

Beyond Unsubscribe: Managing Marketing Preferences - Pardot + Salesforce

■ INTERMEDIATE | ADMIN



Saurabh Gupta
Founder, Cloud Compliance



Speaker Agenda

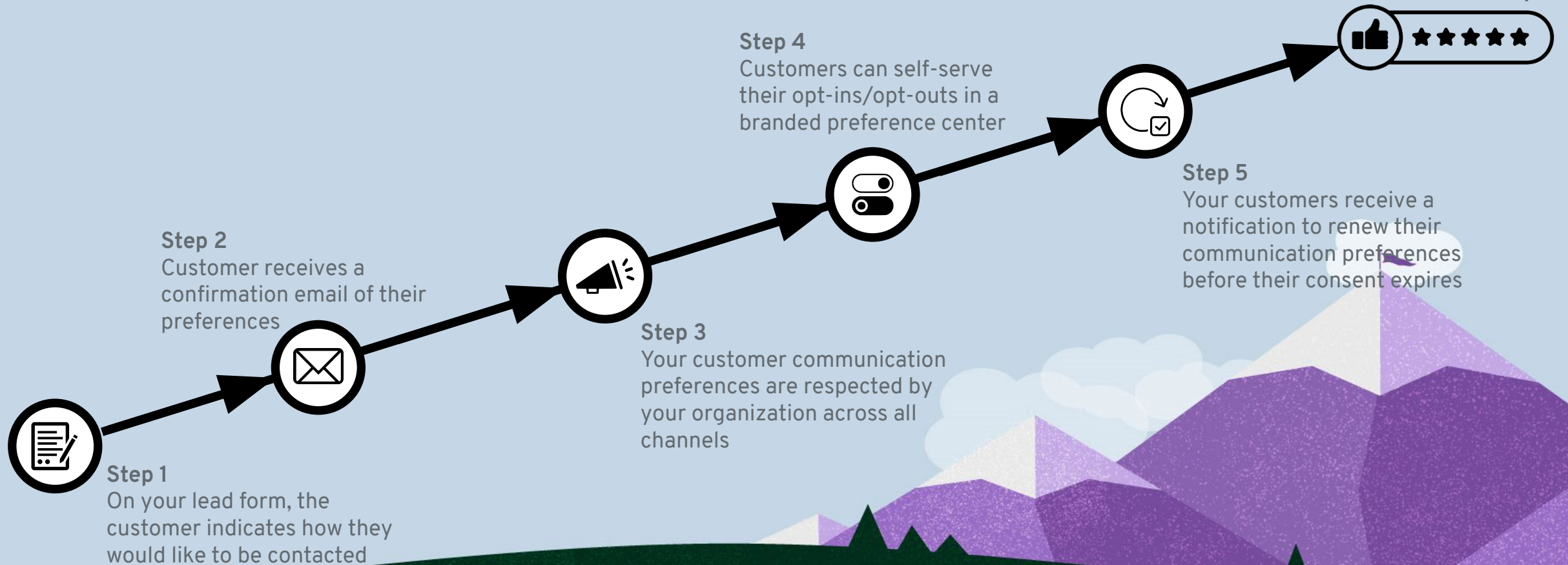
What's going on here?

Time	Agenda	Extra Info
1.05	Can your email subscribers do anything other than unsubscribe?	
1.10	Are your marketing efforts evolving to respect data privacy laws?	
1.15	How are other Pardot & Salesforce customers addressing GDPR, CCPA, LGPD, and other privacy laws in their marketing efforts?	
1.25	How can marketers organize omnichannel preferences for different purposes, brands, business units or consumer personas?	

Consent Management

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Your customer's ideal user experience



Omni-channel Marketing Context



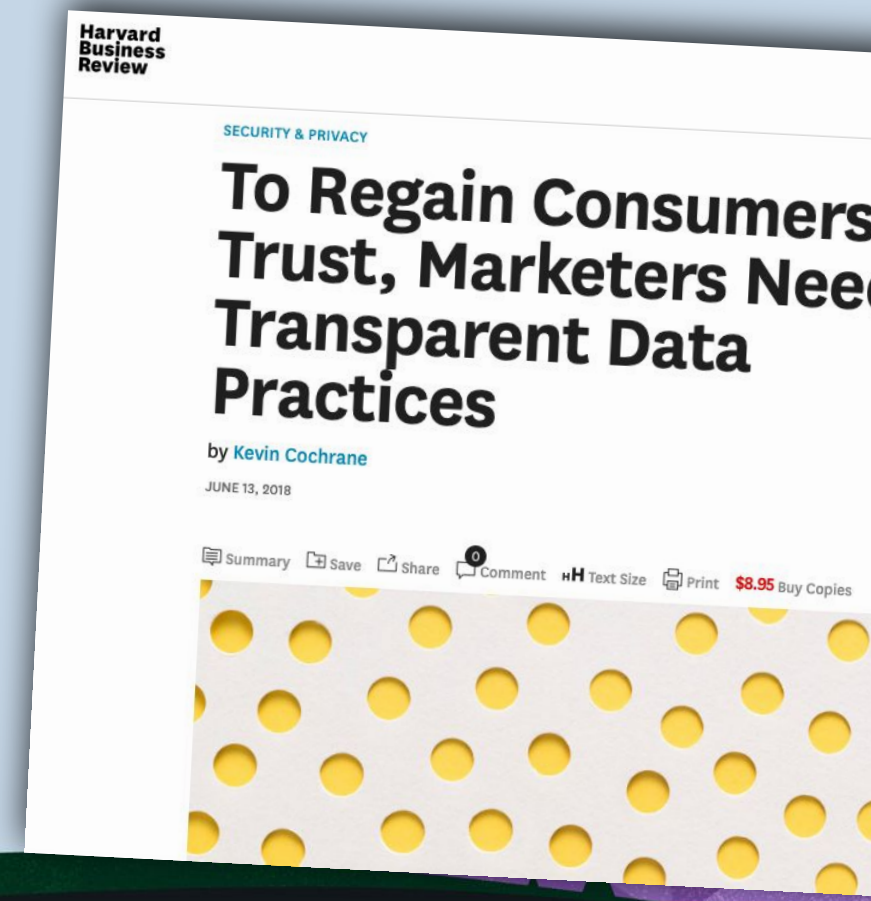
Covid

Personalize

Too many apps

Privacy laws

- Businesses are required to treat Personal Data fairly, transparently and lawfully
- Individuals consent & opt-in may be needed to process their data and contact them
- Non-compliance can impact the Brand, cause embarrassment & monetary penalties



Salesforce+Pardot , new challenges

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- Manage preferences allows a middle ground and personalization for subscribers
- Omni-channel opt-in/out are not shared across Pardot & Salesforce

- Maintain Consent and preferences by Channel and Purpose
- Comprehensive consent data - when, how, for what, by whom etc.
- Default these in case of lead get forms as appropriate
- Auditable records of opt-ins and opt-outs for posterity

Create Contact Point Type Consent

Product Recall-SMS

* Privacy Consent Status

Opt In

* Capture Contact Point Type

Email

* Effective From

Oct 2, 2020

* Effective To

Oct 2, 2025

Cancel Save

Sign up + Consent form

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Sainsbury's

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Terms and conditions

We want you to know exactly how our service works and why we need your registration details. Please state that you have read and agreed to these terms before you continue.


You must accept the terms and conditions.


 ☐ I agree to the [terms and conditions](#).

Contact permission

We'd love to send you money-off coupons, exclusive offers and the latest info from Sainsbury's by email, post, SMS, phone and other electronic means. We'll always treat your personal details with the utmost care and will never sell them to other companies for marketing purposes.

Please let us know if you would like us to contact you or not by selecting one of the options below.

 ☐ Yes please, I'd like to hear about offers and services.

 ☐ No thanks, I don't want to hear about offers and services.

Register

Mar-tech + CRM Integration = Omni Channel + Privacy Compliance

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Cloud Compliance Home Implement Manage Dashboards Contacts Leads In

Contact **Mr. Saurabh Gupta** + Follow

Title CEO Account Name [PlumCloud Labs](#) Mobile 202-555-0143 Individual [Saurabh Gupta](#) Email saurabh@plumcloudlabs.com

Release notification via SMS not allowed

Details Related **Consents**

On-Premises

	EMAIL	SMS	SOCIAL
RELEASE NOTIFICATIONS	Opt-In	Opt-Out	Opt-In
PRODUCT RECALL	Missing	Missing	Opt-In
CUSTOMER SUPPORT	Opt-In	Opt-In	Missing

- Respect preferences across Apps/channels - Email, Social & Call Centers
- Ability to select the most effective channel for each purpose
- Single view of consent/interactions across CRM, eCommerce, Mar-tech

Opt-in dates are leveraged by Pardot

Contact

Mr. Saurabh Gupta

Title	Account Name	Mobile	Individual	Email
CEO	PlumCloud Labs	456-985-8521	Saurabh Gupta	info@cloudcompliance.app

Newsletters via Social Not allowed - Product Recall via SMS not allowed

Details

Related

Consents

Contact Owner	Sue Hodder	Phone	455-858-9874
Name	Mr. Saurabh Gupta	Mobile	456-985-8521
Account Name	PlumCloud Labs	Email	info@cloudcompliance.app
Title	CEO	Home Phone	444-789-7485
Birthdate	7/5/1968	Other Phone	454-785-8475
Fax		Individual	Saurabh Gupta
Asst. Phone	147-784-7854		
Do Not Sell	<input type="checkbox"/>		

Consent Creation

Consent Summary

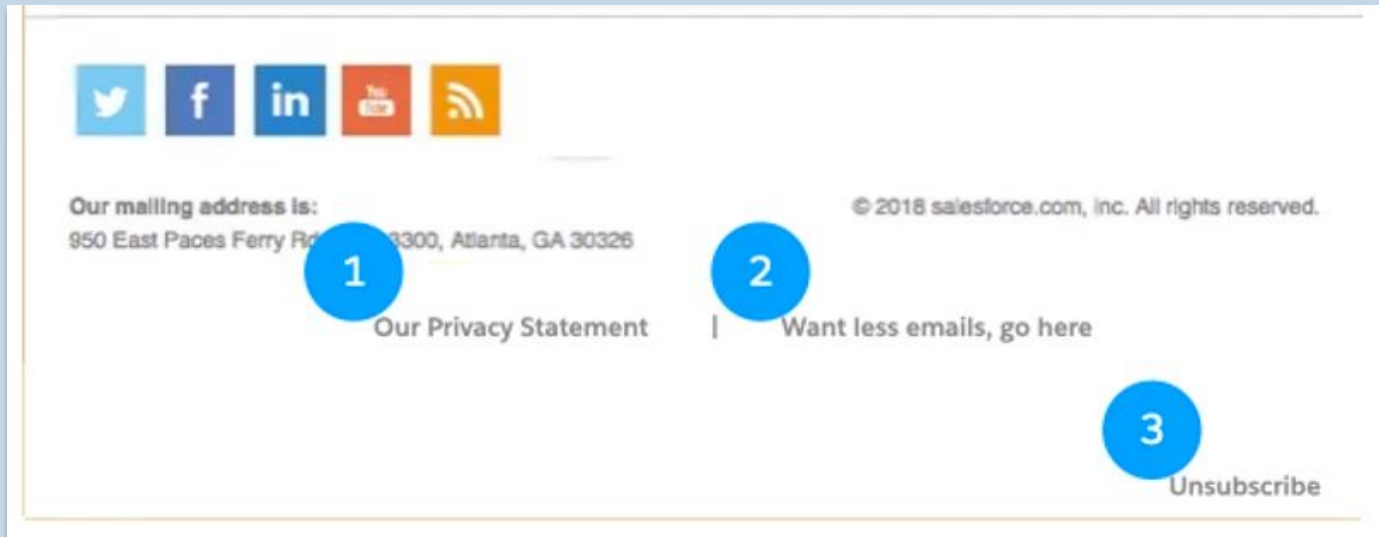
Consent Processing Status

Marketing Integration

CustomerSupport Email On Premises Date		Product Recall Email Cloud Product Date	5/7/2026
CustomerSupport Email Cloud Product Date	5/7/2026	Product Recall Email On Premises Date	
CustomerSupport SMS Cloud Product Date	5/7/2021	Product Recall SMS Cloud Product Date	5/7/2021
CustomerSupport SMS On Premises Date		Product Recall SMS On Premises Date	

Mar-tech + CRM Integration - How?

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- Centrally maintain preferences in CRM and sync them with Pardot
- Automate campaign membership in Pardot
- Embed a self-service preference link in emails and other outreach

Self-Service Preference Center - Enable access across channels

[PRIVACY POLICY](#) [MANAGE CONSENT](#)

COMMUNICATION PREFERENCES

Want to manage your commercial email communications from PlumCloud Labs LLC.?

First, tell us your email address so we know who you are.

Email : info@plumcloudlabs.com

First Name : S

Last Name : Gupta

DEFAULT



Phone

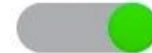
Social

Email

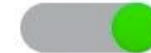
SALES



expire on Nov 24, 2022



expire on Feb 28, 2021



expire on Nov 24, 2022

SURVEY



SYSTEM PREFERENCES



DON'T PROFILE



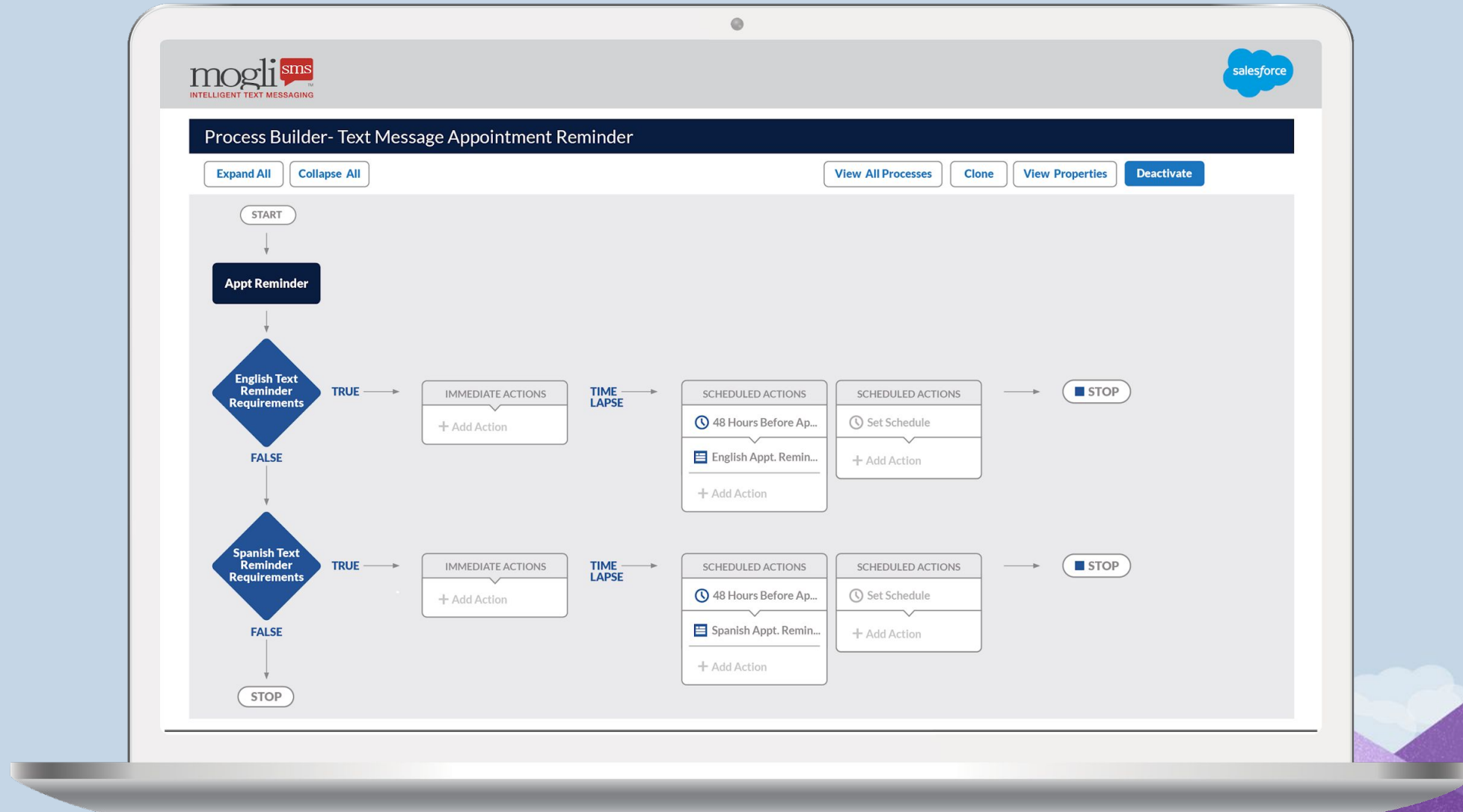
DON'T TRACK



Save

- Make preference management easy (preferably password-less)
- Most Marketing tools don't sync back preferences to Salesforce 'Out of box'
- Cloud Compliance uses Salesforce Communities free version for this

Mar-tech + CRM Integration - How?



Process

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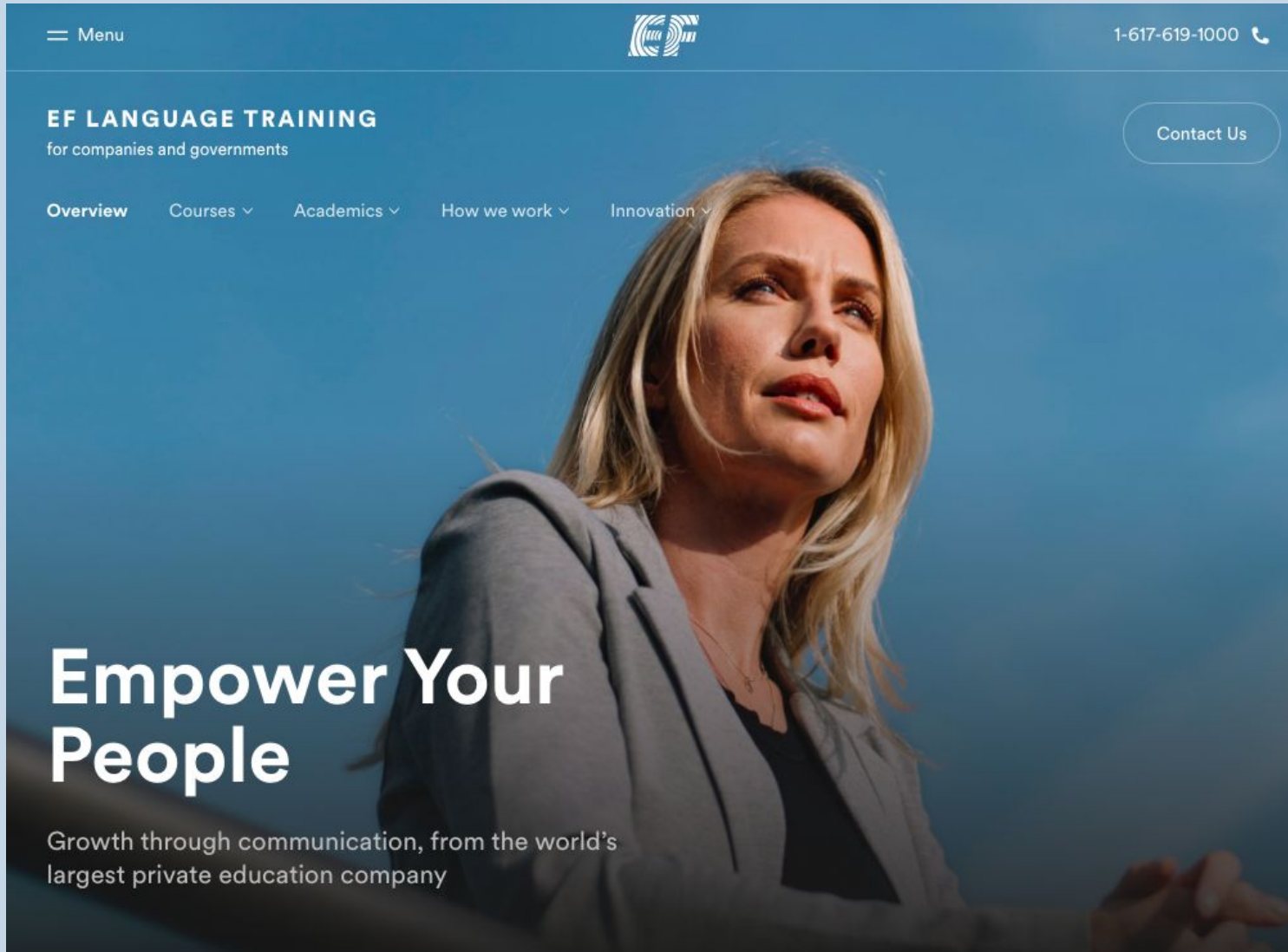
Ask permission

Create Consent

Share across
Pardot

Update via Self-service

- Consents are created / managed in Salesforce with Cloud Compliance's automation (or home grown solution)
 - Automated on new contact/lead creation / Lead registration forms
- Opt-in dates are sync'd to Email marketing tools for eg Pardot
- Other AppExchange apps are invoked from Salesforce based on communication preferences
 - SMS apps like SMS 360, SMS Magic, Mogli, Twillio etc.
 - Other social media integrations such as WhatsApp etc.
 - Invoked via Flows or other automation
- Consents are managed via Cloud Compliance self-service privacy portal

The image shows the top section of the EF Language Training website. It features a blue header with a 'Menu' icon, the EF logo, and a phone number '1-617-619-1000'. Below the header, the main content area has a background image of a woman looking up. The text 'EF LANGUAGE TRAINING' is prominent, followed by 'for companies and governments'. A navigation bar includes 'Overview', 'Courses', 'Academics', 'How we work', and 'Innovation'. A 'Contact Us' button is in the top right. The main headline 'Empower Your People' is in large white font, with a sub-headline 'Growth through communication, from the world's largest private education company' below it.

Menu

EF

1-617-619-1000

EF LANGUAGE TRAINING
for companies and governments

Overview Courses Academics How we work Innovation

Contact Us

Empower Your People

Growth through communication, from the world's largest private education company

#GDPR

- Preference management with Pardot + Salesforce
- Privacy statement in multiple languages/regions
- Integration with other systems / mobile app

REST API

salesforce pardot



EF EDUCATION FIRST SCALES CUSTOMER CONSENT AND COMMUNICATION WITH CLOUD COMPLIANCE

EF Education First, an international education company, had their customer consent data fragmented on leads and contacts, and were in need of a central repository to manage their customer's communication preferences. With Salesforce and Cloud Compliance, the company was able to deliver unified consents, a better brand experience, and avoid violating anti-spam laws.

CUSTOMER: **EF Education First**

CHALLENGE: **Privacy Compliance**

APP: **Cloud Compliance Privacy Suite**

90% Increase
in productivity building
consent preference centers

100% Compliance
with privacy regulations

100% Consolidation
customer opt-out
preferences





"Customer trust is our first priority. We look for the most robust data security and privacy solutions to safeguard it"

JOHN PROKOS
VP of Technology, EF Education First



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SALESFORCE + LEAD REGISTRATION & CONSENT MANAGEMENT
LEAD GEN FORM - A GDPR/CCPA FINE WAITING TO HAPPEN?


CLOUD COMPLIANCE GDPR/CCPA SERIES

aditya Jun 3 • 4 min

A Lead fills a form...what happens next?

Salesforce, Lead generation and consent management

[Write a comment](#)




SALESFORCE + CONSENT MANAGEMENT & COMMUNICATION PREFERENCES
WHAT, WHY, AND USE CASES

Aniket Save May 22 • 3 min

Managing Consent - What, Why, and Use Cases for Salesforce

If your boss approached you and said...Where should we manage Communication Preferences? and Why? Here's the answer..

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LGPD COMPLIANCE
Salesforce data privacy steps for Brazil

PlumCloud Labs Sep 6 • 1 min

Salesforce and LGPD - Data Privacy for Brazil

If your Salesforce Org has Brazilian personal data, download this PDF to learn the key steps your company should consider.

[Write a comment](#) 1 ❤️

PERSONAL DATA INVENTORY	ASSESS DATA PROCESSES	POLICY BASED DATA MGMT.	MANAGE CONSENTS	AUTOMATE PRIVACY RIGHTS	SALESMAN / CUSTOMER
<ul style="list-style-type: none"> Analyze and document personal data purpose, usage, accessibility, disposal etc. 	<ul style="list-style-type: none"> Analyze and document personal data purpose, usage, accessibility, disposal etc. 	<ul style="list-style-type: none"> Formalize policy and enforce data retention, minimize via deletion or data anonymization 	<ul style="list-style-type: none"> Use Salesforce's Individual object and others to create and maintain audit ready consent 	<ul style="list-style-type: none"> Streamline privacy right processing with self-serve Privacy portal for portability, deletion etc. 	<ul style="list-style-type: none"> Prevent data breach or data loss
<ul style="list-style-type: none"> Manually in Excel 	<ul style="list-style-type: none"> Manually in Excel 	<ul style="list-style-type: none"> Custom Apex 	<ul style="list-style-type: none"> Custom Apex 	<ul style="list-style-type: none"> Custom Apex 	<ul style="list-style-type: none"> Custom Apex
<ul style="list-style-type: none"> Click auto-scan with Cloud Compliance 	<ul style="list-style-type: none"> In Salesforce with Cloud Compliance 	<ul style="list-style-type: none"> Automated with Cloud Compliance 	<ul style="list-style-type: none"> Fully managed with Cloud Compliance 	<ul style="list-style-type: none"> Auto-processed with Cloud Compliance 	<ul style="list-style-type: none"> Data Cloud

[Cloud Compliance Data Management Suite for Salesforce](#)
<http://bit.ly/cloud-compliance-app>

EASY OPT-IN/OUT = ❤️ + SAVE \$

OFFER A CENTRALIZED SELF SERVICE PREFERENCE CENTER FOR ALL CHANNELS AND REDUCE COST

ASK ME AGAIN, EARLY

WITH NEW LAWS, CONSENT EXPIRES, AUTOMATE

PlumCloud Labs Sep 6 • 1 min

Pardot Cloud Compliance datasheet - 5 ways to grow customer love

Manage consent and communication preferences for multiple channel and purpose with Pardot/Salesforce sync using Cloud Compliance.



Next Steps

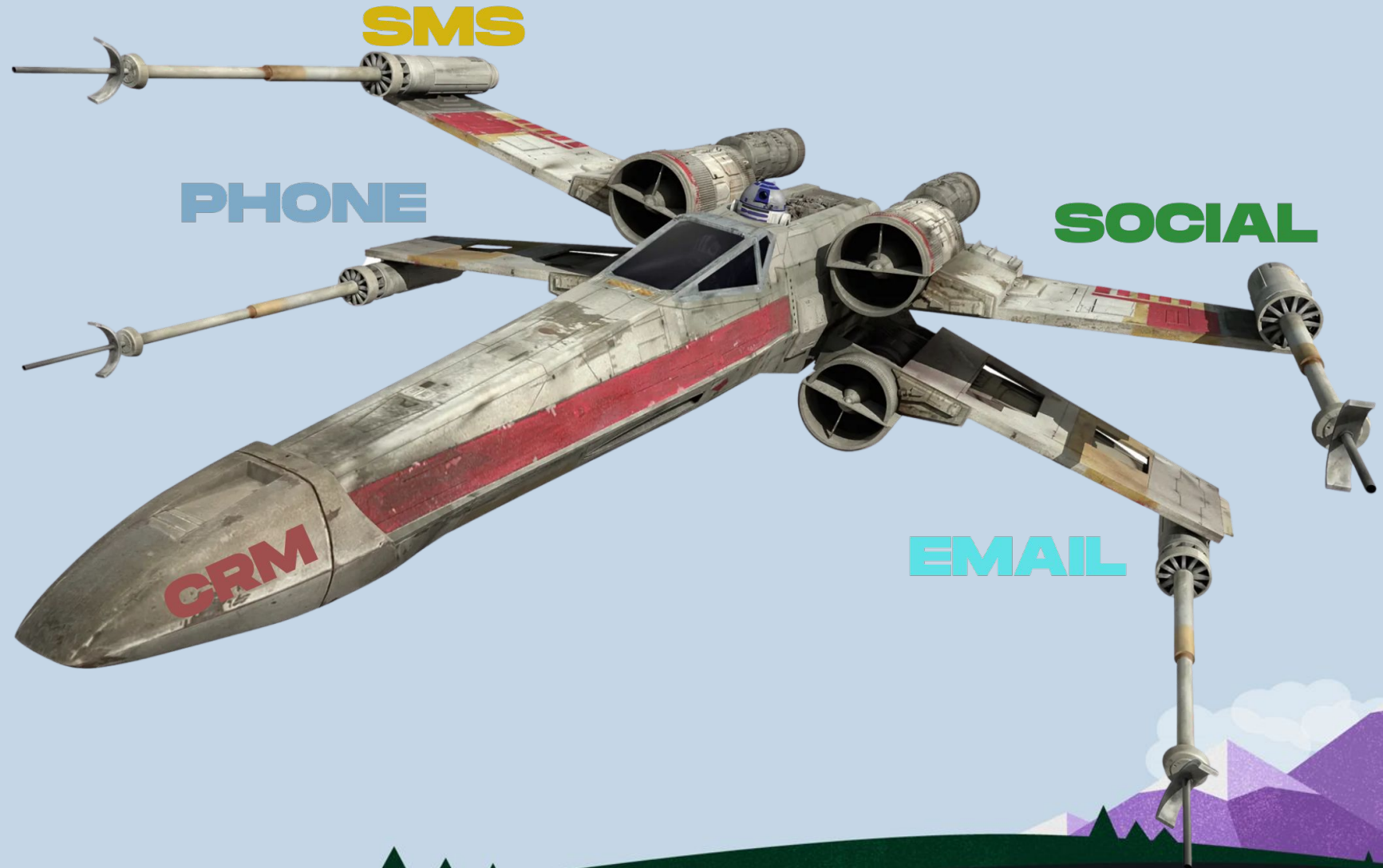
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- Identify how your organization can leverage omni-channel in a respectful and privacy compliant manner
- Determine the mix of channels/AppExchange apps to leverage consent based outreach
- Reach out to Cloud Compliance to assist with your data privacy and communication preference efforts



Omni-channel Marketing - CRM + Channel Apps + Cloud Compliance

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Salesforce Data Security & Privacy Compliance made Simple!

- Cloud Compliance, AppExchange ISV Partner
- Go-live in weeks

<https://cloudcompliance.app/book-a-demo/>



Deloitte.

**FLOOR
DECOR**

NRC NORWEGIAN
REFUGEE COUNCIL

ClearChoice
DENTAL IMPLANT CENTERS



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Thanks for listening!



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You can find me on the social media links above
or hit me up at saurabh@cloudcompliance.app



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