Align Sales & Marketing with Sales Cloud & Pardot

Sales and marketing have worked apart for too long. Great technology is breaking down the walls. Here is how to align sales and marketing with Sales Cloud & Pardot.

Conor Ebbs

Part 1 - Knowledge is power

Sales & marketing alignment begins with data sharing.

Marketers rely on performance metrics to judge the success of campaigns, but this data should not be siloed. Sales and marketing teams need a unified, real-time view of campaign performance to kickstart alignment.

Engagement History Dashboards are the answer!

Engagement History Dashboards

Engagement History Dashboards are out-of-the-box components that allow you to visualise key campaign performance data in Salesforce.

They show detailed metrics on how prospects have engaged with your campaigns and associated marketing assets (emails, custom urls, forms, landing pages). Read more about them here.

You can **embed Engagement History Dashboards on Accounts, Campaigns, Contacts, Leads, Person Accounts and Opportunities.** Each dashboard displays metrics customised to the specific record.

1. Accounts

A crucial tool for ABM, adding the Engagement History Dashboard to Account records reveals:

- Campaign activities by account
- Engagement over time by contact
- List of active contacts with detail on the specific marketing assets they engaged with
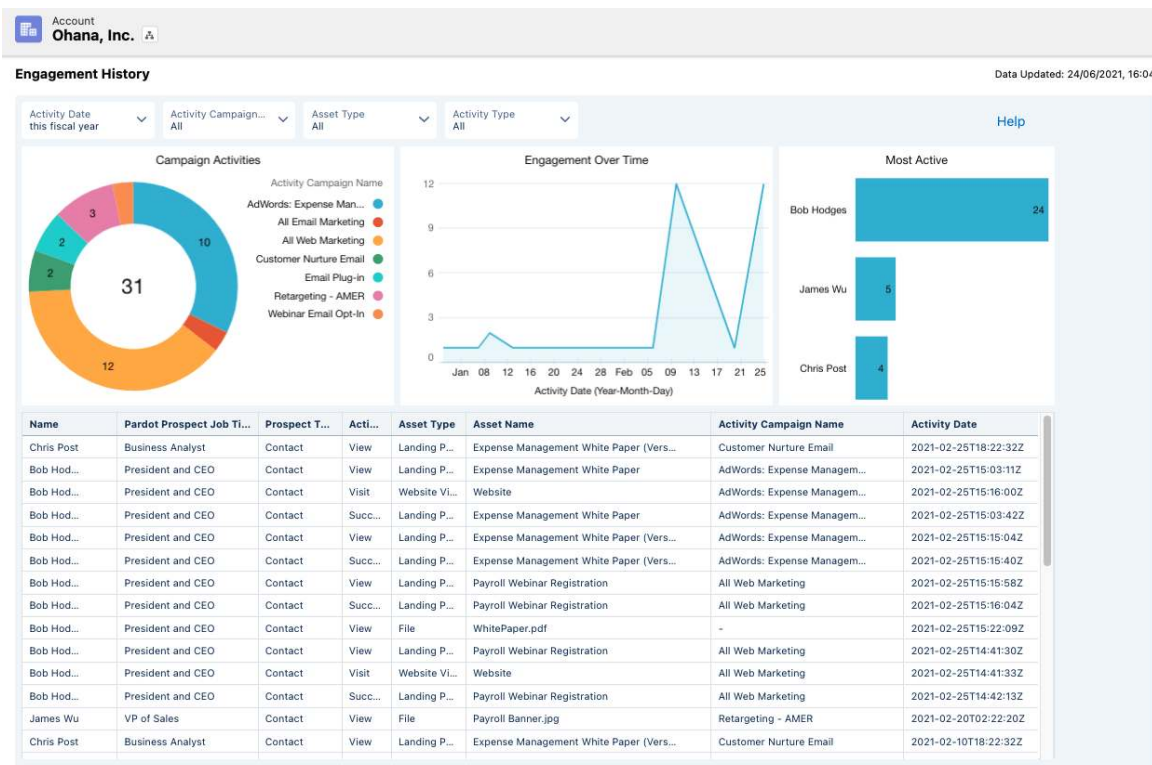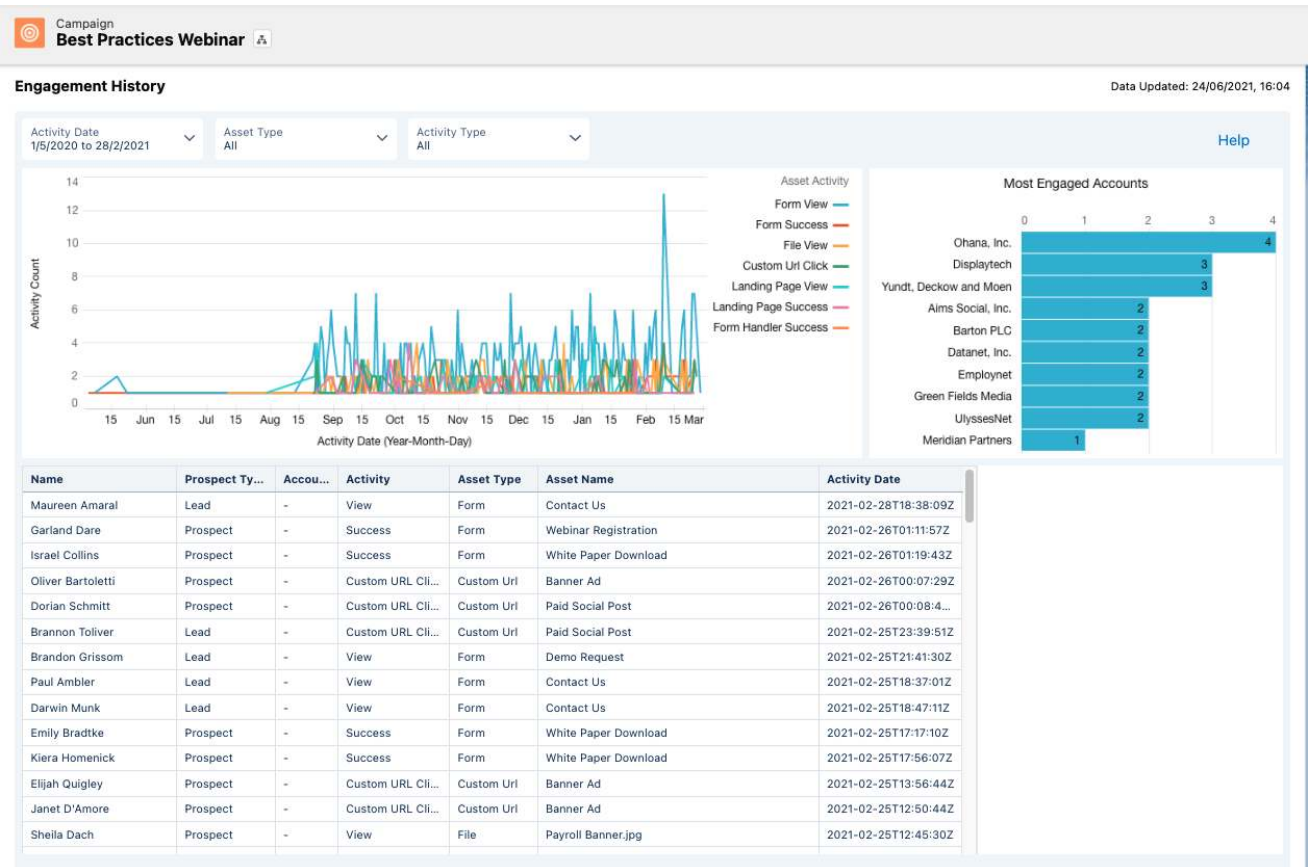
2. Campaigns

Adding the Engagement History Dashboard to Campaign records reveals:

- Most engaged Accounts
- Recent activity by campaign members
- Asset activity list

What campaigns are running and how are my contacts engaging with them?

Adding an Engagement History Dashboard to Campaign records answers this crucial question from your sales team.

Empowering sales with the latest data and the ability filter and customise it accelerates alignment and increases transparency. It also saves time that would have been spent creating reports and communicating back and forth over email.

3. Opportunities

Adding the Engagement History Dashboard to Opportunity records reveals:

- Activity Timeline
- Activity by Campaign
- List of detailed recent activity by related contacts
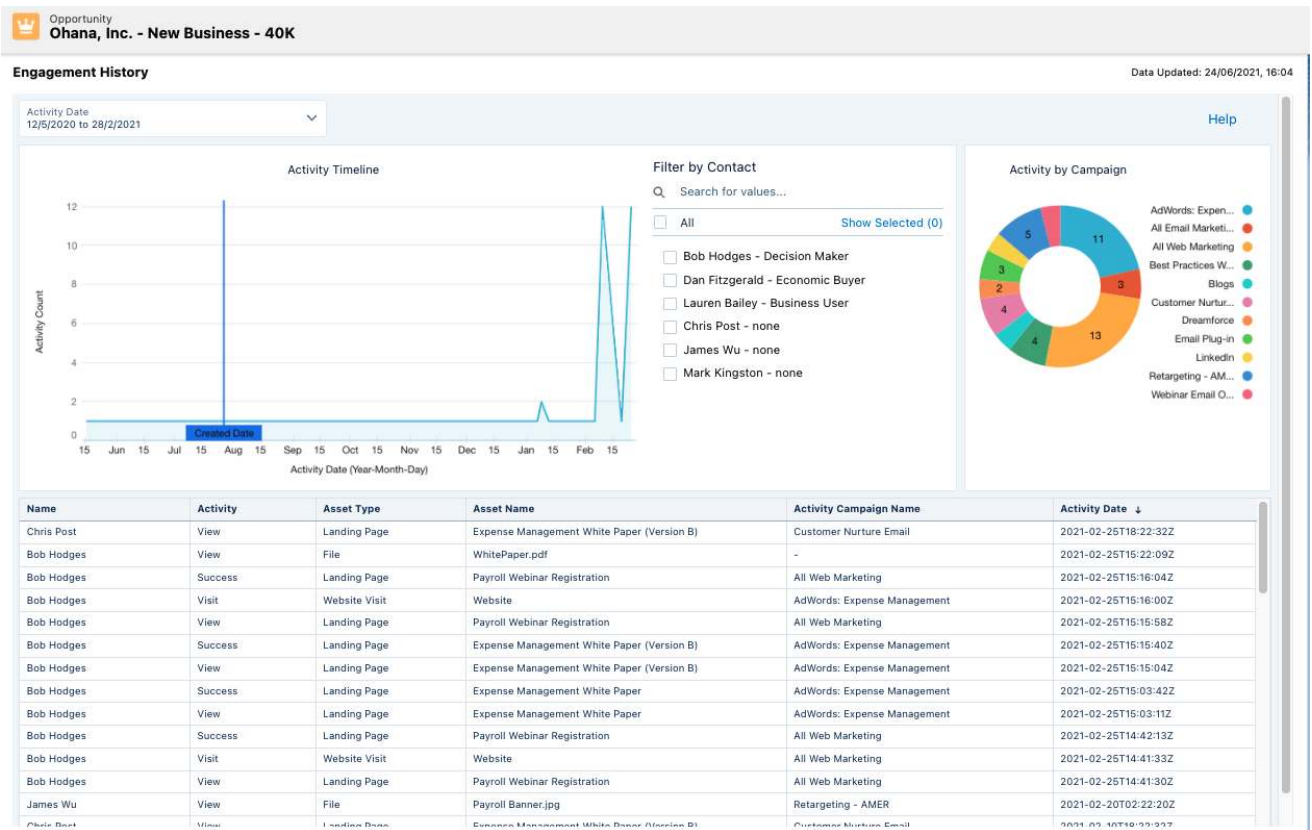
How do I implement Engagement History Dashboards?

Engagement History Dashboards empower your sales team with real-time engagement metrics, so they have the data to focus their efforts, and close more deals!

To implement Engagement History Dashboards, follow this excellent guide from Salesforce: https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/engagement_history_implementation_guide.pdf

You need to be using Connected Campaigns to roll out this feature. To roll this out first, follow this training guide: https://www.pardot.com/training/connected-campaigns-faq/

Knowledge is power.

Marketing automation at its best could be boiled down to one mantra: *simple features, well executed.*

In this section, we will create a custom scoring model around key product differentiators to supercharge sales & marketing alignment.

Scoring categories
Scoring categories (Pardot Plus and above) allow you to score prospects on more than one product, service, or business unit.

You can assign a scoring category to a specific folder (e.g. pdf downloads for product X) and add scores to specific scoring categories for webpage visits, form completions and link clicks.

Learn more about scoring categories here.

Scoring anchors
Scoring categories can be created on the basis of product lines, service offerings, or value drivers.
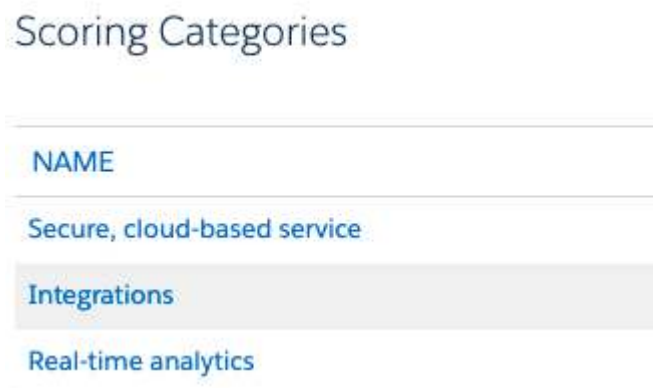
In this example, we imagine a technology company providing a SaaS product. Their scoring categories will be anchored to their three key product differentrators.

1. Real-time analytics
2. Integrations with market-leading systems
3. Cloud-based service

Create a custom scoring model

Step 1 - Create scoring categories
Our first step is to create scoring categories in Pardot for each product differentiator.
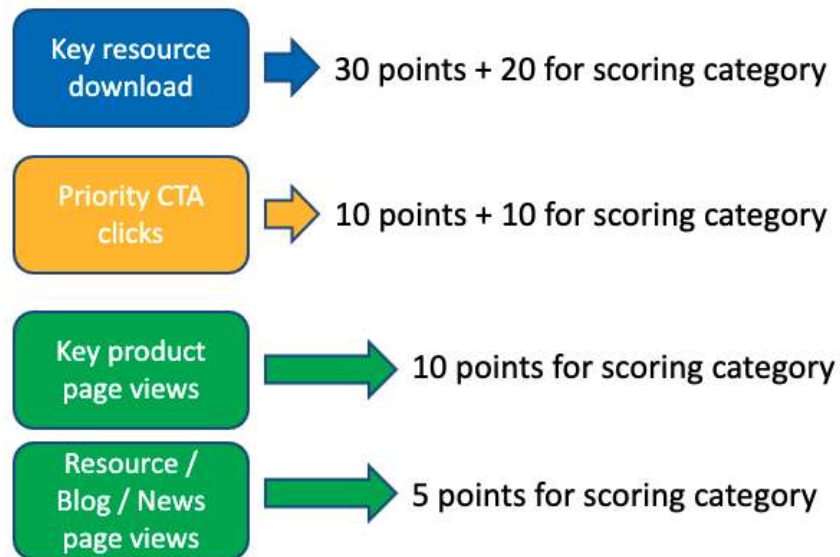
Part 2 - Context is key

Step 2 - create scoring hierarchy

Next we create our custom scoring hierarchy.

Our question to answer is: ***how much score will we add to each scoring category for each engagement type?***

Below is a sample scoring hierarchy.

Step 3 - automate custom scoring

Our next step is to automate our custom scoring. In this example, we have several marketing activities to add scores for: resource downloads (form handlers), CTAs (custom redirects), and webpage visits (page actions).

- For resource downloads, we use completion actions to add 20 points to the relevant scoring category.
- For priority CTAs (calls to action), we use custom redirects to add 10 points to the scoring category.
- For our product differentiator pageviews, we use page actions to add 10 points to the scoring category.
- For our resource and blog pageviews, we use page actions to add 5 points to the scoring category.

Step 4 - Add scoring category data to lead & contact page layouts

Finally, we add scoring categories as related lists to lead and contact page layouts, so the sales team know, immediately, which of our product differentiators is most important to each person.

Knowledge is power. Context is key.

We have empowered sales with key engagement data. We have enriched this data with business-specific context.

To close the loop on sales & marketing alignment, we now set up real-time notifications and daily activity emails for the sales team.

Let's begin with real-time notifications.

Real-time notifications
Busy salespeople can't spend all day loading dashboards and reviewing data.

This is where Pardot notifications come in. You can set up real-time notifications for several key marketing activities:

- Form completions
- Link clicks (onsite or offsite)
- Page views
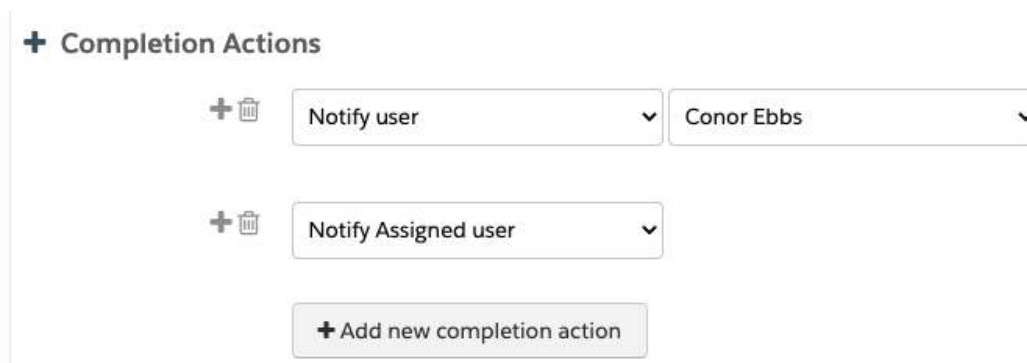
Here is how to set them up.

Form completion notifications
Form completion notifications send an alert to a specific user whenever a form has been submitted. They are easily set up, using Pardot completion actions.

Simply open the Pardot form or form handler you wish to set up alerts for and navigate to the Completion Actions.

You can choose to notify specific users or the assigned user, or both. In Salesforce, the assigned user is **the salesperson who owns the lead or contact record.**

Every time the form is submitted, the assigned user receives an email notification showing:

- Full form fields & values
- Full prospect details
- Recent activity by the prospect

This richly detailed notification is your first

Link click notifications
You can also set up notifications for clicks on specific tracked links, using custom redirects.

The beauty of custom redirects is you can use them for offsite links like banner adverts or social media links as well as key links on your website.

Suppose sales want to be notified each time one of their leads or contacts clicks the 'Book a Consultation' call to action on your website. Simply create a custom redirect and replace the button link with the custom redirect.

When an assigned lead or contact clicks the call to action, a notification will be immediately delivered to the record owner.

Part 3 - Speed is critical
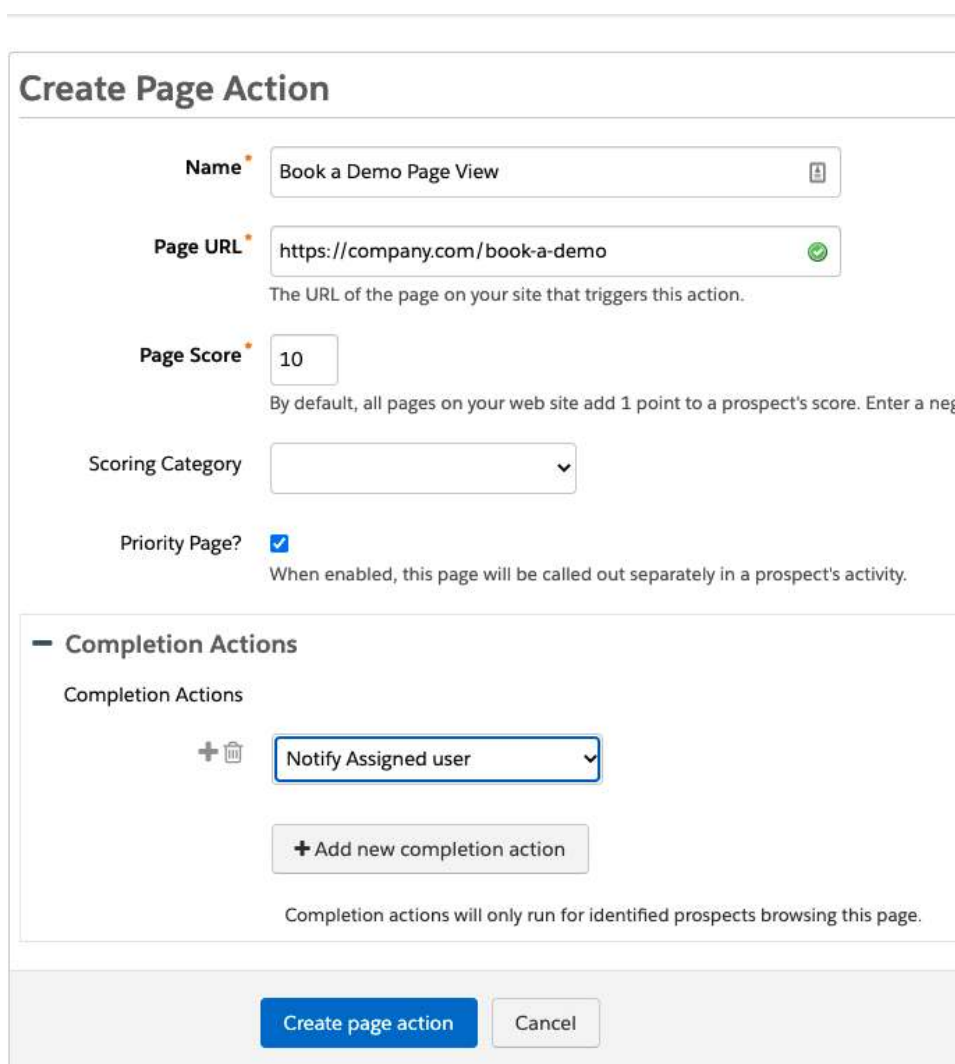
You can repeat this process for ungated resource downloads, banner adverts, social media links, or files that are stored outside of Pardot.

Tip: choose your notifications wisely and don't inundate your salespeople with emails. Focus on the key links that indicate specific intent or provide insight.

Page visit notifications

You may also want to notify sales when an assigned lead or contact visits a priority website page e.g. campaign landing page, pricing, book a demo.

To achieve this, simply create a page action for each priority page as below:

Every time an assigned lead or contact visits this page, an instant notification will be sent to the record owner.

Daily activity emails

Pardot also provides daily activity emails, which can be enabled or disabled at the user level.

Navigate to a user record and click the 'Edit preferences' button on the top right of the screen.

Once there, you can choose to turn on or off several daily activity emails:

- Daily prospect activity emails (for your prospects or all prospects)
- Daily prospect assignment emails
- Daily visitor activity emails (for anonymous visitors) for all visitors or filtered by geography

Alongside real-time alerts, daily activity emails provide your salespeople with a summary snapshot for their assigned leads and contacts, closing the loop on sales & marketing alignment.

Knowledge is power. Context is key. Speed is critical.

I hope you enjoyed this short eBook.

Connect with me on LinkedIn or the Trailblazer Community for more Pardot tips and tricks.