



Learn. Network. Grow.

MParDreamin' 2022

Turn Marketing Into a Recession-Proof Competitive Advantage

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Gold Sponsors



Silver Sponsors



Housekeeping



Genius Bars Are Open
11:00am – 1:00pm EST



Session Tracks
organized by product



Session Recordings
available 24 hours after
the event end date

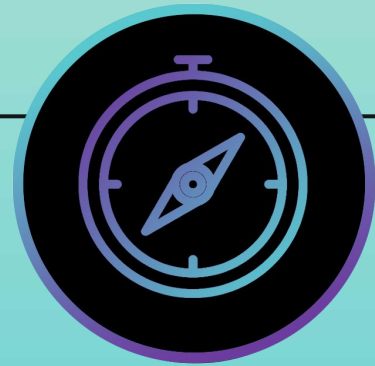
Today's Must Attend Sessions



11:45 am EDT:
**Marketing Cloud
Account Engagement
Product Roadmap**



1:35 pm EDT:
**The Road To Email
Compliance:** The
Basics, Challenges,
and Gotchas



2:50 pm EDT:
**Leveraging
Marketing Cloud
Engagement To
Produce Positive
Customer-Driven
Outcomes**

SWAG, SWAG & more SWAG!

Who will be our 3 lucky winners?



#MarDreamin2022

Our Goal

For you to walk away with tactics to help in the development of your own marketing roadmap. By leveraging several of the following marketing strategies you can be flexible and efficient regardless of what you may encounter on your own marketing journey.



About 20 million Americans quit their jobs in the first five months of 2022 in the 'Great Resignation'.

Alexandre Tanzi, Bloomberg

Change Is An Opportunity To Grow

Don't panic, but instead embrace it.
Be clear on your goals, and grow
towards them.





Let's Discuss Strategies

Work Smarter, Not Harder Is The Goal Of
The Game



Audience Targeting

Audience Targeting

What Audiences should we be targeting and why





Audience Targeting



Targeting Top
Accounts



Retention vs
New
Acquisitions



Case study

Targeting Top Accounts



If your business has been successful in generating and converting leads you may have an established set of Clients. We can target look to target the top accounts from these.

Targeting Top Accounts



Account Based Marketing and building relationships

- Top accounts can have a large percentage of revenue
- Easy to build and manage relationships with less contacts
- Better understanding of your product and offering
- Able to offer longer term strategic support
- Personalize and customize journey's and messages

Retention vs Acquisition

When looking at Retention vs Acquisition and depending on our business model and type of product we can make large savings in time and money.



Why Retention vs Acquisition



5 reasons you should be looking at retention

Existing customers are **50%** more likely to try new products

82% of companies agree that customer retention is cheaper than acquisition.

65% of a company's business comes from existing customers.

Loyal customers spend **67%** more than new ones

Acquiring **new customers can cost up to 7-8x more** than retaining old ones.

Case Study



We have a number of clients who are using ABM and focused on Targeting Top Accounts. Some of the things they are doing are:

- Integrations with Drift & Demandbase
- Clean and concise data to allow for targeting

Targeting top 100 Accounts and their Subsidiaries





Data-Driven Strategies

Use Data to give insights to drive our marketing strategy



78% of marketers state they have changed or reprioritized metrics due to the pandemic. While marketing KPIs saw increased tracking across the board, customer referral rates, customer acquisition costs, and content engagement saw the biggest year-over-year jumps in adoption.

Salesforce - State of Marketing 7th Edition

Data-Driven Strategies

- Integrations
- UTM and web activity capture
- Campaign Influence
- ROI Reporting and B2BMA
- Examples we have seen in action



Data-Driven Strategies

How can you enhance your data capture and analysis



Integrations

Marketing Cloud
Account Engagement
powered by Pardot &
Salesforce standard
integrations

Additional 3rd party
integration tools

Use of the API

Capturing Web activity

Tracking pixels

Google Analytics and
other tools

UTM parameter
capture and storage

Campaign Influence

Understanding
Touchpoints

Automate assignment
to Campaigns

Understand our
channels impact

ROI and Marketing Analytics

Enhanced reporting

Understanding
spend vs revenue

Sharable insights

Clear mapping to
KPIs

Case Study

UTM capture and campaign attribution for ROI reporting



Capture UTM parameters with javascript from the website to Pardot Forms

Use Salesforce Flows to pass this information onto the right objects and custom object to track visits.

At the same time assign Leads & Contacts to Campaigns as Campaign Members

Reports on Campaign influence and ROI

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

1. Capture UTM parameters with javascript from the website to Pardot Forms




iframe code

```
<iframe src="http://www3.lenoxsoft.com/l/256902/2021-04-28/gtn63" width="100%"  
height="500" type="text/html" frameborder="0" allowTransparency="true" style="border: 0"  
id="UTMiframe"></iframe>
```

Web page Javascript

```
<script type="text/javascript">  
  
var iframe = document.getElementById('UTMiframe');  
  
iframe.src = iframe.src + window.location.search;  
  
</script>
```


Start
Record-Triggered Flow

Object: **Lead** [Edit](#)

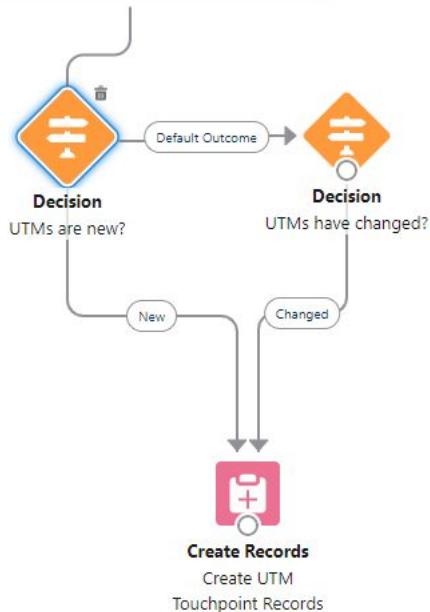
Trigger: **A record is created or updated**

Conditions: **3**

Optimize for: **Actions and Related Records**

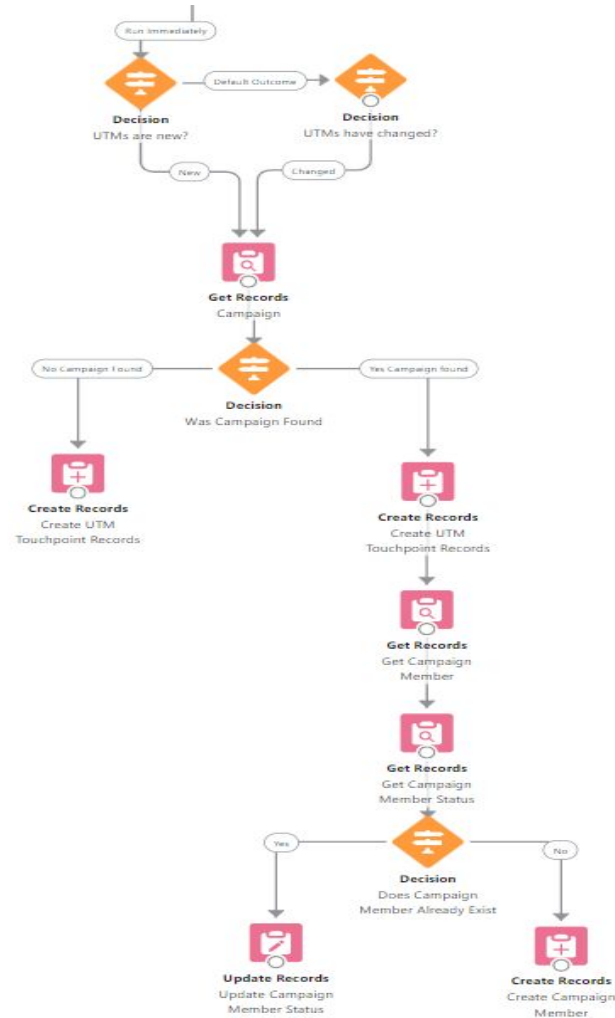
[+ Add Scheduled Paths \(Optional\)](#)

[Open Flow Trigger Explorer for Lead](#)

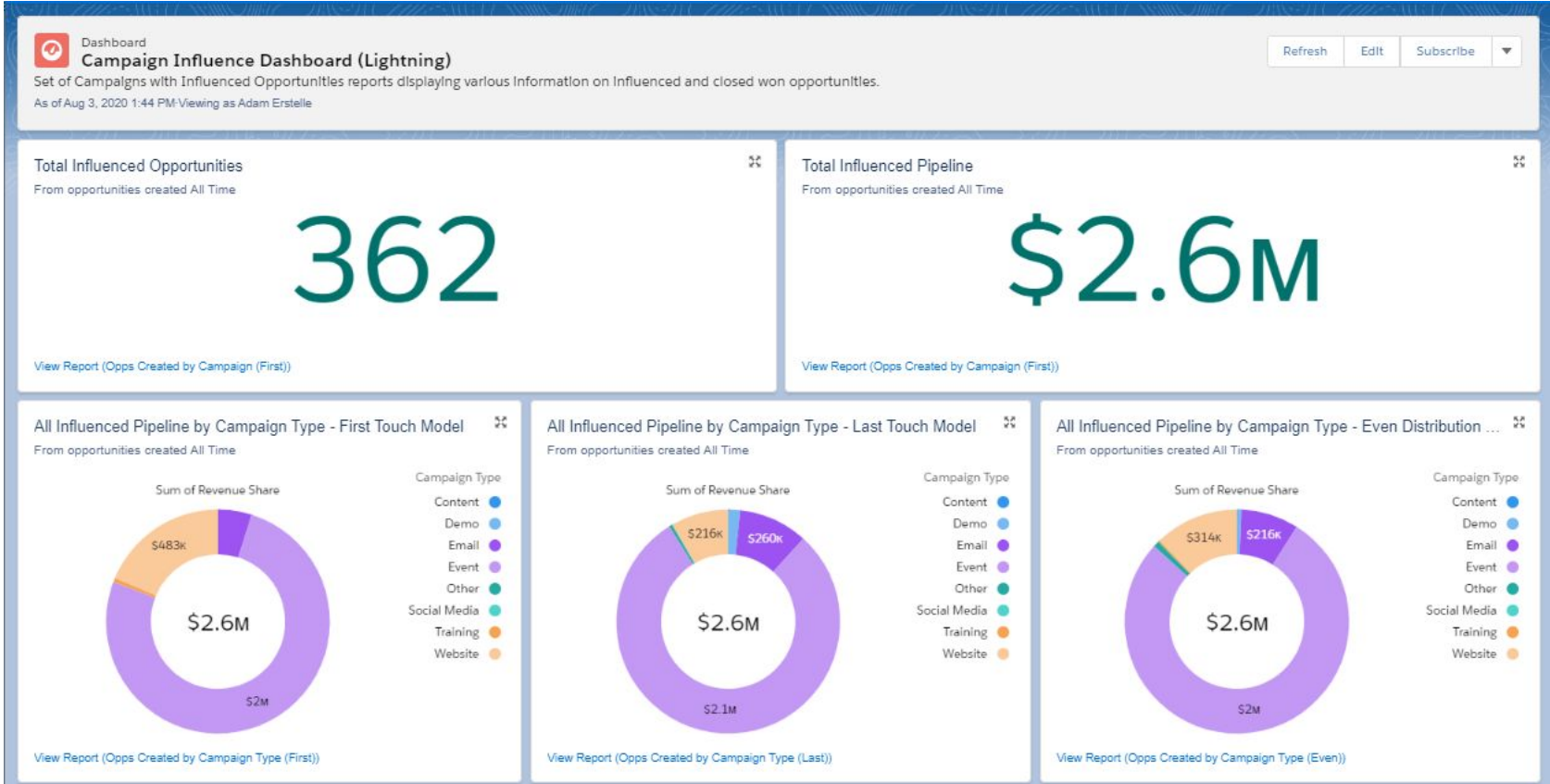


2. Use Salesforce Flows to pass this information onto the right objects and custom object to track visits.

3. At the same time assign Leads & Contacts to Campaigns as Campaign Members



4. Reports on Campaign influence and ROI





Maximize Automation

Maximizing the use of existing tools

Automation Strategy



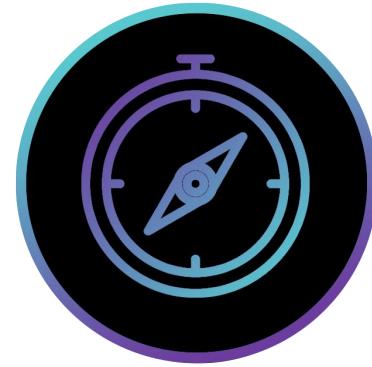
Personalization

Target customers with
unique content



Customer Journey

Tailor experience based on
behavior



Intelligence

Drive next best actions



73% of customers expect companies
to understand their unique needs and
expectations.

Salesforce, Customer Engagement Research

Personalization



Target customers with unique content

- Personalize Email Subject Lines
- Display Content Variations with Dynamic Content
- Get Industry/Product Focused with Scoring Categories
- Group Prospects with Segmentation Lists

A screenshot of a CRM profile for 'Mr. Bob Hodges'. The profile is displayed in a light gray interface with a blue header bar. The header bar contains a user icon and the name 'Mr. Bob Hodges'. Below the header, there are several tabs: 'Overview' (selected), 'Lists', 'Profile', 'Related', 'Activities', 'Audits', 'Lifecycle', 'Opportunities', and 'Related Objects'. The main content area is divided into sections: 'Contents', 'Mailability', and 'Insight'. The 'Contents' section shows contact information: Name (Mr. Bob Hodges), Email (bhodges@example.com), Company (Ohana, Inc.), Account Name (Ohana, Inc.), and Source Campaign (Paid Search). The 'Mailability' section shows the status as 'Mailable' and lists various email-related attributes like 'Email Uniqueness', 'Opted Out', 'Do Not Email', 'Soft Bounce Detected', and 'Hard Bounce Detected'. The 'Insight' section shows a score breakdown: Overall: 513, Expense Management: 103, and Team: 100. The 'Insight' section is highlighted with an orange border.

Tell us how we're doing

Your opinion is like gold to us. That's because we're constantly evolving to meet changing industry and client priorities.

Leave us a review so we can pivot as needed and create exceptional experiences for everyone.



Sharing your feedback is easy.

Use the form below to rate your experience and share feedback. We'll use your review to share our successes and identify areas for improvement.

Leave Us A Review

First Name *	Last Name *
Email *	Company
Branch Location *	How would you rate us? ★★★★★
Let us know how we're doing *	

Submit

Your review is in the right hands

We appreciate your candid feedback and for taking the time to give us a review.

Share Your Feedback With Others.

We've made it simple for you to share your experience with others. We would love to help us spread the message by sharing your feedback on Facebook and Google. Below is a recap of your comments to easily copy and paste.

Review on Facebook

Review on Google

Feedback Review:

First Name:

Angelica

Last Name:

Cabral

Email:

angelica@sercante.com

Company:

Sercante

Branch Location:

Phoenix



Comments:

Your team rocks!

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Email Preferences

Connect with us



Default Content

The default content is shown when the viewer is not a prospect or when no variations match.

Review on Facebook

Review on Google

Variations

Variations are based on the value of field: Branch_Location

Variations are checked in the order they are configured below.

The first variation that matches will display.

Variation A Remove Variation

Show when "Branch_Location" is Phoenix

Review on Facebook

Review on Google

Variation B Remove Variation

Show when "Branch_Location" is Anaheim

Review on Facebook

Review on Google



Nearly **90%** of buyers say experience a company provides matters as much as products or services.

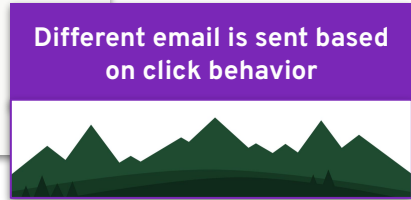
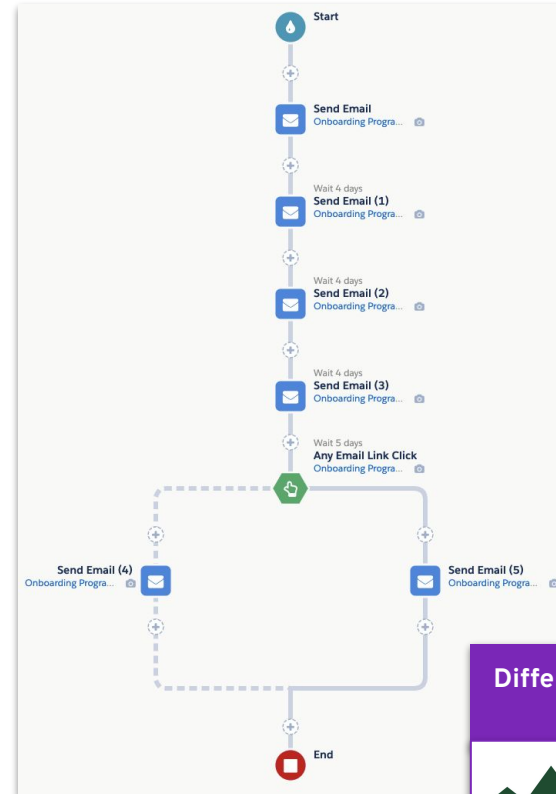
Salesforce, Customer Engagement Research

Customer Journey



Tailor experience based on behavior

- Build Campaigns to Upsell
- Streamline Onboarding Process
- Re-Engage with Dormant Prospects
- Improve Experience with a Multichannel Approach (i.e. SMS)





60% of customers are open to the use
of AI to improve their experiences.

Salesforce, Customer Engagement Research

Intelligence



Drive next best actions

- Map Customer Lifecycle with Einstein Prediction Builder
- Find Marketing Patterns with Pardot Einstein
- Automate Customer Interactions
- Improve Process Automation



All Search Salesforce



Pardot Pardot Dashboard Prospects Accounts Campaigns Automations Pardot Email Email Templates Content More



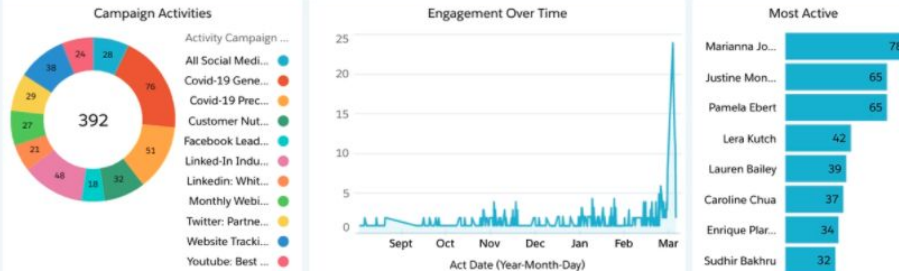
Account Cumulus

+ Follow Edit Delete Clone

Industry: Technology Phone: (312) 997-8000 City: Chicago, IL Account Owner: Jeannette Gomez

Engagement History Details Contacts Sales Service Billing

Activity Campaign All Activity Date All Activity Type All Asset Type All Help



Einstein Insights



Tier A 3x More Likely to Convert

Top Contributing Factors

- Industry is **Technology** and the number of emails opens is **314**
- Company Size is **10,000+**
- Shipping Country is **United States**
- Rating is **87**

Name	Pardot Prospect Job Title	Prospect T...	Activity	Asset T...	Asset Na...	Activity Campaign Name	Act Date
Lera Kutch	Health Systems Specialist	Contact	Success	Form	Contact Us	Customer Nurture Email	3/5/2021
Pamela Ebert	Director of Occupational Safety	Contact	Success	Form	Contact Us	Linked-In Industry Targeted	3/5/2021
Sudhir Bakhru	Supplier Evaluator	Contact	Success	Form	Contact Us	Twitter: Partner Posts	3/5/2021
Marianna Jong	Director of Materials Managem...	Contact	View	Form	Contact Us	Covid-19 Precautions	3/5/2021
Lera Kutch	Health Systems Specialist	Contact	View	Form	Contact Us	Customer Nurture Email	3/6/2021
Lera Kutch	Health Systems Specialist	Contact	View	Form	Contact Us	Facebook Leads: Face Mask Thank You Gift	3/6/2021
Marianna Jong	Director of Materials Managem...	Contact	Success	Form	Contact Us	Monthly Webinar	3/6/2021
Lera Kutch	Health Systems Specialist	Contact	Success	Form	Contact Us	Covid-19 Precautions	3/7/2021

Dynamically evaluate your top accounts



Build Strong Operational Playbooks



Level Up with Playbooks

A form of documentation that holds your company's defined processes and procedures.

Creating Guidance for Success



How does your company do what it does?

Nurture Programs

Approved email templates

Snippets

Trackable KPIs

Personalized paths

Landing Pages

Tracking pixels

Goal conversions

Completion actions

Auto-responder emails

Paid Advertisement

Messaging

Keywords

UTMs

Salesforce integration

Sales Alignment

Elevator Pitch

Value Add

Case Studies

Competitor Comps

Objection Handling



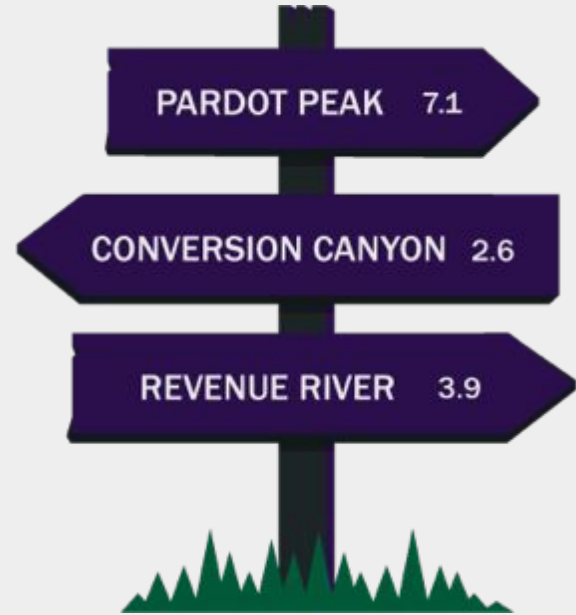
Learning and Development

Creating a culture of growth

Learning and Development

Topics covered

- Trailhead
- Marketing-focused User Groups
- Marketing-focused events
- External support





“It's this sense of community that permeates the Salesforce Ohana that reaffirms my career decision and I couldn't be happier!”

Jason Ventura, Salesforce Solution Engineer, Retired Naval Office, Merivis Grad



Salesforce Community Building Resources



Enjoy these rich community resources

Trailhead

With Trailhead, you can grow not only as a Marketer but also a Salesforce professional. The best part is you can learn at your own pace.

Salesforce Community User Groups

Community User Groups provide a local hub for end-Users to join the discussion around specific marketing trends or products.

Salesforce Community Events

Salesforce produces 1-day events called World Tours in key metropolitan areas to bring Dreamforce to you.

Marketing Specific Resources



Enjoy these resources focused on Marketers for Marketers from our team

The Pardashians

The largest Slack group of MCAE experts and end-Users

Join our incredible community for active discussions around marketing and product specific troubleshooting from anywhere all via Slack!

The Spot

Expert leading blog for all things martech

This is The Spot for marketers on Salesforce. You'll find resources for all the martech challenges — whether you're getting started or need expert advice for advanced integrations.

MarDreamin'

Everything Marketing Cloud and MCAE in one event!

Join a community of end users from across the globe and dive into a variety of topics and product focused sessions that will excite, educate, and expand your knowledge and skill set as a marketing professional.

External Support

We all need a little help sometimes

The AppExchange (app marketplace) provides access to not only cool apps you can use within your Salesforce environment but also opportunities (and reviews) of top consultants and agencies that work in the ecosystem helping other customers like you.



A screenshot of the AppExchange profile for Sercante. The page is white with a dark blue header. At the top left is the 'appexchange' logo. A search bar is in the top right. Below the header is a navigation menu with links: Home, Solutions by Type, Product Collections, Industry Collections, Consultants, Learn, Latest Collections. The main content area has a dark blue banner with 'ALL CONSULTANTS' on the left, 'Sercante | Pardot, Marketing Cloud, and Salesforce Consulting' in the center, and the 'SERCANTE' logo on the right. Below the banner are statistics: Rating (5 stars), Projects Completed (703), Certified Experts (62), and Founded (2017). There is a 'Learn More' button. Below the statistics are tabs for 'Overview', 'Expertise', and 'Reviews (168)'. The main content area features a large green and blue image with the 'SERCANTE' logo and a description: 'Sercante aims to bridge the gap between what is and what could be to make our customers wildly successful on the Salesforce platform.' To the right of the image is a text block: 'We make our clients wildly successful on the Salesforce platform. Sercante aims to bridge the gap between "what is" and "what could be." We help our clients who seek a new way forward map out the path to their vision of sales and marketing operations, taking them from where they are now to where they want to be.' Below this is a 'Featured Resources' section with a link to 'THE SPOT' and a description: 'The Spot: Our blog on best practices, how-tos, and the occasional war story.'

slack Communities to Know

#Pardashian

Pardashians

HowTo**SFMC**

How to SFMC



Ohana Slack

Inside the MarDreamin' event in the Sponsors & Resources section there is a "Slack Communities to Know" booth with instructions on

#MarDreamin2022



It's A Wrap

Let's recap together so you can share with your team

Summary

5 Key Strategies To Turn Your Marketing Into A Recession-Proof Competitive Advantage



Audience Targeting

Upsell and re-engage your existing database, you already acquire them, don't let leads pick up dust!

Data Driven Strategies

Boost your systems with integrations and develop reporting with the end in mind

Maximize Automation

Leverage your marketing automation and CRM to personalize your message and gain positive outcomes

Build Strong Operational Playbooks

Regularly develop strong documentation around significant processes

Learning and Development

Develop a culture of learning and provide with your team with opportunities to share their knowledge



When you win, your customers win!

Create effective marketing strategies in order to provide a consistent customer experience regardless of the obstacles that come up.

SWAG, SWAG & more SWAG!

Who will be our 3 lucky winners?



#MarDreamin2022



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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