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Málaga

dreamOlé

No me llenes el Pardot

Integración prospects entre Pardot y Sales Cloud

Málaga

dreamOlé

Paco Martínez

Trailblazer, 5x or 6x Certified Salesforce Developer and Marketing Cloud Consultant at @wamhello

Málaga

Marketing & Sales alignment

How to achieve this goal?

Letting marketing and sales departments manage their prospect interactions and online marketing campaigns in one central platform.

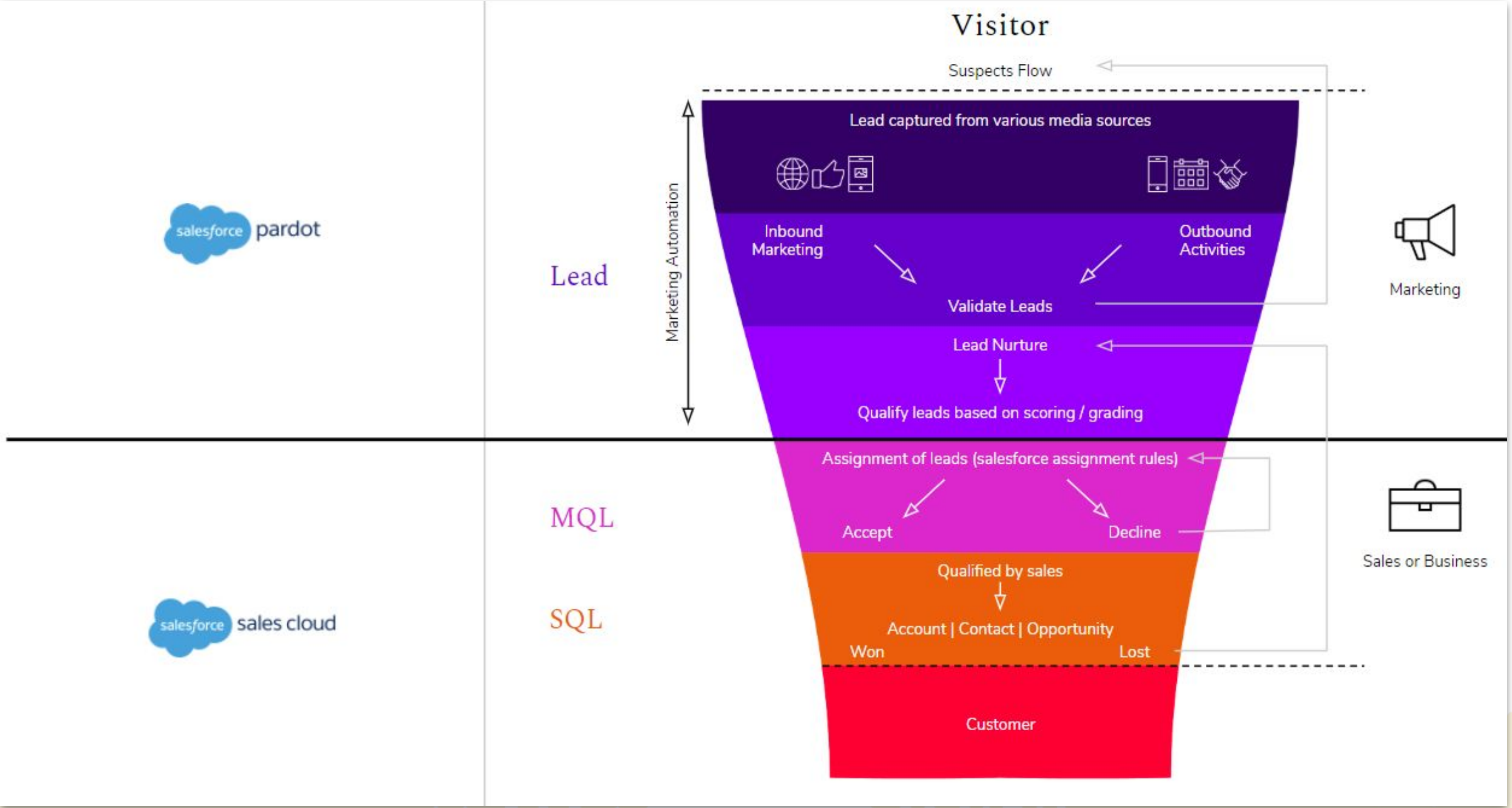
Marketing & Sales alignment

Sales
¡Vaya mierda de leads me envías que no quieren comprar nada!

VS

Marketing
Mira quien habla que me los envia con email sin validar y encima con Opted Out

Sales Cloud & Pardot Schema



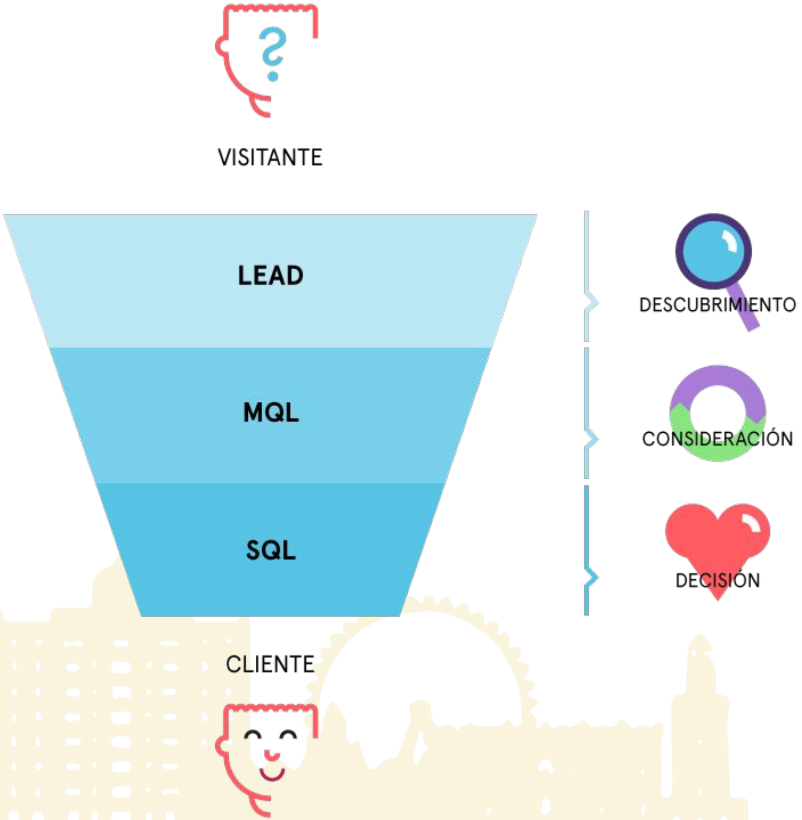
Salesforce Integration

MQL, SQL & Customer for Pardot

MQL
Prospect Assigned

SQL
Prospect with an open opportunity

Customer
Prospect with a won opportunity



Salesforce Integration

Pardot Salesforce Connector

Is not only install appexchange package

Salesforce Integration

Mapping Fields

Data interchange between Pardot & Sales Cloud

HOME > ADMINISTRATION

Prospect Fields

Custom Fields

Filter:

NAME	FIELD	SALESFORCE.COM FIELD NAME	TYPE
VAT Code	VAT_Code	VAT_Code__c	Text
Mobile phone	Mobile_phone	MobilePhone	Text
Primary contact	Primary_contact	Primary_contact__c	Text
Web Account Creation Date	Web_Account_Creation_Date		Text
Web Account Last Log-in Date	Web_Account_Last_Log_in_Date		Text

Showing 5

Default Fields

Filter:

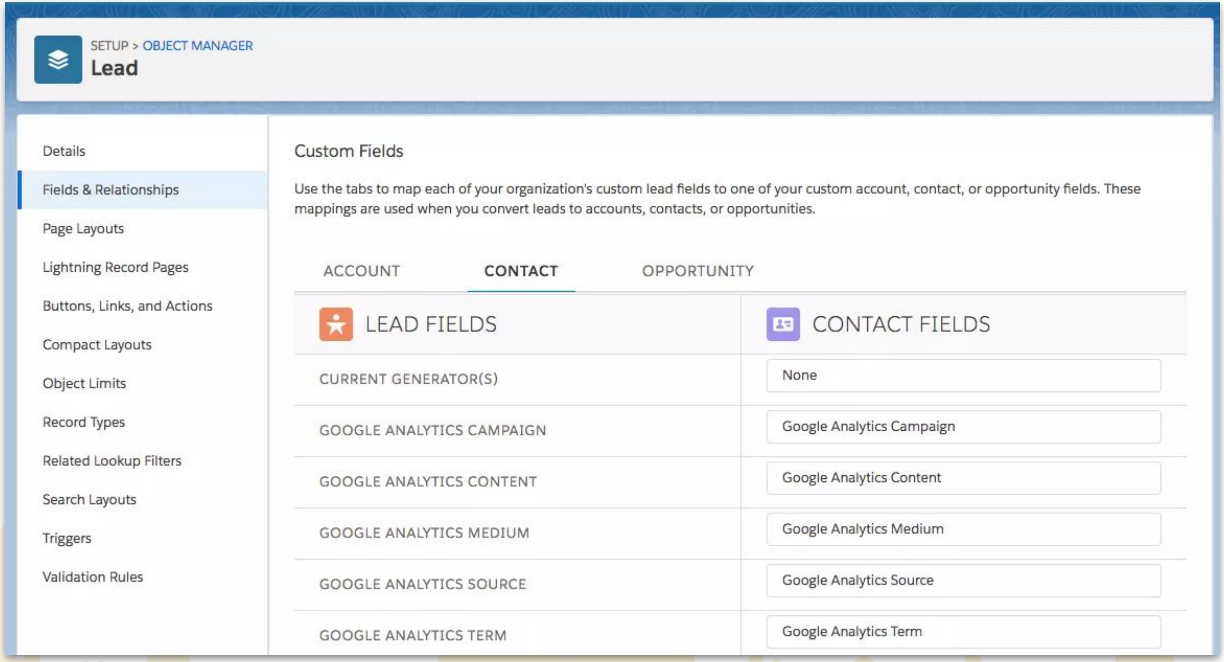
NAME	FIELD	SALESFORCE.COM FIELD NAME	TYPE
Scoring Category Last Scored At	last_scored_at	*pi__Pardot_Last_Scored_At__c*	Date
Country	country	*MailingCountry*	Text
Email	email	*Email*	Text
Company	company	*Company*	Text

Salesforce Integration

Mapping Fields

From Lead to:

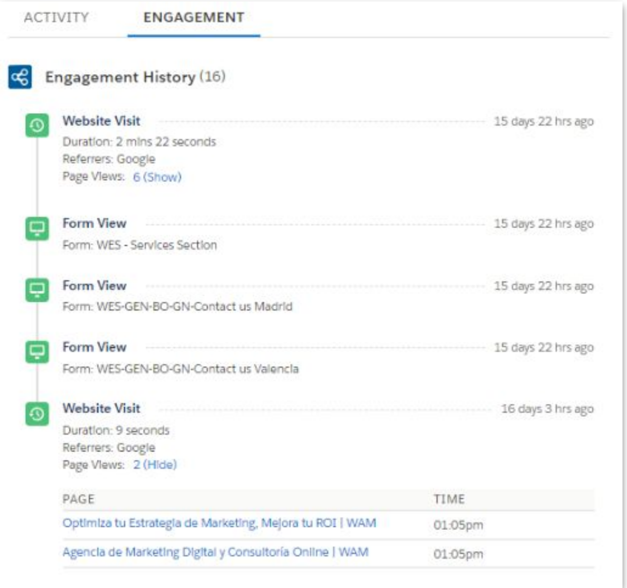
- Contact
- Account
- Opportunity



Lead / Contact Layouts

- There are no marketing info in salesforce contact or lead layouts with useful info for the commercial team

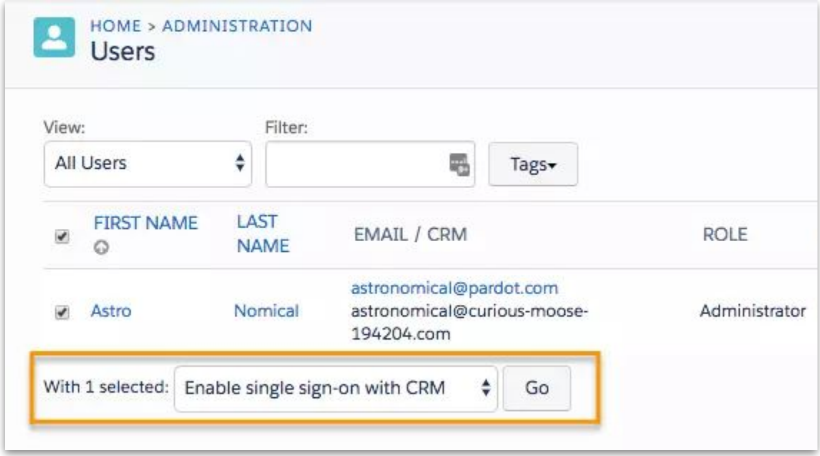
- Because of this lack of information in the salesforce layouts the commercial team doesn’t know if the contact is in the Pardot platform or not available to send communications. (one to one,list or engagement programs)



Salesforce Integration

Salesforce Pardot Single Sign-On

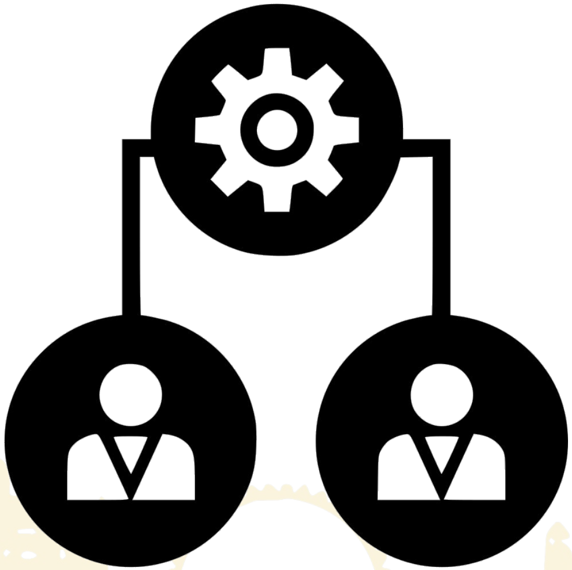
Salesforce/Pardot single sign-on (SSO) enables users to transfer seamlessly between Salesforce and Pardot without needing to separately log in to accounts.



Salesforce Integration

User Integration

Any users with assigned prospects in Pardot should have a Salesforce username selected in their user settings. If a user doesn't have this set up, Pardot reassigns their prospects to the **Salesforce connector** user in Pardot.



Salesforce Integration

Assigning Pardot Prospects to SFDC (Leads)

- Understand the types of criteria used to assign prospects
- Leverage the different methods of assignment
- Reassign prospects to another sales user

Salesforce Integration

Assignment methods

- Automation rules
- Engagement Studio
- Completion actions
- Table actions
- Manual assignment
- Import

Prospect user assignment

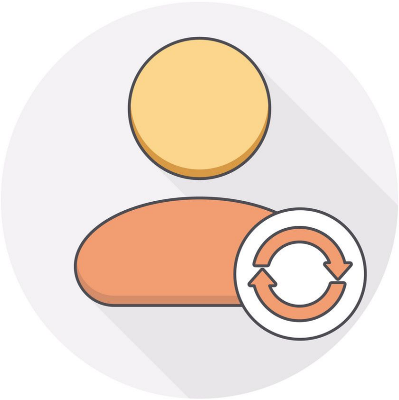
And remember:

Sales Cloud has **always** preference over pardot for prospect assignation

From Pardot to Sales Cloud

The prospect must be assigned to:

- User
- Queue
- Salesforce active assignment rule
- Group (Marketing)

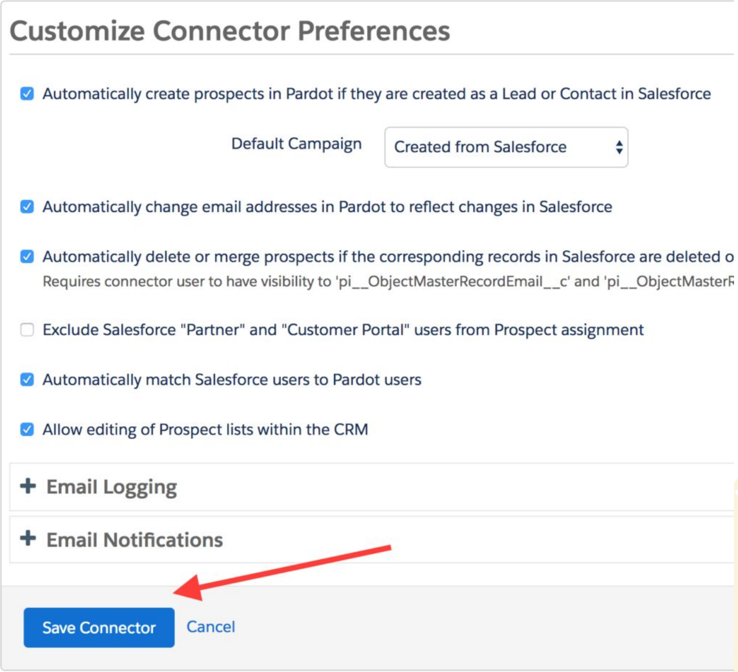


If a prospect in Pardot has a CRM ID that matches the ID of a record in Salesforce, the two records can sync. These prospects don't need an assigned user in Pardot to sync.

From Sales Cloud to Pardot

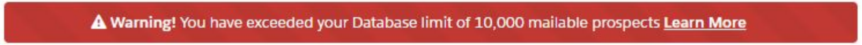
Two modes of synchronization available

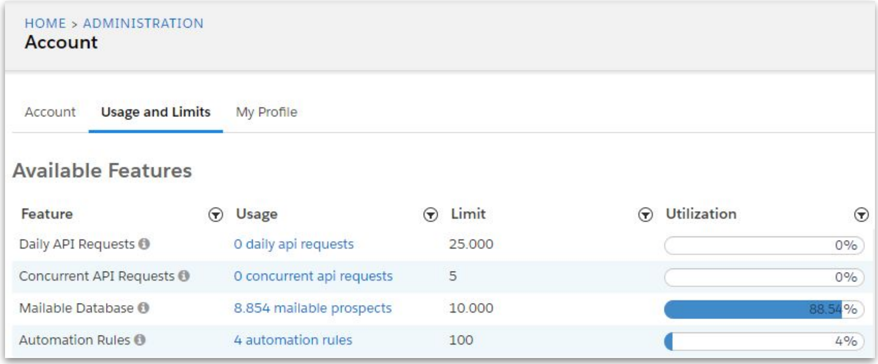
- **Auto**
  - All contacts or leads created in sales cloud are created in Pardot Automatically
- **Manual**
  - Send to pardot action button



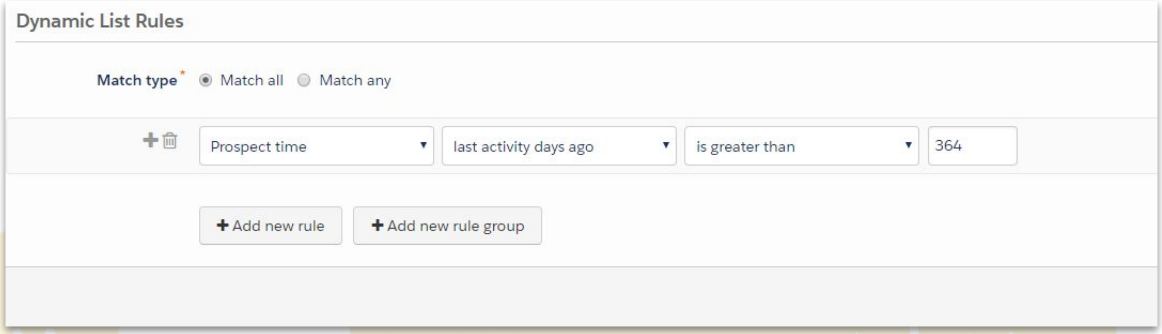
Prospect limit in Pardot

- Buy more contacts (10k packages)
- Clean your database of Prospects with no activity in your account





Feature	Usage	Limit	Utilization
Daily API Requests	0 daily api requests	25.000	0%
Concurrent API Requests	0 concurrent api requests	5	0%
Mailable Database	8.854 mailable prospects	10.000	88.54%
Automation Rules	4 automation rules	100	4%



Prospect limit in Pardot

Considerations about recycle bin in Pardot

- Items in the recycle bin don’t count toward usage limits.
- Admins can permanently delete prospects in the recycle bin. Pardot no longer tracks prospects when they’re permanently deleted.
- A deleted prospect is restored when the Salesforce record it’s syncing with is undeleted
- Tags are deleted permanently and don’t appear in the recycle bin
- You can’t empty the recycle bin

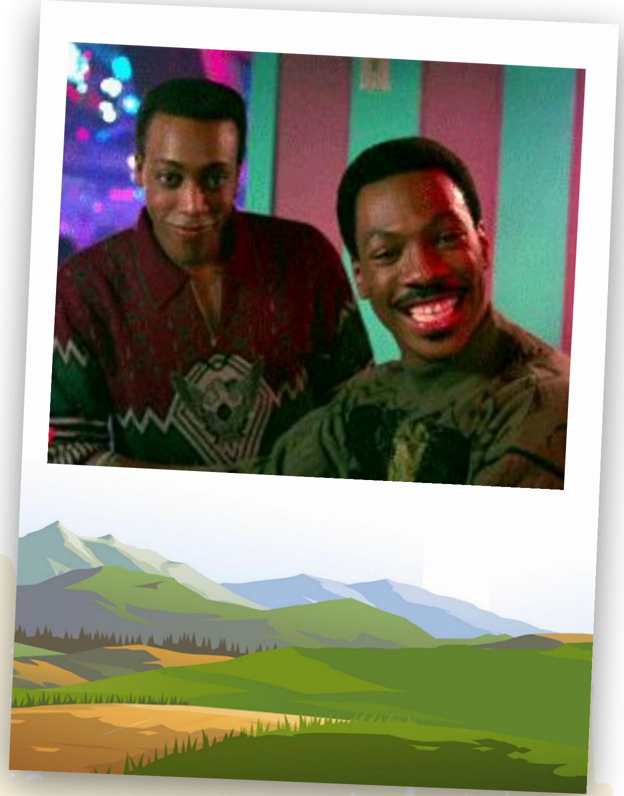
From Sales Cloud to Pardot

Wait! There is another brand new option

Selective Syncing

- Use Marketing Data Sharing, a feature available for Pardot Advanced customers using the Pardot Lightning app

- Use a custom connector user and limit the records the user can see



http://www2.pardot.com/implementing-selective-syncing-with-pardot

Salesforce Integration

Selective syncing requirements **(1)**

- Dedicated Salesforce user with an active “Salesforce” User License.

- Create a custom Salesforce Profile where “View All/Modify All” permissions are removed from the lead and contact objects

Salesforce Integration

Selective syncing requirements **(2)**

- Ensure that the custom object "ObjectChangeLog" has full permissions

- Lead and/or contact sharing settings are listed as "Private" for the organization-wide defaults

Salesforce Integration

Setup & configuration

- Check organization-Wide defaults
  - set to private

- Create sharing rules
  - Create lead/contact rules
  - Select rule type
  - Select value and criteria
  - Add filter logic
  - Select Users
  - Sharing access set to: read/write

Salesforce Integration

Considerations for selective syncing

- The prospect must meet the lead sharing rule criteria prior to assignment so the connector user can “see” and sync with the new lead when it is created in Salesforce

- Standard or custom fields used in the sharing rule criteria must be created and mapped in Pardot.

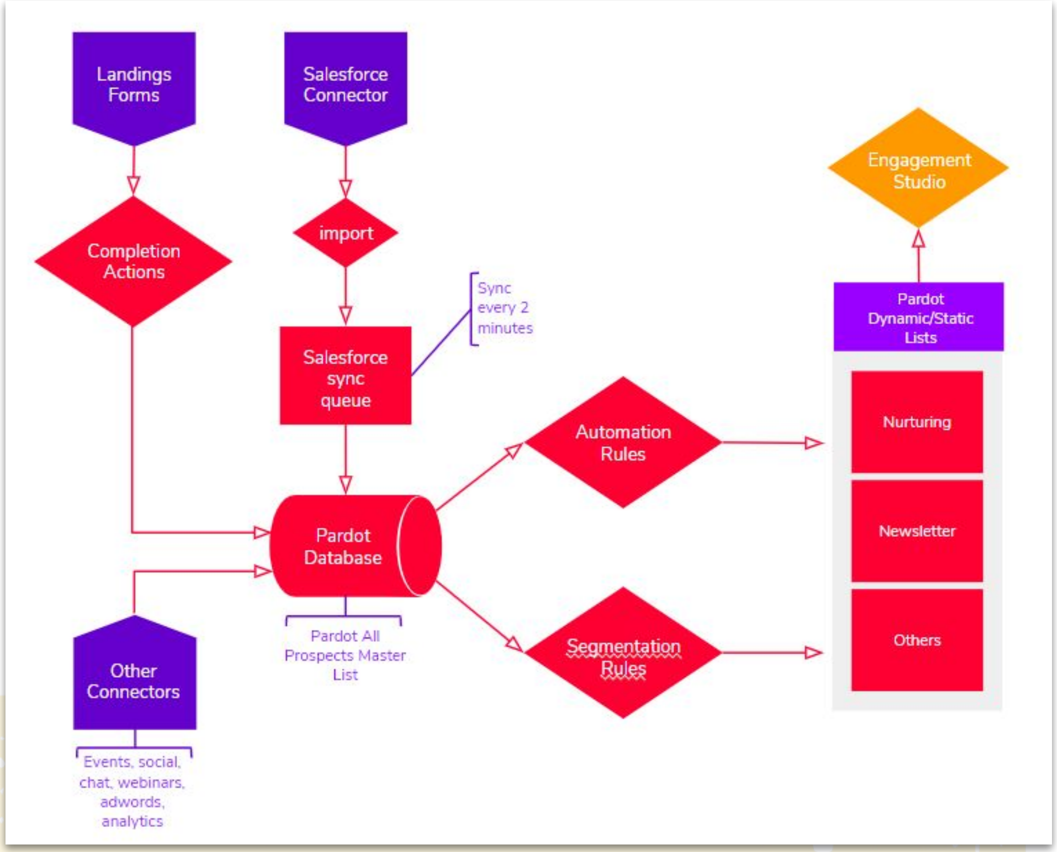
Salesforce Integration

Additional notes on this feature

- A new prospect will be automatically created in Pardot when a lead or contact with an email address is created in Salesforce
- Is not retroactive and will only create prospects in Pardot for leads and contacts created after the setting has been enabled
- Leads or contacts who were previously created and did not meet the sharing rule criteria, but later are edited to meet it, will not be automatically created in Pardot

Sales Cloud & Pardot

Pardot Technical Architecture Schema



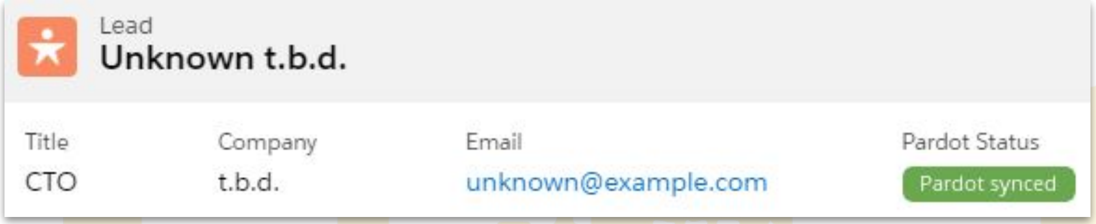
Prospect integration
Sales Cloud Setup

From Sales Cloud to Pardot

Another problem is that this action is available to all commercials and that they don’t have limits or rules that prevent them to send this contact to pardot: any sales user can send a contact to Pardot with no control at all.

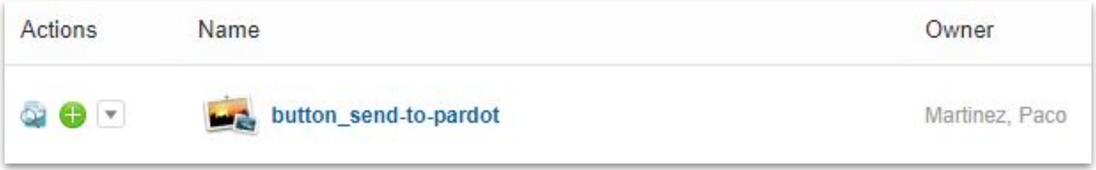
Send to Pardot Actions

Insert a visible signal that aware the commercial team if this contact/lead is in pardot or not.



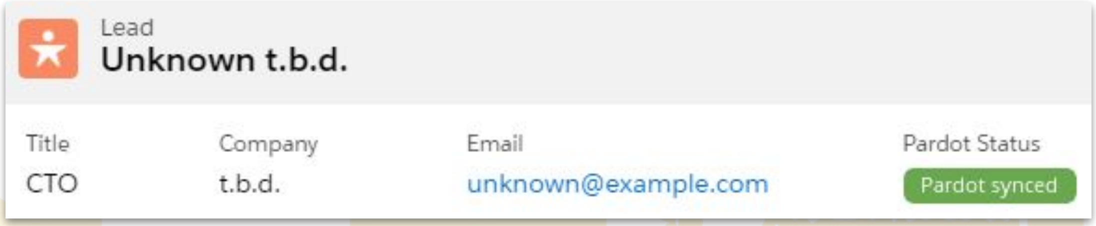
Steps to reproduce

1. Upload images of button in documents (classic)



2. Create Formula in lead and contact object

3. Add formula in page layout or compact layout

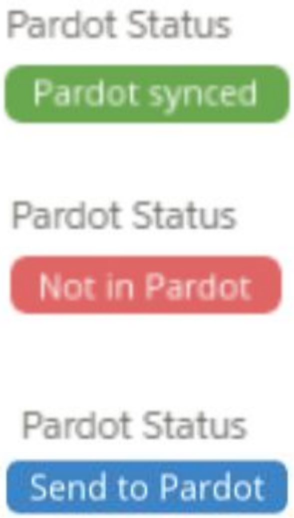


Lead / Contact Formula

- Create formula field that require rules to show or hide the action and add to the contact and lead layouts.

- Some of the rules could be:
  - contact has valid email
  - contact is the primary contact of their account
  - contact has an email_optin status is true

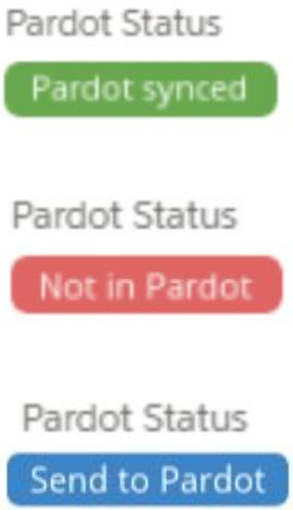
If the result of this formula is true the formula shows the action **[send to pardot]**



Sales Cloud Formula (Lead)

IF(!ISBLANK(**pi__url__c**),
IMAGE("{imageurl}","Pardot synced"),

IF(AND(ISPICKVAL(**Status**,
"Nurturing"),!ISBLANK(**Email**)),
HYPERLINK("/apex/pi__SendToPardot?LeadEmail="
& Email &"&leadId="& Id &"&serverUrl="&
$Api.Partner_Server_URL_90,"Send 2 Pardot"),
IMAGE("{image_url}","Not in pardot")))



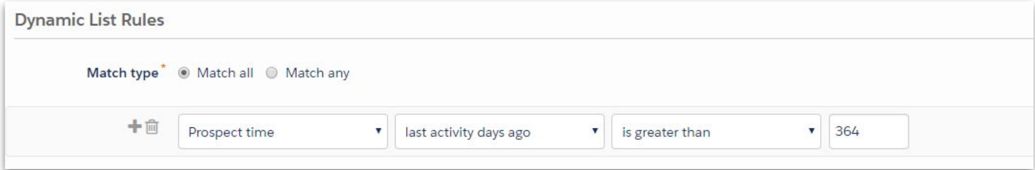
Prospect integration
Pardot Setup

salesforce pardot

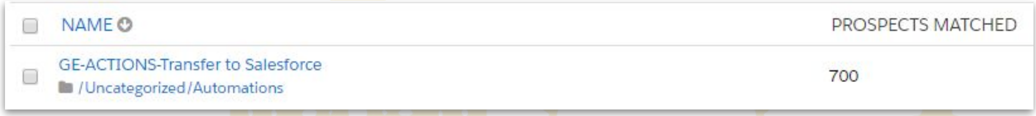
Steps to reproduce

1. Disable Automatically create prospects in Pardot if they are created as a Lead or Contact in Salesforce

2. Clean your database of inactive prospects if needed via Segmentation Rule



3. Create Automation Rule to pass prospects from Pardot to Sales Cloud



Gracias!

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