





1 How did we approach the project



Problem(s):



Segmentation

Due to lack of consolidated system, segmentation was pretty much impossible.



Inability to track ROI

Due to range of platforms and unmapped customer journey – there was not ROI tracking



Low click-through rate on the e-mails

E-mails were created for ad-hoc purposes, design ranged in style



deliverability

Duplication of data, numerous domains, uncleaned data resulted in lower than expected deliverability rates



Targeted journeys

All digital marketing operation focused on manual mass sends



No single customer view

Lack of single customer view due to decentralized data and multiply platforms



2 Phase 1: Enablement



Baseline configuration:

Pardot baseline configuration: folder, structure, account fields, prospect fields & opportunity fields

HOME > ADMINISTRATION
Prospect Fields

Custom Fields

Filter:

[+ Add Custom Field](#)

NAME	FIELD	SALESFORCE.COM FIELD NAME	TYPE	UPDATED AT	ACTIONS
Videos Viewed [Hub ID:89330]	uberfliphub89330videosviewed		Number	Jul 24, 2019 2:14 AM	⚙️
Videos Viewed [Hub ID:88523]	uberfliphub88523videosviewed		Number	Jun 5, 2019 7:18 PM	⚙️
Videos Viewed [Hub ID:106281]	uberfliphub106281videosviewed		Number	Sep 20, 2019 6:54 AM	⚙️
uf_last_visited_item_title	uf_last_visited_item_title		Text	Aug 21, 2019 12:11 PM	⚙️
uf_last_visited_item_id	uf_last_visited_item_id		Number	Aug 21, 2019 12:11 PM	⚙️
uf_conversion_item_title	uf_conversion_item_title		Text	Aug 21, 2019 12:11 PM	⚙️
uf_conversion_item_id	uf_conversion_item_id		Number	Aug 21, 2019 12:11 PM	⚙️
Type of training	Type_of_training	Type_of_Training__c	Dropdown	Jul 25, 2019 10:15 AM	⚙️
Type	Type	Type__c	Dropdown	Aug 8, 2019 4:21 AM	⚙️
Tweets Viewed [Hub ID:89330]	uberfliphub89330tweetsviewed		Number	Jul 24, 2019 2:14 AM	⚙️
Tweets Viewed [Hub ID:88523]	uberfliphub88523tweetsviewed		Number	Jul 24, 2019 2:14 AM	⚙️
Tweets Viewed [Hub ID:106281]	uberfliphub106281tweetsviewed		Number	Sep 20, 2019 6:54 AM	⚙️
Test_Uberflip	Test_Uberflip		Radio Button	Oct 21, 2019 1:42 PM	⚙️
Test_Radio	Test_Radio		Radio Button	Oct 21, 2019 10:59 AM	⚙️
Sync to Pardot	Sync_to_Pardot		Text	Oct 18, 2019 7:06 AM	⚙️

Updated: Filter:

State US Tools 10:47 AM

State Car 8:13 PM

State Aus 9:11:17 AM

NAME	TYPE	CRM FIELD	UPDATED AT	ACTIONS
Annual Revenue	Text	AnnualRevenue	Feb 7, 2019 6:32 PM	⚙️
Billing Address One	Text	BillingStreet	Feb 7, 2019 6:32 PM	⚙️
Billing Address Two	Text		Feb 7, 2019 6:32 PM	⚙️
Billing City	Text	BillingCity	Feb 7, 2019 6:32 PM	⚙️
Billing Country	Text	BillingCountry	Feb 7, 2019 6:32 PM	⚙️
Billing State	Text	BillingState	Feb 7, 2019 6:32 PM	⚙️
Billing Zip	Text	BillingPostalCode	Feb 7, 2019 6:32 PM	⚙️
Description	Textarea	Description	Feb 7, 2019 6:32 PM	⚙️
Fax	Text	Fax	Feb 7, 2019 6:32 PM	⚙️
Industry	Dropdown	Industry	Feb 7, 2019 6:32 PM	⚙️
Name	Text	Name	Feb 7, 2019 6:32 PM	⚙️
Number	Text	AccountNumber	Feb 7, 2019 6:32 PM	⚙️
Number of Employees	Text	NumberOfEmployees	Feb 7, 2019 6:32 PM	⚙️
Ownership	Dropdown	Ownership	Feb 7, 2019 6:32 PM	⚙️
Phone	Text	Phone	Feb 7, 2019 6:32 PM	⚙️
Rating	Dropdown	Rating	Feb 7, 2019 6:32 PM	⚙️
Shipping Address One	Text	ShippingStreet	Feb 7, 2019 6:32 PM	⚙️
Shipping Address Two	Text		Feb 7, 2019 6:32 PM	⚙️
Shipping City	Text	ShippingCity	Feb 7, 2019 6:32 PM	⚙️

- Review of all the fields required to run lead-allocation rules in CRM
- Review and creation of all the fields required by Marketing to run: webinars, campaigns, forms creation etc
- Adding custom fields that are mandatory for highly customized CRM setup.

Baseline Forms:



Development of baseline forms: Contact-us, Internal Referral and External referral forms.

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- **On Site Training** – at a time and location of your choice

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*Required Field

What solution can we help you with?

Please Select

First Name

Last Name

Job Role

Please Select

Email

Phone

Company

Industry

Please Select

Country of residence

Please Select

Nature of your enquiry

☐ Please keep me up to date with SAI Global's solutions.

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SUBMIT

Submit

- Forms had been created to match existing forms, but as the new forms are hosted on Pardot, marketing team have full control over what can be shown
- Forms have dynamic components to adjust for different opt-in requirements in regions
- Forms are syncing with both Pardot and CRM



4 Phase 2: Enhancement



Migration of data: numbers



Email

Migration of over

50

E-mail templates



Automations

Migration of over

200

dynamic segmentation rules and lists.



Prospects data

Migration of

100,000

prospects profiles with some historical data



Campaigns

Migration of over

150

campaigns.

& More...

Engagement History



Engagement history configuration & enablement

- Engagement history data that's stored in Pardot shows up in Salesforce when you view it
- Engagement History can sync up to 90 days or 10 million rows of data
- Everyone can easily see exactly how many times a Pardot form or landing page has been viewed or submitted, or an email's statistics for total delivered, total unique opens, open rate, total unique clicks, click through rate, and more.

The screenshot displays the Pardot Engagement History interface. At the top, a summary card titled "Engagement" shows six key metrics:

Metric	Value	Subtext
Email Open Rate	11.7%	1,200 Unique Email Opens
Email Click-Through Rate	5.4%	550 Unique Email Clicks
Total Emails Delivered	10,250	
Form Submission Rate	12%	375 Total Form Submissions
Total Form Views	3,125	
Unique Marketing Link Clicks	4,500	

Below the summary card, a "Score: 45" is displayed. The main section is titled "Engagement History (25)" and lists various activities:

- Form Success: 23 hrs 28 mins ago
- White Paper Download
- Eng Page View: 1 day ago
- Eng Page: Expense Management White Paper
- Success: 1 day ago
- White Paper Download
- View: 1 day ago
- Event Registration

A modal window is open, showing a message: "We found no potential duplicates of this contact." Below this, it lists the "Engagement History (93)" for a specific contact, showing a timeline of activities:

- Website Visit: 9 days 19 hrs ago, Page Views: 1 (Show)
- Form View: 9 days 19 hrs ago, Form: [redacted]
- Landing Page View: 9 days 19 hrs ago, Landing Page: [redacted]
- Tracked Link Clicked: 9 days 19 hrs ago, Email: [redacted], Link: [redacted]
- Email Open: 9 days 19 hrs ago, Email: [redacted], List: [redacted]

Connected Campaigns

Connected Campaign setup enablement



Campaigns
All B2B Marketing Campaigns ▾

29 items • Sorted by Campaign Name • Filtered by Campaign Record Type • Updated a few seconds ago

<input type="checkbox"/>	CAMPAIGN NAME ↑	TOTAL FORM SUBMISSIO...	TOTAL FORM VIEWS IN CA...	TOTAL FORM SUBMISSIO...	TOTAL FORM VIEWS IN HI...
1	<input type="checkbox"/> AdWords: Expense Management	0	0	0	
2	<input type="checkbox"/> Best Practices Webinar	0	0	0	
3	<input type="checkbox"/> Blogs	0	0	0	
4	<input type="checkbox"/> Cold Leads Re-engagement Nurture	0	0	0	
5	<input type="checkbox"/> Competitive Deal Nurture	0	0	0	
6	<input type="checkbox"/> Corporate Website	1,099	10,274	1,099	10,274
7	<input type="checkbox"/> Dreamforce	43	432	43	432
8	<input type="checkbox"/> Dreamforce 2017 Campaign	0	0	0	
9	<input type="checkbox"/> Dreamforce Campaign!	0	0	0	
10	<input type="checkbox"/> Education Nurture	0	0	0	

11 ☐ Em
12 ☐ Fac
13 ☐ Fac
14 ☐ Lin
15 ☐ My
16 ☐ Ne

All ▾ Search Campaigns and more...

Sales Home Accounts ▾ Contacts ▾ Leads ▾ Opportunities ▾ Tasks ▾ Calendar ▾ Groups ▾ Notes ▾ Reports ▾ Campaigns ▾ More ▾

Customer Conference - Email Invite (Sample) Edit Delete Clone ▾

Influenced Opportunities (6+)

OPPORTUNITY NAME	CONTACT NAME	REVENUE SHARE	AMOUNT
Global Media - 140 Widge...	Jon Amos (Sample)	\$0.00	\$15,000.00
Global Media - 140 Widge...	Carole White (Sample)	\$0.00	\$15,000.00
Global Media - 140 Widge...	Geoff Minor (Sample)	\$0.00	\$15,000.00
Acme - 120 Widgets (Sam...	Jennifer Stamos (Sample)	\$0.00	\$4,000.00
Acme - 120 Widgets (Sam...	Leanne Tomlin (Sample)	\$0.00	\$4,000.00
Acme - 120 Widgets (Sam...	Howard Jones (Sample)	\$0.00	\$4,000.00

[View All](#)

Campaign Hierarchy (0)

Campaign Member Statuses (2) New Change Default Status

MEMBER STATUS	IS DEFAULT	RESPONDED	LAST MODIFIED DATE
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Phone Notes History

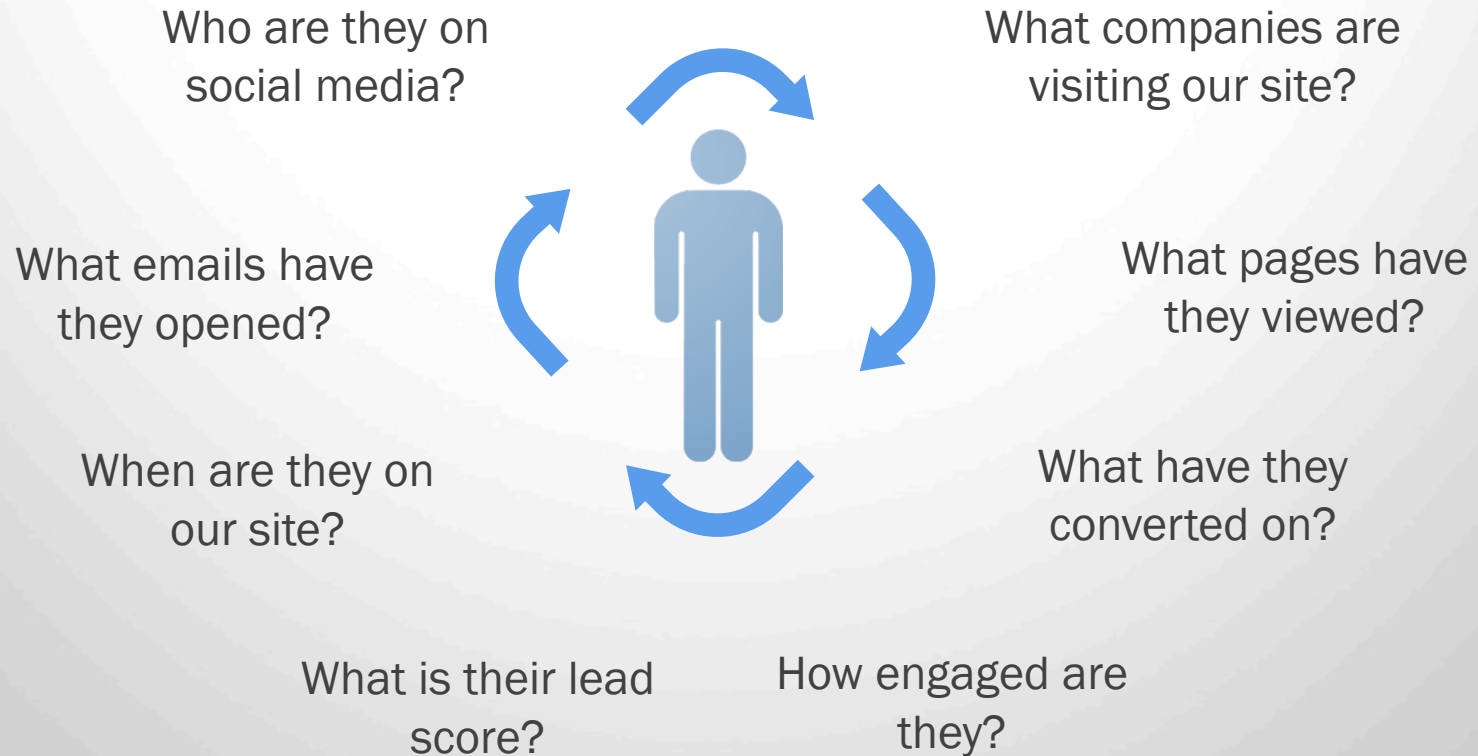
- The entire organization can see at a glance how a marketing initiative is performing, and compare campaigns against each other in insightful Campaign List Views.
- Engagement Metrics Component directly on the Campaign page layout.
- Multi-touch attribution: when and what campaigns a prospect has been exposed to and what made that prospect make a buying decision

Connected Campaigns and Engagement His



Pass valuable lead intelligence to your sales team for faster follow-ups, better connects, and warmer leads.

360° View of Your Leads

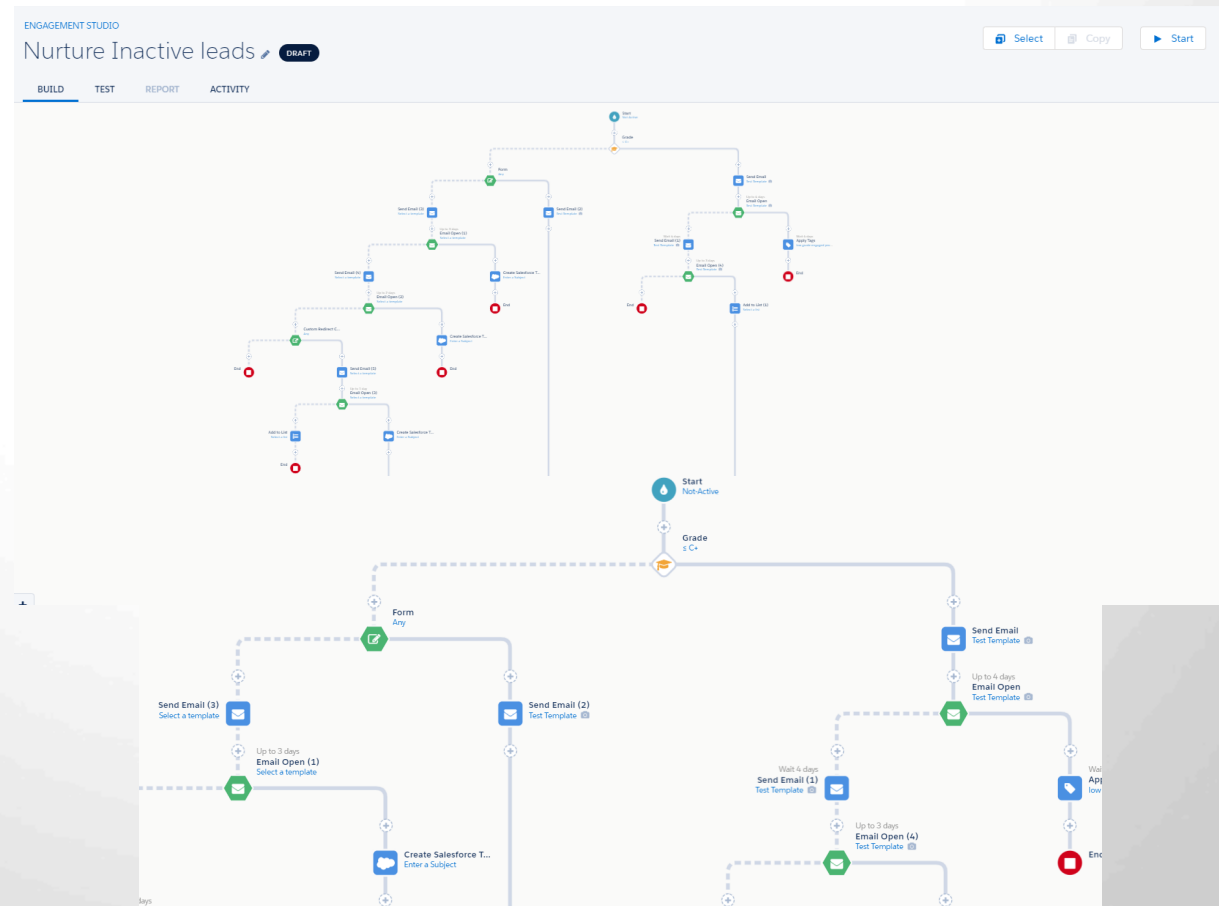




At-risk journey

Re-targeting: "At Risk Journey" for prospects that had been inactive development

- See key email performance metrics at a glance in the Overview tab.
- Drill down to details on sent, delivered, opened, clicked, and contacts lost.
- Track your email's engagement (opens and clicks) over time, and break it down by email client and device.

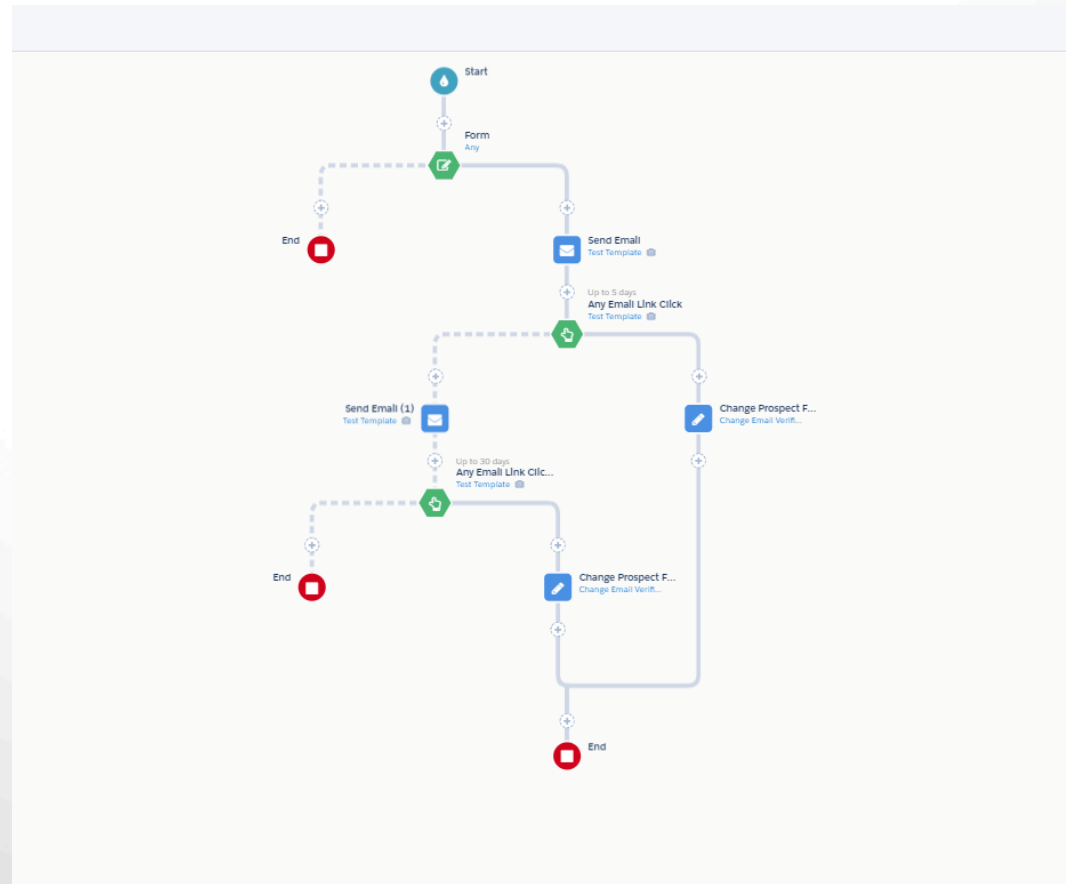




Double opt-in Journey

In order to improve data quality and make sure that e-mail addresses in the database are valid, double opt-in journey had been developed.

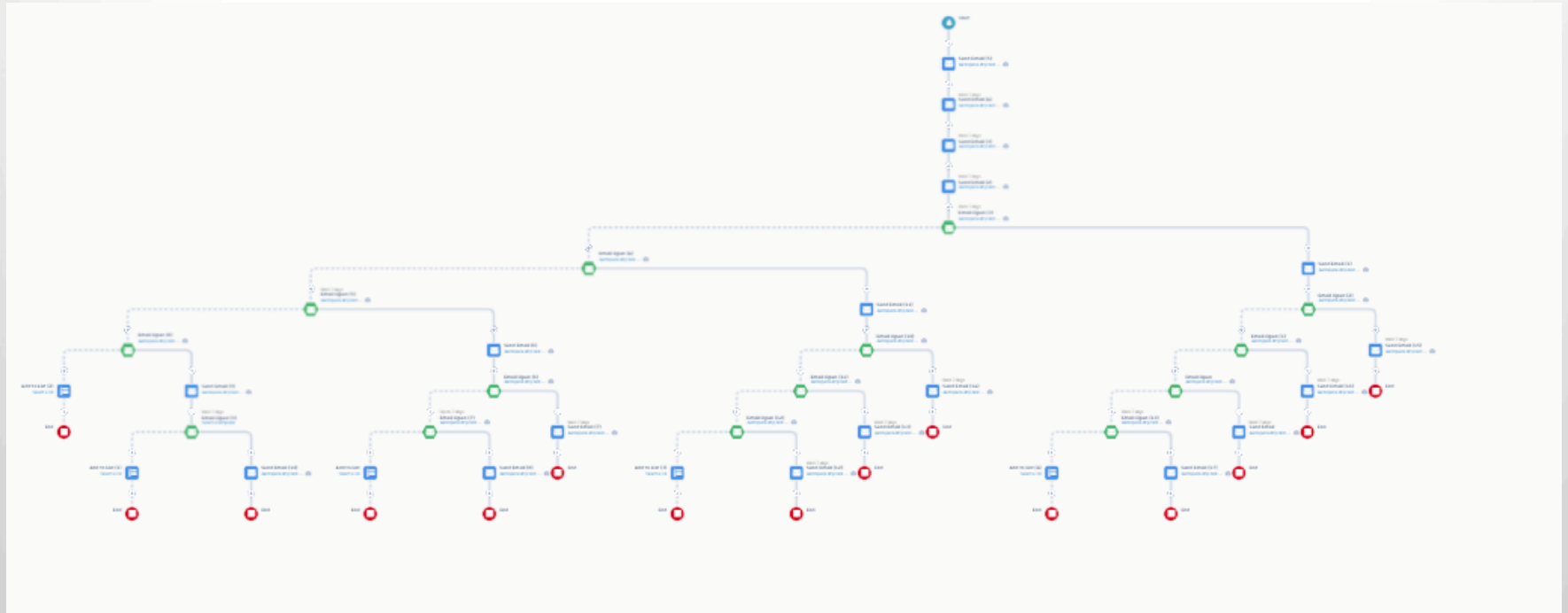
- Data is kept clean
- Drill down to details on sent, delivered, opened, clicked, and contacts lost.
- Track your email's engagement (opens and clicks) over time, and break it down by email client and device.



Lead Nurture Journey development



See a high-level overview of your email's performance, broken down into the key categories of engagement, deliverability, and contacts lost.



- Over 40 segments
- Fully-automated ALWAYS-ON drip campaigns
- Global coverage
- Scalable drips that can be adjusted per region needs



Pardot offers a great way to score your prospects with its out-of-the-box scoring mechanism. You can add points to a prospect's score when they open an email, click a link, access content, and much more.

- Scoring is based on the activates a prospect performs
- Grading looking at industry, role and job title and location
- Enables to identify the “best-fit” prospects so internal Sales team know the likelihood to make a purchase.
- Grading and scoring automates leads creation process.

Scoring Rules

Custom Redirect Click	3 points
Email Open	5 points <i>Adjust score on the very first email open only.</i>
Event Checked In	30 points
Event Registered	2 points
File Access	3 points
Form Error	-5 points
Form Handler Error	-5 points
Form Handler Submission	50 points
Form Submission	10 points
Landing Page Error	-5 points
Landing Page Success	50 points
Olark Chat	10 points
Opportunity Created	50 points
Opportunity Lost	-100 points
Opportunity Won	0 points
Page View	1 point
Site Search Query	3 points
Social Message Link Click	0 points

Overview	Lists	Profile	Related	Activities	Audits	Lifecycle	Opportunities	Related Objects
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Profile Criteria: Default

CRITERIA ⓘ	GRADE ADJUSTMENT	MATCH?
Location	2/3 letter	👍 👎
Job Title	2/3 letter	👍 👎
Industry	2/3 letter	👍 👎
Department	2/3 letter	👍 👎
Company Size	2/3 letter	👍 👎

Showing 5 of 5 Page 1 of 1

Facts and numbers



Automation Rules		43 automation rules
Landing Pages		40 landing pages
Forms		57 forms
Total Emails Sent		510,705 total emails
Email Templates		76 email templates
Dynamic Lists		99 dynamic lists
Lists		280 lists
Campaigns		294 campaigns

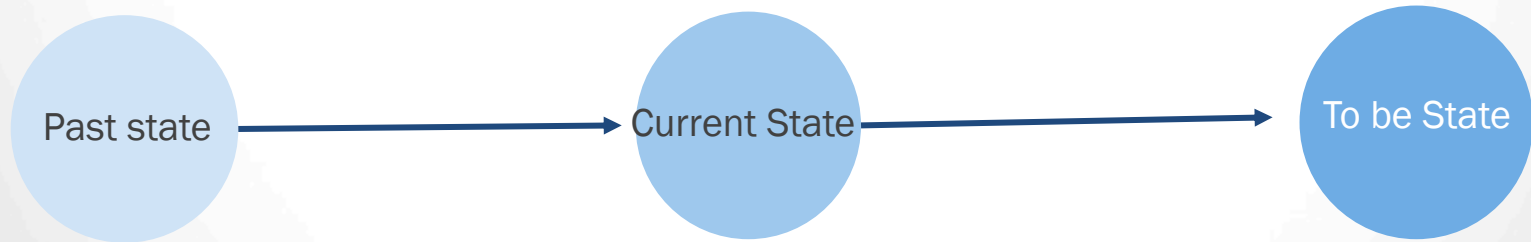


6 Results



Overview: past state > current state

A comparison of the differences between past state & current-state from Marketing Automation process point of view.



- Segregated data sources
- De-centralized content
- Lack of cross-regional platform collaboration
- Lack of consistency in “go-to marketing strategy”
- Lack of sophisticated Marketing analytics
- Lack of cross-regional re-use of content
- Lack of advanced marketing automation programs
- Limited Marketing-Sales coloration due to range of platforms used

- Centralized content source:
 - Landing Pages
 - Email templates
 - Campaigns
 - Forms templates
- Centralized Contacts database
- Centralized database of marketing qualified / not qualified leads
- Advanced Marketing analytics
- Centralized campaign management
- Centralized “lead-source” channel
- Fully Automated nurture programs
- Scoring model
- Automations and automated triggers
- Centralized solution for Marketing & Sales collaboration

- Health Checks current feature usage
- Embedding & Support
- Focus on Process & People as well as Technology
- Prioritisation of current and backlog pieces of work



THANK YOU

