



Learn. Network. Grow.

**MParDreamin' 2022**



# From Accidental Salesforce Admin to Accidental Pardot Admin: What Now?

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# Agenda

1. How I got here
2. Top 5 technical skills that translate from Salesforce to Pardot
3. The 3 biggest soft skills you'll need to brush up on for success



# Journey to Success

# What I thought it'd look like...



Salesforce  
Administrator

Pardot  
Administrator

Sales  
Operations  
Manager

Sales  
Operations  
Director

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9



# What it actually looked like...



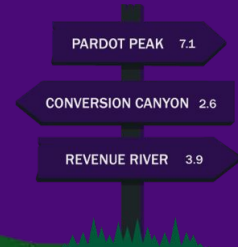
Accidental  
Salesforce **and**  
Pardot  
Admin

MS Dynamics  
Admin

Sales  
Operations  
Manager

Marketing  
Consultant

Jump Start Program  
Manager





# Five Things to Improve Your Proficiency

# Syncing Fields



- Pardot Settings ► Object and Field Configuration
- Decide what sync behavior you want each field to have
  - Use Pardot's value
  - Use Salesforce's value
  - Use the most recently updated record
- Check the default field mappings

## Gotchas:

- Pardot *cannot* change record ownership once it's been assigned
- Pardot Checkboxes & Salesforce Checkboxes operate differently
  - Salesforce Checkbox = Pardot Radio Button
  - Pardot Checkbox = Salesforce Multi-Select Picklist
- "Use the most recently updated record" means the record with the more recent "Last Modified Date", not the field that was updated most recently
- Changes to Formula fields in Salesforce will not trigger sync with Pardot

## Bonus:

- Experience with Salesforce means you'll have a much easier time sorting through any sync errors between the systems

## ▼ Object and Field Configuration

Account Fields

Opportunity Fields

Prospect Fields

Custom Objects

Object Sync Settings



# Cleaner Data

- Keep the junk out of Salesforce
  - [Create automation rules to find bad Pardot prospects](#)
- Establish a marketing lead process in addition to your sales lead process
  - Use Pardot [Scoring](#) & [Grading](#) in conjunction with automation rules to automatically send the right prospects to sales at the right time

**CLEAN ALL**



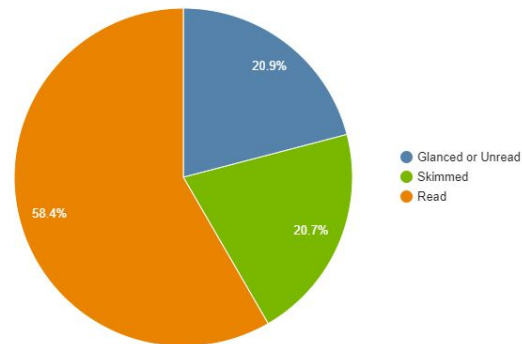
**THE DATA**

# Better Reporting



- **Pardot Reporting** - Great For:
  - Monitoring individual asset performance
  - Email Client breakdowns (list emails only)
  - Interaction analysis (list emails only)
  - CTR report (list emails only)
- **Salesforce Reporting** - Great for **everything else**
  - Enable Engagement History and [create these 5 reports](#)
  - Campaign Influence

Opened Email Engagement



Check out [Pardot & Salesforce Marketing Reporting 101](#) for more details!

# Understanding Automation

- If you're comfortable building Flows, Automation Rules and Engagement Studio Programs will be easier to understand
- ESPs - not just for emails!
  - Assign campaign member status
  - Update fields from a form handler
- Better equipped for complex marketing automations
  - Remove someone from ESP if they reply to an email
  - Upsell campaigns based on purchased products
  - Campaign Management with IDs/Statuses
  - Track what asset inactive prospects re-engage on

**USING  
SALESFORCE FLOWS**



**USING PARDOT  
AUTOMATIONS**



**USING  
BOTH TOGETHER**



# User Management Made Easy



- [Salesforce User Sync](#) to control all Pardot access
  - Salesforce Profile determines Pardot User Role
    - May need to clone profiles for people who need different levels of Pardot access
- Create Identity Users if people need Pardot access but no access to Salesforce

## Synced Users

Sync with Salesforce.  
Edited in Salesforce (for most fields).  
Must be deactivated in Salesforce.  
Do not have Pardot-only log in credentials.  
Must use their Salesforce username and password. Can access Pardot by logging in to Salesforce, or by clicking Log in with Salesforce from the Pardot log in screen.  
Cannot be used to authenticate API integrations, third-party connectors, or legacy email plug-ins.

## Pardot-Only Users

Do not sync with Salesforce.  
Edited in Pardot (for all fields).  
Can be deleted in Pardot.  
Can log in to Pardot with Pardot-only credentials.  
Can access Pardot directly from the Pardot log in screen.  
Can be used to authenticate API integrations, third-party connectors, or legacy email plug-ins.



# Top Three Soft Skills to Brush Up On

# Dust Off These Skills



## How to Write Marketing Content

- [Prevent 5 Awkward Email Sends](#)

## Communication

- Only go as technical as the person you are speaking with can understand
- You can bridge the sales-marketing gap
- Learn how to say “no” to leadership

## Wayfinding

- Planning for complex marketing campaigns
- Marketing & Sales strategy
- Automations





# 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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