



Using Account Engagement (Pardot) Engagement Studio for Complex Lead Routing

Walk through of a real-life automation setup



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MParDreamin' 2022

Using Engagement Studio for Complex Lead Routing

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About

- 10+ in Digital Marketing
- Graduated from FSU with B.S. in Information Technology
- Joined ADT Commercial in 2021
- Currently Marketing Automation Specialist



About



ADT
Commercial

- Almost 150 years of history
- ADT Commercial introduced in 2019



- ▶ **300,000+** Customer Locations
- ▶ **150+** Commercial Locations
- ▶ **3** Dedicated Monitoring and Operations Centers
- ▶ **5,000+** Commercial Employees
- ▶ **2,000** Commercial Technicians
- ▶ **145+** Years Customer Service Excellence





The Challenge

A dashed white line extends horizontally from the end of the word "Challenge". At the right end of this line is a white location pin icon with a vertical line inside its circular head.

The Challenge

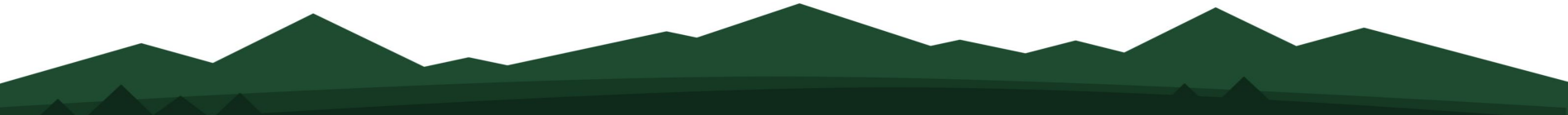


85% of business is returning customers

- Started commercial-focused brand from scratch
- Existing customers, word of mouth, 1 to 1 relationships, boots on the ground, cold calling

Steps to business growth

- Bring in new leads and customers
- Prevent overloading the sales team with unqualified leads
- Integrate with existing legacy systems and environments





The Requirements



The Requirements



- Replace legacy inbound lead process to flow through Account Engagement (Pardot)
- Be able to determine sales readiness and segment lead type
- Be able to segment lines of business
- Allow applicable data to flow into current sales systems and processes



The Solution

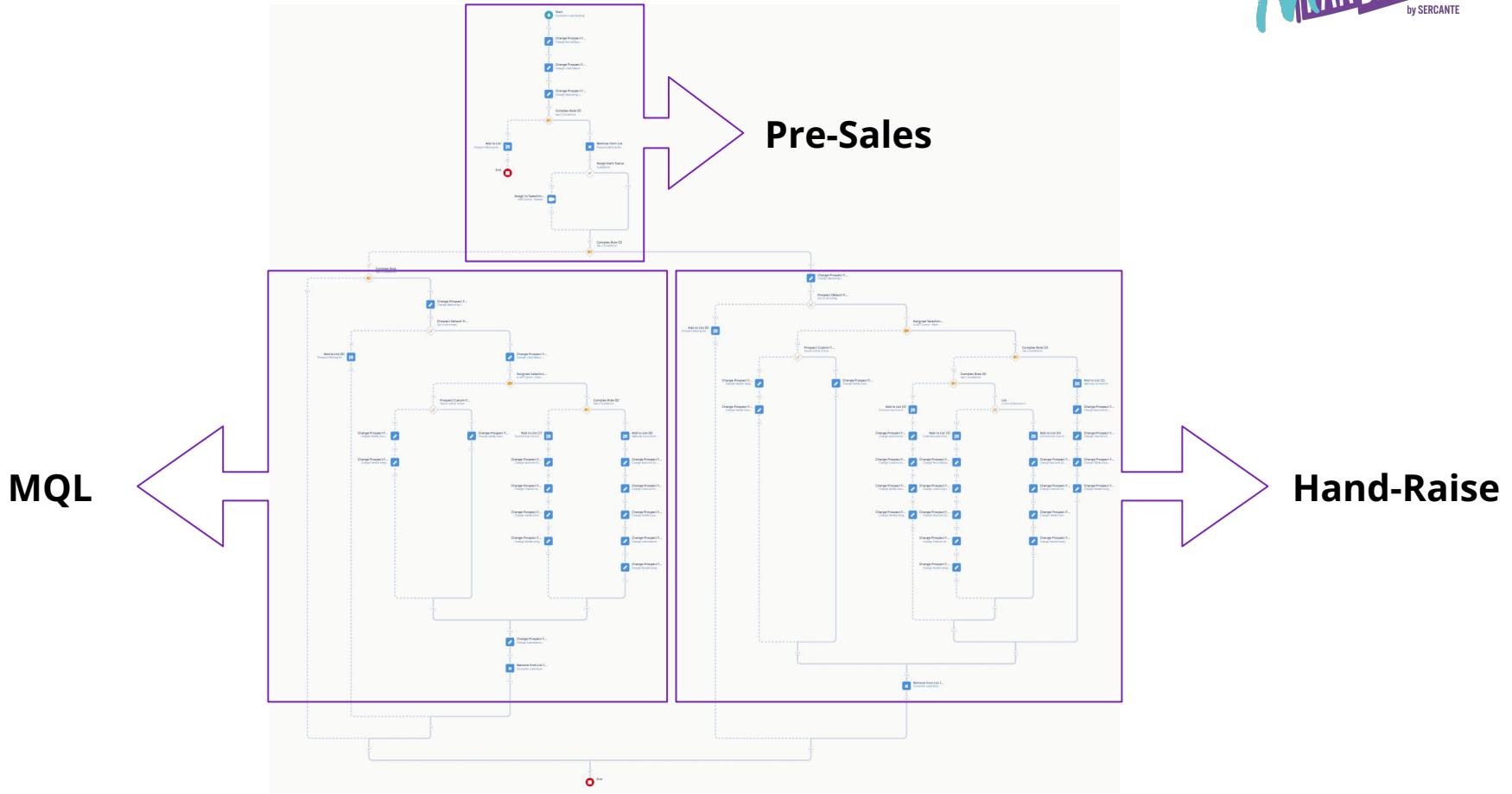


The Solution

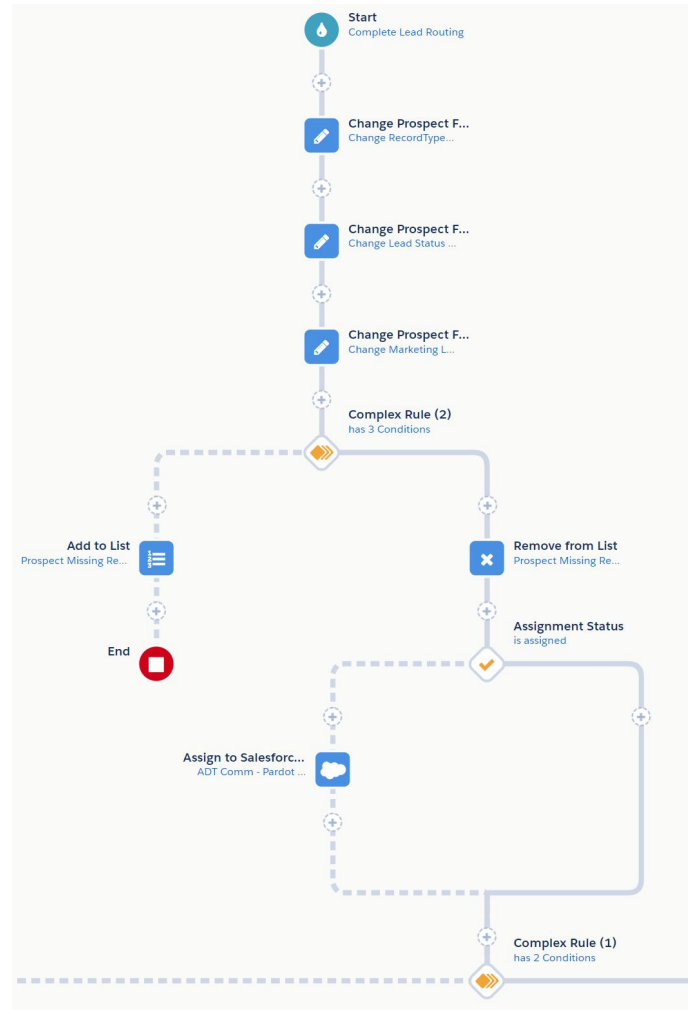


- Implement Forms
- Develop Automation using Engagement Studio
 - Pre-Sales, Hand-Raise, and MQL
 - Core Commercial, National, and Small Business
- Integrate Account Engagement (Pardot) and Salesforce
 - Field data mapping
 - Existing sales processes via Salesforce workflows
 - Lead routing - National User, Account Engagement Queue, SMB Queue, Salesforce Routing

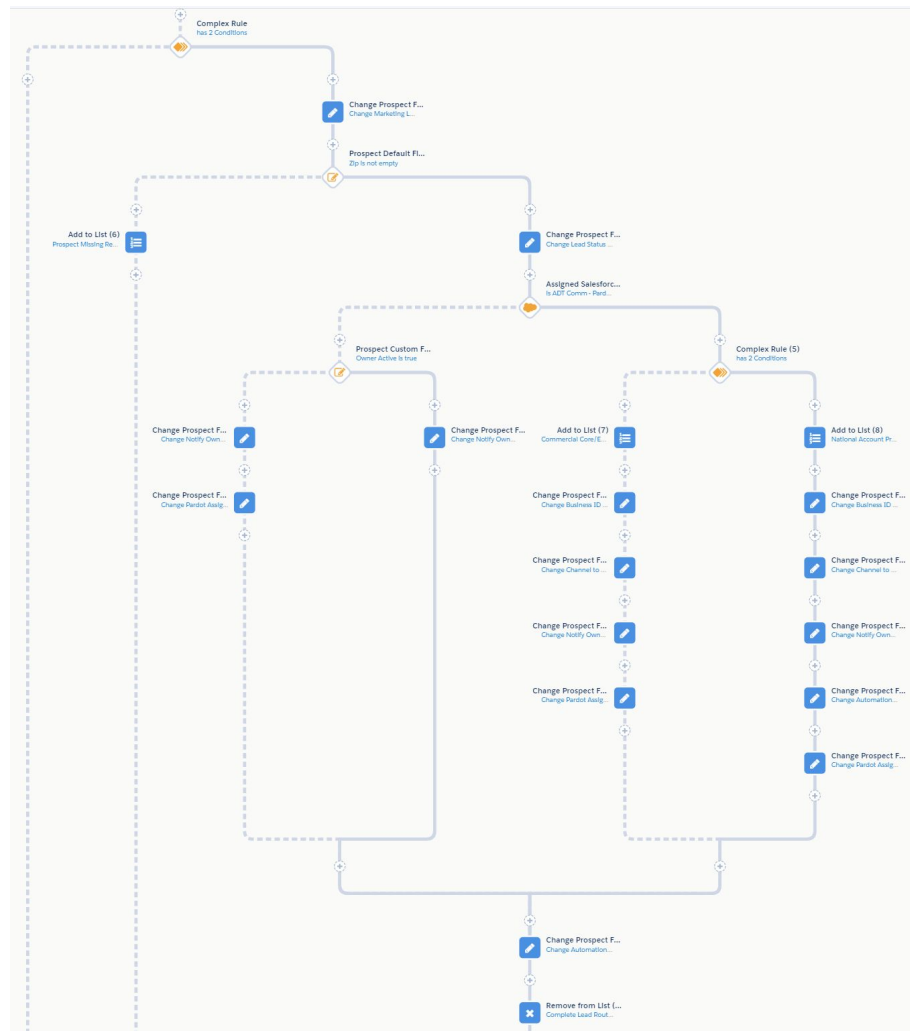
The Solution



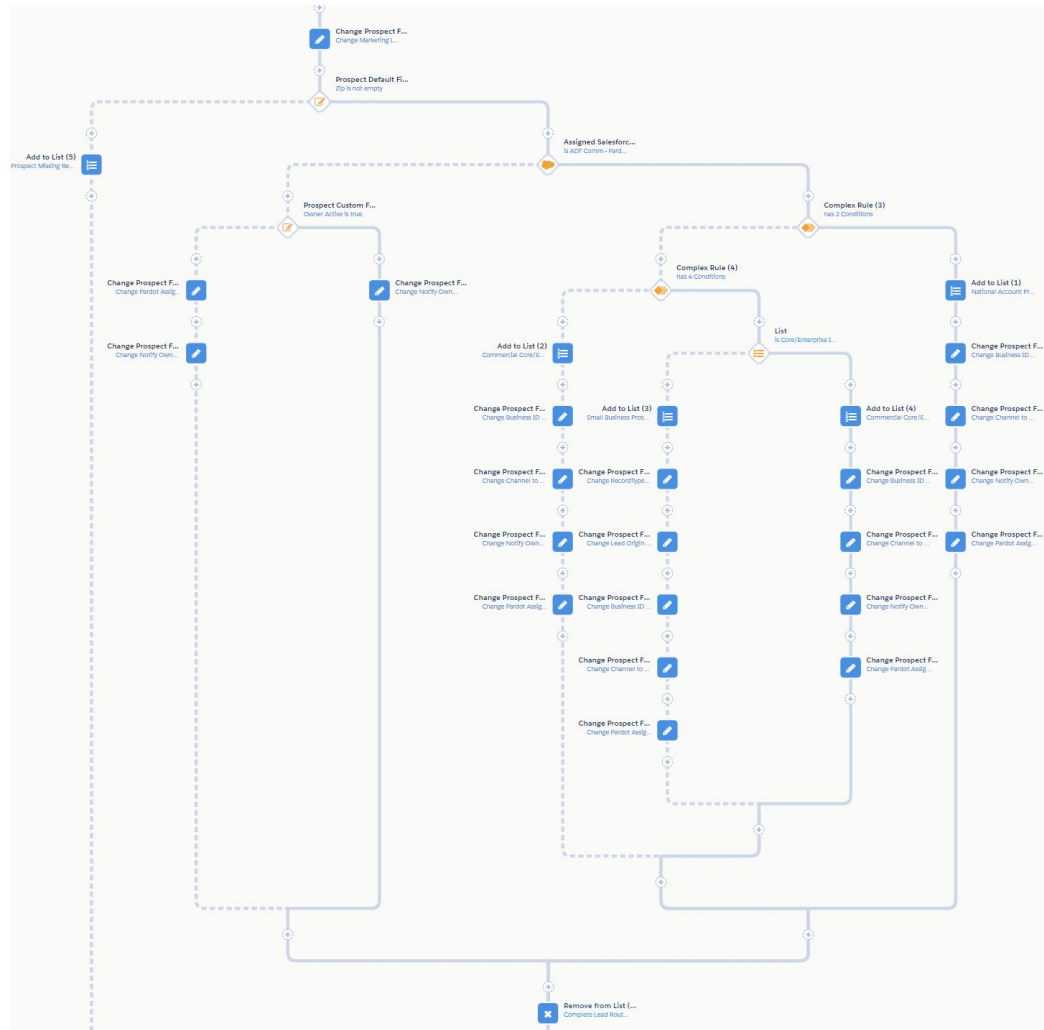
Pre-Sales



MQL

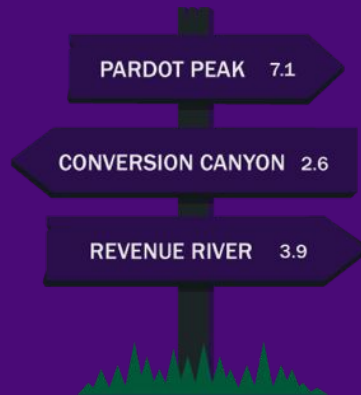


Hand-Raise





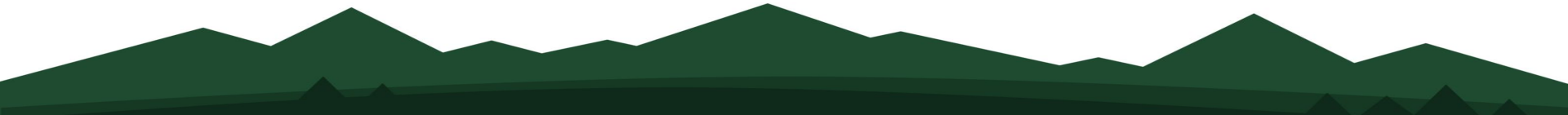
The Future



The Future



- More targeted marketing initiatives
- Further integrate additional systems
- Optimize scoring model
- Develop more intricate customer journeys





The Results

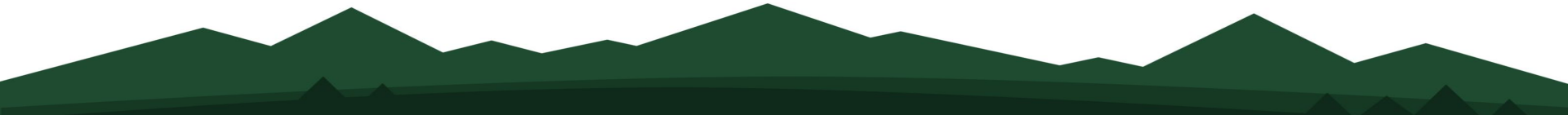
A dashed teal line extends from the end of the word 'Results' to the left of a teal location pin icon. The location pin icon has a circle at the top containing the number '4'.

The Results



- More customer insights for marketing and sales
- Gives sales more qualified leads
- Better reporting and tracking for all
- Reduced duplicate leads and accounts
- Cross team awareness for company-wide support

Ultimately sets us up for business growth!





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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