



The client, a profitable US-based venture providing a wide range of eco-friendly items for homes and offices, wanted to overhaul their existing marketing processes before expanding their business.

Scope

- Lead Grading based on factors e.g. industry, location and company size
- Lead Scoring based on actions e.g. viewing pages, searching for information & brochure download.
- Automation Rules & Completion Actions - for automatic prospect routing
- Engagement History Lightning Component on Lead and Contact page layouts
- Pardot's Form Handlers - to pass data entered in Salesforce's Web-To-Lead forms to Pardot.
- Mapping of Lead and Contact custom fields to custom Pardot fields using Salesforce Connector.
- Use of Pardot's Connected Campaigns facility.

Technology

Pardot

Benefits

- The time taken to contact the assigned leads reduced by half.
- Connected Campaigns attributed a Closed Won opportunity's revenue to the visitor's original touchpoint, allowing the marketing team to see the campaign ROI.
- Important information e.g. form submissions and page visits was visible to the sales reps.
- Prospects Created chart & Active Prospects For Review list provided prospect activities insights
- The Marketing Calendar listed scheduled campaigns & allowed easy adjustments
- Salesforce-Pardot syncing allowed Marketing to craft more effective campaigns & Sales to close deals faster.
- The integration aligned Marketing & Sales and helped the company to make timely decisions based on accurate data.

Challenges

The Root Cause Analysis sessions uncovered following:

- The marketing team scrambled to follow up on leads due to lack of scoring and grading data
- Some of the leads were falling through the cracks as it was not clear who should handle them.
- Marketing reps needed a way to identify which campaigns generated more profitable leads.
- The marketing team needed a way to move the leads quickly through the pipeline.
- The marketing team wanted their contribution in influencing the buyers' decision to be more visible.
- The sales team wanted more visibility into the prospect activities.
- The top management wanted a well-defined lead nurturing process and a way to measure their sales funnel.

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