definition and Solution Design



Step 1

Business
decisions



Step 2

Configuration
decisions



Step 3

System setup/
configuration



Step 1: Business Decisions

1. Business reasons around why you need business units, and basis for differentiation (i.e. entity, geography, product)
2. Administrator for each business unit
3. Users - business units map
4. Identify categories of prospect entry points (i.e., website, gated content and events)

Step 2: Configuration Decisions

1. Business Unit Names
2. Level of User Access
3. Document each data source within each category by business unit (e.g., lead forms, form handlers from BU1 website)
4. Identify a custom field for each business unit/ object combination for data segregation
 - We went for "<name of business unit> Pardot BU" checkbox
 - These fields **cannot be** mapped between Pardot and Salesforce
5. Document how custom field will be set for each prospect data source

Step 2: Configuration Decisions

Mexico
(sample - BU1)



Landing
Page



Gated
Content



Contact
Us Page



Eventbrite

Mexico
<Lead>
Pardot BU



Mexico
<Opp.>
Pardot BU



Brazil
(sample - BU2)



Landing
Page



Gated
Content



Contact
Us Page



Eventbrite

Brazil
<Lead>
Pardot BU



Brazil
<Opp.>
Pardot BU



Step 3: System Setup

1. Configure business units and their administrators (via Pardot setup)
2. Follow the steps specified in the email sent to administrators
3. Map users to the business units
4. Create the custom field for Lead, Contact, and Opportunity objects (and any mapped custom objects) in **Salesforce**
5. Navigate to Marketing Data Sharing in **Pardot** and select the custom field for the BU for each object (custom and standard)

System Setup

Account Settings
CONNECTOR SETTINGS
USER SYNC
MARKETING DATA SHARING
CAMPAIGNS

- > Automation Settings
- > Object and Field Configuration
- Connectors
- Domain Management
- Exports
- Imports
- Recycle Bin

Marketing Data Sharing Criteria

OBJECT	CRITERIA
Lead	Mexico <input type="checkbox"/> _Pardot_BU__c = true
Contact	Mexico <input type="checkbox"/> _Pardot_BU__c = true
Opportunity	Mexico <input type="checkbox"/> _Pardot_BU__c = true
Lead Programs and Courses	Mexico <input type="checkbox"/> _Pardot_BU__c = true

Step 3: Bear in Mind

1. You cannot delete a business unit once it's been created
2. Each object can have only one Marketing Data Sharing rule
3. Each rule can be based on one Salesforce field and uses the equals operator
4. The field cannot be mapped to Salesforce
5. The Default setting for an object uses the connector user's permissions to control which records sync

Setup by Business Unit

- V2 Connector
- Marketing Data Sharing
- Campaigns: separated by record type
- Tracker domain: subdomain has to be different, root domain can be the same

Myths

- You cannot do it alone
- Pardot Sandbox does not handle more than 1 business unit



How long did it take?

60 days*

What took us the most time?

Defining
prospects
journeys

Decisions
about
historical data

Researching
BU
configuration

Product
interests
solution design

“ Learning Resources

With A Little Help From My Friends

The Beatles

”

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Business Units: Salesforce's resources

- [Pardot Business Units Implementation Guide](#)
- [Managing Business Units](#)
- [Marketing Data Sharing](#)
- [Default Prospect Field Mapping](#)
- [Configure Marketing Data Sharing Rules](#)
- [Salesforce-Pardot Connector Settings](#)
- [Sync Prospects Safely With Cross-Business Unit Leads and Contacts](#)
- Pardot Office Hours and 1-1 Pardot Support

Business Units: Partners' resources

- [Your 7 Step Guide to Mastering Pardot Business Units](#), *Cultivate*
- [Pardot Business Units: Ultimate Setup Guide](#), *Salesforce Lounge*
- [What Are Pardot Business Units? – Overview and Limitations](#), *TheDrip*
- [Pardot Business Units – Leads and Contacts Syncing to Multiple BUs](#), *Nebula*

Sandbox: Salesforce's resources

[Pardot Sandboxes](#)

[Create a Sandbox for Pardot](#)

Daily Pardot Office Hours
(Premier Clients)

Sandbox: Partners' resources

[Introduction to Pardot Sandboxes](#), *TheDrip*

[The What, How and When of Pardot Sandboxes](#), *Nebula*

[The Pardot Sandbox: 9 Need-to-Knows About this Critical Feature](#), *Sercante*

[How to Test in Pardot Sandboxes, Training Orgs... and Even Production](#), *Sercante*

Thanks for listening!



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