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MParDreamin' 2022

Identify Ideal Customers And Tune Pardot To Better Serve Them

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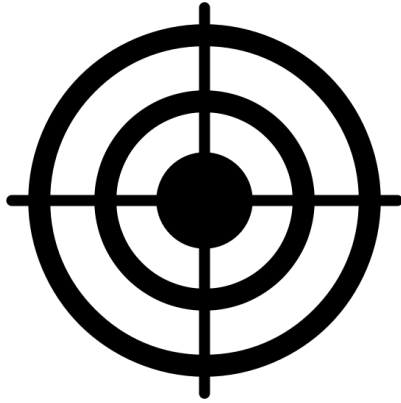
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THE SPOT
FOR PARDOT JOBS

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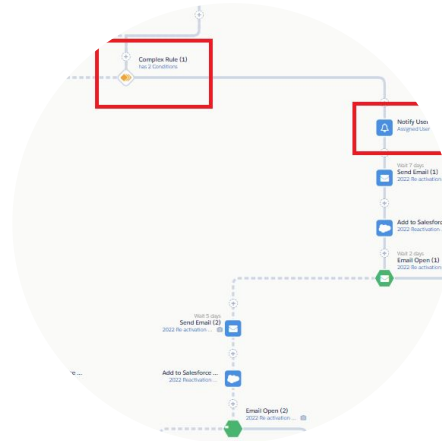
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Agenda



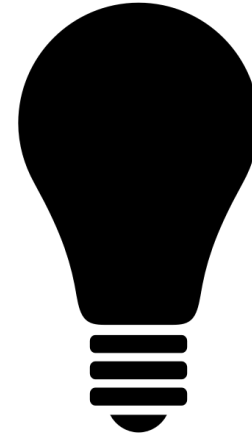
The ideal deal

How to create an ICP and why you should have one



Using it for real

Setup & Example use cases of ICP profiling in MCAE



Conclusions

What to keep in mind



Ideal customer profile

How to create it and why you should have one

What is an Ideal Customer Profile?



- Imaginary buyer most likely to become a high-value customer
- Method to target your resources to the most valuable accounts & prospects
- One ICP can have several buyer personas → implications in technical setup
- Crucial that understanding of the ICP & Buyer Persona are the same. Collaboration!

Why a clear ICP is important

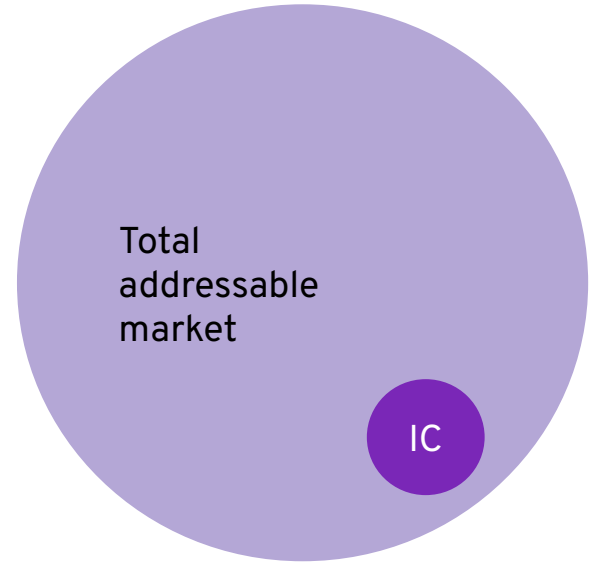


- Align your company, marketing and sales strategy
- Efficiency in directing marketing efforts - cut noise
- Optimize content and conversion points → Higher conversion rates
- Faster sales cycles and higher lifetime value

Ideal Customer Profile



- Detailed demo/firmographic definition of your ideal buyer:
 - Location
 - Budget
 - Company size
 - Revenue (B2B)
 - Purchasing power (B2C)
 - Age/gender (B2C)
- ICPs are tightly tied to business targets.
What are you after?
 - Top line growth?
 - Profit?
 - Larger market share?
 - Other?



Ideal Customer Profile evolution



- 2001-2012: **Geo expansion**

 - 66% growth in restaurants

 - 30 new locations/year



- ICP: Likely loyalists

 - Broad middle class families
 - Budget- and value-conscious
 - Looking for a fancier-than-average dining experience
 - >10 visits/year

- Actions

 - Longer menu
 - More email promotions

Ideal Customer Profile evolution



- 2001-2012: **Geo expansion**

 - 66% growth in restaurants

 - 30 new locations/year



- 2012-2019: **Increased profitability**

 - 9% growth in restaurants

 - <10 new locations/year

- ICP: Likely loyalists

 - Broad middle class families
 - Budget- and value-conscious
 - Looking for a fancier-than-average dining experience
 - >10 visits/year

- Actions

 - Longer menu
 - More email promotions

- ICP: Wealthier occasional diners

 - Upper middle class couples & groups
 - Quality-conscious
 - Looking for an average meal
 - <5 visits/year

- Actions

 - Shorter menu, pricier on average
 - 50% fewer email promotions



Using it for real

Setup & Example use cases of ICP profiling in MCAE

What do I need to set up?



1. **Break down and map** your ICP into a list of attributes and corresponding values
2. Know your data model. Make sure the data gets there **on time** to make a decision!
3. Automation rules to **assign** profile, **change** grade match, supporting scoring
4. **Activation** through your funnel

Implementation in Pardot - Fields



1. Map necessary fields

- Quality
- Formulations

2. Make sure in CRM the fields are in correct levels

- Forms and quality
- Data source

The image shows two screenshots from the Pardot interface. The top screenshot is the 'Edit Custom Field' page for a field named 'Clouds in Use'. The 'Type' is set to 'Multi-Select' and the 'Custom Field ID' is 'Clouds_in_Use'. A red box highlights the 'Custom Field ID' field. Below this, there are checkboxes for 'Keep this field's type and possible values', 'Required', 'Record and display multiple responses', and 'Use pre-defined values'. The bottom screenshot is the 'Create Custom Field' page, showing a list of Salesforce fields to choose from, such as 'AccountSource', 'Account_NPS_Score_c', and 'BillingCountryCode'. A 'Create Custom Field' button is at the bottom.

The image shows two screenshots from the Pardot interface. The top screenshot is the 'Configure Account Fields' page, showing a table of default fields for accounts. The bottom screenshot is the 'Prospect Fields' page, showing a table of default fields for prospects.

NAME	TYPE	CRM FIELD
Billing Country	Text	Billing_Country
Shipping Country	Text	Shipping_Country

NAME	FIELD	SALESFORCE.COM FIELD NAME	TYPE	FIELD API NAME
Region	Area		Dropdown	Area__c
Region for Contact & Lead	Region	Region__c	Dropdown	Region__c

NAME	FIELD	SALESFORCE.COM FIELD NAME	TYPE
Country	country	MailingCountry	Dropdown

Implementation in Pardot - ICP score

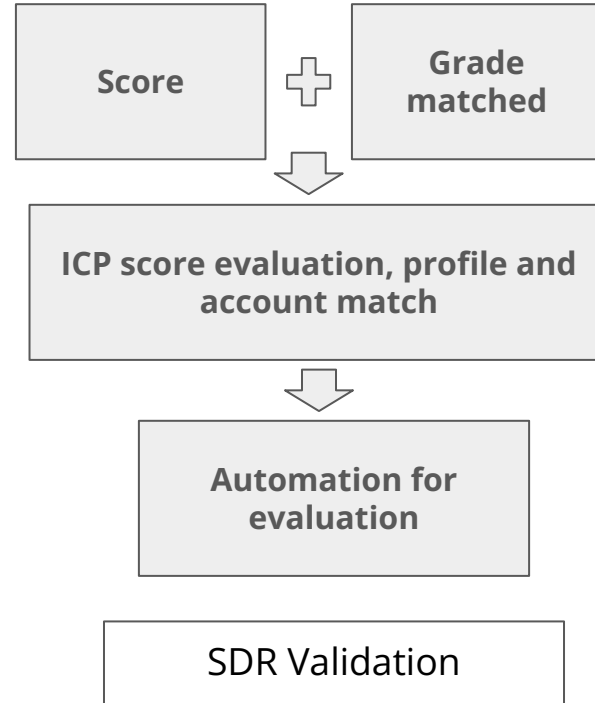


Matching of the intention and fit

1. ICP Score
2. ICP value (true/false)

The screenshot shows the Pardot rule builder interface. It features a 'Match all' radio button selected. The conditions section includes three rules: 1. 'Prospect score' is greater than 60. 2. 'Prospect score for Scoring Ci' is greater than 30. 3. 'Prospect profile' is 'Profile ICP - Test'. The actions section includes: 1. 'Change prospect custom field' for 'ICP score' to 5. 2. 'Assign prospect to queue' to 'Global'. 3. 'Apply tags' with 'icp' and 'add a tag'.

Pardot/MCAE ICP build up automated

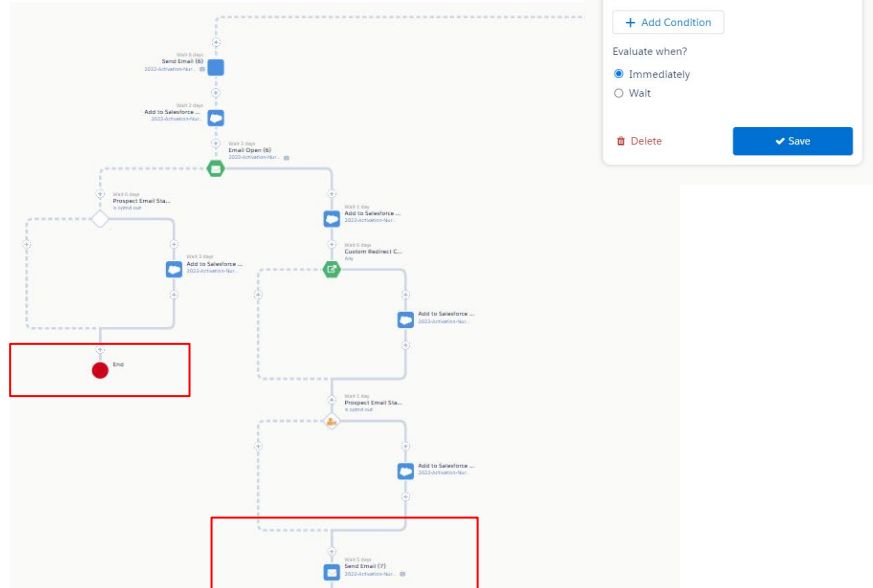


Use case: Engagement differentiation



Normal customer experience

- Slow track, longer warm up
- Less activation for inactives



Use case: Engagement differentiation



Normal customer experience

- Slow track, longer warm up
- Less activation for inactives

PROSPECT CUSTOM FIELD

Prospect custom field
ICP score

is greater than

4

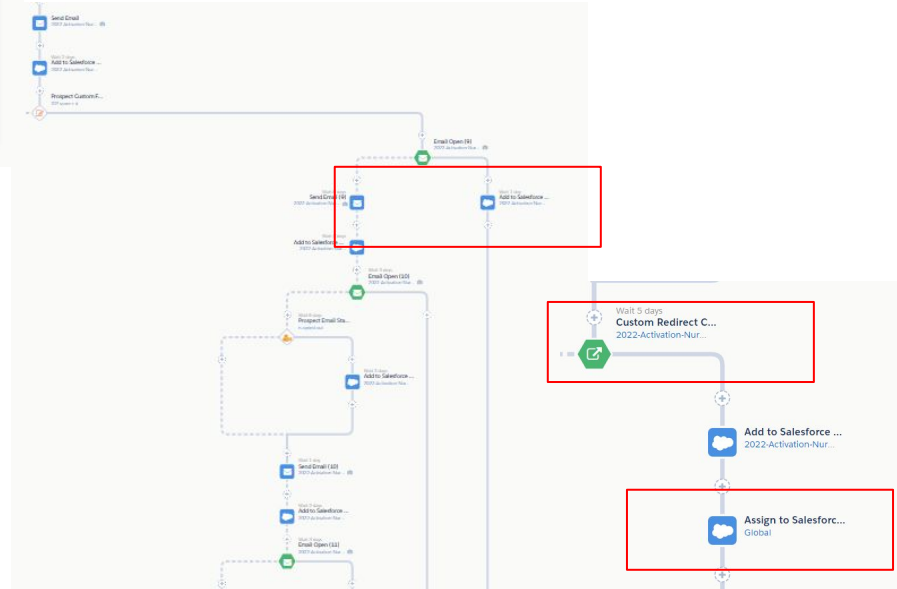
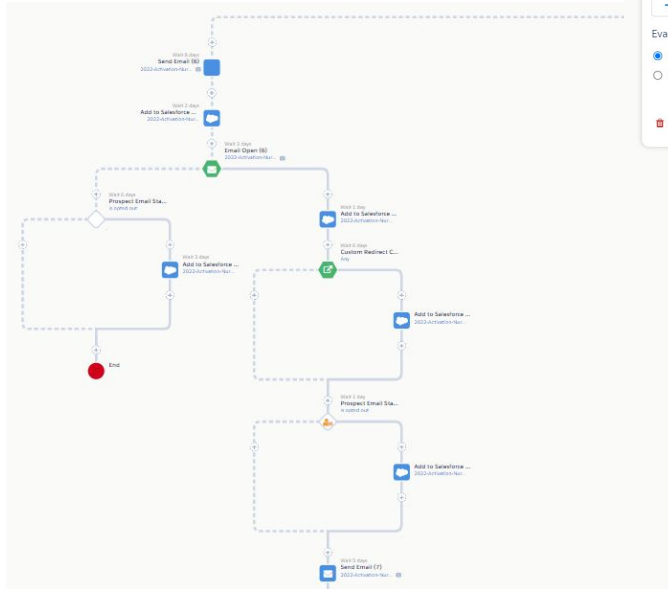
+ Add Condition

Evaluate when?
 Immediately
 Wait

Delete Save

ICP experience

- Fast track & reminder efforts
- Sales prioritisation & routing based on activity (Also CR scoring)



Use case: Level of service

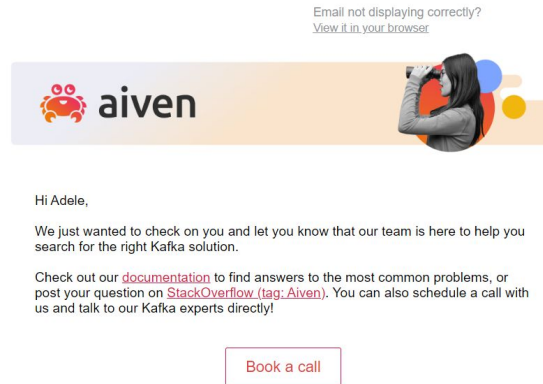


ICP experience

- Differentiated level of service (demo) or self-service (with free trial)

Features

- Dynamic content
- Custom Redirect & Conditional Completion Action

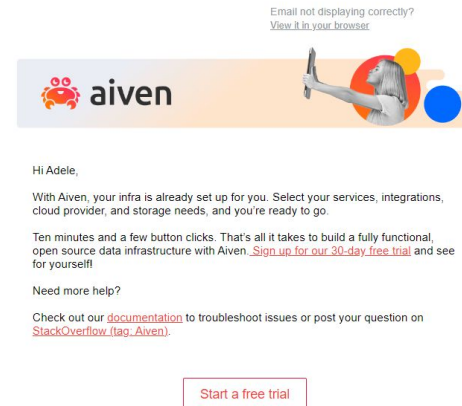


Hi Adele,

We just wanted to check on you and let you know that our team is here to help you search for the right Kafka solution.

Check out our [documentation](#) to find answers to the most common problems, or post your question on [StackOverflow \(tag: Aiven\)](#). You can also schedule a call with us and talk to our Kafka experts directly!

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Use case: Personalised chat journey



ICP experience

- Chat visibility
- Strong ICP actions

Features

- Chat that connects with Pardot & CRM
- Field mapping
- Profiles, scores and ICP score



Use case: Personalised chat journey

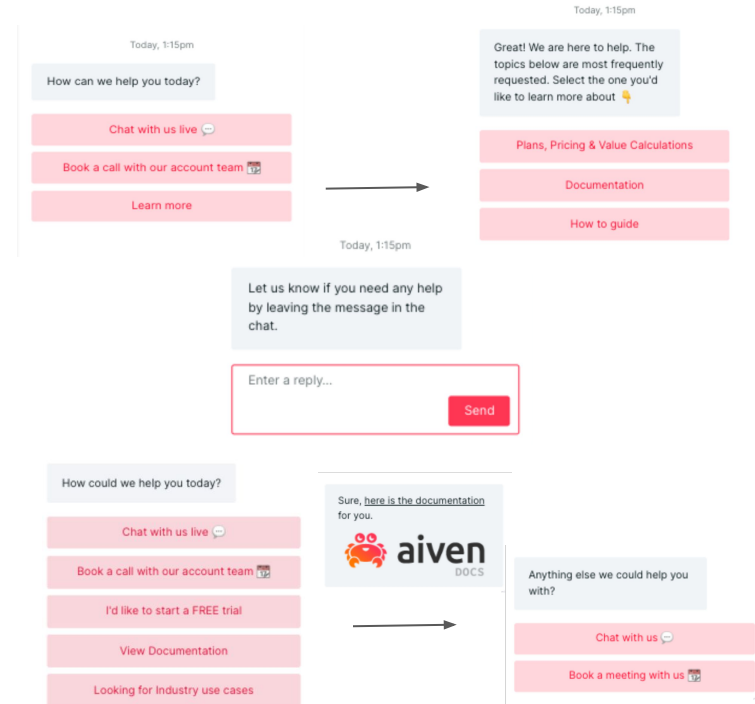


ICP experience

- Chat visibility
- Strong ICP actions

Features

- Chat that connects with Pardot & CRM
- Field mapping
- Profiles, scores and ICP score



Key takeaways

1. **Know your business, buyer profile and ideal customer** in level where you can differentiate attributes - before implementing
2. Align technical matrix of fit (grade)& intent (score) together with your stakeholders **across the organization**
3. **Prioritise and boldly implement** it to your processes and activities. Keep consistent.
4. **Learn** from the results, adjust, and implement constantly



Questions?



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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Grade - Fit & Score - Intent



1. **Set up criteria** and prioritise it
2. Set grading profiles
3. Automation to **assign roles** (can be also adjusted manually)
4. Automation to **assign grade match**

1. Content & Lead **audit**
2. Evaluate the **threshold**
3. Consider using different **scoring categories**
4. Make sure you have **coherent** implementation through your activities guiding to same MQL rule
5. Apply respective scoring category to the activity and check that your activities are in correct scoring categories.

Keep in mind that documentation saves time in alignment the process

A screenshot of the Pardot 'Create Automation Rules' interface. The page title is 'Automation' and the sub-header is 'Create Automation Rules'. The 'Name' field is 'Profile - ICP MarDreaming Example'. The 'Folder' is '/Main/Admin/Au'. The 'Description' is 'This rule support ICP role target area.' The 'Tags' field contains 'mardreamin'. The 'Rules' section has 'Match Type' set to 'Match any'. There are two rules: 1. 'Prospect custom field' is 'JP' and 'Country Code' is 'is'. 2. 'Prospect account field' is 'Billing Country' and 'Location' is 'Japan'. The 'Actions' section has 'Change profile criteria' set to 'Profile ICP - Test' and 'Matches'.A screenshot of the 'ADJUST SCORE' dialog box in Pardot. The dialog has a title bar with 'ADJUST SCORE' and 'Cancel'. The main content area has 'Adjust prospect score' and 'Scoring category' dropdowns. Below that is a 'Flink' dropdown and a 'by' field with a value of '50'. The 'When?' section has 'Immediately' selected and 'Wait' as an option. At the bottom is a 'Save' button.