



Learn. Network. Grow.

MParDreamin' 2022

10 Steps to Fully Maximizing Your Pardot Investment:

The Roadmap to Strategic B2B Growth

Ryan Cammisa

Co-Founder, Cloudtegitic



Special Thanks To Our Sponsors



Title

SERCANTE



Platinum

D=SELECT

stensul

tray.io

Gold

FormAssembly

LeanData

STACK MOXIE

THE SPOT
FOR PARDOT by SERCANTE

Silver

MarketingOps

Goldcast

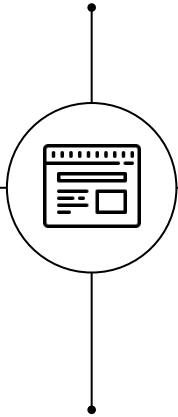
THE SPOT
FOR PARDOT JOBS

GREENKEY

FIONTA

4 Simple Steps to Full Utilization

Capture



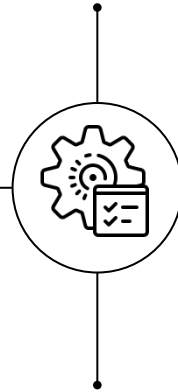
Lead Generation
and
Conversion

Nurture



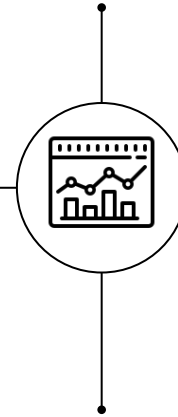
Uniquely educate
audiences to a goal

Automate



Route, Assign,
Qualify and more

Report



Revenue and KPIs
on efforts

Glossary

- ★ For Starters: The Setup Checklist
 - 1. Data
 - 2. Segmentation
 - 3. First Touch ROI Reporting
 - 4. Conversion
 - 5. Multiple Nurtures
 - 6. Sales + Marketing Alignment
 - 7. Qualification
 - 8. Dynamic Content
 - 9. Attribution
 - 10. Campaign Alignment

33% of companies are experiencing challenges in introducing marketing automation due to a lack of internal expertise.

-ZHAW School of Management and Law

For Starters: The Setup Checklist



Pardot Lightning App



Web Tracking + CNAME



V2 Connector



Deliverability Settings: SPF + DKIM



Folder Structure



IP Warming



Asset Nomenclature



HTTPS Enablement

Data

67% of businesses, the main challenge to adopting marketing automation is integrating data from different sources and systems.

-SpotlerUK

Clean data, dupe free, and aligned for reporting

Data Challenges

Understand data inputs and mitigation rules

Priorities

What data criteria do we need moving forward?

Fixing Your Data

Assess, Clean, Field Integrity and Formatting

Enrichment

ZoomInfo, InsideView, Clearbit, etc.



Segmentation

85% of B2B marketers feel that they're not using marketing automation to its full potential.
-SIRIUSDECISIONS

Messaging to audiences using info from CRM + MA

Data + Fields

Use CRM fields to build your ideal list

Persona's

Is this prospect on the right list?

List Structure

The relevant track for that prospects persona

Rules

Automate list creation and addition



First Touch ROI Reporting

77% of CMOs at top performing companies say their most compelling reason for implementing MA is to drive up revenue.
-GLEANSTER

Marketing's important question:
What is working / not working?

Step One

Where do revenue driving leads come from?

Sources

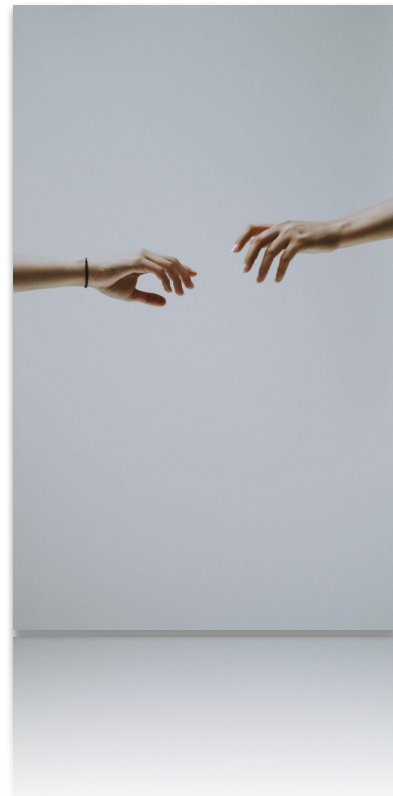
The channel that brought you in

Reason

Accurately identify the "why"

Traffic

Campaign-specific tracking to keep it clean



Conversion

Capturing Leads with Forms + aligned content

Content CTA

Traffic optimized for capture

Optimized LPs

Clear and easy navigation

Progressive Profiling

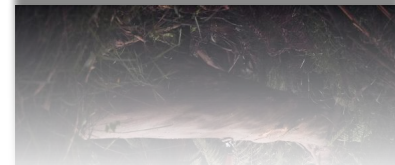
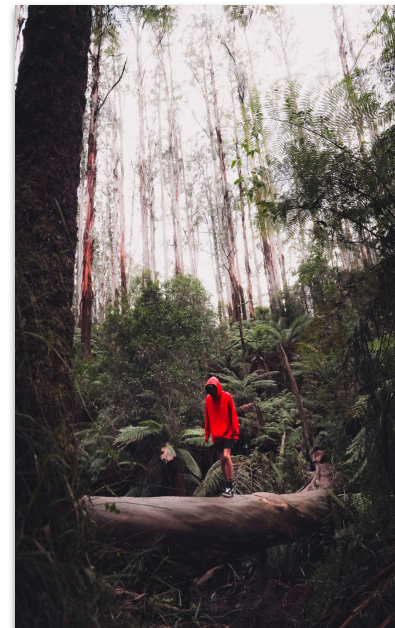
Simplify lead gen experience

Actions + Automations

What's the next step?

82% of marketers who are trying to increase lead quantity are also looking to increase lead quality.

-SCOOP IT



Multiple Nurtures

Only 8% of businesses are using marketing automation to nurture their existing customers.

–SIRIUSDECISIONS

48% of businesses say most of their leads require “long cycle” nurturing with many influencers.

–Ascend2

Separate, relevant messaging tracks for your buyers

Set Objectives

Purpose-driven engagements to goals

Define the audience and segment

Person, Product, Criteria

Value vs Sales Pitch

Uniquely educating prospects to the objectives

Timeline with Evaluation

Dates with campaign alignment and testing



Sales + Marketing Alignment



Aligning sales and marketing also leads to 38% higher sales win rates.

-MARKETINGPROFS

58% of marketers now believe that upselling is one of the most important marketing automation benefits.

-MOOSEND

Team collaboration to meet revenue goals

Tech Stack

Sales using Pardot in CRM

Service Level Agreement

What does each team need?

Content + Messaging

United approach to outbound coordination

Revenue Optimization

Lead to Cash process aligned revenue goals



29% of B2B marketers
are using marketing
automation to generate
higher quality leads.
-STATISTA

Qualification

Separately qualify prospects with scoring + grading

Lead Scores

Measuring your prospects engagements

Grading

Demographic characteristics to be defined

Quality

2D system to sort Leads + Contacts

The Finish Line

Work out thresholds and degradation processes



Dynamic Content

Email + Web content based on data and segment

80% of consumers say they are more likely to shop with brands that provide a personalized experience.

-YIELDIFY

Compared to mass campaigns, personalized automatic campaigns results in 500% higher conversion.

-SALES Manago

Increasing Engagement

Prospects only care about their needs

Time to Value

Less time researching with delivered custom content

Skip the Extra Step

Volume of quantity vs quality

Shorter Journey

The need for more, is less



34% of businesses don't use any attribution model to measure marketing performance.
-GENIUSMONKEY

Attribution

Engagement + Revenue metrics
from marketing actions

Roll Up on Hierarchy

Prospect journey visibility from the starting point to the end purchase

Follow Through

Adding to appropriate Campaigns (every touch)

Contact Roles on Opportunities

Required Field for Sales process

Member Statuses

Which interactions are ROI worthy?



89% of respondents
who have deployed
marketing automation
systems have
integrated it with CRM.
-RESEARCHCORP

Campaign Alignment

Bridging the gap between Salesforce + Pardot

One to One / One to Many

Asset to Campaign alignment

Highest Level of Roll Up

What is your top tier and how many?

Naming Convention

What gets included? What is a Campaign field?

What gets abbreviated?



Summary

Strategy for:

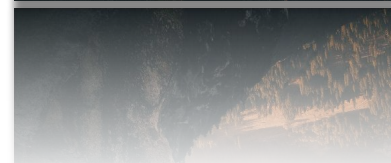
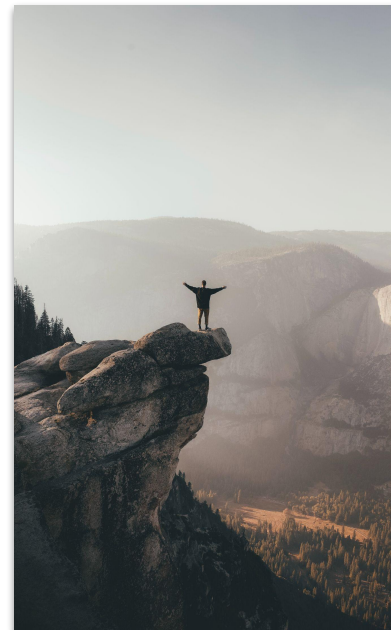
- ★ Capture
- ★ Nurture
- ★ Automate
- ★ Report

- ★ The Setup Checklist
 1. Data
 2. Segmentation
 3. First Touch ROI Reporting
 4. Conversion
 5. Multiple Nurtures
 6. Sales + Marketing Alignment
 7. Qualification
 8. Dynamic Content
 9. Attribution
 10. Campaign Alignment

Where are we today?

Where do we want to go?

What's the next step?





Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

Ryan Cammisa
ryan@cloudtegit.com