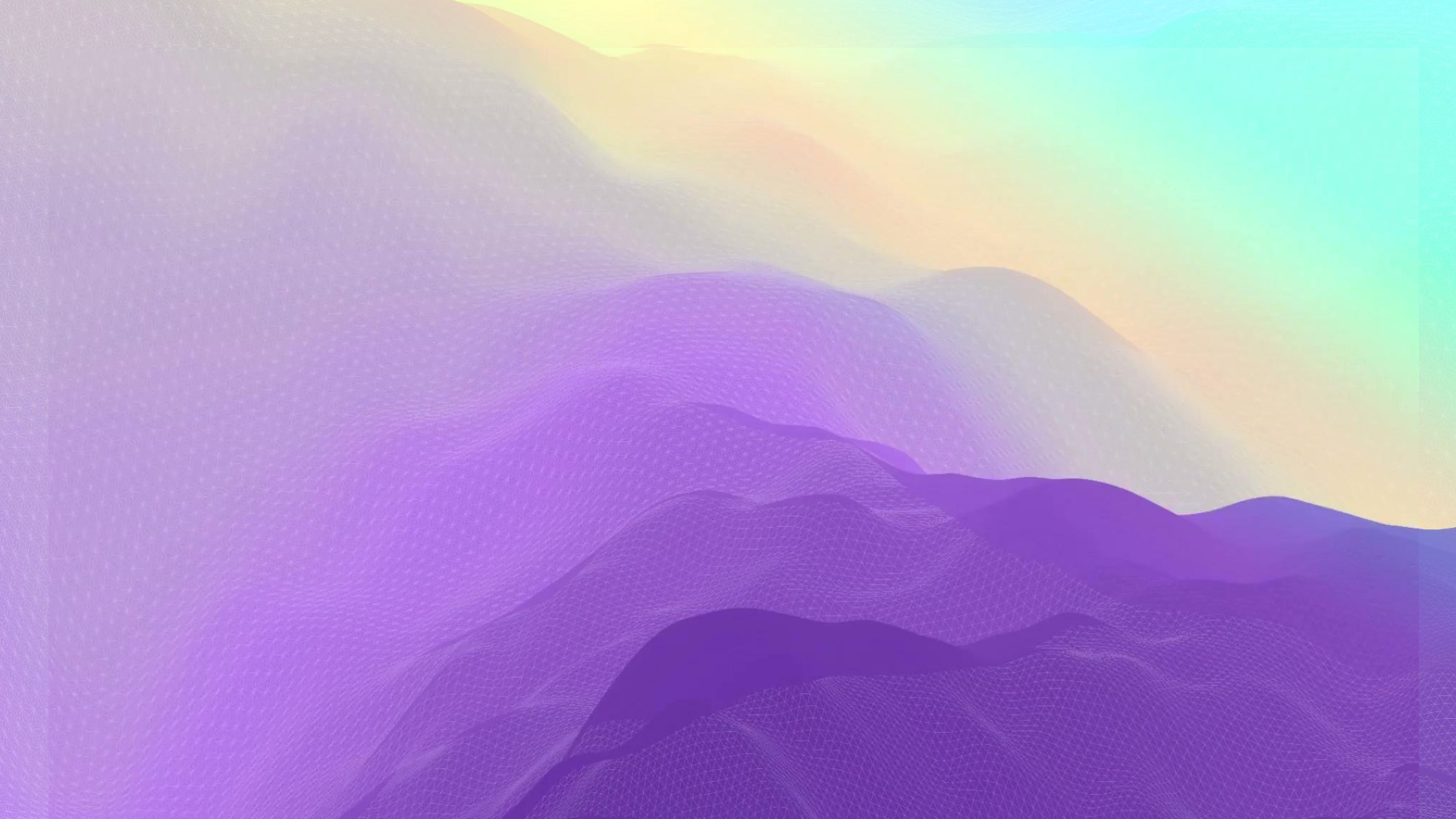




Learn. Network. Grow.

**MParDreamin' 2022**

# Does It Integrate With? Tips To Getting The Most Out Of Your Integration



# Special Thanks To Our Sponsors



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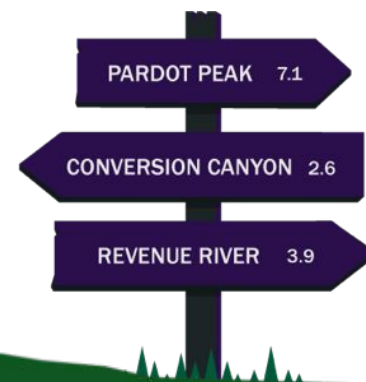
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# Host



**Jacob Catalano**

Product Manager  
Sercante Labs



# Panelists



**Julia Hofmann**

Marketing Operations  
Manager

Faro Technologies



**Bobby Thanepohn**

Marketing Automation  
Program Manager

Promethean



**Mike Creuzer**

Pardot Partnerships & API  
Integrations Lead

Sercante



**Adam Erstelle**

Vice President, Technology

Sercante

## Goal of Panel

Learn from our panelists on how to improve the efficiency of your marstack by leveraging integrations across your marstack and what to do when things “don’t integrate as we expected”. In this session, we will also explore a roadmap of how to tackle a new integration project and how to leverage the Pardot API to access data beyond Salesforce. This will be a good guide of what a marketer needs to know when talking to technical folks.

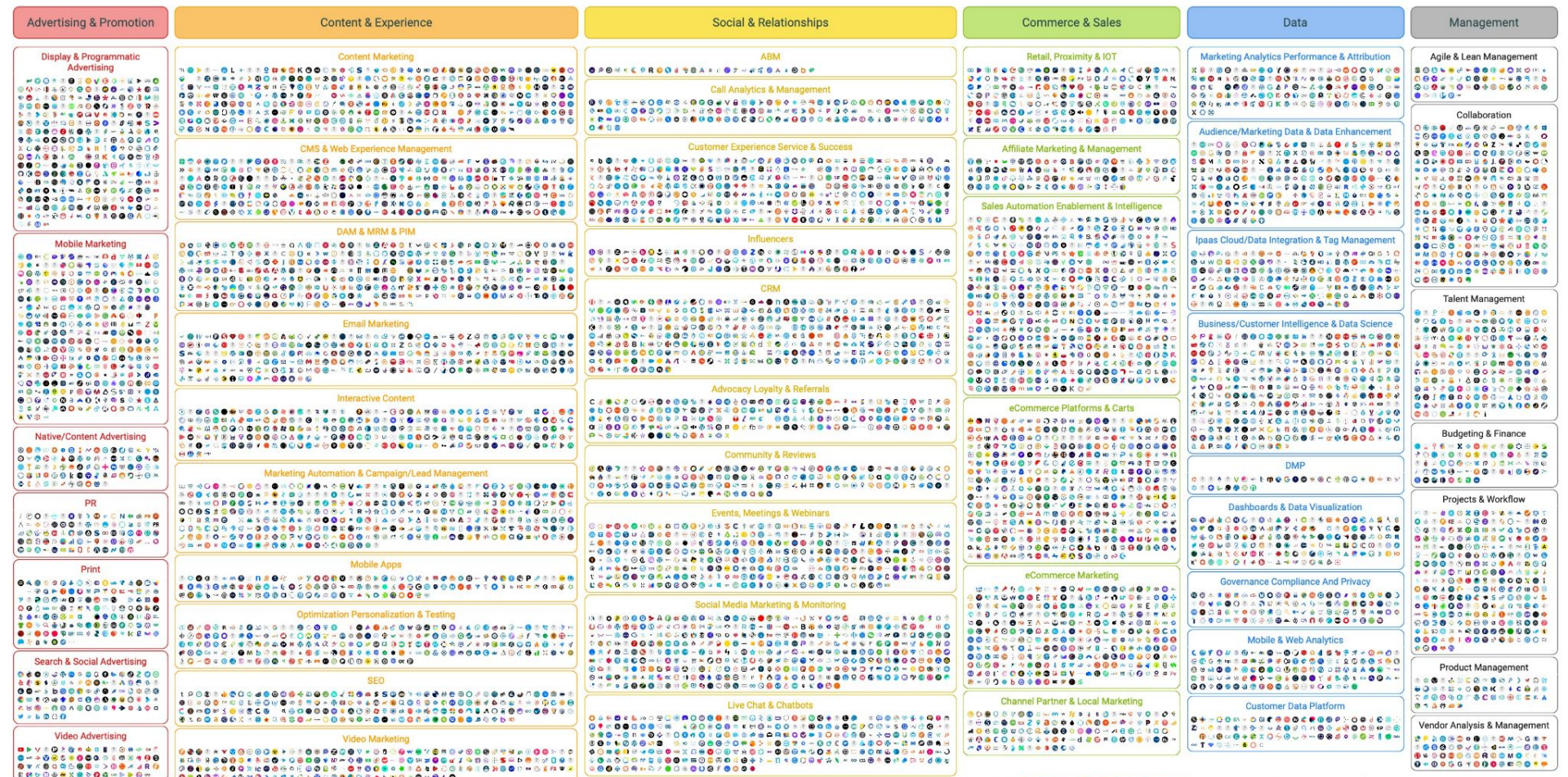
# Reasons To Leverage Integrations



*Many times in Marketing, someone else buys a new piece of tech or we are asked to see how we can made the data flow with less friction.*

Here's a reasons to integrate:

- Unify data in one spot by connecting multiple systems
- Reduce time spent on manual processes
- Consolidate tools to manage automations
- Trigger real time automations



visit [martechmap.com](https://martechmap.com) to search, sort & filter



# Integration Paths



## Native

Connects by itself

## API

Has an API we can use

## Salesforce

Integrates w/ Salesforce



# Native Integration

# Simply Log In



- You log into one tool from the other.
- This is the “Easy Button”
- You get what the integration builder built.
- Usually limited customization capabilities



# API Integration

# Write Code or Zaps



- Write (or have written) Code
- Use an integration platform
  - Zapier
  - Workato
  - **tray.io (Our Sponsor)**
  - Mulesoft
  - Scribe
  - Integrate
  - etc...



# Salesforce Integration

# That isn't a !@#\$\$%^ Integration.....



- Use Salesforce
  - Field updates
  - Custom fields
  - Custom objects
  
- Appexchange package or Salesforce API integration



**So you need an integration  
....what next?**



# Path To Integration



Identity Your  
Need & Gather  
Requirements

Build A Proof  
Of Concept &  
Obtain Buy-In

Test &  
Document  
Every Step

Execute /  
Launch in  
Production

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

# Question 1



Who did you involve in your discovery process?

# Path To Integration



Identity Your  
Need & Gather  
Requirements

Build A Proof  
Of Concept &  
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PARDOT PEAK 7.1

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## Question 2



What are two “gotchas” that you encountered when you began building out your custom integration?

# Path To Integration



Identity Your  
Need & Gather  
Requirements

Build A Proof  
Of Concept &  
Obtain Buy-In

Test &  
Document  
Every Step

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## Question 3



How do you work with your team to keep the project on track?

# Question 4



How do you test your integrations?

# Path To Integration



Identity Your  
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Requirements

Build A Proof  
Of Concept &  
Obtain Buy-In

Test &  
Document  
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Execute /  
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## Question 5



Upon launch, how many initiatives will this integration affect?

## Question 6



How often do you seek feedback to improve on the integration?



# Summary



# How To Work With Developers



1. Identity Your Need & Gather Requirements
2. Create A Simple Process & Review Solutions
3. Build A Proof Of Concept & Obtain Buy-In
4. Test & Execute
5. Regularly Collect Feedback & Improve

# Coming Up Next...



Create A Great  
Welcome Email  
Journey In Marketing  
Cloud

**2:25 PM EST**

Unlock B2BMA:  
Going Beyond  
Stock Dashboards

**2:25 PM EST**

Here At Last: Pardot  
Conditional  
Completion Actions

**2:25 PM EST**

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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!

# Finding The Best Integration



*Generally speaking native vendor led integrations are usually the most cost effective way of integrating systems as it is developed by the developers who created the application you are trying to integrate. However, it usually is also the most limiting as it has to work across Users and focuses on the roadmap managed by the company who built the application.*

Here's a few ways to integrate your marstack:

- Native Integrations
- Paid Integrations (AppExchange)
- Middleware (Zapier, Tray.io, etc)
- Custom Solution



# What Needed To Be Solved?



## Faro Technologies

Goal:

Solution:

Timeline:

## Promethean

Goal:

Solution:

Timeline: