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MParDreamin' 2022

Foster A Junk-Free Pardot Org: Data Maintenance Tips

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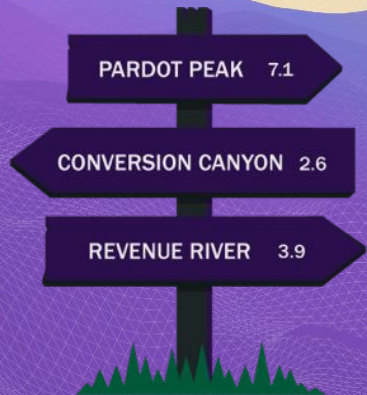
Agenda:

- How to Clean-Up your Org for Today?
- How to Maintain your Org for the Future?
- Benefits of a Junk-Free Account Engagement/Pardot Org?
  - Consistent Content
  - Fewer Sync Errors
  - Improved Analytics & Reporting



Tips to Clean

4 Steps to Clean your Org

Understand What's Junk

Determine How to Fix

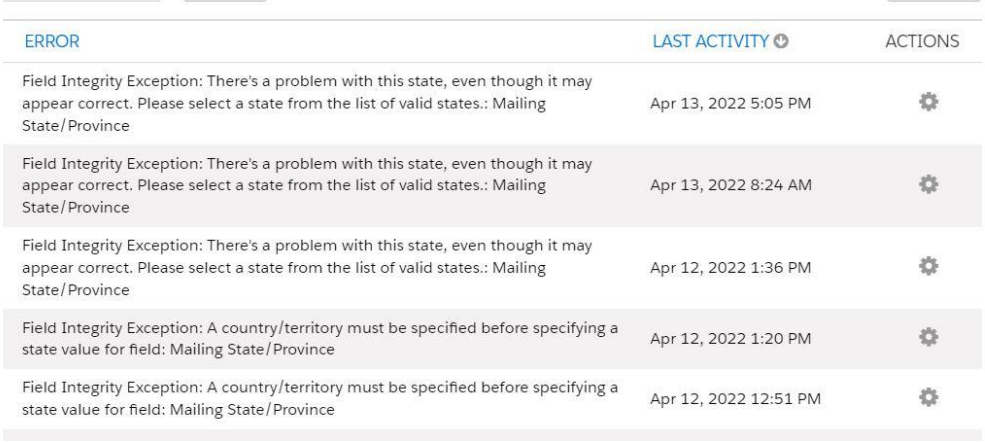
Export/Clean Junk Data

Test/Review Data Updates

Understand What's Junk

- Text fields with ALL CAPS
- Non-Standardized state/country picklist values
- JUNK/SPAM form submissions
- Pardot Sync Errors
- Duplicates

Understanding what is "Junk" is very subjective, but an important exercise for long term data health. Please note that some things are harder than others to fix, as different use cases are more complex. We will be diving into common use cases that



ERROR	LAST ACTIVITY	ACTIONS
Field Integrity Exception: There's a problem with this state, even though it may appear correct. Please select a state from the list of valid states.: Mailing State/Province	Apr 13, 2022 5:05 PM	
Field Integrity Exception: There's a problem with this state, even though it may appear correct. Please select a state from the list of valid states.: Mailing State/Province	Apr 13, 2022 8:24 AM	
Field Integrity Exception: There's a problem with this state, even though it may appear correct. Please select a state from the list of valid states.: Mailing State/Province	Apr 12, 2022 1:36 PM	
Field Integrity Exception: A country/territory must be specified before specifying a state value for field: Mailing State/Province	Apr 12, 2022 1:20 PM	
Field Integrity Exception: A country/territory must be specified before specifying a state value for field: Mailing State/Province	Apr 12, 2022 12:51 PM	

Determine How to Fix

- Text fields with ALL CAPS
  - When data is sent to Pardot, data will be inputted into the respective First Name and Last Name Fields. If there are hundreds of records to fix, then we will need to fix through Excel. If only a small number of records are affected, we are able to update manually by logging into each record.

- Non-Standardized state/country picklist values
  - Within Salesforce Setup, there is a section to select what State/Country Picklist values are acceptable. First determine what those values are (spelled out or abbreviated values). If this is only affecting a few values we are able to fix through Pardot Automation Rules; however, if every state is incorrect, then we will need to export and fix through Excel.

Determine How to Fix

- JUNK/SPAM form submissions & Pardot Sync Errors
  - What is SPAM to you?
    - This is what makes data clean-up subjective. Most organizations will consider certain form submissions that contain explicit content or asking to improve their websites SEO as Junk.
    - Others will not accept any email addresses that contain “@gmail.com” or “@yahoo.com”. Fixing this type of Junk data can be done manually, through automation rules, or using Excel. It is very much dependant on how many records need to be fixed if this is completed in Pardot manually or through Excel.
  - Pardot Sync Errors can be a variety of things:
    - Data Formatting Issues
    - Access Issues
    - Process Alignment Issues
    - Customization Issues
    - Duplicate Records

Determine How to Fix

- Duplicates
  - We have to go through an exercise of understanding our duplicate data:
    - How many duplicate records exist? A few or a few thousand?
    - What is the information that we need to de-duplicate? Just email address info or are there other fields that are captured causing data issues?
  - Should the duplicate records be deleted or merged?
    - Depending on for how long the data has existed, you may be okay deleting but likely you'll want to merge.
  - If we are merging, what criteria should define who the "Master" record is?
    - Last Activity Date, Created Date, or is there a specific field that defines who the priority record is?

Export/Clean Junk Data

- Text fields with ALL CAPS
  - Pardot is not able to sort based on text field capitalization. We would need to export all of our Pardot data that is effected Once data has been exported into an excel .csv file, we can use the formula =STANDARDIZE(), to make sure any text fields with ALL CAPS values are updated in bulk. After the data has been fixed in Excel, we will re-import the updated data and use email or CRM ID update the needed values.

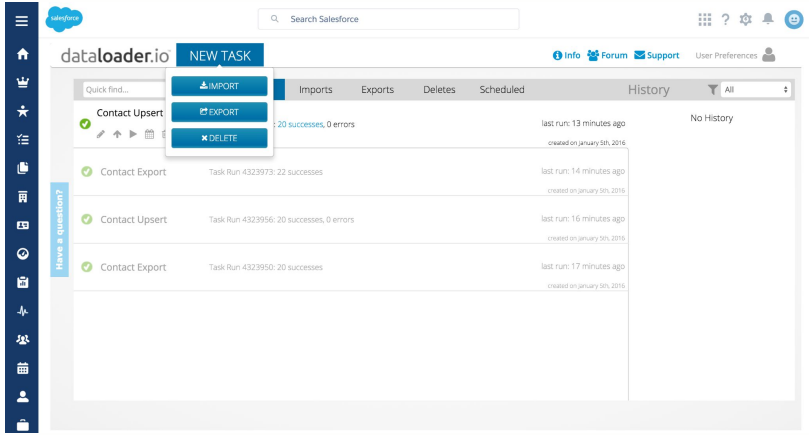
- Non-Standardized state/country picklist values
  - First determine if this is something that can be fixed using a Pardot Automation Rule.
  - If there are too many field values that need updates and too many automation rules are needed, we can update through Excel.
    - First, the data would need to be pulled into a Dynamic List and then exported. Once it has been exported into an excel .csv file, we can use the formula =VLOOKUP(), to match the value in Pardot with what Salesforce accepts.
    - After the data has been fixed in Excel, we will re-import the updated data and use email or CRM ID update the needed values.

Export/Clean Junk Data

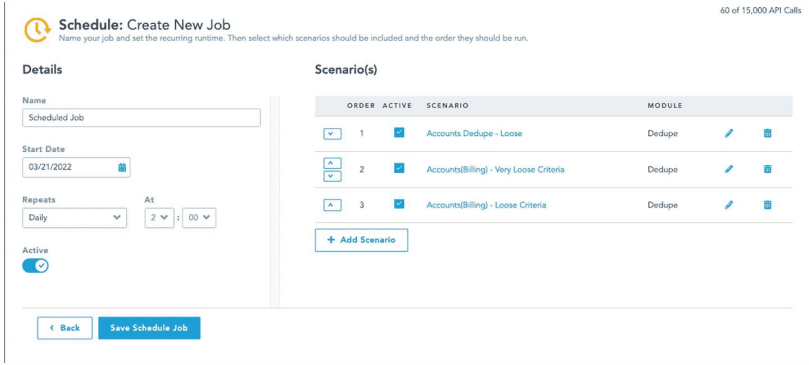
- JUNK/SPAM form submissions & Pardot Sync Errors
  - Pardot Sync Errors can be a variety of things. Depending on the issue, fixing this will happen in either Salesforce, Pardot, or Excel.
    - If the issue is related to Access, the updates will need to take place on the Salesforce user record.
    - If the issue is related to Process or Formatting, then this can be done in either Pardot or Excel. Process errors are commonly related to records not syncing because of a Validation Rule error. Either the Validation Rule needs to be updated, or the field in question needs to be updated to fit the Validation Rule. That can be done manually or in bulk through Excel.
    - Data formatting errors are because of picklist value issues (wrong value) or text character limits.

Cleaning Duplicates

Dataloader



3rd Party Solution



Test/Review Data Updates

- Review Dynamic Lists
  - Dynamic Lists can be used to compile all records that have been deemed as “Junk”. Ideally this list stays relatively low if not empty.

- Monitor Pardot Sync Error Queue
  - The Pardot Sync Error Queue should be 0 after this update. If there are any errors remaining, determine if the errors are related to Junk and update accordingly.

Tips to Maintain

3 Keys to Maintain your Org

Dynamic Lists

Pardot Dynamic Lists allow marketers to define criteria and all prospects matching that criteria populate into the list over time. From the Dynamic List, records can be added to the recycle bin or have Tags added.

Tags

Pardot Tags are searchable within Prospect Lists. When a certain Tag, like “spam” is added to a prospect, they can easily be added to the recycle bin.

3rd Party Integrations

There are many 3rd Party Integrations that will flag data for review, automatically add records to the Pardot recycle bin based on defined criteria, or will merge records based on defined criteria.

Clean with Dynamic Lists

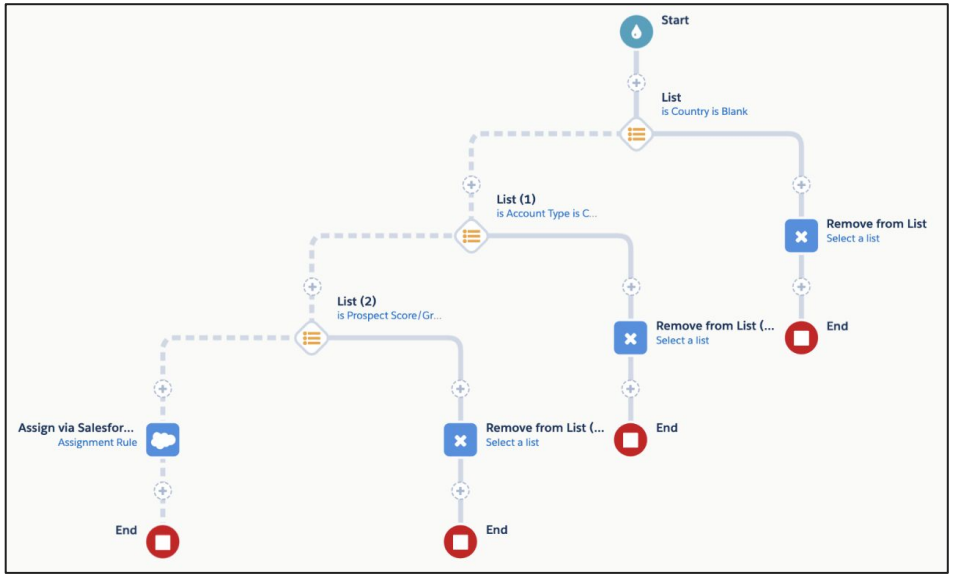
Set up lists to catch junk data

- Create “Junk Finder” dynamic lists for the 4 fields that are most likely to contain junk
    - First Name, Last Name, Job Title, Email
- Search for common junk terms or bad formatting
    - None, first, name, n/a, nope, abc, www., http://, No longer, retired, other, junk, inactive, remove, (,)
    - Email’s without a “@” or “.”
    - List of common junk terms
- Regularly review lists to ensure you are catching junk but not actual prospects
    - For example, if you were to include “Nope” as a phrase to scrub from the email field, you could return Leslie Knope at lknope@parksandrec.com
- Regularly review the prospects on these lists to clean or delete junk!

Get Creative with Engagement Studio Programs

Syncing to Salesforce

Decide when prospects should be synced to Salesforce based on multiple criteria

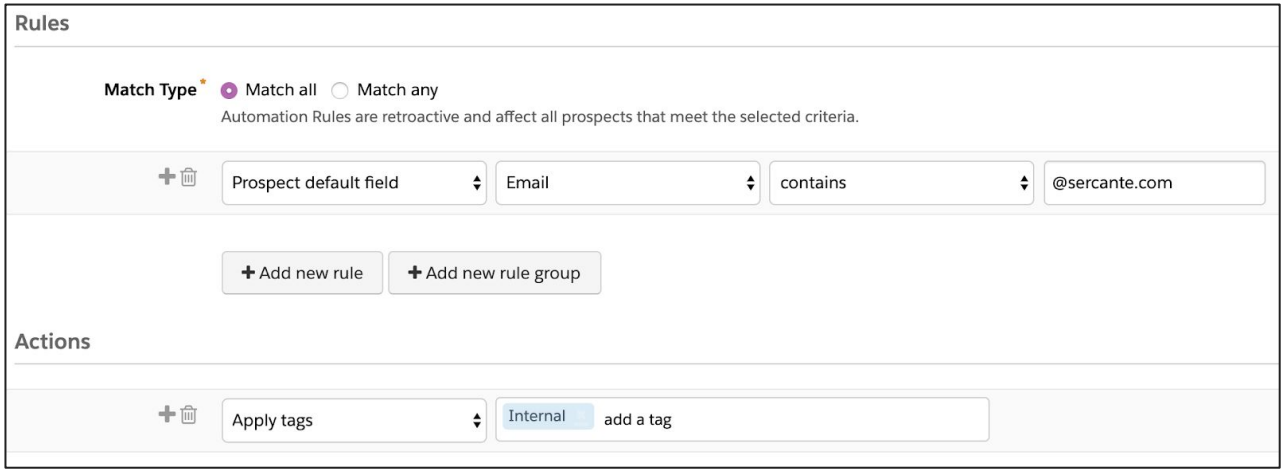


Tags! Tags! Tags!

Many Uses (as long as they are maintained well!)

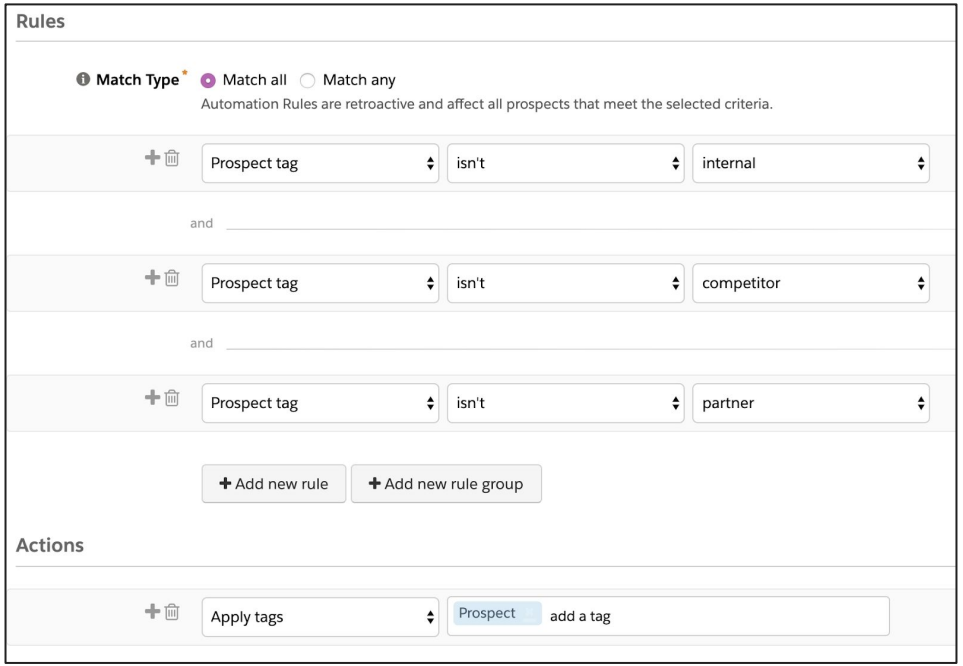
Classify the ***type*** of prospect (internal, partner, competitors vs true prospects) to you filter your lists quickly and easily

1. Create Automation rules to tag prospects of each type



Tags! Tags! Tags!

2. Set an Automation rule to tag everything else as bona fide prospects:

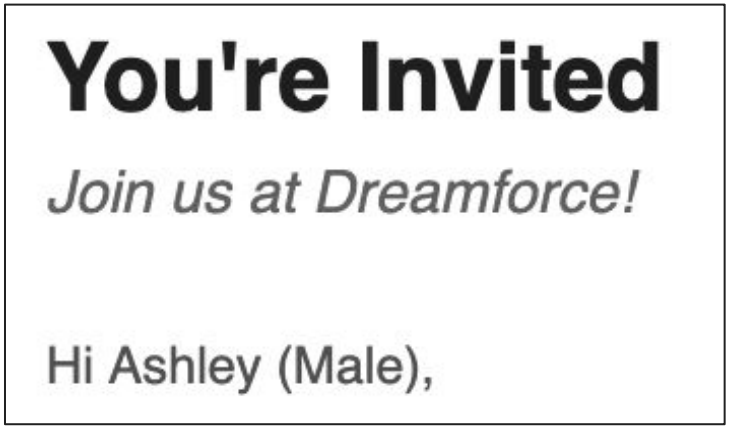


Benefits

Why a Junk-Free Org Matters?

Why cleaning your data promotes consistent content:

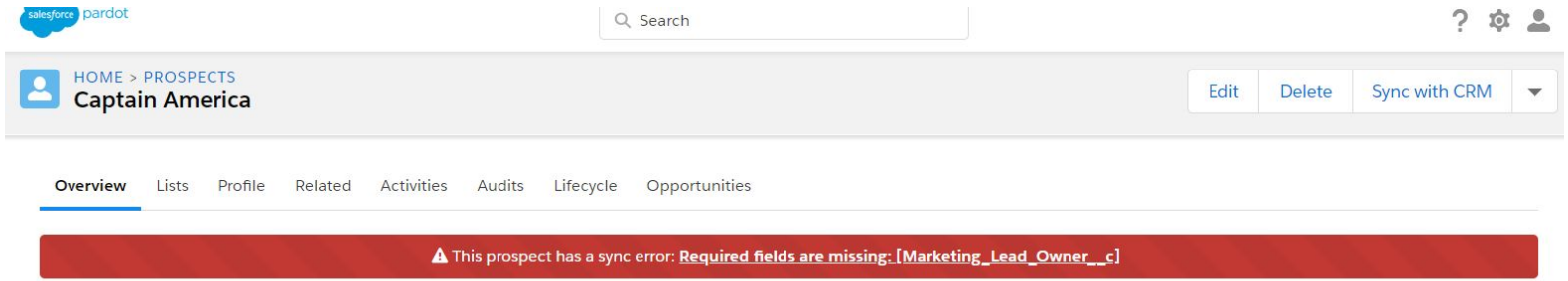
- Avoid emailing fake addresses
- Personalize emails without issue
    - Variable Tags
    - Dynamic Content
- Stay under your mailable limit



Why a Junk-Free Org Matters?

Why Sync Errors can be troublesome:

- Sync Errors will prevent data from syncing with Salesforce, but does not prevent data from being updated or existing in Pardot
- Pass good data over to Sales without issue
- Use Salesforce specific data for campaign emails
- If a sync error occurs, campaign information generated in Pardot is not recorded in Salesforce and can cause reporting issues



Why a Junk-Free Org Matters?

Why junk data can affect reporting/analytics:

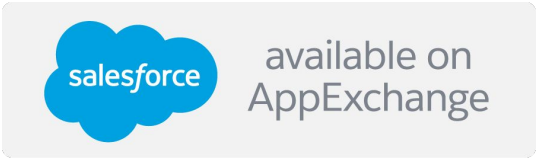
- Inflated Numbers
    - Form Submissions that are junk can make it seem like we are either over or underperforming depending on if we are pulling in Invalid Lead Status values
- State/Country Filters
    - When reports or dashboards are sorted by region if values are incorrect or not syncing, we are unable to understand how outreach/campaigns are generating leads
- Pardot Sync Errors prevent records from syncing between Pardot and Salesforce
    - That includes Salesforce updates pushing into Pardot for Engagement Studio Programs and Pardot updating campaign member information in Salesforce

3rd Party Integrations - Sercante Prospect Updater

Fix, Exchange, and Enrich Pardot Prospect data to keep things running smoothly (think: less sync errors). Similar to Eloqua's Contact Washing Machine app, though a lot more powerful. It's more like a full Laundromat.

Key Features:

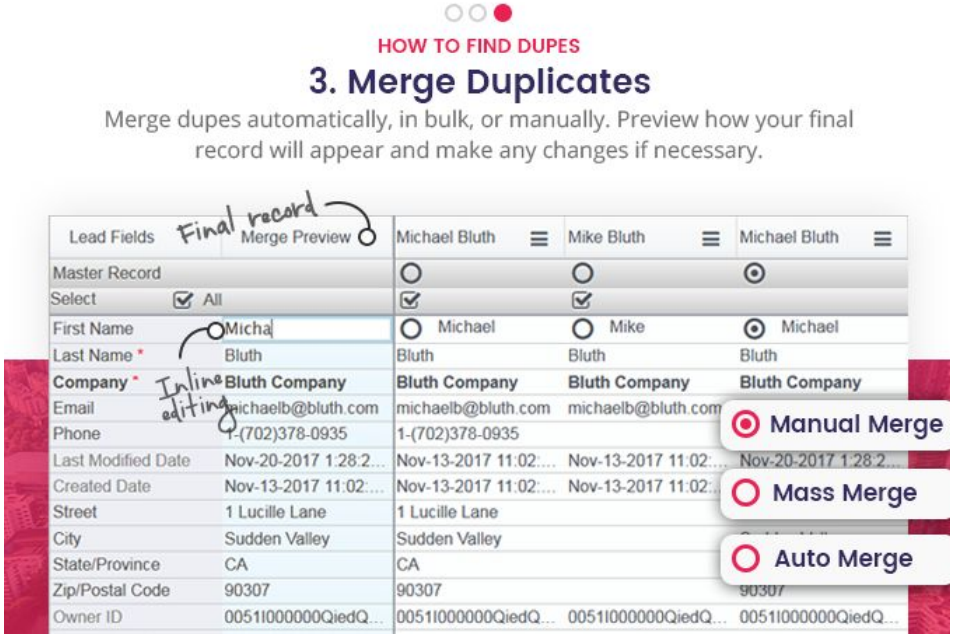
- Manipulate field data in ways that you can't with Pardot
- Change data using rules set up in a Google Sheet
- Data Pre-processor for Form Handlers
- Remove records from Pardot without use of Automation Rules or Salesforce Sync



3rd Party Integrations - Cloudingo

Merge Duplicates automatically or through Excel files:

- Identify duplicate records based on field value matches and automatically merge them into a single record while keeping notes, attachments, activities, and other related data. Your data will be a cleaner, more effective, and more reliable resource.
- Scan incoming data from spreadsheets or via auto-inserts against existing data. Update matching existing records, and only insert new unique records.
- Easily and quickly mass update, delete, verify, and standardize data with a simple filter system to report on data and take action.



*https://directory.leandata.com/isv-partners/cloudingo

Summary

- How to Clean-Up your Org for Today?
  - Determine what is junk (added to recycle bin) and what should stay
  - Understand how the junk should be removed and how it can be fixed to stay
  - Create Automation Rules or update through Excel export/import
  - Use Dynamic Lists and Pardot Sync Error Queue to verify fix has worked

- How to Maintain your Org for the Future?
  - Use Automation Rules, Dynamic Lists and Tags to help Flag junk records
  - Update criteria for junk data (removal from system)
  - Block time once a week or month to review Dynamic Lists and Prospect Lists for spam removal

Summary

- Benefits of a Junk-Free Pardot Org?
  - Fewer errors allow for improved personalization on landing pages and emails
  - Fewer Pardot Sync Errors allows for a better connection to Salesforce data and updates to campaign member information from Pardot
  - Clean Data allows for more accurate reporting & dashboards to improve future campaigns and forecast appropriately

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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!

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