KickOff

Friday, January 13, 2023   10:58 AM

CedarGate
Pardot Implementation
5 forms, 5 email templates, from Hubspot
Wants to Kick off Early Next Week
Send email today
Trish usually sends really good emails
Hubspot previous

Smriti Shrestha (Salesforce Rockstar)
David Sitmar (Product Owner for Salesforce)
Gina (head of coms and Patricks managers)
Shereen Siddiqui (Product manager)
David-Missed
Patrick, talking at everyone.

Pardot Scope of Work

Lead & Contact Portion
- [ ] I will send over an overview for them to review.
- [ ] Send over redacted screen shots of what the layout would look like from another org as well.

Mapping Users
All Admin Access
Patrick
Sarah
Gina
- [ ] They would like us to send them a paperwork info of different types of access to Pardot.

Custom Field

- [ ] Send over whatever code is needed for the website and he will add it to google tag manager.
- [ ] DNS - send over the information to them. Start there. Mike on IT team, we may need to do a screen share with them.

Enable both Lightning & Classic email builder.

- [ ] Import Contacts - Screen share first, and then either have a screen share or have us do it.

- [ ] Sandbox - do they have the correct account type?

Existing Customer Base - they want them in Pardot
New Customers - Not a ton or anything really in hubspot that they want to pull over to salesforce.

Description: [For Kickoff Calls] Please provide the Salesforce Username & Password that IMG will be using to login with.:

Will need to discuss this during kick-off. I will have our Salesforce admin and product owner on the call.

If you would like to provide any additional details, please do so here::

We would like to discuss the process for making changes within Salesforce. Our Salesforce admin team would also like to understand the level of effort required from them for work within Salesforce (outside of Pardot) and come up with an implementation timeline for all involved :)

They have to run any changes through their process in regard to updating any objects/pages.

Hubspots
They have a series of emails that they use.

5 emails

Ghost Fields for pulling UTM Parameters on the Forms.

They are going to wrap around with Sarah and see which ones she would prefer. She's the one that will choose the five.

Deadline or times they wont be available:

Offsite marketing meeting in 4-5 weeks.

Salesforce side could be slower.

Team Meeting is Feb 6th.

Emails - Send to:
Patrick
Shereen [Project Sponser
Gina [Project Lead]

Shereen cc'd on invoices that are emailed.

Preference - Lighting Build

{Brand Guidelines}

Salesforce Development Team works in a 2 week Sprint.

Send over Smriti Shrestha details -

She really likes Sandbox.

Schedule Meeting next week.

2 - 1 hour training sessions.
Right after the 2nd training session they enter the 30 day support. Use us as a resource.

Tip: share screen with scope of work on it.