salesforce pardot

Eight Ways Pardot Can Unlock Salesforce CRM

Supercharge your CRM with Pardot — B2B marketing automation by Salesforce.

INTRODUCTION

One unstoppable tool, one incredible customer experience.

58% of top-performing companies - companies in which marketing contributes more than half of the sales pipeline - have adopted marketing automation. (Forrester Research)

Not impressed?

Consider this: a quarter of all B2B Fortune 500 companies are already using marketing automation, along with 76% of the world's largest SaaS companies. (Pardot)

So why are so many of these top-performing businesses choosing to add marketing automation to their mix of sales and marketing tools? And how can adding Pardot, Salesforce's B2B marketing automation solution, increase the value of your CRM?

Marketing automation and CRM are complementary tools that really reach their full potential by being thoughtfully paired. When used in combination with Salesforce, Pardot can unlock much of the key functionality that top-performing

sales and marketing teams now rely on — helping to bridge the gap between marketing and sales, provide greater insight into campaign performance, jumpstart lead generation efforts, and positively impact ROI.

So what is this key functionality, and how can it improve the processes of your marketing and sales teams? We'll dive into these questions (and many more) in the following eBook.

58% of top-performing companies - companies in which marketing contributes more than half of the sales pipeline - have adopted marketing automation.

-Forrester Research

How do Pardot and Salesforce work together?

Before diving into features and benefits, it's important to have a solid understanding of the tools in question.

You may already be familiar with Salesforce's Customer Relationship Management (CRM) platform, which helps track sales activities from lead to opportunity to customer. The focus of a CRM is to collect and store data about existing customers while managing new customers and sales opportunities, covering every touch point and every stage of the buyer lifecycle.

Pardot is a Salesforce product that allows marketing teams to create, deploy, and manage online marketing campaigns that take your customer through the full lifecycle — all in one central platform. The platform can also significantly improve efficiency by automating many menial tasks that are traditionally performed manually.

So, if CRM is primarily a sales tool, Pardot is the marketing counterpart. When deployed together, they turn your company into a tightly aligned sales and marketing machine that produces lifelong customers (and happy ones, to boot!).
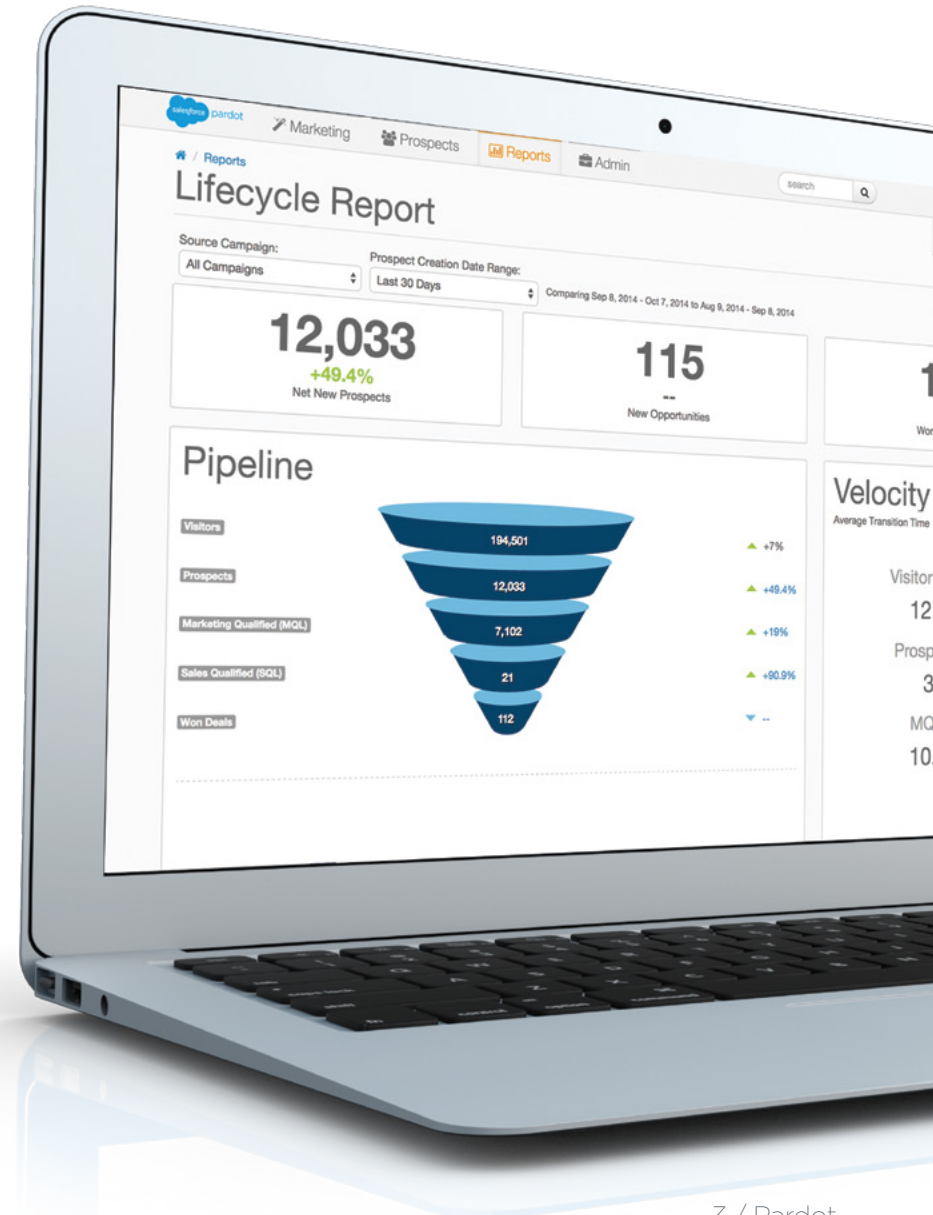
A Continuous Sales and Marketing Cycle

Together, Salesforce and Pardot create a unified sales and marketing funnel that will support your customer throughout their entire lifecycle. Pardot sits at the beginning of each buying cycle, bringing in leads and helping to move them through the sales process. Salesforce delivers key information about those leads and customers to your sales reps. When your customers are ready to purchase new products or renew existing contracts, you have data-rich systems in place to deliver relevant cross-sell, upsell, and maintenance campaigns.

Integrating the two systems allows you to sync information bi-directionally, meaning that an update to a record in your CRM will automatically be made in your marketing automation tool (and vice versa). Having this steady communication between the platforms is what makes this connection so powerful, helping to keep marketing and sales on the same page. With Pardot and Salesforce working in tandem, both teams can gain insight into prospect activity, increase the efficiency of the marketing-to-sales handoff, cater to prospects' specific needs — and, ultimately, transform their bottom line.

Next we'll look at eight specific ways that adding Pardot to your Salesforce CRM can improve efficiency, communication, and insight from click to close. Let's begin!

78% of successful marketers cite marketing automation systems as most responsible for improving revenue contribution.

-The Lenskold and Pedowitz Groups

Lead Management That Skyrockets Productivity

Poor lead management can be a threat to your entire pipeline. Fortunately, pairing Pardot with Salesforce can unlock some key functionality that will give you greater control over the lead management process, from the point of lead generation to conversion and beyond.

1. Fill your pipeline with sales-ready leads.

Recent research by SiriusDecisions indicates that buyers are more than two-thirds of the way through their research process before they even reach out to sales. This growing trend in buyer behavior has brought lead nurturing to the forefront of marketing and sales strategies because of its ability to ensure that buyers are getting the information they need, when they need it.

Using Pardot's lead nurturing capabilities, marketers can automatically "drip" valuable content to leads over time,

nurturing them to a sales-ready state. This reduces the heavy lifting for sales and prevents reps from wasting time pursuing leads who aren't yet ready to buy. Marketers can in turn increase the value of their database by preventing cold leads from slipping through the cracks.

Data from lead nurturing campaigns, like emails sent and opened, will be displayed in Salesforce under the lead or contact record, so that reps can stay up to date on how their prospects are engaging with these campaigns. Reps can also choose to add leads to specific lists and nurturing campaigns from within the Salesforce interface.

Only 25% of leads are legitimate and should advance to sales.

-Gleanster Research

2. Pursue only qualified leads.

A common source of tension between marketing and sales teams is poor lead quality. When marketing is measuring success based on the quantity of leads generated, sales is going to have some complaints about the quality, and your two teams could be headed for trouble.

Fortunately, Pardot offers a simple solution. With the data gathered via a marketing automation system like Pardot, marketers can score and grade incoming leads so that only the most qualified get passed on to sales. It's important that the two teams come together to define what makes a quality lead. This aligns everyone by giving the marketing team a benchmark they can use to qualify leads, and preventing sales from throwing out leads just because they aren't sales-sourced. The lead scores and grades are displayed in Salesforce, so sales reps always know who their hottest prospects are.

Focusing on quality and discounting quantity often requires a mindset shift, but when deals start closing faster the naysayers are quickly silenced.

3. Assign leads to sales reps at the right time.

It shouldn't come as any surprise that lead assignment can get messy. At what point do leads get assigned to sales reps? Who should they be assigned to? Marketing automation can provide an elegant solution to this problem through automated lead assignment. The assignment triggers look for specific buying behaviors, so you know you are only passing over the leads that are truly ready to engage with sales.

When leads reach a score and grade threshold or take a specific action, they can be automatically assigned to sales reps based on Salesforce queues or complex business rules that take into account territory, product, and more. This automated lead assignment prevents sales reps from wasting time on leads who aren't ready to talk, while simultaneously helping them prioritize the leads that need more immediate follow-up.

Only 23% of sales professionals say marketers consistently deliver sales-ready leads.

-BtoB Magazine

4. Streamline your data collection process.

Manually updating prospect profiles can be a hassle, databases can get bogged down with duplicate leads, and the department responsible for maintaining detailed records is often a gray area. With Pardot, prospect information entered into forms and obtained via detailed prospect tracking is automatically imported, de-duplicated, and displayed in both Pardot and Salesforce, putting a wealth of information at your sales reps' fingertips. Add onto that the Data. com connector and progressive profiling capabilities, and you'll gain additional insight into social profile information, interests, activities, job titles, and more — so your sales team can increase their response time and tailor their communications to the needs of each individual prospect.

68% of successful marketers cite lead scoring based on content and engagement as most responsible for improving revenue contribution.

-The Lenskold and Pedowitz Groups

Your Free Feature Guide

Ready to take a closer look at Pardot's features? Our free guide, Salesforce for B2B Marketers, walks you through each of the features that matter most to B2B marketers — and outlines how they'll integrate with your Salesforce CRM.

GET THE EBOOK

Sales Intelligence That Lets You Sell Faster

The emphasis on sales intelligence is growing, and it's not hard to see why. Armed with a store of prospect and buyer data, sales reps can target their conversations in ways they couldn't a few years ago. By using Salesforce as a central database and filling it with valuable, tracked data collected by Pardot, your sales team can not only sell more effectively, but also faster and more efficiently.

5. Know what your prospects are doing, as they do it.

Using Pardot and Salesforce together gives you the opportunity to go beyond basic demographic information. With marketing automation, you can delve into detailed behavioral tracking, so that you can view which pages your prospects are visiting, what types of content they're interested in, and where they are in the buying cycle — all within the Salesforce lead or contact record.

With Pardot's prospect tracking capabilities, you can see a log of all touch points with your prospects, from files downloaded to email correspondences and more. This prospect activity history provides unparalleled insight into exactly what your leads are interested in, allowing your sales reps to tailor their phone calls or sales pitches accordingly.

54% of companies with marketing automation capture intelligence for the sales team, compared to 25% without.

-The Lenskold and Pedowitz Groups

6. Give your sales team x-ray vision with real-time activity alerts.

With Pardot your sales reps will receive real-time alerts whenever a prospect is active on your site (or when they take a specific action you've deemed important, like visiting the pricing page or downloading a white paper). By having this detailed information delivered in real time via email or the Salesforce1 platform, sales can stay up to date on their prospects' activities and interests, giving them the ability to "strike while the iron is hot" instead of wasting time chasing down dead ends.

According to the Harvard Business Review, companies that try to contact potential customers within an hour of receiving queries are nearly **7 times as likely** to have meaningful conversations with key decision makers as firms that try to contact prospects even an hour later. Yet only 37% of companies respond to queries within an hour.

Pardot's alerts gives sales reps the ability to customize which prospects they'd like to monitor based on things like activities and geography. One simple click can take you to the prospect records in Salesforce, and you can even set up daily digest emails of assigned prospect activity.
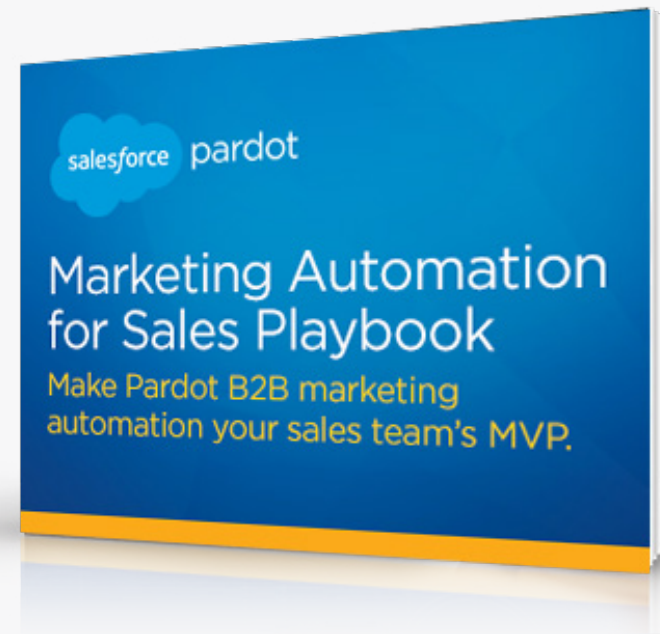
Empower your sales team.

Think marketing automation is just for marketing? Think again. In the Marketing Automation for Sales Playbook, you'll learn quick, simple ways that marketing automation can give your reps the edge in sales conversations.

GET THE EBOOK

Reporting That Helps You Market Smarter

The efforts of your marketing and sales teams are meaningless without a way to track and measure their success. Tying Pardot marketing automation to your CRM allows for more detailed reporting, from individual email tracking to closed-loop ROI reporting, opportunity tracking, and more.

7. Attribute revenue to the right efforts.

When Pardot is tied to Salesforce, campaign ROI reporting becomes that much easier. Bi-directional syncing ensures that campaigns created in your marketing automation platform map back to your CRM, making it possible to tie closed deals back to the campaigns that created them. This allows you to judge campaign influence, attribute revenue to campaigns, track marketing spend, accurately measure ROI, and project future revenue.

Closed-loop reporting helps clear up gray areas when it comes to revenue attribution. With Pardot tracking in place, where a lead originated and what influenced them along the way is never a mystery. This allows marketing teams to make more intelligent decisions about how to spend their budget, and helps translate formerly siloed campaign spending into the language of the C-Suite: closed-won new business.

Gleanster reports that CMOs at top-performing companies indicate that their most compelling reason for implementing marketing automation is to increase revenue **up to 79%**.

8. See how your sales funnel is performing.

Pardot gives you the ability to see more than just campaign success — you can also gauge the health of your sales funnel via the Lifecycle report. Using this report, you can see how many prospects are in each stage of your sales funnel (and for how long), as well as any important opportunity data pulled from Salesforce. You can also use the connection between Pardot and Salesforce to get a deeper look at your MQLs, SQLs, won deals, and total revenue — then drill down into individual prospect records for more information.

Pardot + Salesforce: Better Together.

Ready to see how this combination of tools can help address any of your specific pain points? Check out our interactive microsite to learn more about how Pardot and Salesforce can help you accomplish common marketing and sales goals, such as sending sales the right leads at the right time, and building trusting relationships with your prospects.

LEARN MORE
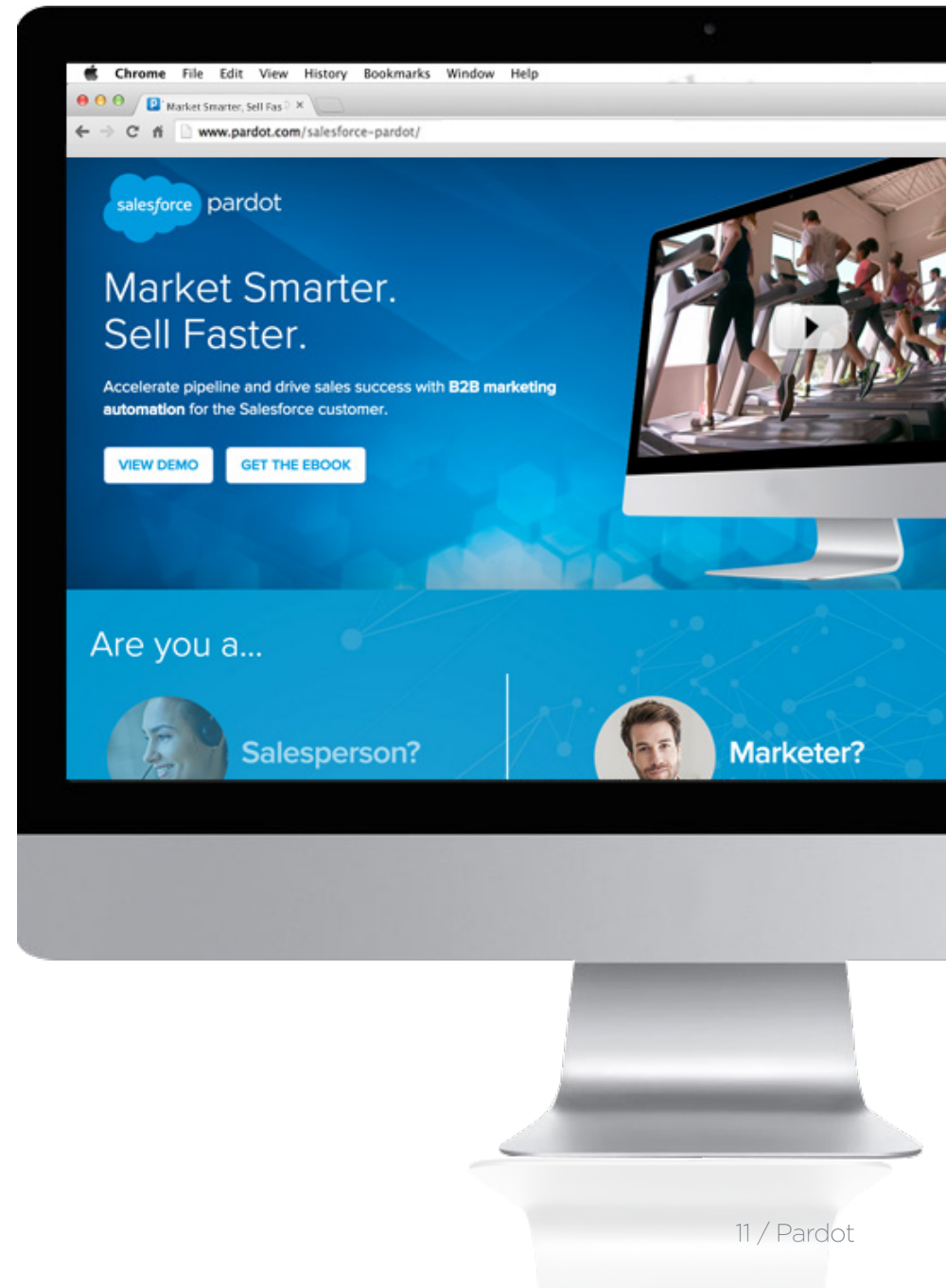
salesforce pardot

WANT MORE INFORMATION?

Pardot is B2B marketing automation by Salesforce.

Your customers are smarter, more capable, and better-informed than ever before. This new breed of consumer demands a better breed of marketing, and the Pardot platform has the capabilities to get you there.

LEARN MORE