

Future-Proof Your Pardot Org through Solid Requirements Gathering

☐ Beginner | Admin



Lucy Mazalon
SALESFORCE BEN/
THE DRIP



Jaime Lopez
AIVEN



Lucy Mazalon

[SalesforceBen.com/The DRIP](https://SalesforceBen.com/TheDRIP)



THEDRIP

Jaime Lopez

Aiven



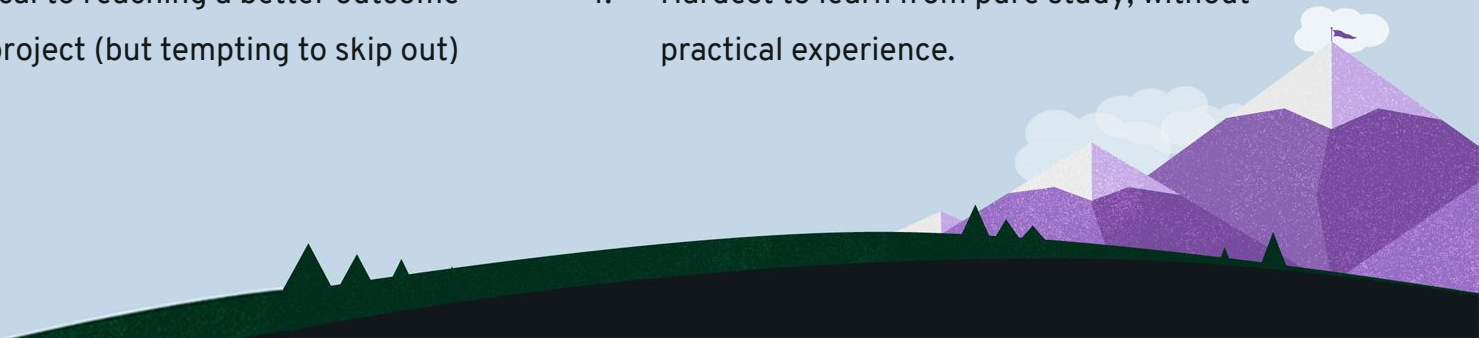
Why requirements gathering? Why now?



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Four compelling reasons:

1. Career development: the skill plays a big role in advancing as a Salesforce/Pardot admin or becoming a consultant.
2. Project success: critical to reaching a better outcome with the completed project (but tempting to skip out)
3. Pardot is not an island: more related products, more complex orgs, greater reliance on Pardot from multiple teams.
4. Hardest to learn from pure study, without practical experience.



Pardot is a cross-team effort. Roles are becoming blended.

It's time you step up to take ownership,
and 'future-proof' your Pardot app.



Who are you?

We guessed our audience could be:

Pardot Admins

Who are dedicated to overseeing and optimizing the Pardot app.

Salesforce Admins

Who oversee and optimize the Salesforce org, and take on Pardot as additional responsibility.

Marketing Super Users

Who step in to manage user needs day to day, and hold training sessions.

Consultants

Who work with clients to tailor Pardot and/or Salesforce to their needs.



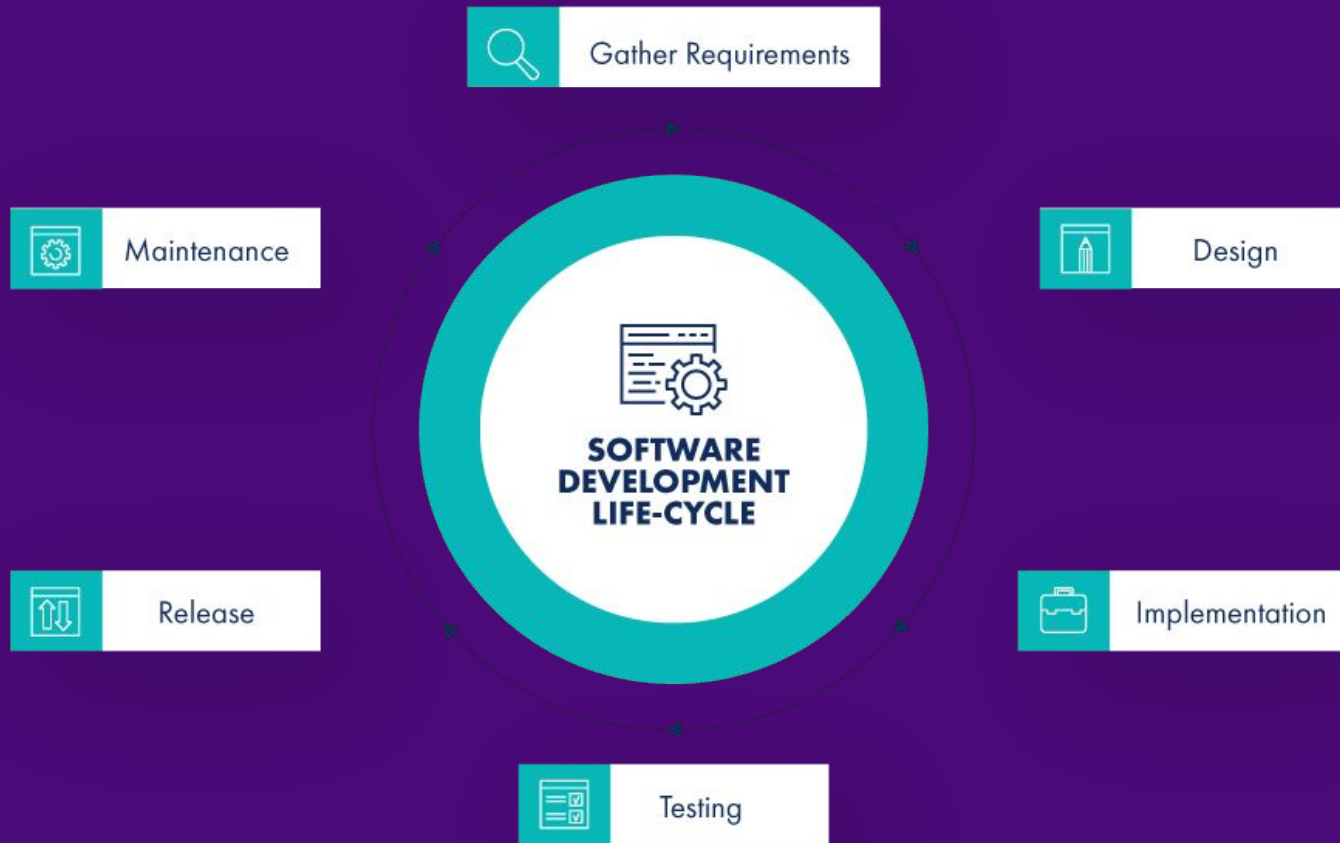
What is Requirements Gathering?

Asking/observing users about how they currently use technology, and their future aspirations.

The process differs based on the following factors:

- Project type (Sales, Service, Marketing etc.)
- Project size
- Industry





Why is Requirements Gathering important?

Essential for designing and delivering solutions that meet user needs and expectations.

'Leave no stone unturned':

- Leverage technology at your disposal,
- Understand how the business operates,
- Reduce assumptions.



Poll:

**Which describes your
attitudes towards
requirements gathering?**



Who should you involve?

How to talk to stakeholders/other teams.

Technical stakeholders

- End users
- Solutions architect
- Application owner/manager

Angle

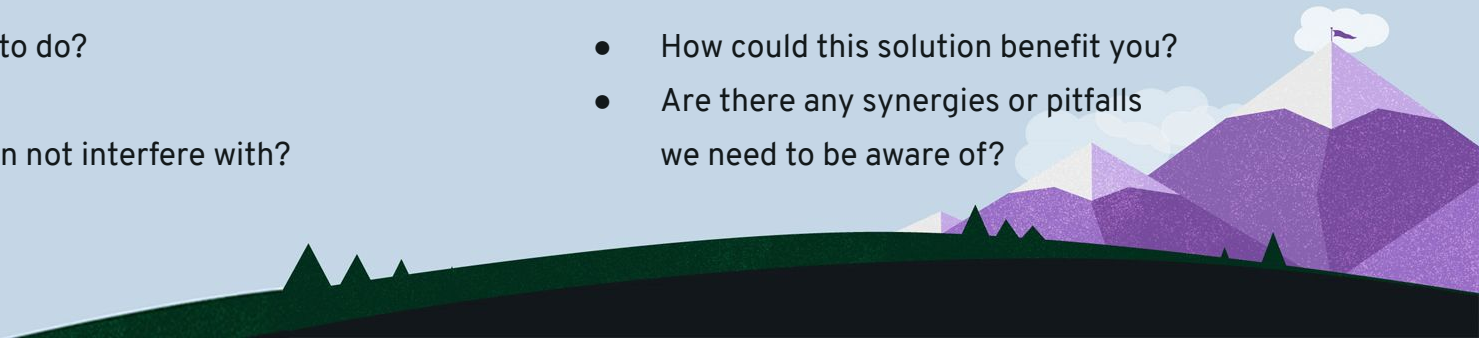
- What does this need to do?
- How will you use it?
- What can this solution not interfere with?

Non-technical stakeholders

- Sales users/Light users
- Fellow admins/teams
- Management

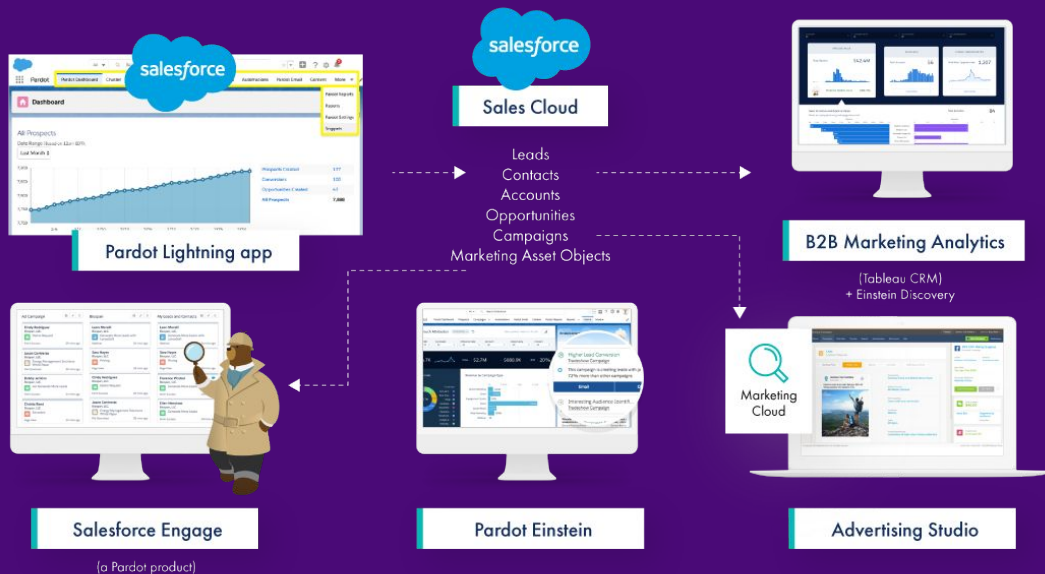
Angle

- How could this solution benefit you?
- Are there any synergies or pitfalls we need to be aware of?



Pardot is not an island....

Expanding product, growing number of integrated apps.



Gather information to make recommendations on a path forward...

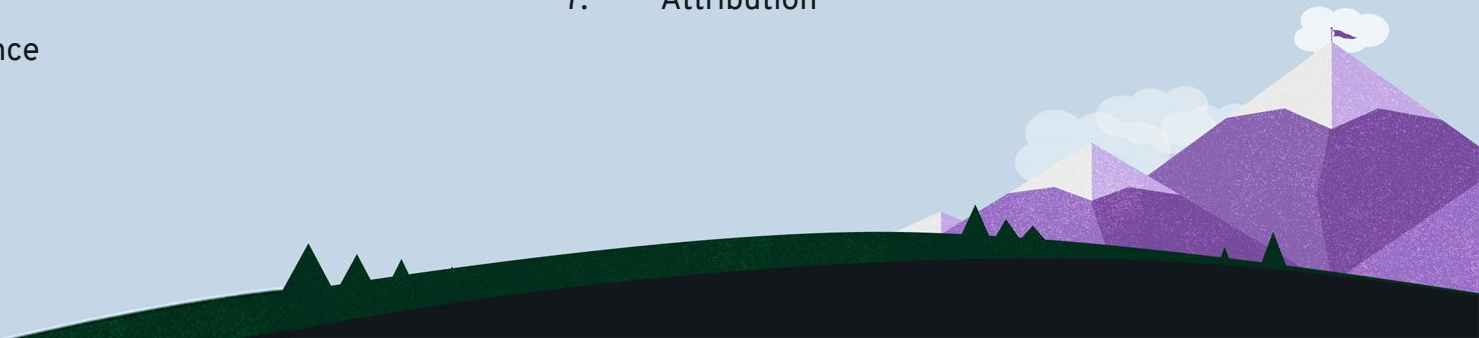
**Salesforce/Pardot landscape +
business objectives =
recommendations**



Preparation

Give yourself a marketing crash course.

1. Main marketing objectives of the instance you're working on
2. Connection to Sales targets
3. Users and use case
4. Access and governance
5. Show-stoppers
6. Sync and data availability
7. Attribution



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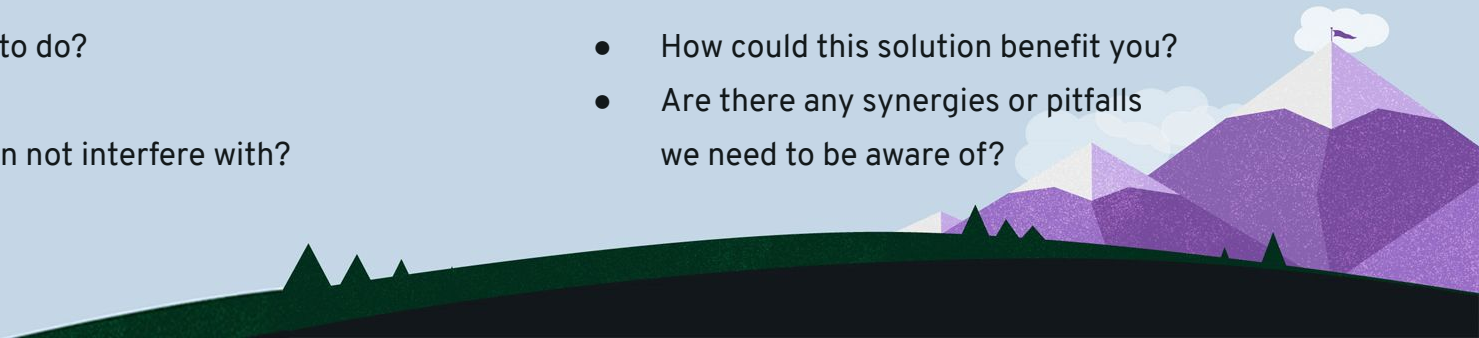
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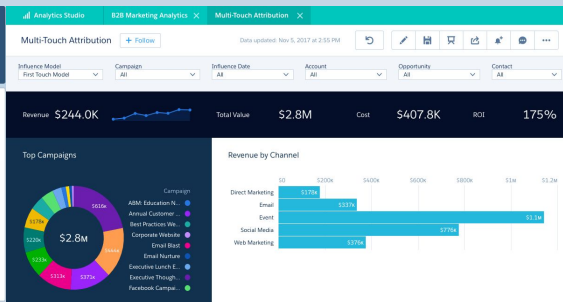
Assess your marketing trends using available tools and methods.

Sources

- Salesforce reports & dashboards
- B2B MA dashboards (if existing account)
- Field data (score, grade, behavior score)
- Website analytics
- Interviewing/observing users
- Previous marketing automation tool reports

What you're looking for:

- Velocity (speed, duration in stages)
- Bottlenecks
- High/low volumes
- Successes (qualified leads, opportunities won)
- Failures (disqualified leads, opportunities lost)
- Mailability (opt-outs, hard bounces)



Gathering Pardot Requirements

Structure your requirements like an onion

1. Interaction of your solution with Salesforce Core
2. Interaction of your solution with other Salesforce products like Pardot, and of these products between themselves
3. Interaction of your solution with other non-Salesforce products in your stack



Prioritization!

You've planted the seed of vision, now to set yourself up for success...



Prioritization!

Welcome to MoSCoW...

- Phasing work out (especially with a 'young' Salesforce org!)
- Finite resources at your disposal:
 - time, budget, people?
- MoSCoW: Must have-Should have-Could have-Won't have
- Starts with the necessary/non-negotiable items (that will become dependencies)
- Workshop wrap-up, or afterwards.
- Place requirements into boxes (use Miro whiteboard app, or Quip documents)

MoSCoW Prioritization

M**MUST HAVE:** Non-negotiable product needs that are mandatory for the team.**S****SHOULD HAVE:** Important initiatives that are not vital, but add significant value.**C****COULD HAVE:** Nice to have initiatives that will have a small impact if left out.**W****WILL NOT HAVE:** Initiatives that are not priority for this specific time frame.

The grass looks greener...

...or simpler on the other side.

Typically solution managers/owners only need to worry about their own piece of the puzzle. Easy, right?

Your job is to consider the implications for you and all others.

Ask yourself:

- How may someone else use the data I will generate?
- What happens when I create a record in Salesforce?
- How may someone misuse this? Possible consequences?



Challenges

Beware of these 'red flags'

Expectations of Pardot:

- Too high, it's not magic.
- Underestimating effort required, false perception due to its simplicity.

Wanting to do everything, now.

- Don't design Pardot without Salesforce being set in stone.
- Getting fixated on terminology.

Over engineering:

- Don't let people get fixated on 'edge cases'.

Side effects

- Typically nobody else understands Pardot!

Scope creep

- Once requirements are agreed, freeze them

Representatives from non-marketing teams being resistant/unengaged.

- Bias to action: "This is my proposal. If no comments in X days, it will stand"



Thanks for listening!



[linkedin.com/in/lucymazalon/](https://www.linkedin.com/in/lucymazalon/)



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