Background

# Center for Strategic and International Studies (CSIS)

- CSIS is a think tank based in Washington, DC founded in 1962 with a specific focus on issues concerning defense and security, international relations, trade, technology, finance, energy and geostrategy.

- CSIS rolled out the use of Salesforce as our CRM in 2016 to replace the existing systems iMIS and Blackbaud's Raiser's Edge and selected Mailchimp as a stop gap solution to email marketing.

- ~150 users across 30+ research programs all operating and marketing their work independently. Press and Congressional Relations teams operate as outreach to the respective audiences, but users responsible for their own audience marketing.

- Three separate "audiences" for mailing: Public, Members, and Press.

- High dollar, low volume donor base (primarily organizational).

Mailchimp Woes

Issues:

- Lack of granular permissioning meant that anyone who could send an email could also create new templates or new "audiences."
- Native integrations to Salesforce were insufficient leading to additional costs through API-based solutions, and Mailchimp data coming back into Salesforce was insufficiently meaningful.
- Lack of insight into why specific audiences were being targeted led to users/directors pushing for larger recipient numbers.
- Inconsistencies in templates led to a lack of professionalism and brand identity.
- Product direction heavily slanted toward small businesses/e-commerce.
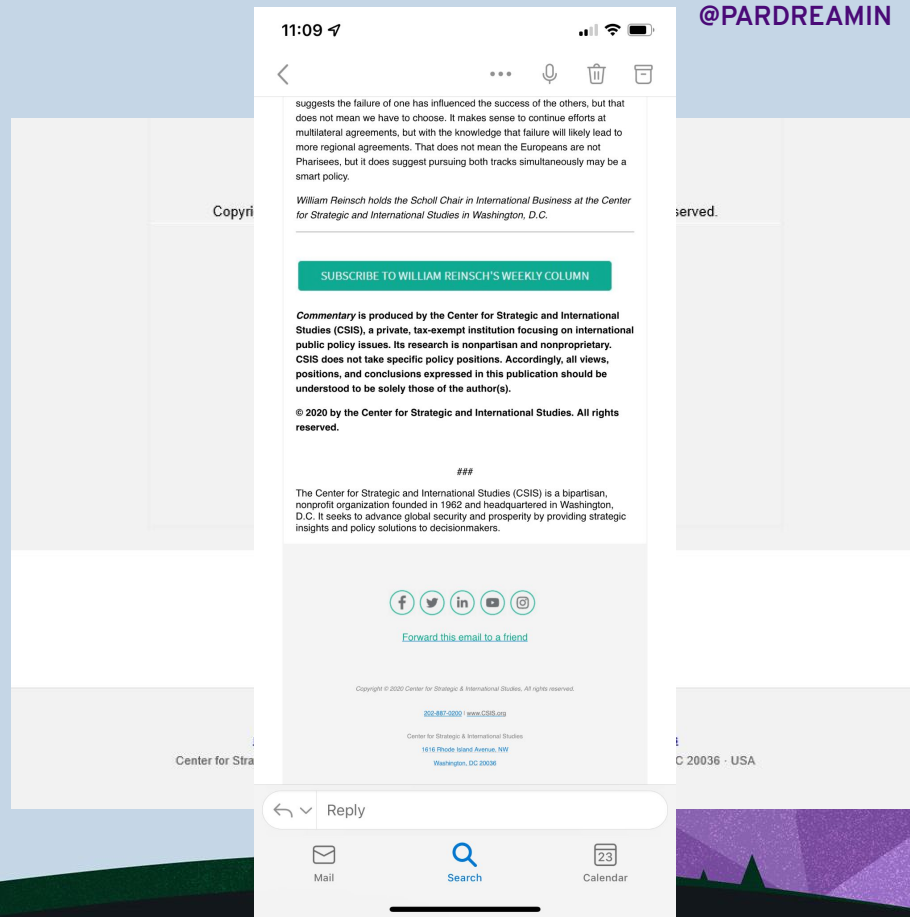
The Selection Process

We evaluated three systems:

- Pardot
  - Provided promising "additional" tools (cookie tracking, dynamic content, social integrations)
  - Sales cloud integration and Custom Object support
  - Primarily B2B marketing
- Salesforce Marketing Cloud
  - Best suited to transactional giving and B2C marketing
  - Has additional features we'd make no use of (SMS marketing, multi-channel marketing)
  - More expensive to implement for CSIS
- Constant Contact
  - Much like Mailchimp, heavily focused on e-commerce
  - Easy to use UI but complicated API integration setup with third-party integrator

Implementation

Implementation Timeline

Getting off the ground in six months or less

Timeframe	Task	Notes
1 month	Pre-Implementation Groundwork	Lay out initial implementation strategy, audit existing systems and workflows, write user stories for system requirements, clean existing contacts, and begin determining which assets will transfer
2 months	Initial Setup	Set up integration user, Connected Campaigns strategy identified and set up, folder/organizational structure identified, user review/role and permissions definition, asset and contact migration, custom object/field sync
1 month	Testing and Connecting	Begin testing migrated assets and user stories, connect tracking code to website, set up vanity URL and get SPF/DKIM alignment, verify sending and tracking domains, establish dedicated IP
1 month	User Training	Ongoing user training explaining basics of new system; held four trainings a week for 1 month (16 total trainings, 140 users)
6 weeks	IP Warming	Ramped up sending schedule where volume increases weekly over a period of time.
LAUNCH	Pull the plug on Mailchimp integrations	Because of our rollout strategy, we were running two mail systems concurrently. Once we had all users migrated over, we were finally able to pull the plug on Mailchimp.

Migration Statistics

Migrated:

249,937
Prospects

223
Existing Segmentation Lists

70
Templates

~94K
Lines of Code

1.6GB
Assets Transferred

1,751
Individual Images and Files

# Pardot Features we LOVE

Gamechangers

- Custom Redirects
- Dynamic Content
- Completion Actions
- New Segmentation Options
- Cookie Tracking

Utilizing the new features in Pardot has helped us to raise our average open rates across the board and doubling our average click rate.

Segmentation with completion actions allows us to target our most engaged audiences in ways we've never been able to before.

Cookie tracking provides us insight into what our most important donors and readers are doing on our website, and increased engagement has driven all-time high traffic to our website.

Dynamic content has made our flagship newsletter customized to each readers preferences based on the interests they've subscribed to.
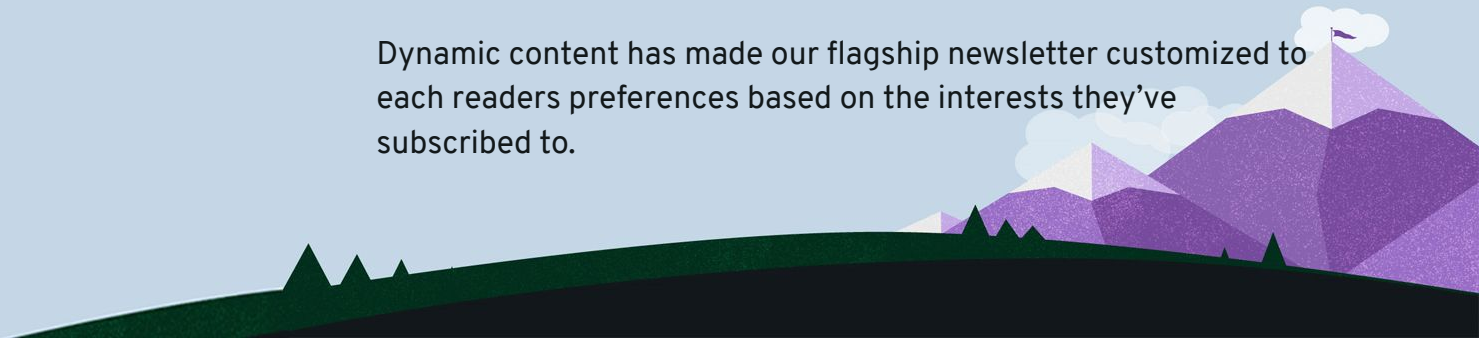
Mailchimp vs. Pardot Stats

Mailchimp

- Open/Click Rates of 16%/1.2%
- 1,027 templates and three audiences
- Opt Out rates avg ~1%
- No tracking ability beyond email
- Limited flexibility in terms of adjusting mailing preferences

Pardot

- Open/Click Rates of 22%/2.4%
- 70 templates and one global audience
- Opt Out rates avg <0.7%
- Full tracking across CSIS.org, tracking key touchpoints of crucial donors
- Subscriber has full control of subscriptions and new subscription interests are much easier to add

Lessons Learned

Good Implementation Partner is Key

- Partnering with an expert integrator (such as Sercante) will ensure a successful implementation

- Utilizing the vast community resources inside of Salesforce and out
    - Salesforce Exchange Discord - https://sfxd.github.io/
    - Email Geeks Slack Channel - https://email.geeks.chat/
    - The Spot for Pardot - https://thespotforpardot.com/
    - The Drip - https://www.salesforceben.com/thedrip/

- Work with your implementation partner to develop a plan, and work through that plan one step at a time

- Budget at LEAST 4 weeks of time beyond implementation time for flexibility in schedule

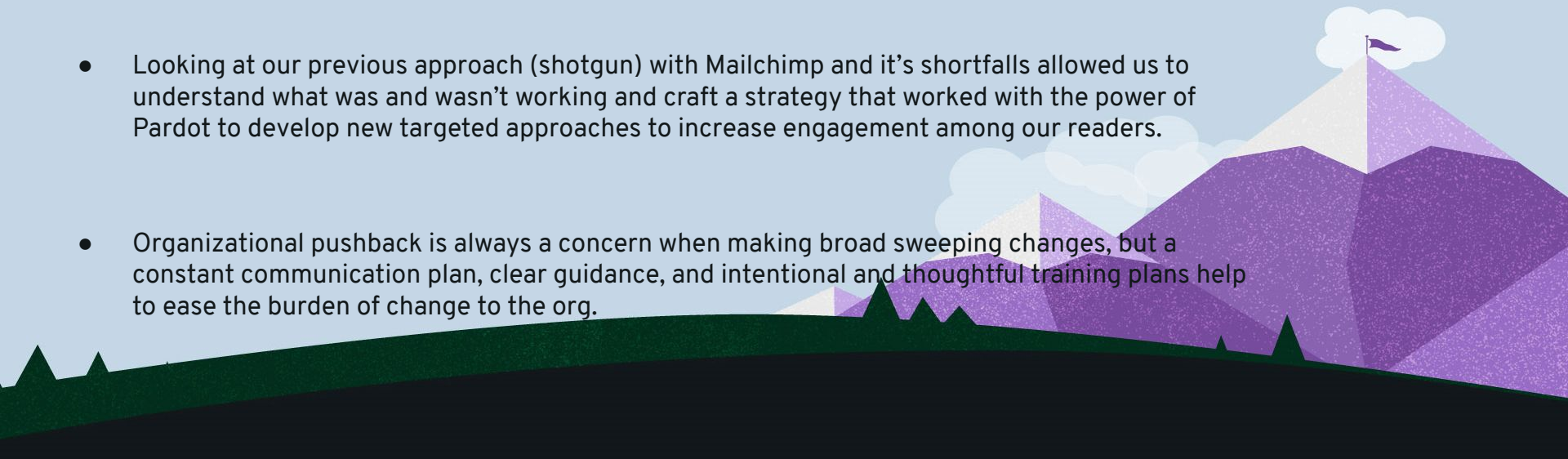- It may seem daunting, especially for solo admins--you got this!!
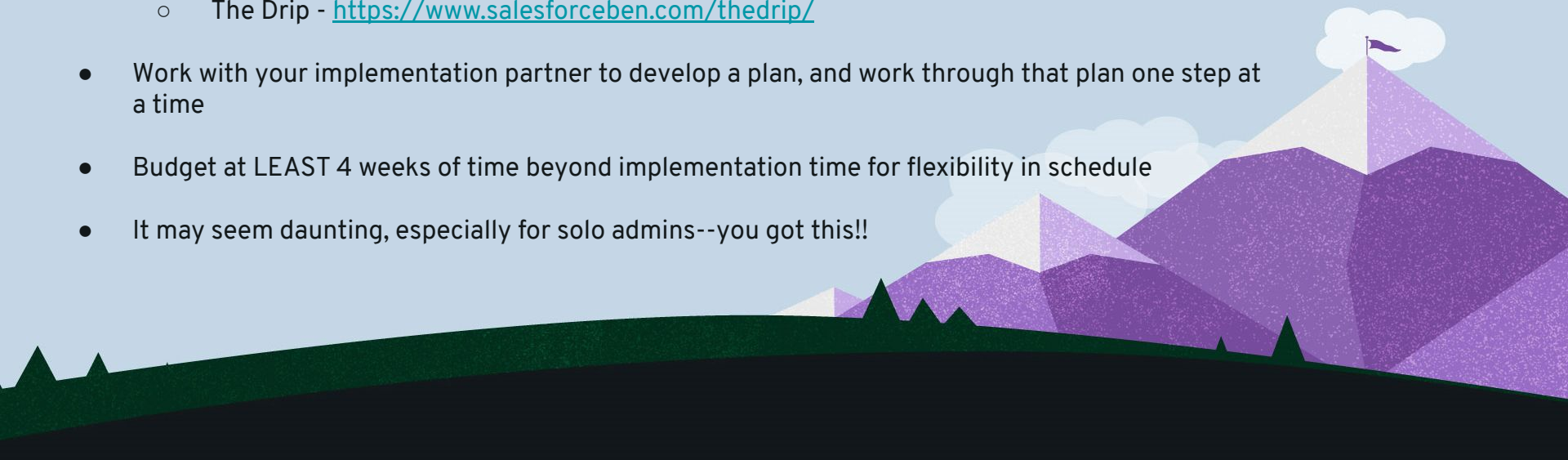
Fully Understand Your Data and Migration Strategy

- Utilize the weeks leading up to your purchase date to clean your database. Junk data and emails will only clutter your org and lead to higher bounce rates. The Spot for Pardot has some great tips and tricks (thanks for the great article Erin!!).

- Mapping out your data flows and migration process beforehand will GREATLY simplify the process.

- Coming up with a "transition plan" from your existing system, and *properly warming a dedicated IP address* can be challenging for a larger org. We ran into some hiccups when our volume suddenly increased dramatically.
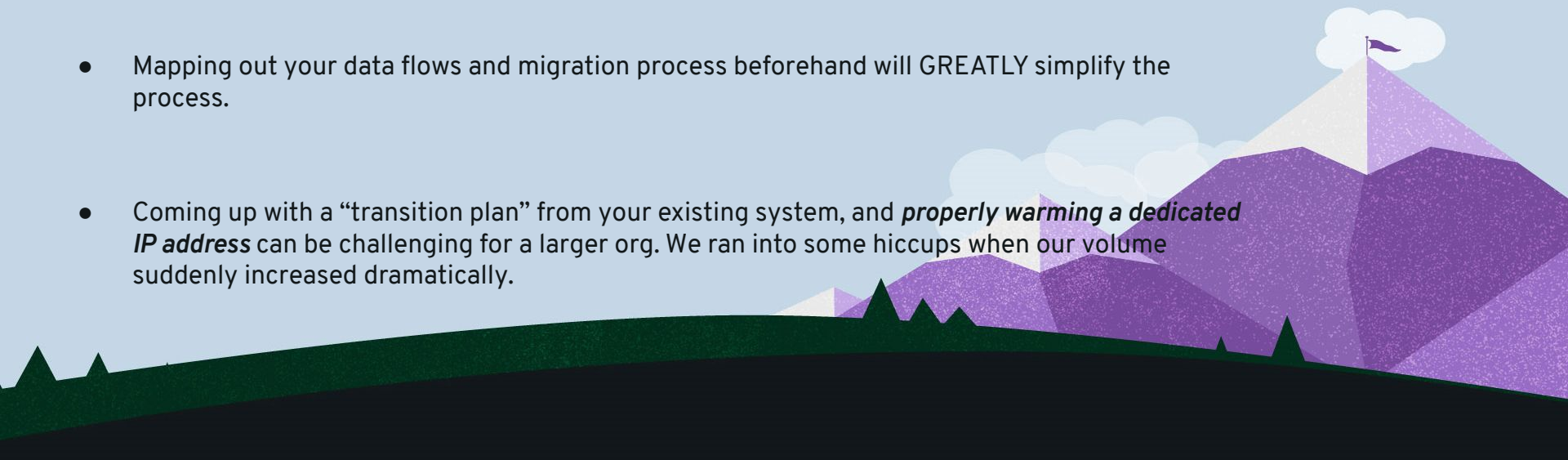
Use New System Implementation to Adjust Mailing Strategy

- We took advantage of the new system to come up with institutional guidelines for mailings that had previously not been codified. These included new branding guidelines, limitations on number of mailings that could be sent, and audience size for any individual mailing.

- Looking at our previous approach (shotgun) with Mailchimp and it's shortfalls allowed us to understand what was and wasn't working and craft a strategy that worked with the power of Pardot to develop new targeted approaches to increase engagement among our readers.

- Organizational pushback is always a concern when making broad sweeping changes, but a constant communication plan, clear guidance, and intentional and thoughtful training plans help to ease the burden of change to the org.

PAR DREAMIN'
by SERCANTE

"How to write a good email:
1. Write your email
2. Delete most of it
3. Send"
- Dan Munz