

Levi Careers Pardot Implementation



Items Needed for Implementation

Below is a list of items needed from you for implementation. You can upload those items to this document as comments, or add them into the chat section to the

Item		Comments
⋮ Salesforce Login		Needed for Pardot installation access. We can share access with a team member, or if have an extra license we could use that as well.
⋮ Website Login		Needed to install Pardot tracking code on your website as well as integrate forms
⋮ Domain Login		Needed to validate your domain within Pardot to help avoid SPAM filters
⋮ Sample Email Template		Please provide a sample (if any) of an email template you would like recreated in Pardot

Implementation Stages

Below is a list of the high level stages of the implementation process

Stage		Status	Description	
⋮ Stage 1: Pardot Technical Configuration		⊗ Complete	Install Pardot App, configure permissions, adjust page layouts and establish connector	
⋮ Stage 2: Email Deliverability		⊗ Complete	Adjust and verify DNS, set primary tracker and force HTTPS	
⋮ Stage 3: Prospect Segmentation		⊗ Complete	Import leads/contacts from Salesforce, setup dynamic lists for All Mailable, All Leads, All...	
⋮ Stage 4: Web Integration		⊗ Declined	Install campaign tracking code and integrate web forms	1
⋮ Stage 5: Asset Creation		⊗ Upcoming	Create first email template for review	

Website Tracking Code

DNS

SPF Record

Current SPF: insert value
New SPF: v=spf1 include:aspmx.pardot.com ~all

TXT Records

Domain/Host: _domainkey

Entry/Points to: t=y; o=~;

Domain/Host: 200608._domainkey

Entry/Points to: k=rsa;

p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQDGoQCNwAQdJBy23MrShs1EuHqK/dtDC33QrTqgWd9CJmtM3CK2Z
iTUgkhcxnkEtGbzg+IJqcDRNkZHyoRezTf6QbinBB2dbyANEuwKI5DVBRBFowQOj9zvM3lvxAEboMlb0szUjAoML94HOkKuGuC
kdZ1gbVEi3GcVwrlQphal1QIDAQAB;

Domain/Host: @

Entry/Points to: **[insert value]**

CNAME Record

Domain/Host: go.yourdomainhere.com

Entry/Points to: go.pardot.com

Open Items for Discussion:

- Form integration - Are there website forms you're looking to integrate into Pardot?
- Pardot Prospects - Are all contacts from the imported spreadsheets being imported into Pardot as well?
- Marketing Assets - What emails are being built in Pardot?
- Engagement Program outline - [Engagement Program Outline Template](#) - Do you have any ideas for your first engagement program?

Related Files:

•	Project Planning	
	Dedicated Implementation Specialist A project manager is assigned by our team internally. Once assigned, a kickoff email will be sent with your project manager cc'd.	Included
	Project Kickoff Call The 30-minute kickoff call will be the opportunity to review the scope of work, collect logins, and set expectations for both teams in terms of deliverables.	Included
	Customized Implementation Plan All projects will have a dedicated Asana project plan that outlines all project deliverables. From this project plan, you can track the status of the project, take notes, access recorded training calls, etc.	Included

CRM Integration

Install the Pardot Connector Package/Bundle

Installation of Pardot. Requires a CRM Admin login. If there are any spare licenses, account name will be "sfcd-(client name)@growwithimg.com"

Included

Lead and Contact Page Layouts Updated

Two sections are added to the Lead and Contact page layouts in Salesforce. The "Engagement History" Lightning Component displays all of the Pardot activities for the individual Lead/Contact. Additionally, a "Pardot" section containing fields and buttons are added to each lead and contact/person account page layout with the appropriate Pardot fields as well as "Add to Pardot List" and "Send to Pardot" buttons. Includes setup of out-of-the-box Engagement History Dashboards.

Included

Mapping Users and Single Sign-On

Pardot has three levels of access: Admin, Marketing, and Sales:
https://help.salesforce.com/s/articleView?id=sf.pardot_user_roles.htm&type=5 | Map in any of your Salesforce users to Pardot with the appropriate access. Does not include creating Salesforce users.

Included

Mapping CRM Standard and Custom Fields to Pardot Fields

Default fields are automatically mapped to Pardot, and we will map in any custom fields you need for segmentation on the standard objects. Does not include field creation or custom object field mapping. Up to 10.

Included

Things Completed in CRM Integration

- Pardot Lightning App has been installed.
- User Sync & Single Sign-On is done.
- Person/Candidate & Lead Page Layouts & App Pages Updated.
- Prospects have been imported

Things Needing Clarification On

- Do you have any custom fields that you want mapped over to Pardot? (Have confirmation of more than 10, waiting on the 10 that are highest priority)
 - In regards to the lists that were discussed in the Kickoff Call:
 - Would you prefer a Check Box? Or a Picklist/Dropdown for the options?
 - Options: Email in 3 Months, Email in 6 Months (Any additional options?)

Technical Setup

Website Tracking Code to Log Visitor Activity

The team creates a "Website Tracking" code from a Pardot campaign. The tracking code is then added to each website page before the </head> tag. This will give us website visitor and known prospect activity data/scoring. Includes one tracking code placement.

Included

Vanity Tracker Domain (CNAME)

Create/configure custom tracker domain for Pardot assets (landing pages, forms, cookie links, etc.). Example "go.(domain).com". Includes one tracker domain setup.

Included

Email Authentication for Email Deliverability Optimization

Generate and update DNS records for email deliverability optimization.

Included

Lightning Email Builder Setup

Configuration of the Lightning Email Builder. Includes setup of custom domain for file hosting through Salesforce CMS (example: "pardot.(domain).com"). Also includes pre-recorded training video.

Included

Lead Scoring

Includes review of out of the box scoring options as well as customization of the available items for scoring

Included

Marketing Asset & Integration Setup

Database Import/Salesforce Data Sync

Import existing Leads/Contacts to Pardot after the connector is established. Includes import of two lists.

Included

Add-Ons & Connectors Setup

Setup out-of-the-box connectors, including: Webinar Connectors (WebEx, ReadyTalk, GoToWebinar), Event Connectors (Eventbrite), Other Connectors (Google Analytics, bit.ly, AddThis, Olark), Social Media Connectors (Facebook, Twitter, LinkedIn)

Included

Custom Designed Email Templates

IMG to build custom email template based on an existing template from client or provided samples. Includes one email template in the standard builder or the Lightning builder.

Included

List Segmentation Setup

Create a dynamic or static list in Pardot. Includes up to 5 lists.

Included

Engagement Programs Setup

The client is expected to provide copy for Up to 5 emails for a drip/nurture series (usually plain-text). IMG to provide best practices, setup, and help with launching. Client provides copy. If client does not have an engagement program plan ready by 30-day support period, client will receive an engagement program template and a how-to video.

Included

Training and Support

Customized training based on Project Plan

IMG responsible for two one-hour recorded training sessions. Session 1 email sending training, session 2: automations, asset building, custom field mapping, scoring

Included

Post training support and customization

After the second training, enter a 30-day post-training support period for quick questions/quick calls. Any new project requests over 1 hour will be billed separately.

Included

Recorded Sessions & notes

- TBD

HELPFUL LINKS

Feel free to use the links below for additional resources and guidance throughout the process. We've provided links to the most relevant Pardot Trailhead resources.

- Pardot Basics - <https://trailhead.salesforce.com/content/learn/modules/pardot-basics-lightning>
- Pardot Email Marketing - <https://trailhead.salesforce.com/content/learn/modules/pardot-email-marketing-lightning>
- Pardot Lead Scoring - <https://trailhead.salesforce.com/content/learn/modules/pardot-lead-scoring-and-grading-lightning>
- Pardot Engagement Studio - <https://trailhead.salesforce.com/content/learn/modules/pardot-engagement-studio-lightning>
- Pardot Salesforce Integration - <https://trailhead.salesforce.com/content/learn/modules/pardot-salesforce-integration-for-lightning-app>