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MParDreamin' 2022



Breaking Borders - Going Global with Marketing Automation

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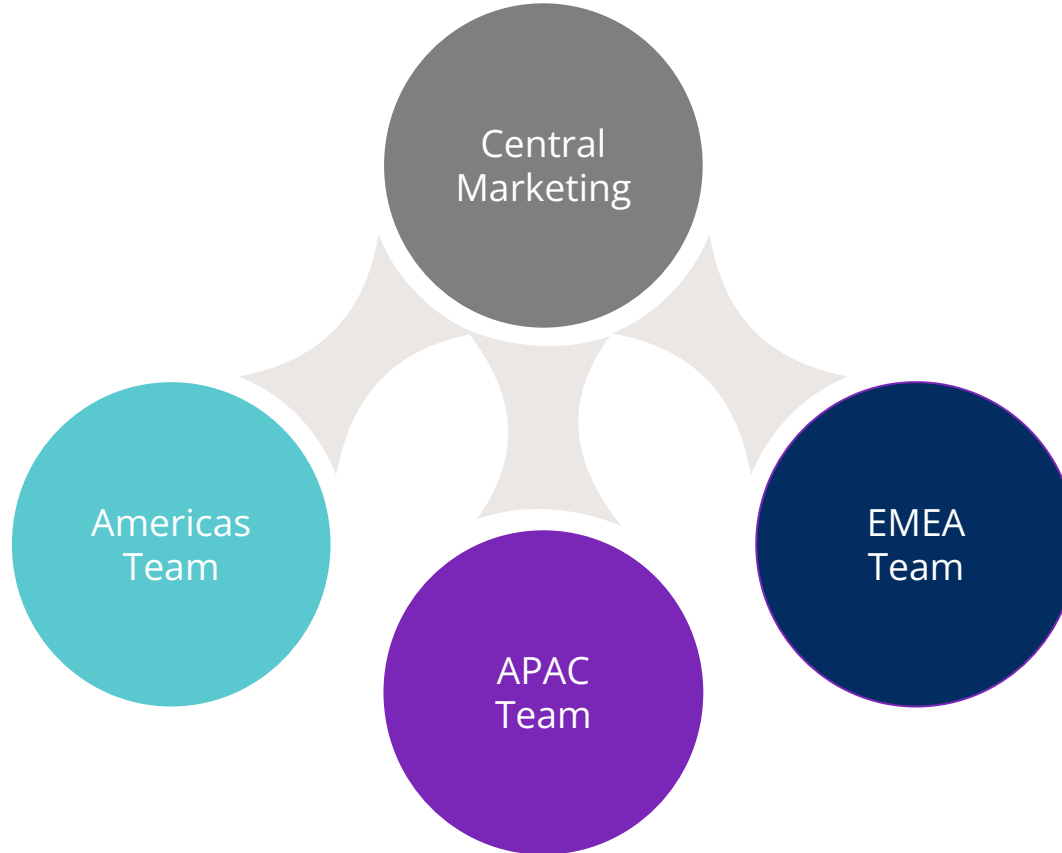
Our objective

“

Identify two key strategies for operating a successful marketing automation function in a multinational organisation

”

What is Global?

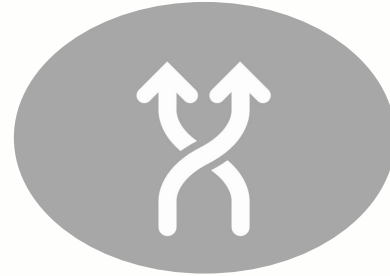


What we'll cover



People

Building the right team and
empowering them for global
success

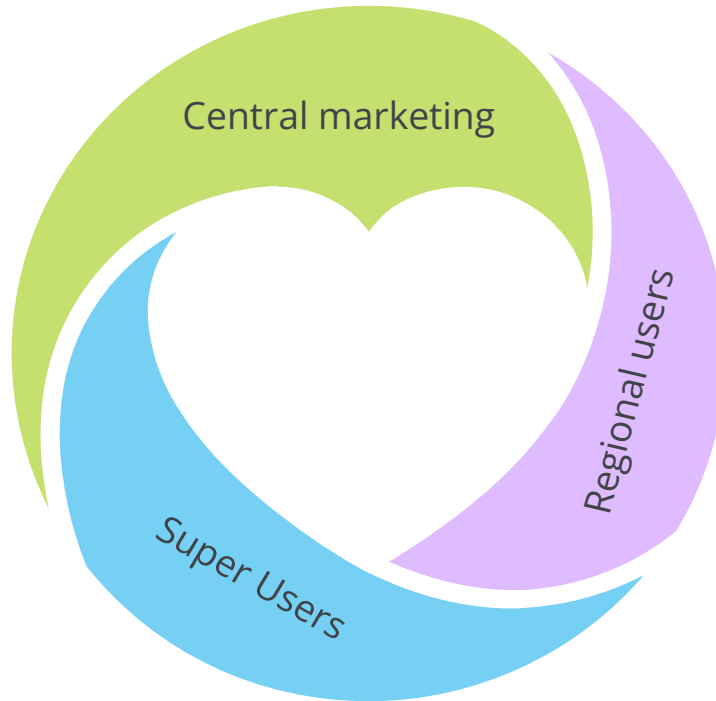


Structure

Balancing collaboration and
decentralisation to define
ownership and org structure

Build your team

The three pillars of the marketing automation function



We are the Champions

Central Marketing

Champions-only training
New feature early access
Cross-regional network

Represent regional interests
Provide feedback on initiatives
Escalate support requests

Champions

First-line support
Promote best practices
Advocate for the platform
Embed new processes

Provide feedback
Share successful campaigns

Regional Users



Empower your people



Central marketing



Champions



Regional
users



Sales users



IT / Salesforce
admin



Senior
stakeholders

Empower your people



UX tools

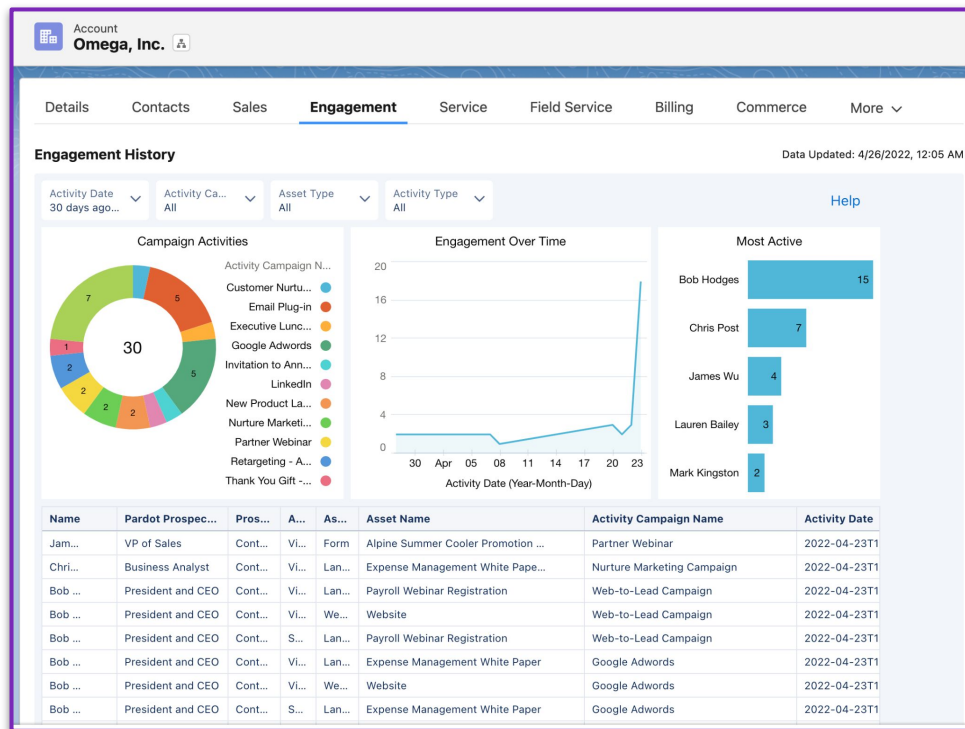
Embedded Dashboards
Engagement History
Pardot Lightning App

Permissions

Pardot Roles
Salesforce Profiles
Data and Folder Visibility

Automation

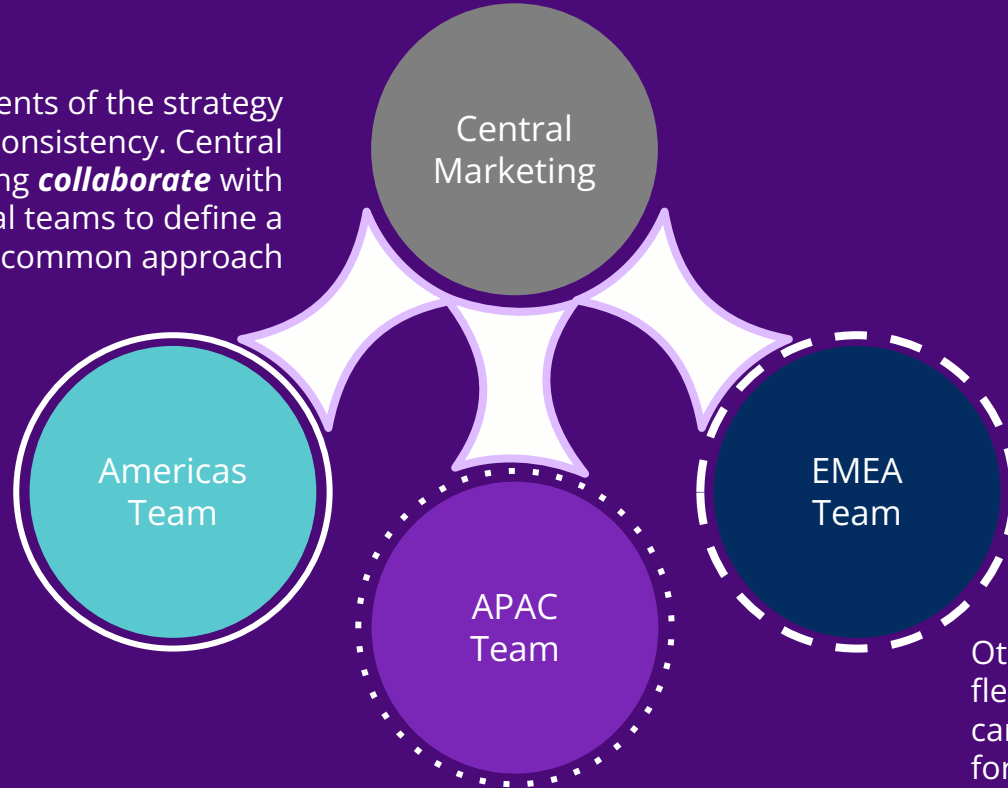
Salesforce Tasks
Contact Roles
Segmentation Lists



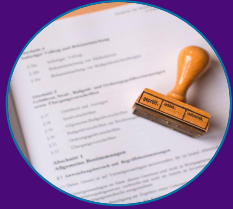
Creating genuine ownership



Some elements of the strategy require consistency. Central marketing **collaborate** with regional teams to define a common approach



Other areas require more flexibility and central marketing can offer **decentralised** control for the regions to operate independently



Collaboration *and* decentralisation

The spectrum of ownership



Common approach

Decentralised

All records accessible to and shared by all users	Data	Data fully partitioned in all systems
Campaigns and assets created and distributed centrally	Marketing Initiatives	Each region creates and launches independent campaigns
Preferences are managed centrally and apply to all regions	Preference Management	Regional preferences may differ and are independent
A single scoring and assignment model	Lead Qualification	Varied scoring models and assignment rules
Central marketing offer training and support to all users	Training and Support	Regional users organise training and support independently

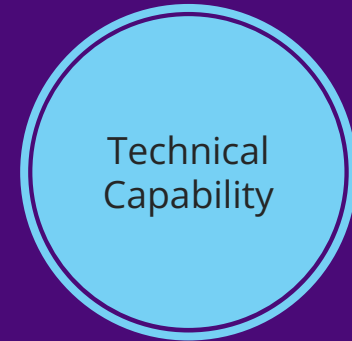
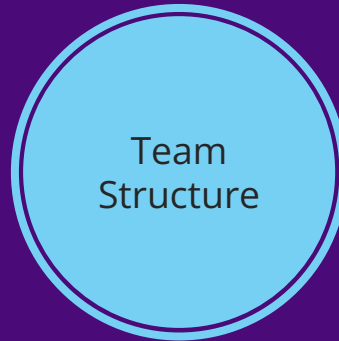
Spectrum of ownership



Common approach



Decentralised

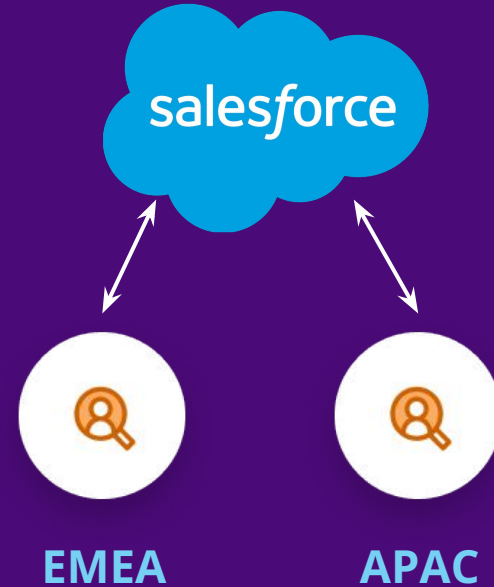


Business Units



Available business units: 0 / 2

	Business Unit Name	Business Unit ID
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2	<input type="text" value="APAC"/>	<input type="text" value="0Uv8d0000004CABCAI"/>



Structuring your global org

To BU or not to BU



Single instance

One prospect visible to and shared by all marketing teams

Marketing assets are all in one org, but can be limited by folder permissions

When a Prospect unsubscribes from one team's marketing, they unsubscribe from all

A single scoring and assignment model

All users operate the same processes in the same org, so can be trained together

Data

Marketing Initiatives

Preference Management

Lead Qualification

Training and Support

Multiple Business Units

Unique prospect records in each unit. Any sharing requires heavy customisation

Sharing of assets is currently very limited, but improvements are being introduced

Regional preferences may differ and are independent of each other

Varied scoring models and assignment rules

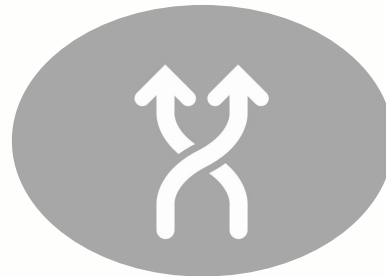
Regional users may have varied processes, but can benefit from shared training

Summary



People

Building the right team and
empowering them for global
success



Structure

Balancing collaboration and
decentralisation to define
ownership and org structure



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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