SOP - Pardot Quickstarts

General expectations:

- All communication/scheduling should come from your IMG email/calendar
- Your team lead (Mallory or Katie) should be cc'd on all communications, quotes, and requests
- You should get back to a client email within 48 hours, even if it's just to tell them that you need time/are working on something
- You should aim to complete projects in 2-3 weeks (8-10 hours total)
- If you have questions, please ask them!

Expectations for Pardot QuickStart line items:

PROJECT PLANNING

- **Dedicated Implementation Specialist -** A project manager is assigned by our team internally. Once assigned, a kickoff email will be sent automatically with you cc'd if you are the PM. The team member assigning the project should also send you the scope of work for your new client via Slack.
- **Project Kickoff Call -** Within 24 hours of the kickoff email being sent to the client, we would like to schedule a 30- or 60-minute kickoff call depending on the complexity of the project. For quickstarts, 30 minutes should be plenty. During the kickoff email we will review the scope of work line by line with the client to make sure we have everything we need and action items are in place. Please use your IMG account/google hangouts to schedule the meeting to keep things consistent.
- **Customized Implementation Plan -** We use Asana for our project tracking tool. Once the new Asana project is created automatically, your Team Lead will share the Asana project with you. Please also add the main POCs from the client's side to this document. You will make updates here as you go through the implementation process.

CRM INTEGRATION

- **Install the Pardot Connector Package/Bundle -** Install Pardot (usually for all users unless they want for admins only): https://pardot-appexchange.herokuapp.com/
  - They can either send us a login for an existing System Admin account or they can create a user account for us using "sfdc+(client name)@growwithimg.com"
  - Whichever user you're logged into you can make the Pardot Admin, even if it's an IMG user
  - How to do the technical install of Pardot/Pardot Lightning: https://www.loom.com/share/a5e9aad252bc4fa7bfc07d1843b248a9
  - Here is the guide in case you need to reference it: https://www.pardot.com/training/pardot-implementation-guide/
- **Lead and Contact Page Layouts Updated -** We add a section to each lead and contact/person account page layout called "Pardot" and add the Pardot fields underneath, add the "Add to Pardot List" and "Send to Pardot" buttons to the lightning actions, and then on the front-end, add the "Engagement History" lightning component on the lead and contact/person account layouts. We also set up the Engagement History Dashboards on the Lead, Contact, Account, and Campaign level. If they have B2B Analytics Dashboards, we also configure the out-of-the-box reports.
  - Here is a guide on setting up the Engagement History Components: https://www.loom.com/share/b608f01be2454134894cbfac252e4bfe
- **Mapping CRM Standard and Custom Fields to Pardot Fields -** Only map in the custom fields they ask for during the kickoff, if they don't have any in mind to start we will map them in as needed.
- **Mapping Users and Single Sign-On -** Make sure that the connector has three things completed:

    - The yellow bar above the connectors is cleared (give the B2Bma user permission to view the fields requested)
    - The campaign sync with Salesforce is on fully (all checkboxes are checked)
    - You create two new active Salesforce Campaigns :
        - Website Tracking (this will get you the web tracking code)
        - Salesforce/Pardot Sync (this will be the campaign you add to the connector for when new leads/contacts are created as prospects automatically)
    - You ask during the kickoff which users they'd like in Pardot and map in what they'd like based on their Salesforce profiles mapping to Pardot roles

TECHNICAL SETUP

- **Website Tracking Code to Log Visitor Activity** - Generated from the "Website Tracking" campaign you created during the technical setup. After you have the code, you can add it to their quip doc project plan. Either send it to their team to implement if they have a web team, or our web team (Luciano luciano@growwithimg.com) can place the tracking code for them, as long as we have a website login.
- **Vanity Tracker Domain (CNAME)/Email Authentication for Email Deliverability Optimization** - Ask during the kickoff which email sending domains they will like to use. Add these domains to the Domain Management section and retrieve the entries. We also usually set up a "go.(client website name).com" tracker domain for them. You can then put all of the entries into the "DNS" section of their quip doc project plan. We will need to ask during the kickoff call where their domain is hosted, and if they have an internal team to handle adding the Pardot entries. If they do not, we will need a login. Our team can usually handle this ourselves but we can loop in Luciano if we need help.
- **Lightning Email/Landing Page Builder Setup** - Configure drag-and-drop builders under Setup > Pardot Settings > Content Setup. Includes setup of custom domain for file hosting through Salesforce CMS and a pre-recorded training video.
- **Lead Scoring** - Review out-of-the-box lead scoring during training. If they would like to discuss scoring outside of training, only schedule a 30 minute call. You can also show them how to set up custom scoring using automation rules if applicable. If they ask you to set up custom scoring rules, you can do one as part of the "Automation Rule" line item in the Marketing Asset section. Additional rules are charged by the hour.

MARKETING ASSET & INTEGRATION SETUP

- **Database Import/Salesforce Data Sync -** During the kickoff, we ask the client if they'd like all their leads and contacts/person accounts from Salesforce in Pardot. If yes, we create salesforce reports for all leads and all contacts, export from SF, and import to Pardot under Pardot Settings > Import. We can also upload other lists if they'd like, we might just need to ask them if they'd like these people in Salesforce as leads as well, instead of just in Pardot.
- **Add-Ons & Connectors Setup -** Under the "connectors" section, we talk through if they would like to use any out-of-the-box connectors and show them how to create them. We usually do not log into the different connected platforms for them, unless specifically requested.
- **Custom Designed Email Templates -** We can either replicate an existing template they have, or, we have a designer in-house (Kristin kristin@growwithimg.com) that can design a new email template for them. After Kristin designs the template, we send it to our contractor Ricky through this request form. In the request to Ricky, we will send him any details around the email template, the client login credentials, and ask him for an hours quote. You will then run the quote by Mallory for approval. Once approved, let Ricky know and and his team will build.
- **Form/Form Handler Setup -** We need to know what kind of website/form builder they use in order to make a recommendation on using Pardot-hosted forms vs. form handlers. If they have Wordpress with Gravity Forms, we recommend form handlers. Almost every other scenario, we recommend a Pardot-hosted form. Ricky's team will build the forms using the same process as the email templates (send request, get an hours quote, get approved, etc).
- **Automation Rule Setup (including Pardot and Salesforce assignment rules)** - Once they have a web form connected, we'll want to talk through how they'd like to set up their completion actions/route leads into Salesforce. Other

than that, automation rules pop up as you go along through the project. Our default recommendation for an automation rule is “if you have a prospect with a score > 100, create a Salesforce task for their assigned user to follow up with the highly-engaged prospect.”

- **List Segmentation Setup -** Help them set up a dynamic or static list in Pardot (preferably dynamic so we can show them how it works).
- **Engagement Programs Setup -** The client is expected to provide copy for 3-5 emails for a drip/nurture series (usually plain-text). From there we can apply best practices for copy. Additionally, we will want to talk through what the flow of the EP will look like. We then build out the emails (or show them how to if they are more hands-on), set up the engagement program, and help them launch. Many times they will ask for recommendations, so come prepared to the kickoff!
    - ***Use the engagement program outline in their project plan quip doc to help guide this process***
    - If they need ideas, you can send them this doc from Salesforce: 6_Common_Use_Cases_for_Engagement_Studio.pdf

TRAINING

- **Customized training based on Project Plan -** We usually do two one-hour training sessions with the client. Our normal rubric for these trainings is here: 2022 Pardot Training Outlines but we can customize them to whatever the client wants to focus on (building/sending an email, launching an engagement program, etc). We also have our pardotquickclips.com video library if they need additional quick help in Pardot. We use Loom to record the training sessions and send the video to the client afterwards. You can also add the recording to their quip doc project plan.
- **Post training support and customization** - After the second training, we send them an email letting them know they’ve entered the 30-day support phase. During this time, they will be using Pardot on their own and we will be there as a resource for any questions. Here’s a generic template you can use (PLEASE DO NOT SEND THIS AS IS, PERSONALIZE FOR CLIENT):

Hi (name),

Here's the video from our second training: (vid link)

I also wanted to let you know that we are now in our 30 days post-training support period. You still have (x) on the scope of work, so if any (automated email programs/email template designs/etc) come to mind, please let me know and we will get those wrapped up. Otherwise, I will be here as a resource for any questions as you/your team begin(s) to use Pardot.

As an additional resource, here is a link to our Pardot Quick Clips: https://www.pardotquickclips.com/video-library/

After the 30-day support period is finished, you can continue to submit requests through our client portal: https://support.growwithimg.com/pardot-salesforce-support-requests/
The portal is monitored frequently, and you should see a response within 2-5 business days. You can also place a support ticket at (link) in the meantime.

Thanks,
(Name)