



Standardizing Assets Across Account Engagement Business Units



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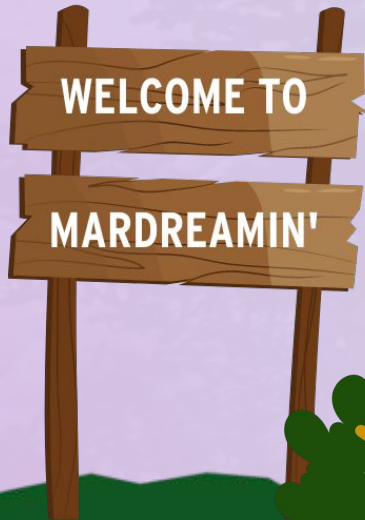
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Agenda



- Why Standardization is Important
- Tips & Tricks
- “Bulk Asset Copy” Flow



Why Standardization is Important

Why Standardization is Important

- Provides consistency for Users
- Ensures assets and processes meet your org requirements
- Allows Admins to better manage the Business Units
- Helps keeps your documentation and training materials consistent
- Reduce effort and costs associated with managing multiple business units



Tips & Tricks



Tips & Tricks

1. Document your field mappings
 - a. Ensure your fields are used consistently across BUs
 - i. Keeps your data clean
 - ii. Prevent Salesforce sync errors
 - b. Review consistency in
 1. Name
 2. Type
 3. Sync Behavior
 4. Usage



Tips & Tricks

1. Document your field mappings

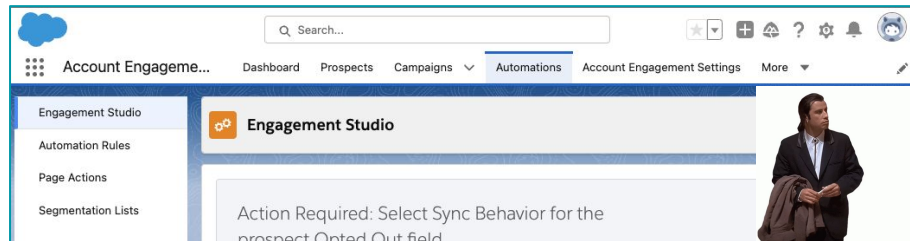
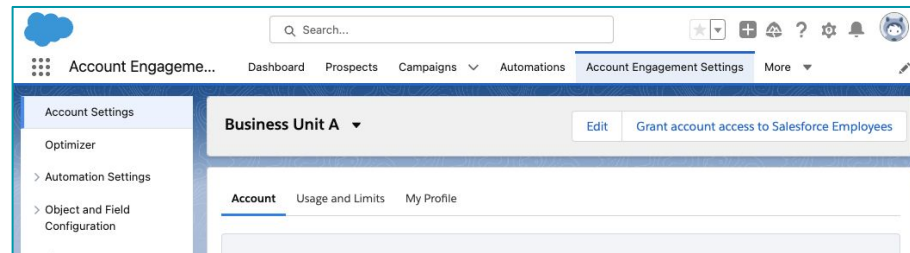
a. [Template!](#)

| Field Name | Field API Name | Definition | Field Type | Data Type | Attribute Values | Data Populated in Account Engagement by | BU 1 | BU 2 | BU 3 | BU 4 | BU 5 | SFDC Field Label | SFDC Field API Name | SFDC Object(s) | SFDC Data Type | Universal Name | Notes |
|-------------------------|--------------------|--|----------------------------|--------------------------------------|------------------------------------|--|---|---|---|---|---|-------------------------|---------------------|----------------------------------|--------------------------------------|-------------------------------------|-------|
| Front facing field name | Backend field name | What the field tells the user or how the field is used in Account Engagement | Object + Default or Custom | What kind of data the field captures | Pre-determined values on the field | Where does the data come from if not Account Engagement (integrations, SFDC, etc.) | Indicates which BU(s) the field exists in | Indicates which BU(s) the field exists in | Indicates which BU(s) the field exists in | Indicates which BU(s) the field exists in | Indicates which BU(s) the field exists in | Front facing field name | Backend field name | Which Object the field exists on | What kind of data the field captures | Use when matching fields across BUs | |
| | | | ▼ | ▼ | ▼ | | | | | | | | | ▼ | ▼ | | |
| | | | ▼ | ▼ | ▼ | | | | | | | | | ▼ | ▼ | | |
| | | | ▼ | ▼ | ▼ | | | | | | | | | ▼ | ▼ | | |
| | | | ▼ | ▼ | ▼ | | | | | | | | | ▼ | ▼ | | |



Tips & Tricks

2. Universal Naming Conventions & Folder Structure
 - a. Ensures users know which BU they are in
 - i. BU name is only shown on the "Settings" tab
 - b. Helps your users easily navigate each BU
 - c. Keeps things organized



Tips & Tricks

3. Opt in to Salesforce-side user management
 - a. Keeps Salesforce Profiles and Account Engagement User Roles aligned
 - b. BU access is controlled within Salesforce



Tips & Tricks

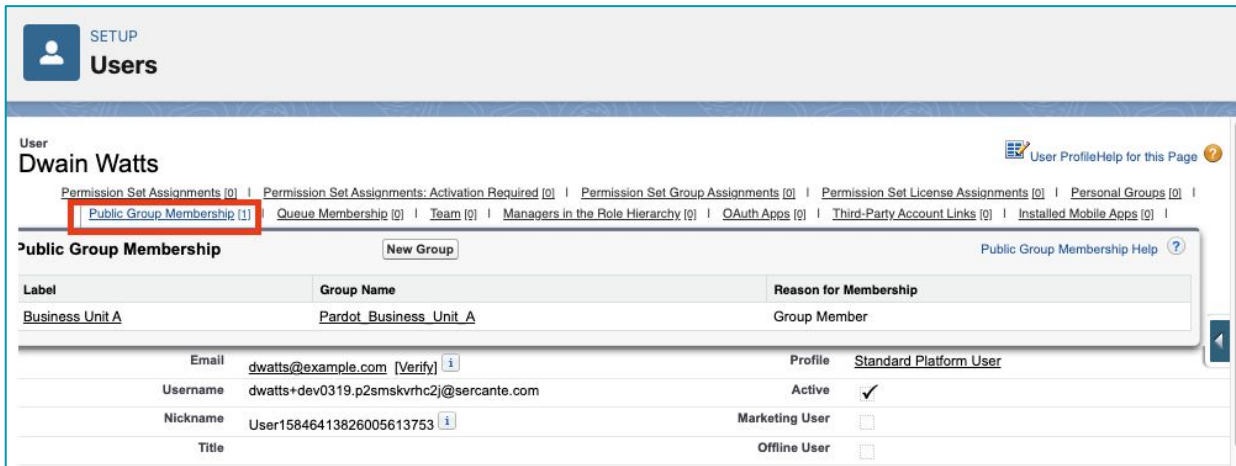
Map Salesforce Profiles to Pardot Roles

Salesforce users assigned to Pardot inherit the Pardot role mapped to their profile. If you change the role mapping later, users are updated with the new role.

| <input type="checkbox"/> SALESFORCE PROFILE | PARDOT ROLE |
|--|---------------|
| <input type="checkbox"/> Contract Manager | Marketing |
| <input type="checkbox"/> Custom: Marketing Profile | Marketing |
| <input type="checkbox"/> Custom: Sales Profile | Marketing |
| <input type="checkbox"/> Custom: Support Profile | Marketing |
| <input type="checkbox"/> Identity User | Marketing |
| <input type="checkbox"/> Marketing User | Marketing |
| <input type="checkbox"/> Minimum Access - Salesforce | Marketing |
| <input type="checkbox"/> Read Only | Marketing |
| <input type="checkbox"/> Sercante Standard User | Marketing |
| <input type="checkbox"/> Solution Manager | Marketing |
| <input checked="" type="checkbox"/> Standard User | Administrator |
| <input checked="" type="checkbox"/> System Administrator | Administrator |

Tips & Tricks

3. Bonus Tip: Use Salesforce Public Groups for easier management
 - a. View who has BU access more easily
 - b. Add users to multiple BUs at once



The screenshot shows the Salesforce 'Users' page for a user named Dwain Watts. The page is titled 'Users' and includes a 'SETUP' button. Below the user name, there are several navigation links: 'Permission Set Assignments [0]', 'Permission Set Assignments: Activation Required [0]', 'Permission Set Group Assignments [0]', 'Permission Set License Assignments [0]', 'Personal Groups [0]', 'Public Group Membership [1]', 'Queue Membership [0]', 'Team [0]', 'Managers in the Role Hierarchy [0]', 'OAuth Apps [0]', 'Third-Party Account Links [0]', and 'Installed Mobile Apps [0]'. The 'Public Group Membership [1]' link is highlighted with a red box. Below the navigation links, there is a 'Public Group Membership' section with a 'New Group' button and a 'Public Group Membership Help' link. A table shows the user's membership in a public group:

| Label | Group Name | Reason for Membership |
|-----------------|------------------------|-----------------------|
| Business Unit A | Pardot_Business_Unit_A | Group Member |

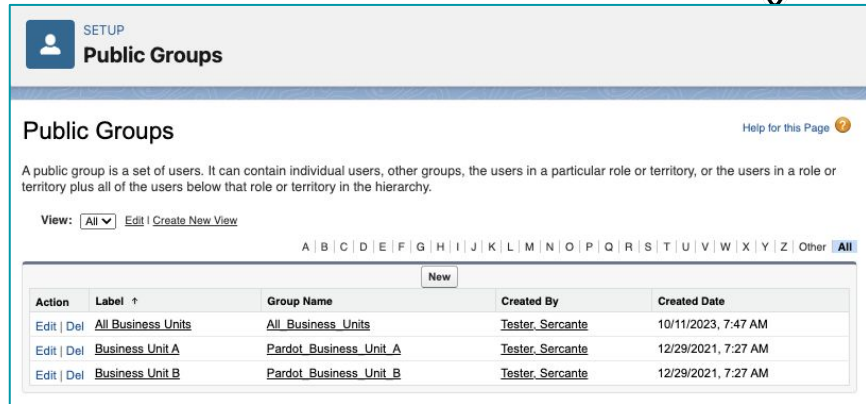
Below the table, there are several fields for the user's profile:

| | | | |
|----------|--|----------------|-------------------------------------|
| Email | dwatts@example.com [Verify] [i] | Profile | Standard Platform User |
| Username | dwatts+dev0319.p2smskvrhc2}@sercante.com | Active | <input checked="" type="checkbox"/> |
| Nickname | User15846413826005613753 [i] | Marketing User | <input type="checkbox"/> |
| Title | | Offline User | <input type="checkbox"/> |

Tips & Tricks

How to set up:

1. Create a Public Group for each BU + a group for all BUs
2. Add the Public Group to BUs
3. Add users to the Public Groups rather than the BU Setup



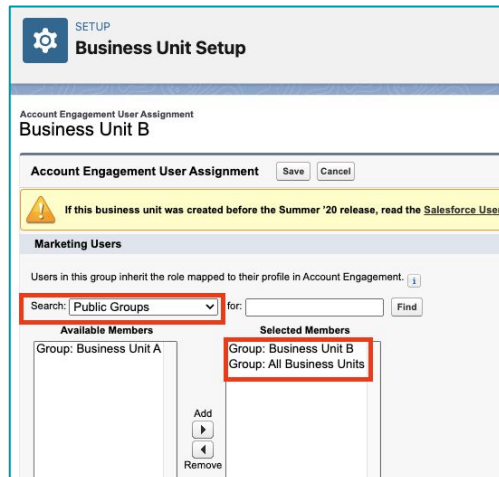
Public Groups

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

| Action | Label ↑ | Group Name | Created By | Created Date |
|--|------------------------------------|--|---------------------------------|---------------------|
| Edit Del | All Business Units | All_Business_Units | Tester_Sercante | 10/11/2023, 7:47 AM |
| Edit Del | Business Unit A | Pardot_Business_Unit_A | Tester_Sercante | 12/29/2021, 7:27 AM |
| Edit Del | Business Unit B | Pardot_Business_Unit_B | Tester_Sercante | 12/29/2021, 7:27 AM |



Business Unit Setup

Account Engagement User Assignment
Business Unit B

Account Engagement User Assignment

Marketing Users

Users in this group inherit the role mapped to their profile in Account Engagement. ⓘ

Search: for:

| Available Members | Selected Members |
|------------------------|---|
| Group: Business Unit A | Group: Business Unit B Group: All Business Units |

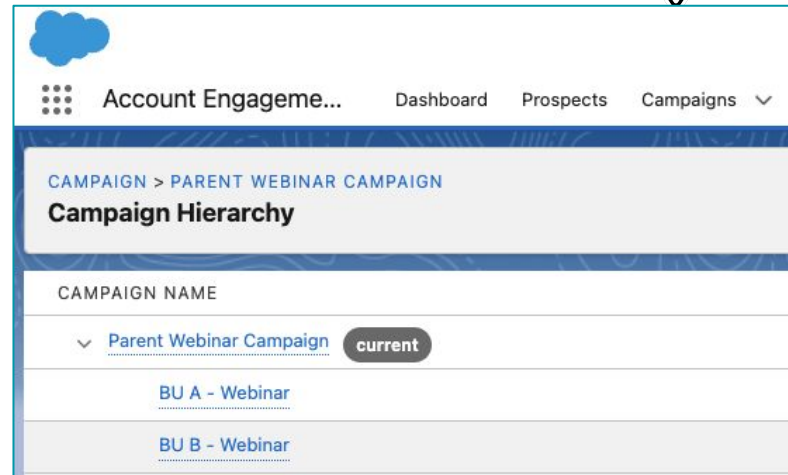
Tips & Tricks

4. Unify your Segmentation & Clean up efforts
 - a. Identify standard segmentation all BUs will use
 - i. Partner, Competitor, Suppression etc.
 - ii. Ensure they are named the same across BUs
 - b. Identify process to clean data
 - i. Country/State standardization
 - ii. Identifying inactive Prospects
 - iii. Spam identification



Tips & Tricks

5. Ensure all BUs are using Campaigns + Campaign member statuses the same way
 - a. Consider adding a Parent Campaign that will unify the campaigns from all your BUs
 - b. Standardize Campaign member status usage
 - i. Including “Responded”!
 - ii. [Auto-generate Campaign Member statuses for different Campaign Types](#)



The screenshot shows a navigation menu with 'Account Engage...', 'Dashboard', 'Prospects', and 'Campaigns'. The main content area is titled 'CAMPAIGN > PARENT WEBINAR CAMPAIGN' and 'Campaign Hierarchy'. It displays a tree structure with 'Parent Webinar Campaign' as the current parent, and two child campaigns: 'BU A - Webinar' and 'BU B - Webinar'.

Campaign Member Statuses (5) New Change Default Status

| Member Status | Is Default | Responded | Last Modified Date |
|---------------|-------------------------------------|-------------------------------------|---------------------|
| Responded | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 12/29/2021, 7:58 AM |
| Attended | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 4/12/2022, 8:13 AM |
| Sent | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 12/29/2021, 7:58 AM |
| Registered | <input type="checkbox"/> | <input type="checkbox"/> | 12/29/2021, 9:04 AM |
| Connected | <input type="checkbox"/> | <input type="checkbox"/> | 1/17/2022, 5:23 AM |

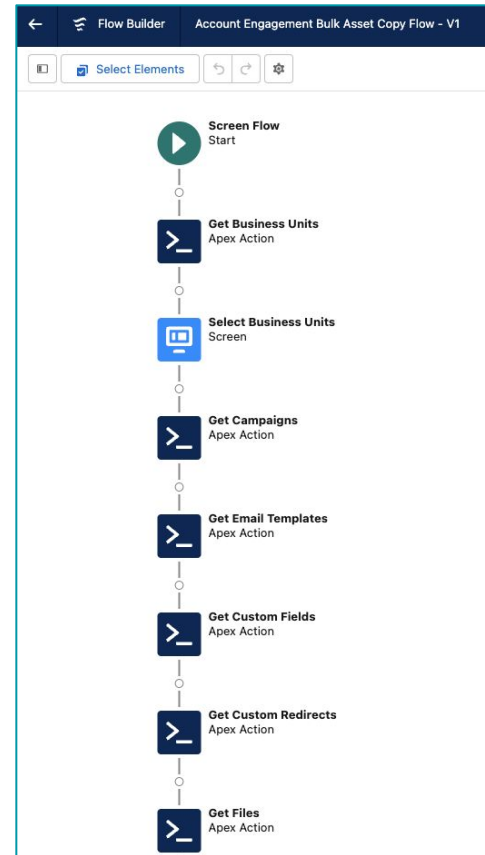
[View All](#)

“Bulk Asset Copy” Flow



“Bulk Asset Copy” Flow

1. Part of the Summer '23 Release
2. Copy the following assets to other Business Units
 - a. Custom Fields
 - b. Engagement Studio Programs
 - c. Files
 - d. Custom Redirects
 - e. (Classic) Email Templates



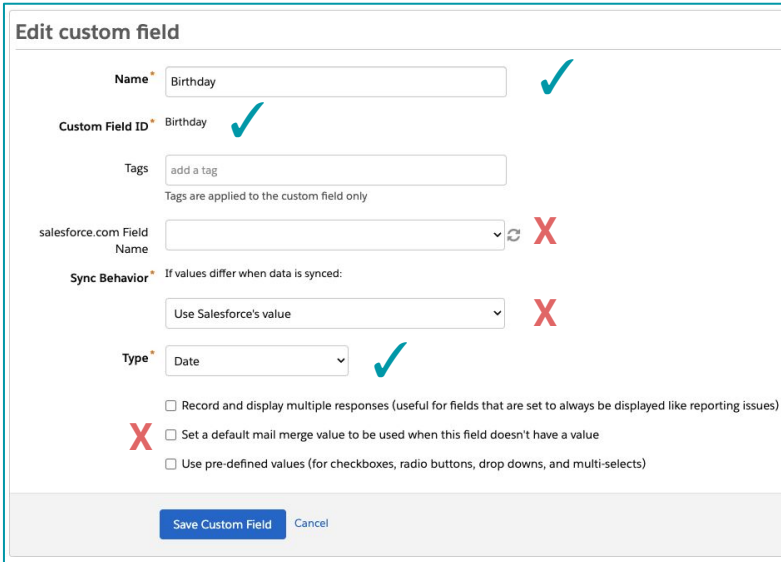
DEMO!



Considerations

Custom Fields

- What is copied?
 - Field Name
 - Field API Name
 - Field Type
- What isn't copied?
 - Field Mapping
 - Sync Behavior
 - Predetermined Values
 - Optional Settings



Edit custom field

Name* Birthday ✓

Custom Field ID* Birthday ✓

Tags add a tag
Tags are applied to the custom field only

salesforce.com Field Name ↻ X

Sync Behavior* If values differ when data is synced:
Use Salesforce's value X

Type* Date ✓

Record and display multiple responses (useful for fields that are set to always be displayed like reporting issues)

X Set a default mail merge value to be used when this field doesn't have a value

Use pre-defined values (for checkboxes, radio buttons, drop downs, and multi-selects)

Save Custom Field Cancel

Considerations

Engagement Studio Programs

- What is copied?
 - ESP Structure
 - Wait days
 - Steps involving fields that are in both Business Units
- What isn't copied?
 - Recipient List
 - Suppression List
 - Send Days/Times
 - "Allow prospects to enter more than once"
 - Assets



Considerations

Email Templates

- When copied, the email sender will be replaced by a General User with the email `replace@example.com`.
- Email Templates containing Dynamic Content will not copy over.
- Subsequent copies of the same template will create a brand new template. It will not update an existing template.

From Choose who your email is sent *from*.

We'll set the From address using your first option below. If it's not available for a given prospect, we'll send from the next option.
Note: autoresponder emails using this template will use the information set below.

Sender *

+ ▾

> Name:

> Email:

If the recipient does not have a value for the reply-to variables chosen below, replies will go to the address the email is sent from.

Custom Reply-To Address

+ ▾

Considerations

Custom Redirects

- What is copied?
 - Google UTM Parameters
- What isn't copied?
 - Completion Actions

Files

- Only image files will copy over

Edit Custom Redirect

Name *

Folder *

Tags

Campaign *

Destination URL * ✓

Tracker Domain
We use this tracker domain to create the link to this asset

+ Google Analytics Parameters

Source

Medium

Term ✓

Content

Campaign

- Completion Actions X

Action

Tags

Resources

- [Field Mapping Documentation Template](#)
- [How to Copy Assets Between Account Engagement Business Units](#) (Blog)
- [5 Ways to Standardize Your Business Units](#) (Blog)
- [Planning for your Business Unit Implementation](#) (Blog)
- [Folder Structure & Naming Conventions](#) (Blog)
- [Protected Campaign Member Statuses Solution](#) (Blog)



Q&A



Thank You!

