

Kickoff (in obsidian)

Tuesday, January 10, 2023 11:30 AM

Dawn - head of marketing. Been there since june (9 months)
Rachel - went on maternity leave, dawn stepped her into her shoes.
Dennis - Joined Mid October/November
Doesn't have a background in Pardot. Dawn doesn't either. She used Pardot like 10 years ago. Rachel & Them have only been using it for about a year. They had 1st time Pardot Premier.
All over software admin.

Attribution.
Map from Lead > Contact > Opportunities
Evaluate ROI
Grading & Scoring
Attributions
Campaigns.

They have to manually add leads to a spread sheet. That's how they are collecting marketing MQL's

Things will be added that don't meet the parameters for unknown reasons.

Order of Priority
Forms (Would prefer to do new forms - audit of forms)
 Audit forms
 Create new ones
 With Zoom information
How do they set up really tight nurture streams & maximize functionality.
 Mapped fields
 Make sure we are using campaigns effectively
 Pardot forms aren't pushing information on campaigns over effectively.
 The connected campaigns are enabled with member sync already.
 When does a prospect become a lead, and then pushed to salesforce
 They want to iron this out.
 What do they do with leads, and when they become contacts.
 This is a Sales & Marketing decision, not just a marketing decision. They want to know the best practices on this.

Some fields are out of sync
Some fields are missing on the contact record/account record.

Folder
Calendar

List of Forms -

How many people have used the form -

She doesn't want to deactivate forms, maybe archive

Forms

- Demo Requests (priority) One demand Demo requests
- Content requests/downloads

They are whiteboarding, for how they process leads from Pardot to salesforce

Lead sources, lad channels

They are trying to create the most process process so that someone can step in when they leave to be able to

Best practices - for lead process.

Deniz has a lot of experience in salesforce

Attribution

Attribution sources, channels. Etc. all the fields have

Lead source (where did it come from)
Lead channel (inbound, outbound)
Lead Type (contact us, digital advertising request) she uses campaign type. Demo request.

Dawns
Forms
How do they set up really tight nurture streams & maximize functionality.

Rachel:
Campaigns
Forms
Organize a database
Nurture

Dawn's Overview

Forms - Forms that breed like Rabbits.
15 forms of demo request forms.
They want to streamline them.

Their understanding is that they can't use Wordpress forms, they can't use form enrichments.

Forms Overwrite themselves.

They want multi touch attribution, but they will settle for first & last.

They do way too much manual for the amount they spend on technology.

They brought in our team to help us streamline forms and collect the right data points. Setting up their things correctly.

Optimize the investment they are making in Pardot.

Been using Engagement studio

Been using new email builder.

Need to implement a new scoring & grading system.

Currently using Clearbit for forms enrichment. They are switching to ZoomInfo.

They have 13 days left.

Pardot, Wordpress, Salesforce.

They don't know how to switch out the information the notes.
They have been using Clearbit for the form completion & form enrichment. They had to manually put in the code in Pardot to enrich it. They need it cleared out and put in ZoomInfo.

Share folder with
Rachel
Dawn
Deniz Ayadin

January 23 - They have to get the form completed before then.

Forms enrichment tool.

Part of this investment for the team will be:
Rachel & Her learn Pardot the best way
They are both marketing pros. They want to make sure Pardot is being used the best way.
Entire marketing team wants to move to Hubspot.

Deniz is happy to stay with Pardot.

As long as salesforce get's fixed in the next 6-8 months.