

SESSION:

# Not Just for Marketers: How to Adopt Pardot Throughout Your Entire Business

A stylized illustration of a mountain range with a flag on the peak, set against a light blue sky and a dark green foreground. The mountains are rendered in various shades of purple and blue, with a small flag on the highest peak. The foreground is a dark green silhouette of a hillside with small trees.

# Not Just for Marketers

...How to adopt Pardot throughout your entire business

Beginner | Strategy



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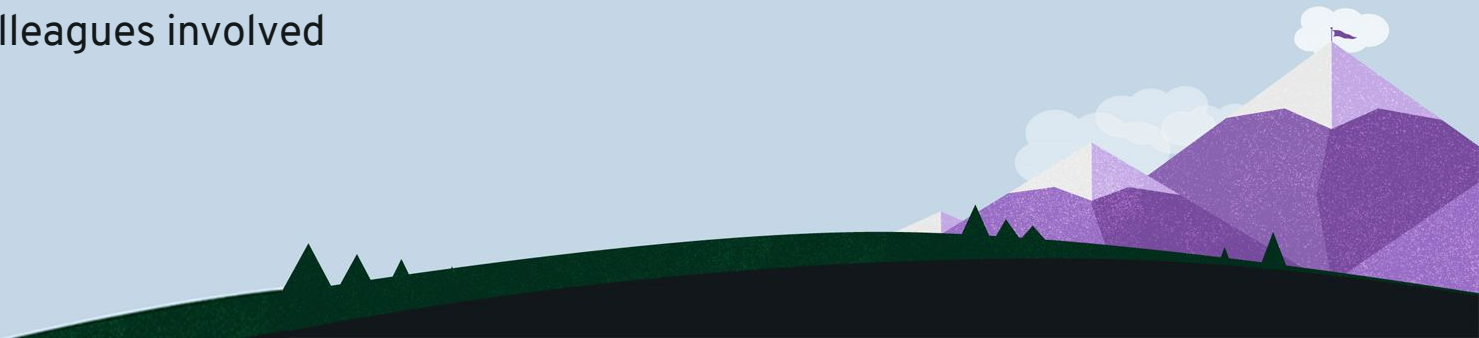
SAMA Consulting & Hazledene Solutions



# Using Pardot Business-Wide

## What to expect in this session:

- Ideas for getting more bang for your buck out of Pardot
- Sample Use Case: Accountability emails
- Getting your colleagues involved





# Traditional Pardot Usage

How do customers traditionally use Pardot?

- Welcome campaigns
- Re-engagement campaigns
- Product launch campaign



# What do they all have in common?

They are focused on the *Sales & Marketing* departments.

Pardot can increase your marketing ROI by an average of

**40%**

Source: [ForceTalks](#)



# Who else can/should get involved?

Everybody!

- Customer Service
- Training
- Human Resources
- Finance & Accounting



# Use Case: Accountability emails in training



Hi %%first\_name%%,

You are now on Week 8! Just take a moment to soak it in that you're already through more than a third of the course at this point. You're doing amazing!

#### So, what can you expect from Week 8?

When we talk about Salesforce, one of the major selling points is that you can secure all of your data. It's great to get all of that data into Salesforce to have a 360 degree view of the customer, but as we know with GDPR and other data privacy laws, just because the data is there does *not* mean that everybody should be able to see it.

That's where we come to the subject of week 8, which is security. Using the functionality that you will learn this week, you can control on a very granular level who sees what is Salesforce - all the way down to who can see a particular field on an object record.

This is one of the pieces that is very important when companies buy into Salesforce. It makes it so that any sector no matter the level of security clearance can use the

## What can you do in an accountability email campaign?

- Provide encouragement
- Set expectations
- Include best practices & tips
- Provide a button to go straight to learning
- Raise awareness of any relevant events or current events (hey yo – ParDreamin'!)



# Use Case:

## Case Satisfaction Survey

### What can you do in a case satisfaction email?

#### We value your feedback!

Feedback is how you can continue to grow and improve. We are strong believers in feedback - and growing and improving - so we need your help!

Could we ask 3 minutes of your time to let us know what you thought about customer support with {{Case.SupportAgent\_\_c}} about {{Case.Subject}}?

How was your experience?

removable

- Provide a channel for feedback
- Include a button for feedback
- OR include two images for a positive or negative experience to allow in-email interaction
- Create tasks to have support agents give unsatisfied customers a follow-up call



# Use Case:

## Finance

### Thank you for your purchase!

We're so glad to have you joining our next course! To secure your spot, please make sure to pay the invoice below.

Get Your Invoice

removable 

## What can you do in a finance email?

- Provide links to different payment options
- Track who has not clicked through to payment
- Send follow-up emails to chase those who haven't paid
- Set a task to follow up with non-payments



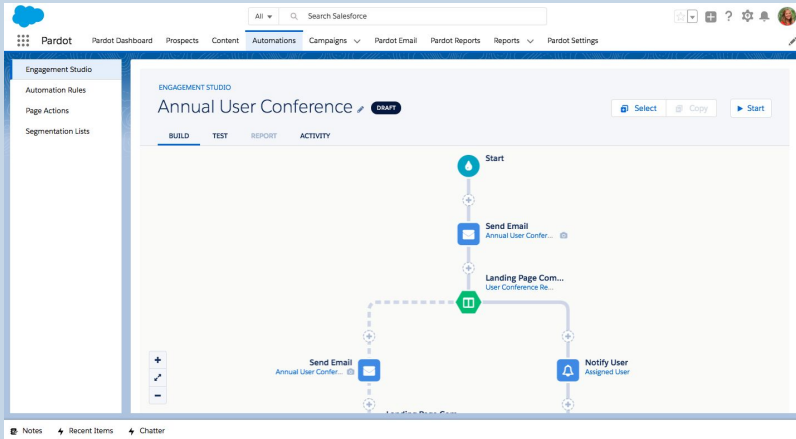


# Bonus story

Use Pardot for your internal communications to make sure your messages are getting across.

# Getting stakeholder buy-in

## How to get other departments involved



## Give them a seat at the Pardot table...

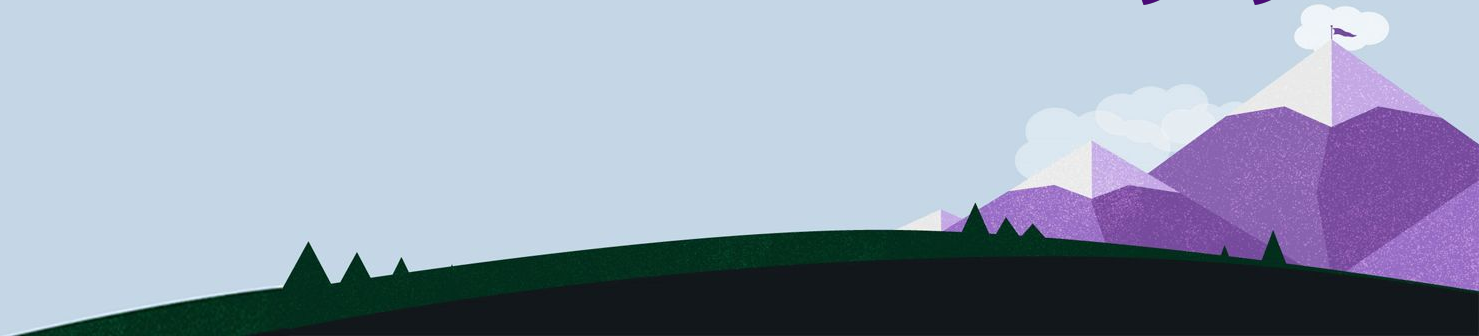
- Find pain points in the business where you can provide value
- Set up campaigns, folders and marketing assets to separate out other departments from marketing/sales & provide the building blocks
- Identify your super users/champions/heros
- Provide training on how to properly use Pardot – like how to schedule emails!

“

A seat at the table means that you're part of the conversation

- Roxane Gay

”



# Thanks for listening!



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