SESSION:

How to Report on and Reassign Qualified Prospects from Pardot & Manage Re-engaged Contacts with Task Queues

How to Report on and Reassign Qualified Prospects from Pardot & Manage Re-engaged Contacts with Task Queues

Intermediate | Strategy

Claudia Hoops
DESTINED

Ling Lee
DESTINED

Tammy Begley
DESTINED

Speaker Agenda

What's going on here?

Time	Agenda	Speaker
1:25 - 1:40	How to report on and reassign qualified prospects from Pardot	Claudia and Ling
1:40 - 1:48	How to manage re-engaged contacts using Task Queues	Tammy and Ling
1:48 - 1:50	Surprise Offer!	Tammy

How to report on and reassign qualified prospects from Pardot

Does any of the below sound familiar?

- Reporting on all Leads - from newsletter sign up to contact us
- Assign to Salesforce for reporting purposes only
- Salesforce master owner of the record
- Solution: Reassignment via Salesforce based on a Pardot Scoring threshold

How to extend this solution further

Marketing Queue to SDR Team

- Allocating the leads to users according to business processes
  - Specific user
  - Round-robin
- Allocating the leads to a queue or users based on a specific criteria
  - Prospect score threshold
  - Prospect grade threshold
  - Combination of prospect score and grade
  - Scoring categories
  - Lead fields

Let’s recap…

Step by step

1. Create a Marketing Queue in Sales Cloud
2. Assign Prospects to the Marketing Queue
3. Identify your MQL/SQL threshold, i.e.
   a. Grading or Scoring
   b. A mix of both
4. Decide on your Reassignment setup, i.e.
   a. SDR queue
   b. Specific sales person
5. Build a Workflow Rule for Reassignment

How to manage re-engaged contacts using Task Queues

Here are questions I get asked all the time...

Why won't Pardot create a new lead?

How can a salesperson, using Salesforce, be notified that one of their existing leads/contacts has engaged with a new campaign?

And what if they're not the assigned owner, but still need to work the lead?

How to extend this solution further

Salesforce Task Queues

- Future-proof the automation to consider Leads and Contact form submission
- Adding the Contact to a Campaign, with a Campaign Member Status
- Automate the creation of Opportunities with contact roles and campaign associated
- Automate the allocation of tasks to users according to business processes as opposed to a queue
    - Round robin
    - Specific user
- Modify the notification channels:
    - Email
    - Custom notification in Salesforce
    - Slack channel

Let's recap...

Step by step

- Step 1: Create Task Queue in Sales Cloud
- Step 2: Create the Process in Process Builder
- Step 3: Add a "Create Salesforce Task" Completion Action in Pardot

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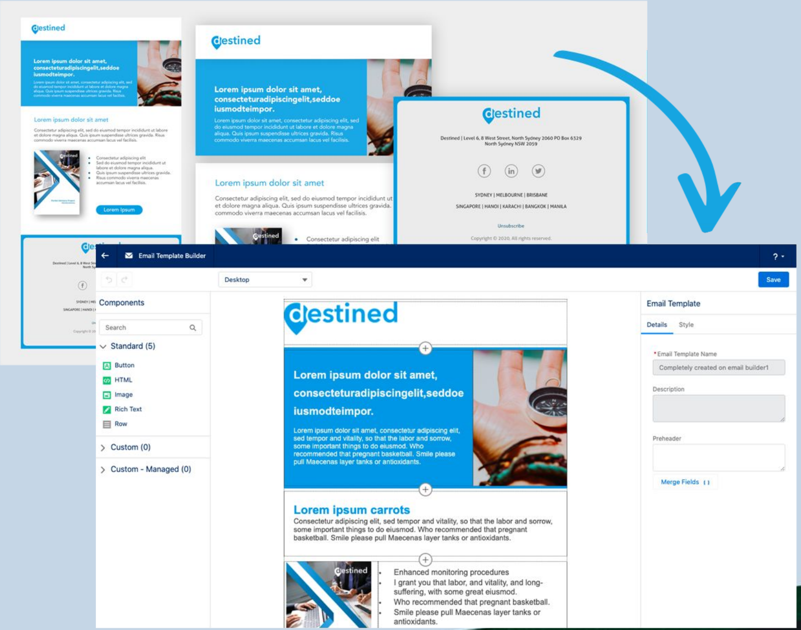

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Thanks for listening!

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