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Standardizing Assets Across Account Engagement Business Units

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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

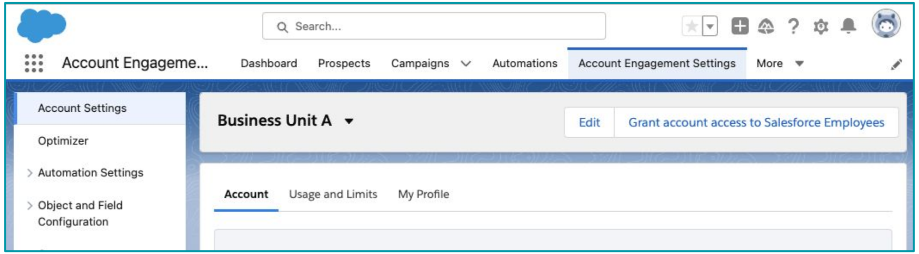
Tips & Tricks

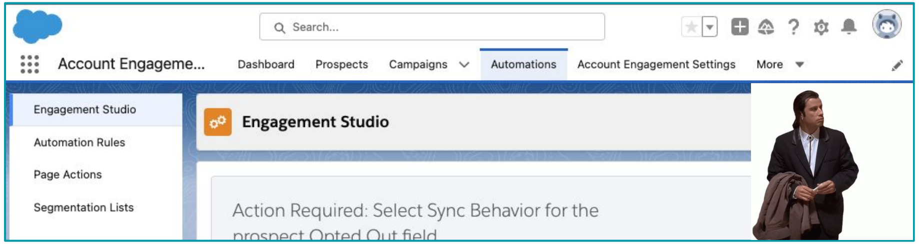
1. Document your field mappings
    a. Template!

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

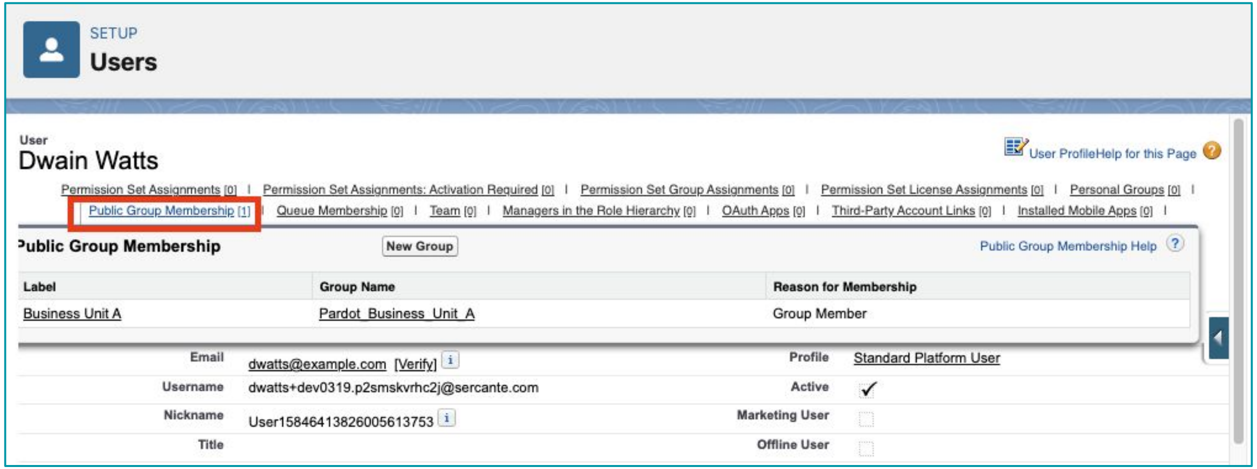
Map Salesforce Profiles to Pardot Roles

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.

SALESFORCE PROFILE	PARDOT ROLE
Contract Manager	Marketing
Custom: Marketing Profile	Marketing
Custom: Sales Profile	Marketing
Custom: Support Profile	Marketing
Identity User	Marketing
Marketing User	Marketing
Minimum Access - Salesforce	Marketing
Read Only	Marketing
Sercante Standard User	Marketing
Solution Manager	Marketing
Standard User	Administrator
System Administrator	Administrator

Tips & Tricks

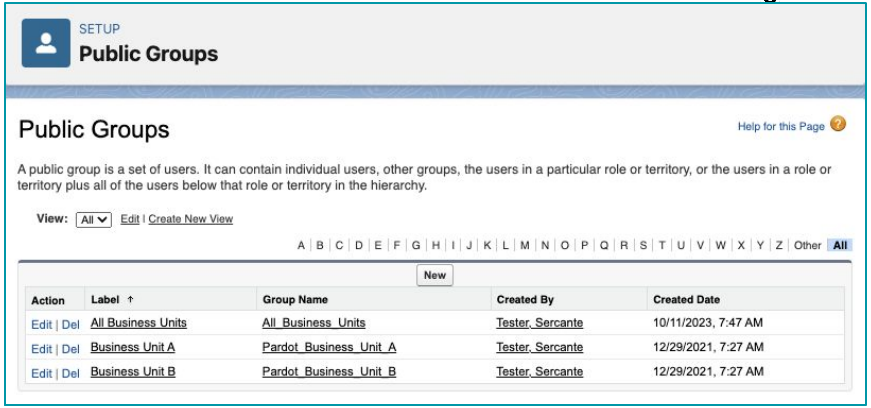
3. Bonus Tip: Use Salesforce Public Groups for easier management
    a. View who has BU access more easily
    b. Add users to multiple BUs at once



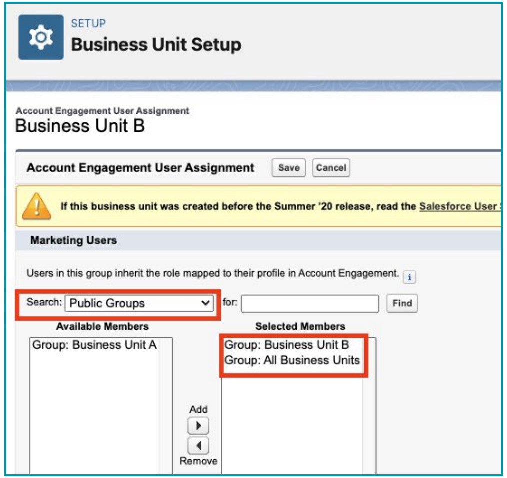
Tips & Tricks

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

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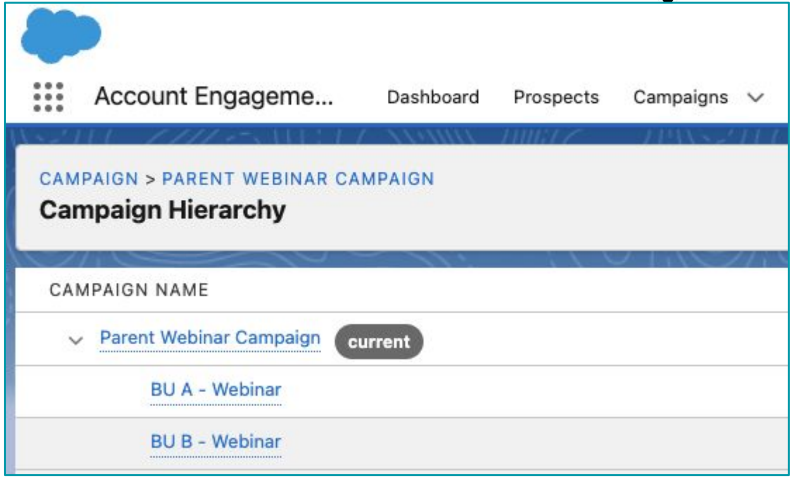
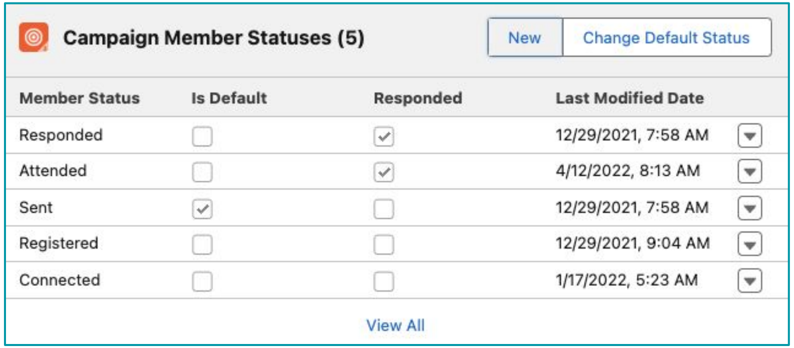
Tips & Tricks

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]

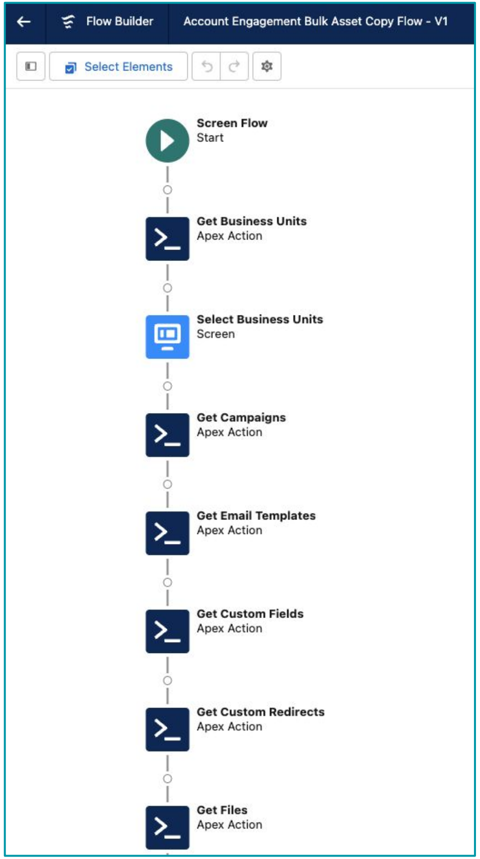




“Bulk Asset Copy” Flow

“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

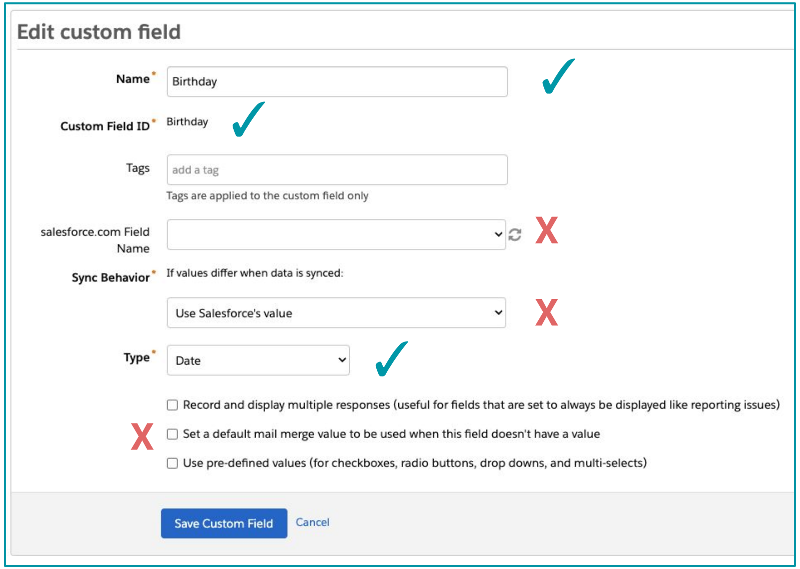


DEMO!

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



Considerations

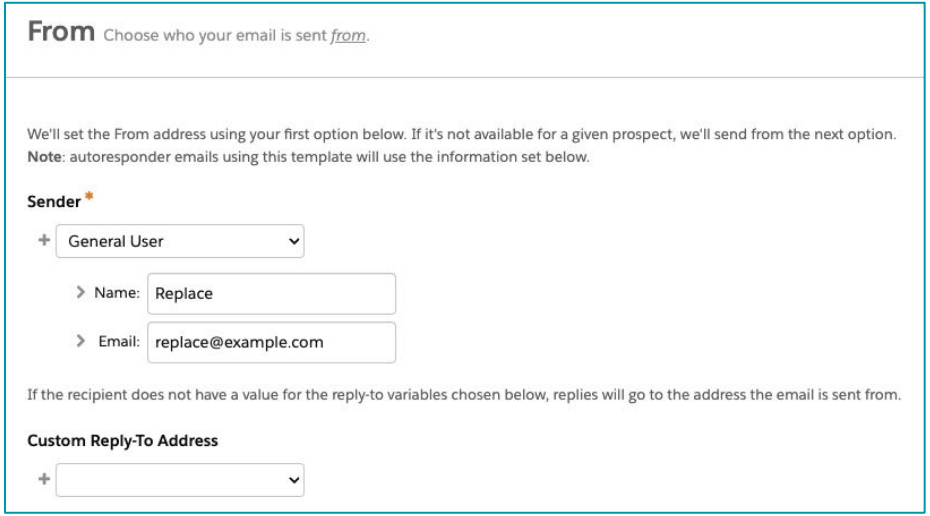
Engagement Studio Programs

- 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.



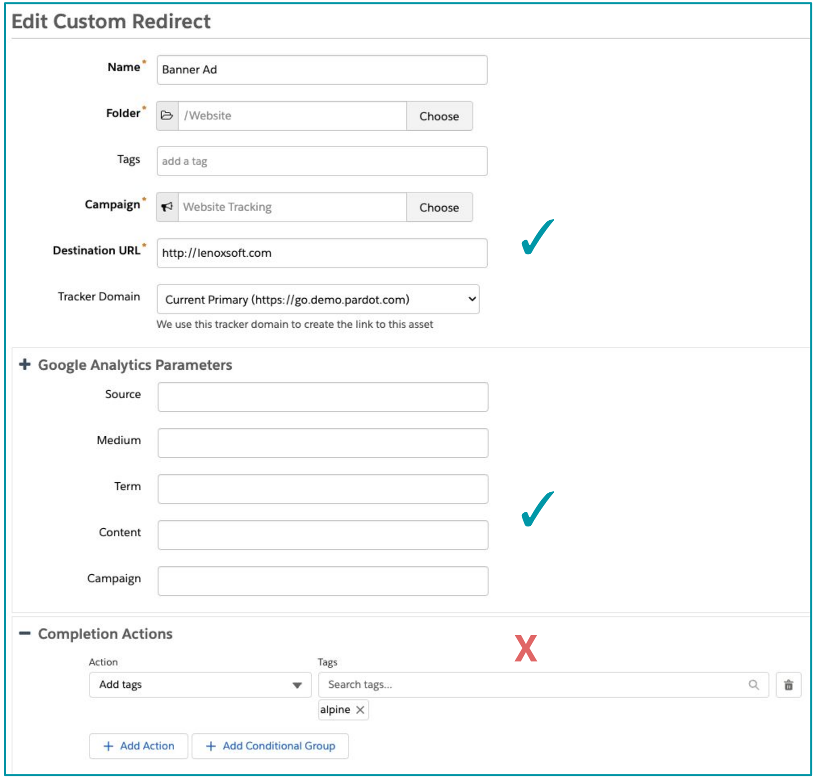
Considerations

Custom Redirects

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

Files

- Only image files will copy over



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!