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SESSION:

Planning for Your Pardot Business Unit Implementation

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Planning for Your Pardot Business Unit Implementation

Intermediate | Admin

Erin Duncan
Sercante

Planning for your Pardot Business Unit Implementation

Disclaimer

- It is highly recommended that anyone considering implementing PBUs work with a Partner with experience in this area.

Considerations for Setting Up Pardot Business Units

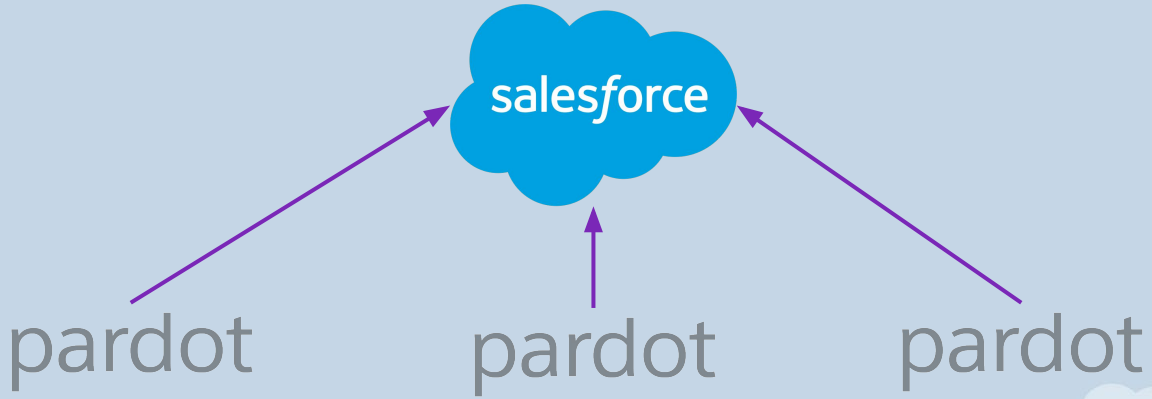
There are several important things to understand about business units.

Partner Assistance

The Pardot Business Units setup process is simple. However, configuration choices can have a widespread impact. The most successful implementations are done with the guidance of a Pardot and Sales Cloud certified partner. For help with finding a partner to work with, contact the Pardot Partner team.

What are Business Units?

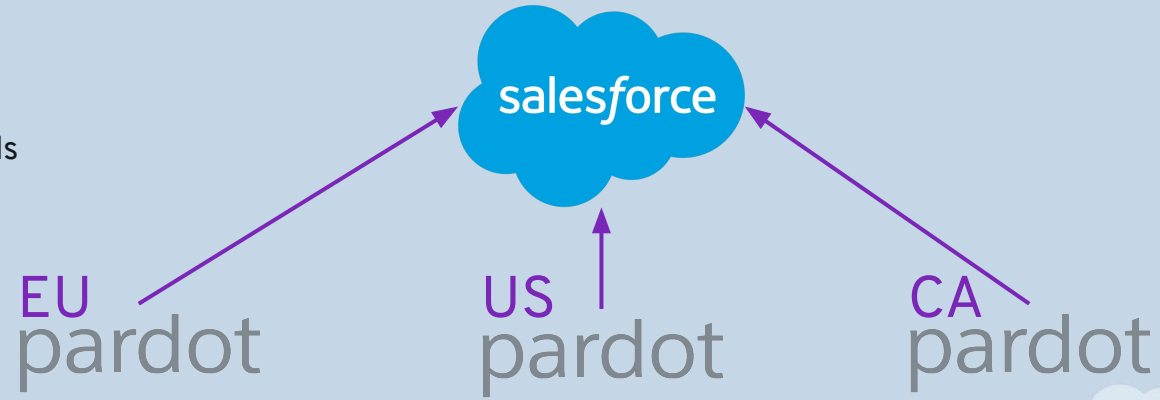
“Pardot Business Units connect to a single Salesforce org, but each unit is its own partitioned Pardot database. Business units don't have a hierarchical relationship”



What are Business Units?

Typical Divisions

- County/Region
- Sub-brand
- Products
- Services
- Industry Verticals



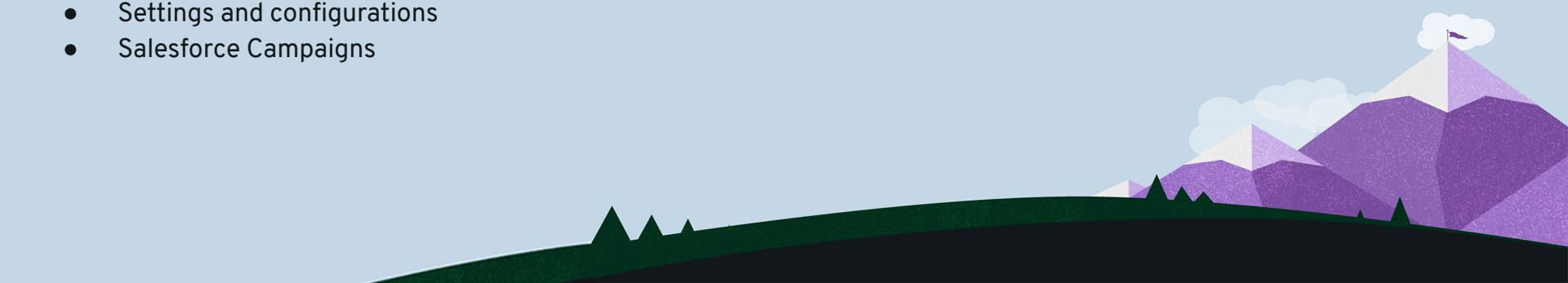
What are Business Units?

Each unit has its own

- Salesforce connector
  - Can use the same Connector user/B2BMA Integration User
- Prospects
- Marketing assets
- Segmentations
- Automations
- Settings and configurations
- Salesforce Campaigns

Access is controlled by

- Salesforce User Sync
- Salesforce Profiles
- Pardot User Assignment
  - Public Group
  - Role
  - User



Type of Implementations

Typical Implementation

- Leads and Contacts exist in 1 PBU at a time
- If these objects need to exist in multiple PBUs, they must be duplicated in SFDC

This is what we are talking about today

Cross-PBU Implementation (aka Single View of Prospect)

- Leads and Contacts can be in multiple PBUs without needing duplicates in SFDC
- Prevents regular syncing to package fields
- Requires custom objects and a thorough understanding of the Pardot API

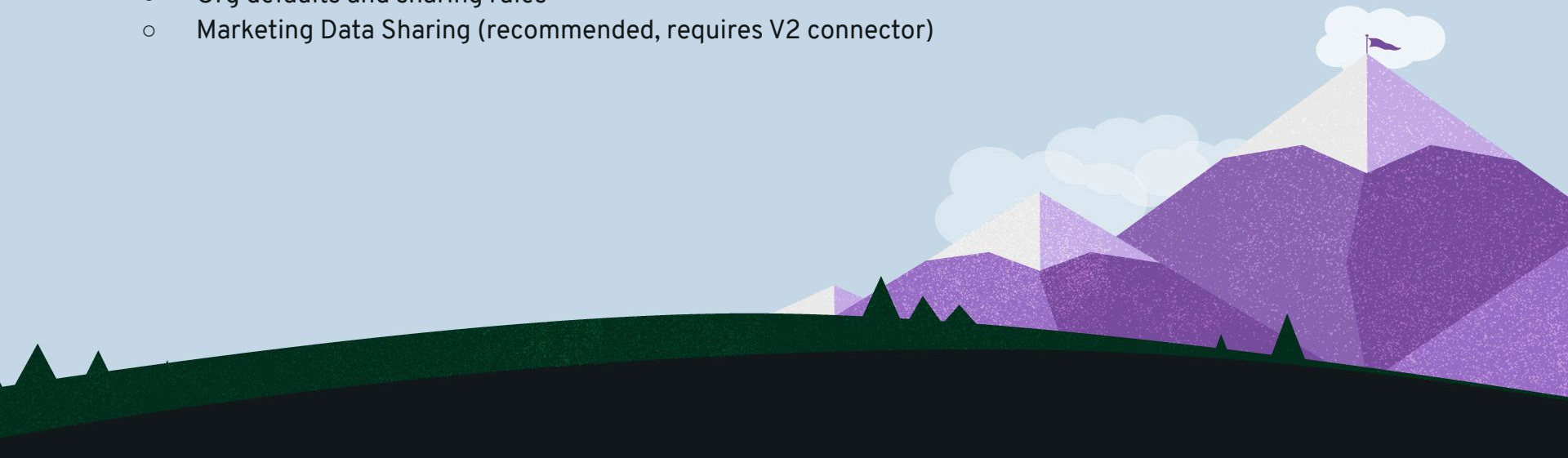
Requirements

- Pardot Advanced or Pardot Premium
- Pardot User Sync
- V2 Connector
- Pardot Lightning

Syncing

Prospects, Opportunities, and Custom Objects can only be in one PBU at a time by default

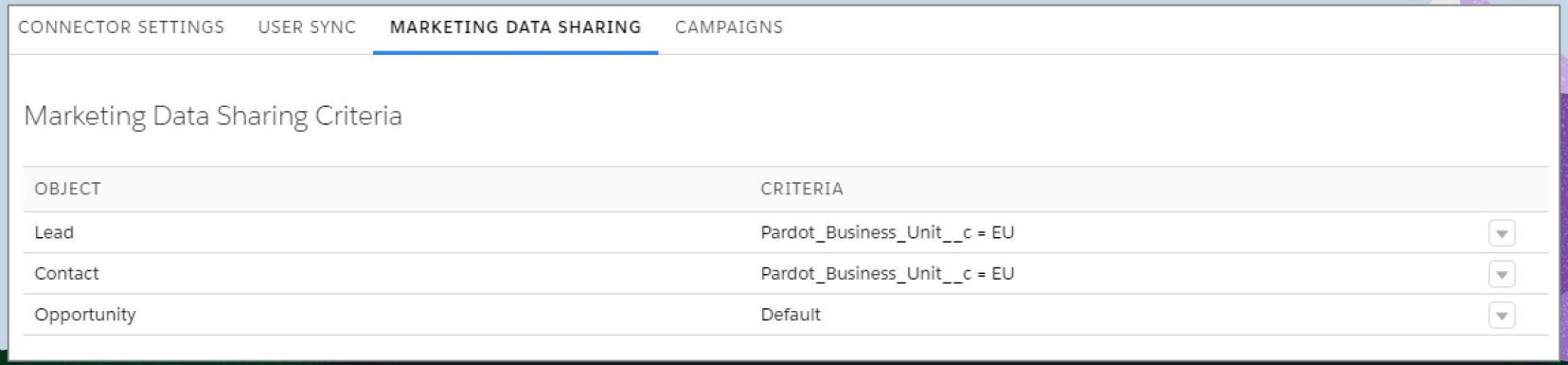
- Control which PBU they sync to with
  - Org defaults and sharing rules
  - Marketing Data Sharing (recommended, requires V2 connector)



Wait, what is Marketing Data Sharing?

Restrict what is eligible to sync from Salesforce to Pardot

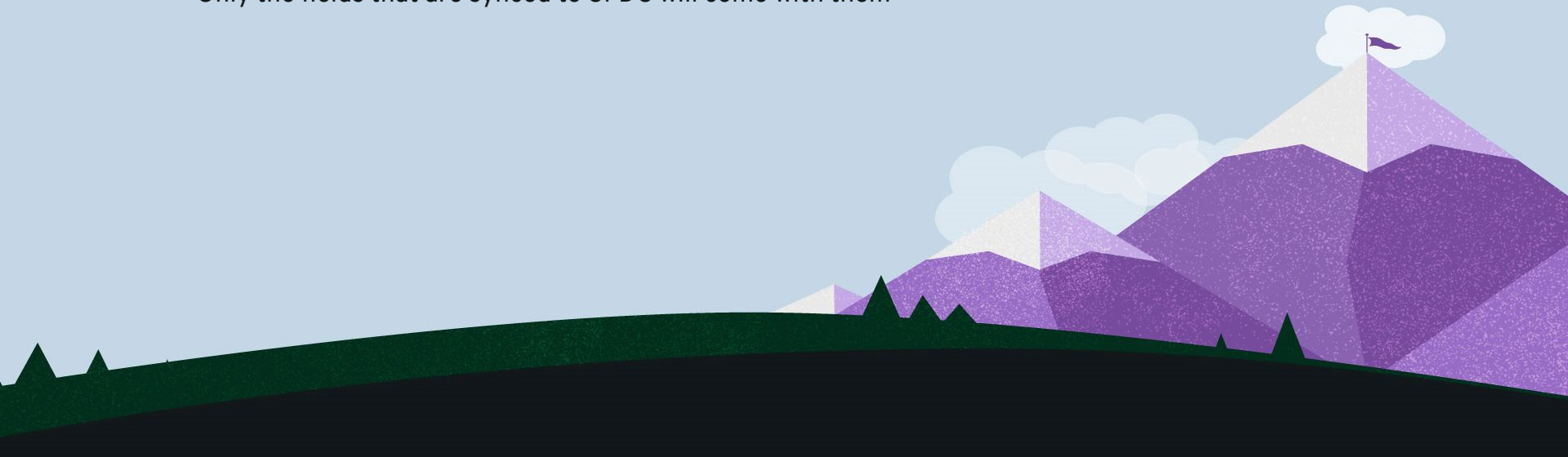
- MDS relies on one rule per object
  - Objects that match the rule's criteria sync to Pardot
  - Object that don't match go to the recycle bin
- One field should control your MDS rules and this field should **NOT** be in Pardot
- More info



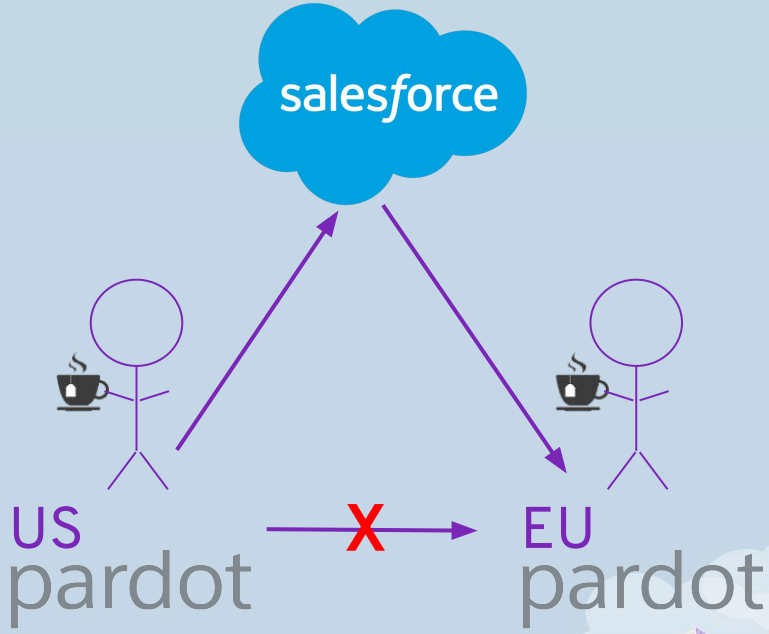
Syncing

If a prospect moves from one BU to another

- Their activity history does not come with them
- Only the fields that are synced to SFDC will come with them



Syncing



Connected Campaigns

Campaigns sync to the individual PBUs through Record Types

- Record types syncing to Pardot should be unique to the PBU
  - i.e. a Campaign can only exist in one PBU

Example Record Types

- Sales
- Marketing (US)
- Marketing (CA)
- Marketing (EU)
- Admin

Business Unit Set Up

Users

- Enable User Sync as part of implementation
  - Map out how Profiles connect to Pardot Roles connect to PBUs

Name	Email	SFDC Profile	Pardot Role	US	EU	CA
Jane Doe	jdoe@email.com	Marketing User - US	Marketing	X		
Colin Smith	Csmith@email.com	Marketing User - EU	Marketing		X	
John Brown	jbrown@email.com	Marketing Admin	Admin	X	X	X

What will be universal?

Decide what will be standardized between PBUs

Recommended

- Naming Conventions and folder structure
  - Recommend adding your PBU name in the conventions
- Fields, field values, and fields syncing to SFDC
- Connector version and settings
- Connected Campaigns
- Custom User Roles

What will be universal?

Decide what will be standardized between PBUs

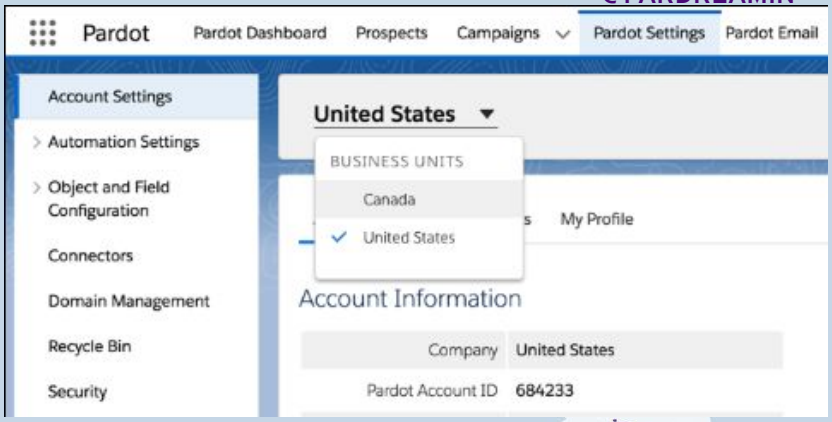
Optional

- Email and layout templates
- Email preference centers
- Engagement Programs
- Automated Processes/Rules

- 5 Ways to Standardize Your Pardot Business Units

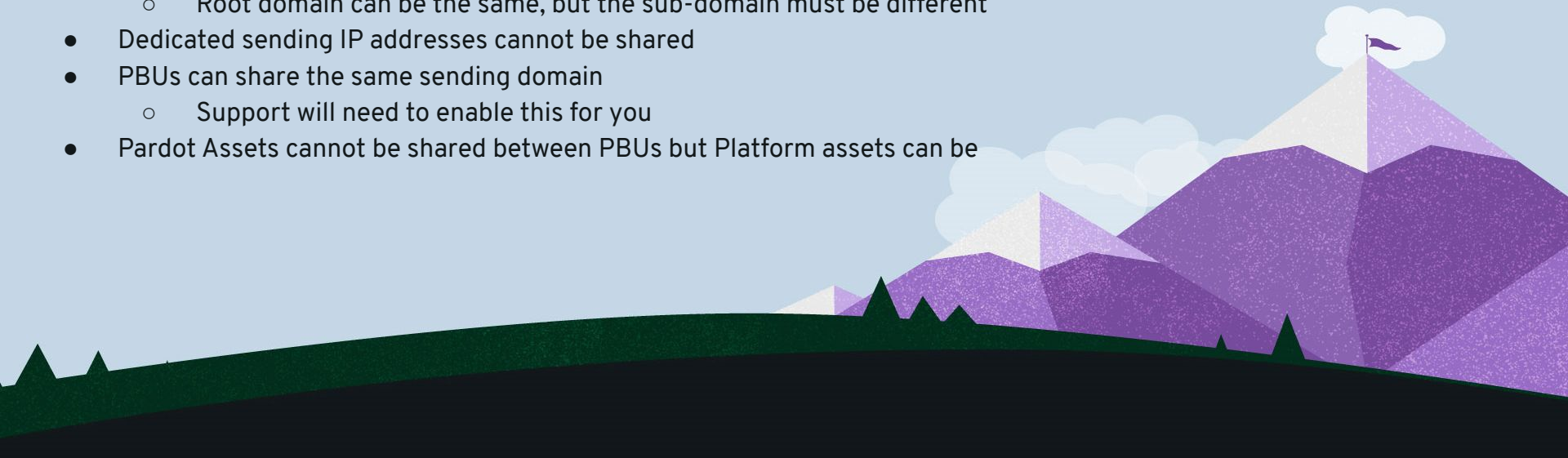
Prep

- Enable Pardot Lightning for all Pardot users
  - Cannot access Business Unit Switcher in Classic
  - Ensure the “Pardot Settings” tab is visible
- Stamp existing Leads, Contacts, Opportunities with MDS value
- Clear/Review your Sync Errors
  - MDS can’t move prospects who are not syncing



Considerations

- If you are consolidating SFDC orgs, do this BEFORE moving to BUs
- Once created, a BU cannot be deleted and the name in Salesforce cannot be changed
- Tracker domains cannot be shared
  - Root domain can be the same, but the sub-domain must be different
- Dedicated sending IP addresses cannot be shared
- PBUs can share the same sending domain
  - Support will need to enable this for you
- Pardot Assets cannot be shared between PBUs but Platform assets can be



Thanks for listening!

ekduncan ernduncan

You can find me on the social media links above or hit me up at erin@sercante.com

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