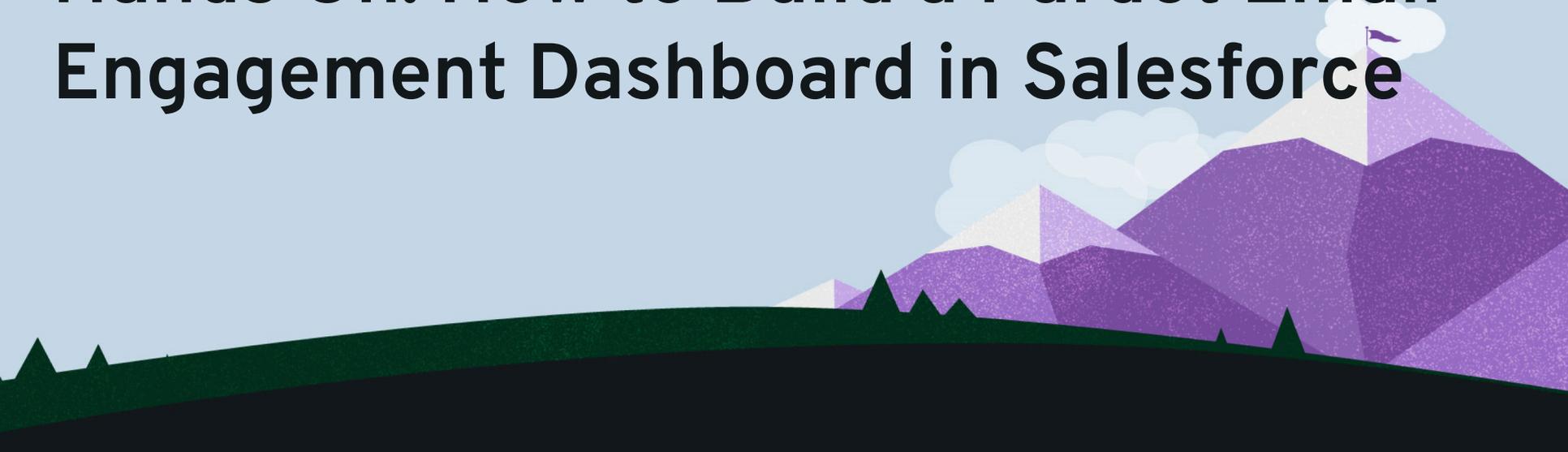


SESSION:

# Hands On: How to Build a Pardot Email Engagement Dashboard in Salesforce



# Hands On: How to Build a Pardot Email Engagement Dashboard in Salesforce

Beginner | Industry



**Karla Vince**

LightBox



# Speaker Agenda

What's going on here?

Time	Agenda	Extra Info
10:05-10:10	Introduction, Why and What You Need to Get Started	<b>Basics</b>
10:10-10:20	Building the Report in Salesforce	<b>Hands on</b>
10:20-10:30	Let's Build a Dashboard – Data Visualization!	<b>Hands on</b>



# Why create a marketing email dashboard in Salesforce?

## A little background...

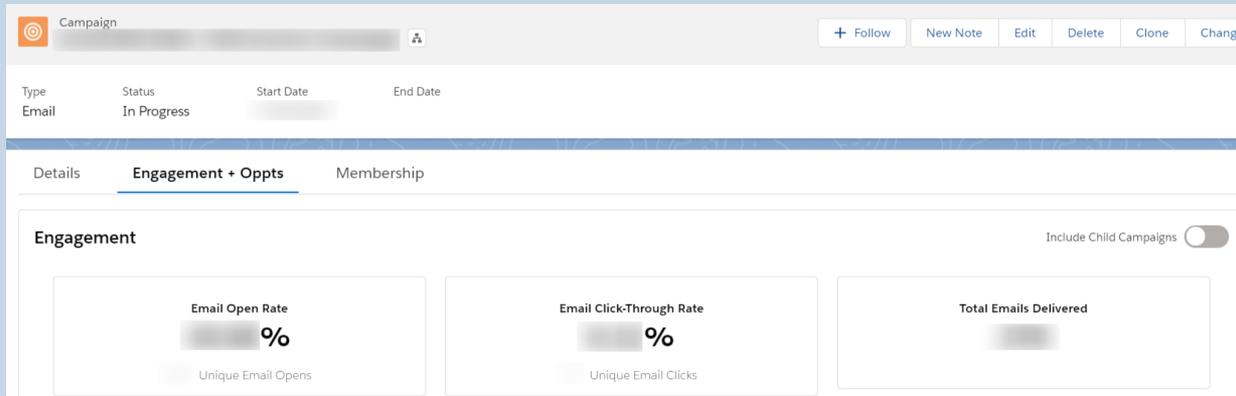
1. No B2BMA – Analytics Studio
2. Transparency and shareability
3. It's EASY!



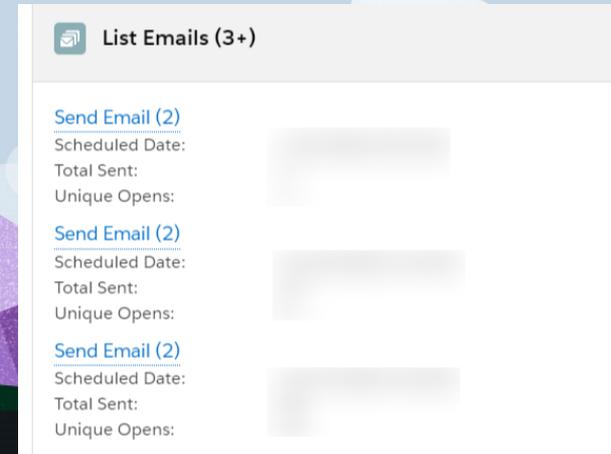
# What you need to get started...

## Let's GO!

1. Pardot Lighting App & Salesforce Lightning
2. Connected Campaigns
3. Ability to view Engagement & List Emails in Salesforce Campaigns



The screenshot shows the Pardot Campaign interface. At the top, there's a 'Campaign' header with a search bar and action buttons: '+ Follow', 'New Note', 'Edit', 'Delete', 'Clone', and 'Change'. Below this is a table with columns for 'Type', 'Status', 'Start Date', and 'End Date'. The first row shows 'Email' and 'In Progress'. Below the table are tabs for 'Details', 'Engagement + Oppts', and 'Membership'. The 'Engagement + Oppts' tab is active, showing an 'Engagement' section with a toggle for 'Include Child Campaigns'. Three cards display metrics: 'Email Open Rate' (with a percentage sign and 'Unique Email Opens' below), 'Email Click-Through Rate' (with a percentage sign and 'Unique Email Clicks' below), and 'Total Emails Delivered'.

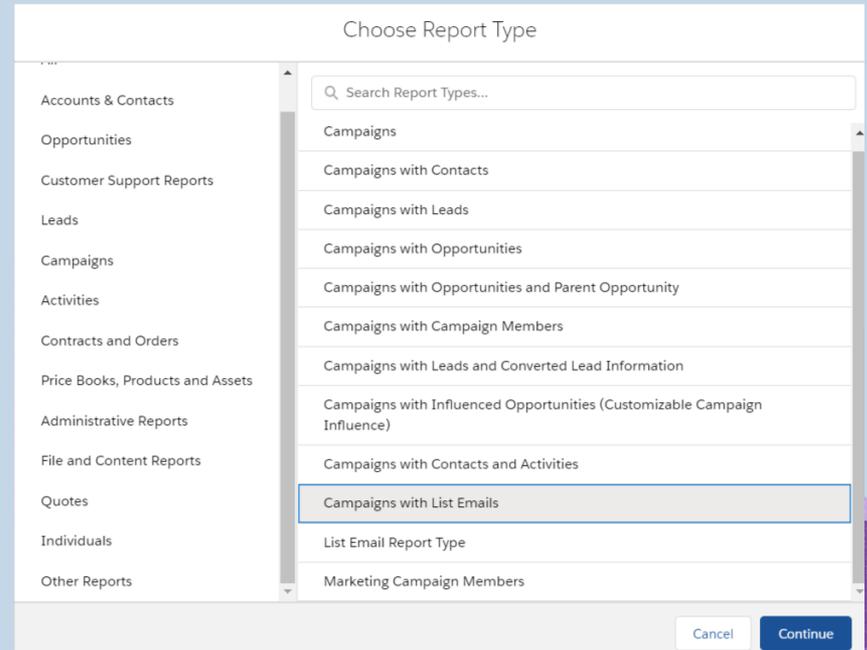


The screenshot shows the 'List Emails (3+)' view. It features three identical sections, each starting with a 'Send Email (2)' link. Below each link are three rows of data: 'Scheduled Date:', 'Total Sent:', and 'Unique Opens:'. The data values are blurred in the image.

# Building the Report in Salesforce

## Report: Campaigns with List Emails

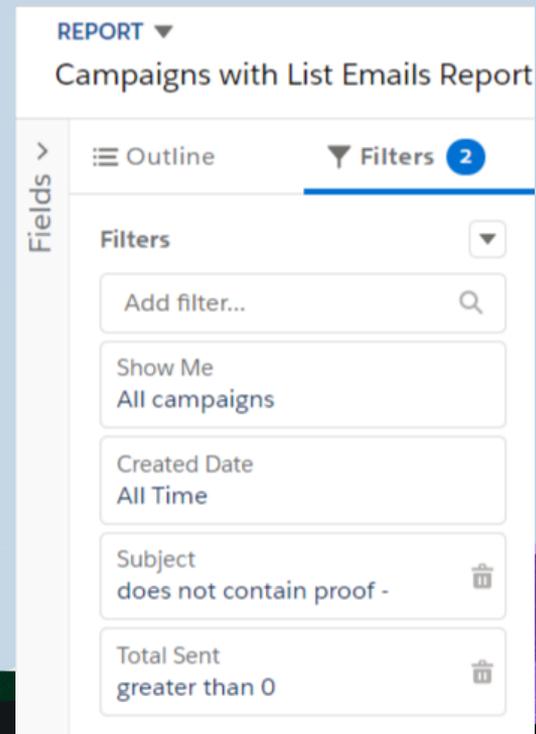
- Choose: Campaigns > Campaigns with List Emails
- Report will pull both list and automated (Engagement Studio) emails.
- Don't see data? Check with your Salesforce admin on the settings.



# Filters Setting on the Report

## Filters that work well for creating a dashboard

- Show Me > All Campaigns
- Created Date > All Time
- Subject > does not contain proof -
- Total sent > greater than 0



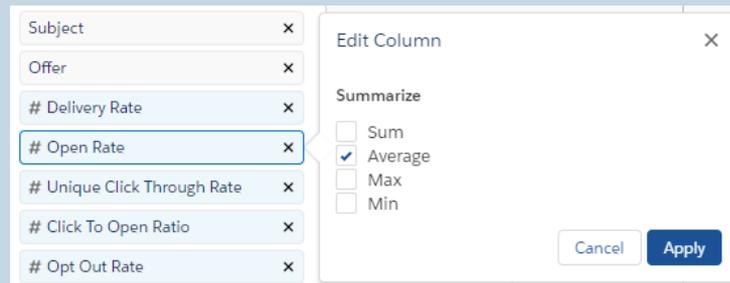
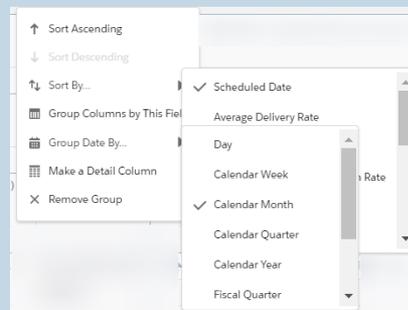
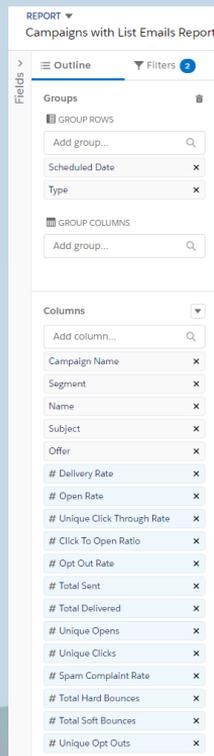
The screenshot shows a report configuration interface. At the top, it says "REPORT" with a dropdown arrow, followed by "Campaigns with List Emails Report". Below this, there are two tabs: "Outline" and "Filters" (which is selected and has a blue circle with the number "2" next to it). On the left side, there is a vertical label "Fields" with a chevron icon. The "Filters" section contains a search bar labeled "Add filter..." with a magnifying glass icon. Below the search bar, there are five filter entries, each in a white box with a light gray border:

- Filter 1: "Show Me" with the value "All campaigns".
- Filter 2: "Created Date" with the value "All Time".
- Filter 3: "Subject" with the value "does not contain proof -" and a trash icon on the right.
- Filter 4: "Total Sent" with the value "greater than 0" and a trash icon on the right.

# Outline Setting on the Report

## Groups & Columns

- Group Rows by Scheduled Date & Type
- Select the Columns of your choice
- For the Rates & Ratio – Select Average



# Final Report: Campaigns with List Email

Sample of what it should look like...

Report: Campaigns with List Emails  
**Campaigns with List Emails Report**

Add Chart

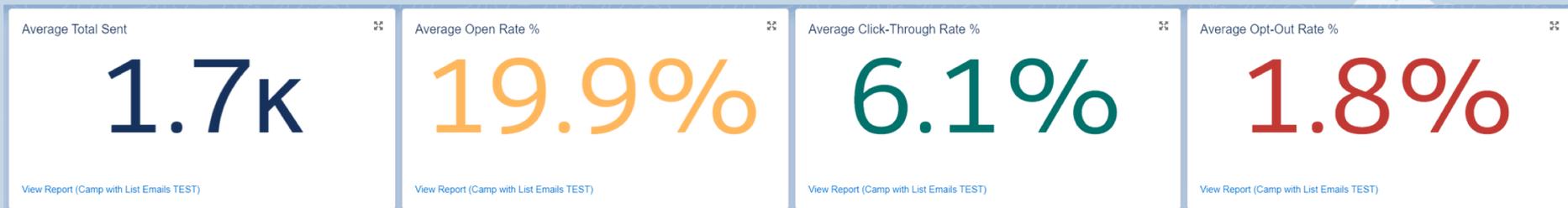
Total Records	Average Delivery Rate	Average Open Rate	Average Unique Click Through R...	Average Click To Open Ratio	Average Opt Out Rate	Average Total Sent	Total Total Delivered
	%	%	%	%	%		

Scheduled Date	Type	Campaign Name	Segment	Name	Subject
April 2021 (10)	List Email (6)				
	Subtotal				
	Automated Email (4)			Send Email (2)	
				Send Email (6)	
				Send Email	
				Send Email (6)	
	Subtotal				

# Let's Build a Dashboard...

## Data visualization – love this!

- Use the “Campaigns with List Emails Report” as the basis the dashboard components
- I use the metric chart for the headers & set the colors to express performance satisfaction
  - Colors can be set on the Component under “Segment Ranges”

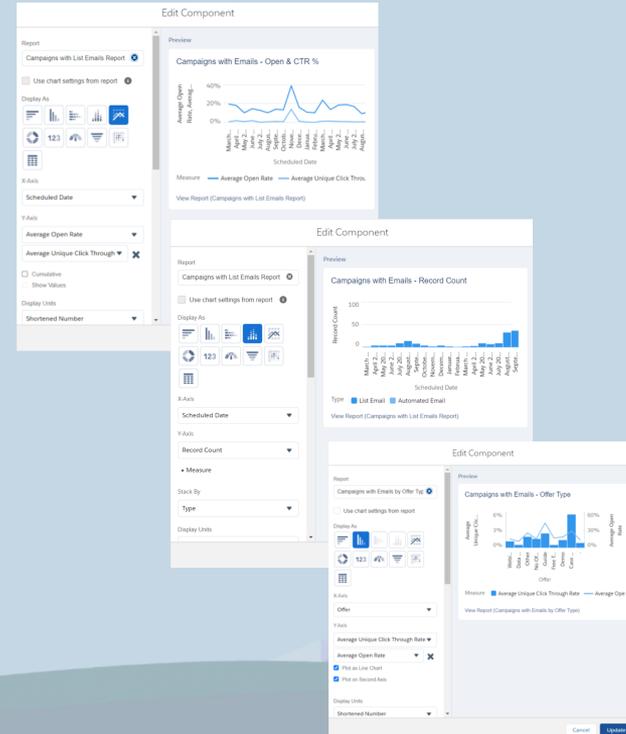


\* The metrics shown are for sample purpose and do not reflect the real numbers

# Dashboard Components Continued

## Line Charts & Bar Charts

- Line Chart for Open & CTR%
- Stacked Vertical Bar Chart for Email Record Count
  - By List Email vs Automated Email (ES)
- Vertical Bar Chart for Custom Campaign field metric

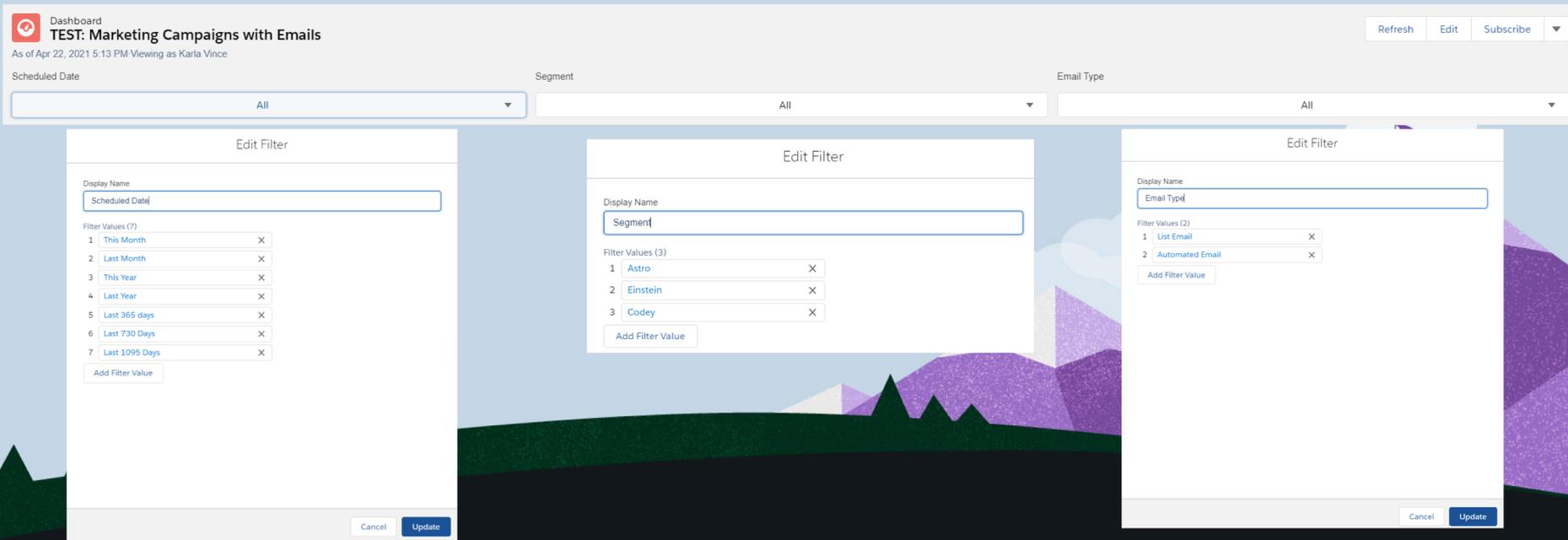


\* The metrics shown are for sample purpose and do not reflect the real numbers

# Dashboard Filters

## The hidden gem!

- I chose – Scheduled Date, a Campaign Custom field, and Email Type



The screenshot shows the Pardreamin dashboard interface for a campaign titled "TEST: Marketing Campaigns with Emails". At the top, there are navigation buttons for "Refresh", "Edit", and "Subscribe". Below this, three filter dropdown menus are visible, each currently set to "All": "Scheduled Date", "Segment", and "Email Type".

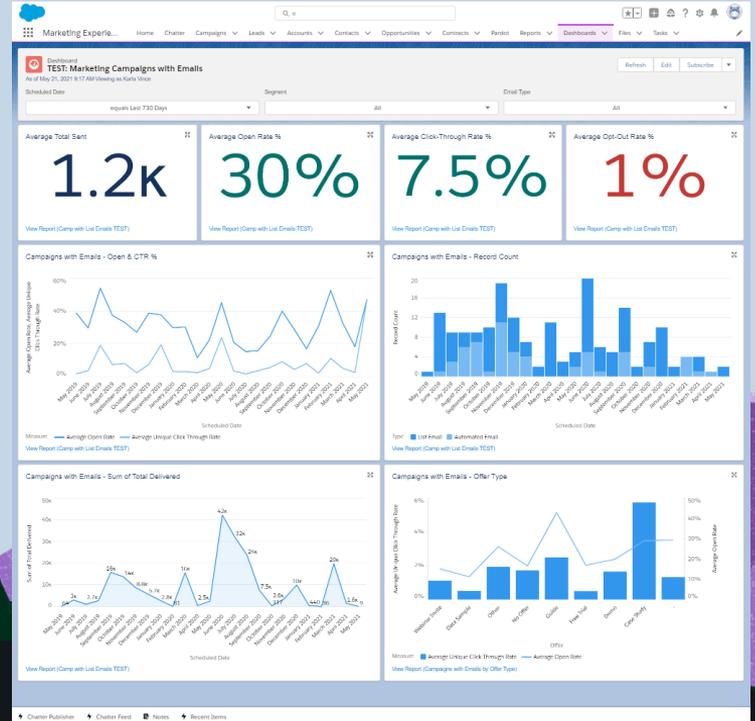
Three "Edit Filter" modal windows are overlaid on the dashboard, showing the configuration for each filter:

- Scheduled Date Filter:** The "Display Name" is "Scheduled Date". It lists seven filter values: "This Month", "Last Month", "This Year", "Last Year", "Last 365 days", "Last 730 Days", and "Last 1095 Days". Each value has a small "X" icon to its right. There is an "Add Filter Value" button at the bottom.
- Segment Filter:** The "Display Name" is "Segment". It lists three filter values: "Astro", "Einstein", and "Codey". Each value has a small "X" icon to its right. There is an "Add Filter Value" button at the bottom.
- Email Type Filter:** The "Display Name" is "Email Type". It lists two filter values: "List Email" and "Automated Email". Each value has a small "X" icon to its right. There is an "Add Filter Value" button at the bottom.

At the bottom of each modal, there are "Cancel" and "Update" buttons.

# Voilà! Brand New Dashboard Completed

What does your dashboard look like?



\* The metrics shown are for sample purpose and do not reflect the real numbers

# Thanks for listening!



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above or hit me up at [kvince@lightboxre.com](mailto:kvince@lightboxre.com)



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