

Salesforce for B2B Marketers: The Complete Guide

a Pardot eBook



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Introduction

Learn why Pardot is the marketing automation solution of choice for Salesforce customers — and why it should be at the top of every B2B marketer’s wishlist. This eBook will walk you through some of Pardot’s top functionality, including go-to features, important statistics, and the advantages of pairing Pardot with Salesforce CRM.

Ch 1. Data Collection

Manually updating prospect profiles is a hassle, and databases can too easily get bogged down with duplicate leads. With Pardot, information obtained via forms or prospect tracking is automatically imported, de-duplicated, and displayed in both Pardot and Salesforce, giving your marketing and sales teams a wealth of actionable information.

Tools like marketing automation can execute on huge amounts of data stored in a database, allowing companies to personalise the buyer journey from start to finish.

MARKETING AUTOMATION USE CASES

LEAD GENERATION



GOAL:

Keep your pipeline stocked with high-quality leads.

GO-TO MARKETING AUTOMATION FEATURES:

Prospect Tracking, Forms and Landing Pages

Use forms, landing pages, and real-time prospect activity tracking to collect detailed information from your buyers. Build landing pages that match the look and feel of your site, run A/B tests to maximise your conversion rates, and track all buyer activity as visitors navigate your website.

DEDUPLICATION



GOAL:

Establish a process for de-duping leads in your database.

GO-TO MARKETING AUTOMATION FEATURE:

Automatic Deduplication

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.

TARGETED FOLLOW-UPS



GOAL:

Collect data from buyers for sales to use for targeted follow-ups.

GO-TO MARKETING AUTOMATION FEATURES:

Prospect Tracking, Forms and Landing Pages, Email Marketing

Fuel sales follow-ups with the information collected by Pardot. Use detailed behavioural data like page views and content downloads to understand your prospects interests and motivations — then use that information to send personalised sales communications.

SUPPLEMENTAL DATA



GOAL:

Fill in the gaps in your prospect profiles.

GO-TO MARKETING AUTOMATION FEATURES:

Data.com Connector, Progressive Profiling

Gain additional insight into social profile information, interests, activities, job titles, and more with progressive profiling and the Data.com connector. Increase response times and tailor sales communications to the needs of each individual prospect.

Progressive profiling is an easy way to improve your conversion rates while still maximising the amount of information you can collect about each buyer.

STATISTICS



66% of marketers reported that enhanced targeting and personalisation were top benefits of marketing automation. *(State of Marketing Automation 2014)*

Personalised emails improve click-through rates by 14%, and conversion rates by 10%. *(Aberdeen Group)*

74% of marketers say targeted personalisation increases customer engagement. *(eConsultancy)*

THE SALESFORCE ADVANTAGE

Avoid the hassle of manual prospect profile updates and duplicate leads with marketing automation. Collect a wealth of buyer data using forms and landing pages, view detailed behavioural information for all of your buyers, and automatically display this data within Pardot and Salesforce.

Ch 2. Lead Qualification

You're already collecting leads — now help your sales reps prioritise their time and focus on the hottest prospects first. Work with your sales team to develop a blended lead scoring and grading model that properly qualifies leads. Automatic lead assignment ensures that these leads are fairly and efficiently distributed among your sales team.

When used properly together, lead scoring and grading can streamline your sales cycle and ensure that your leads are better qualified and properly nurtured before they ever reach the sales department.

MARKETING AUTOMATION USE CASES

GAUGING PROSPECT INTEREST



GOAL:

Judge how interested prospects are in your product.

GO-TO MARKETING AUTOMATION FEATURE:

Lead Scoring

Use Pardot to assign each prospect action a point value. This will allow you to score prospects based on criteria like emails read, white papers downloaded, or web pages browsed. The higher the score, the more interested your prospect is in your solution. Automatic scoring based on activity levels provides objective data in an otherwise subjective sales process.

GAUGING PROSPECT FIT



GOAL:

Don't waste time selling to prospects who aren't a good fit.

GO-TO MARKETING AUTOMATION FEATURE:

Lead Grading

Lead grading allows you to spot the leads that are actually a good fit for your product, so that your reps aren't following up with job applicants and industry researchers. Based on your ideal profile, lead grading looks at a prospect's demographic information to determine a letter grade that will indicate how good of a fit a prospect is for your solution.

ADDED AUTOMATION BONUS:

A blended lead scoring and grading model ensures that only prospects with a high score (indicating a high interest level) and a high grade (indicating a good fit) get passed on to sales.

It's important to customise your lead scoring and grading model to your needs to reap the full benefits.

LEAD ASSIGNMENT



GOAL:

Only pass qualified prospects to sales.

GO-TO MARKETING AUTOMATION FEATURES:

Lead Scoring and Grading, Automation Rules

Use Pardot scores and grades to automate your lead assignment process. Automation rules allow you to set threshold scores and grades that will determine when and who leads get assigned to. For users who prefer to use their Salesforce workflow to determine lead ownership, leads can be assigned to a Salesforce queue or pushed to a Salesforce active assignment rule to sort out lead ownership.

Marketing automation solutions allow you to automatically assign leads to sales reps when they meet certain criteria, keeping sales pipelines well stocked and ensuring that sales-ready leads receive a timely touch.

STATISTICS



61% of B2B marketers send all leads directly to sales; however, only 27% of those leads will be qualified. (*MarketingSherpa*)

Only 25% of leads are legitimate and should advance to sales. (*Gleanster Research*)

80% of B2B marketers rate “generating quality leads” as the technique with the highest profit potential. Second was “improving sales conversion” at 71%. (*BtoB Magazine*)

THE SALESFORCE ADVANTAGE

Scores and grades don't only make life easier for the marketing team. Pardot leads information displayed within Salesforce, including scores, grades, and activity data, makes it easy for sales reps to see who their most qualified prospects are, and who deserves more immediate attention.

Ch 3. Lead Nurturing

Make sure your buyers are getting the information they need, when they need it — even if they're not actively engaging with you during the research process. Use nurturing to keep your company top of mind, move leads through the sales funnel, and re-engage inactive leads. Then, view engagement data in Pardot and Salesforce to gauge campaign success.

Lead nurturing, also called drip marketing, is one of the most powerful and sought-after features of a marketing automation system, and has the potential to transform the way you do business.

MARKETING AUTOMATION USE CASES

SALES DRIP



GOAL:

Nurture non sales-ready leads to sales-readiness.

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. By using lead nurturing to maintain a consistent presence, you can increase the value of your database and keep inactive leads from slipping through the cracks.

EDUCATIONAL DRIP



GOAL:

Stay top-of-mind throughout a long sales cycle.

Data from SiriusDecisions suggests that buyers are more than-two-thirds of the way through their research process before they even reach out to sales. You need a tool that can help your buyers get the information they need during this research process, when they need it — and from you, not your competitors. Lead nurturing can help by delivering educational content to leads over time, keeping your company top-of-mind.

Use drip campaigns to build awareness by sending educational materials over time, then rest assured that your sales team won't be left dealing with a blank slate later on in the sales process. For the leads who aren't quite ready to buy, use nurturing to ensure that they're as educated as possible by the time they're ready to talk to a sales rep.

RE-ENGAGEMENT DRIP



GOAL:

Re-engage cold leads.

Not every lead will buy from you at the close of the sales process. Don't let these cold leads go to waste and get picked up by your competitors. Use lead nurturing to excite and re-engage inactive prospects in your database with exclusive, targeted content.

At any given time, your database is full of leads who are actively participating in the sales cycle — and equally full of leads who are inactive. Reengagement campaigns are targeted toward these inactive leads. The ultimate goal of these campaigns is to prompt leads to take a “hand-raising” action, which would indicate that they are ready to reenter the sales process.

STATISTICS



Nurtured leads produce, on average, a 20% increase in sales opportunities versus non-nurtured leads. *(DemandGen Report)*

Companies that excel at lead nurturing generate 50% more sales-ready leads at 33% lower cost. *(Forrester Research)*

Nurtured leads make 47% larger purchases than non-nurtured leads. *(The Annuitas Group)*

Prospects receive an average of 10 marketing touches from the time they enter the top of the funnel until they're a closed-won customer. *(Aberdeen Group)*

THE SALESFORCE ADVANTAGE

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. As leads interact with your messaging, Pardot can automatically trigger sales alerts, add tasks within Salesforce, or change the course of the program. Reps can also choose to add leads to specific lists and Pardot nurturing campaigns from within the Salesforce interface.

Ch 4. Email Marketing

When it comes to email marketing, you're building, testing, sending, and (hopefully) tracking every email — and that's a lot of work! Use Pardot to build eye-catching email templates, test content to maximise conversions, and track responses and link clicks. Gain even more insight with automatic syncing between Pardot and Salesforce.

Email is at the heart of your online marketing efforts, so it's important to take the time to make sure that EVERY aspect of your strategy is optimised.

MARKETING AUTOMATION USE CASES

BUILDING



GOAL:

Create professional-looking emails that instantly catch the eye.

GO-TO MARKETING AUTOMATION FEATURE:

WYSIWYG Email Builder

Use one of Pardot's 36 pre-built templates (no HTML knowledge required!) or use HTML to create a fully-branded email experience. Designate a use for each email — autoresponder, drip program, one-to-one, or list email — so that your team always knows when to use each template. For maximum convenience, approve certain templates for sales use so that they

can be sent from within Salesforce, minimising the hassle of wading through autoresponders and drips.

TESTING



GOAL:

Increase open rates and conversions with optimised email content.

GO-TO MARKETING AUTOMATION FEATURES:

A/B Testing, Multivariate Testing, Segmentation

Successful email campaigns aren't just about your template. Ensure that your content resonates using A/B testing. Change elements in your email, segment your recipient list, deploy different versions of your email to each segment, and view test data in real time.

SENDING



GOAL:

Maximise platform use by allowing employees to send emails from their interface of choice.

GO-TO MARKETING AUTOMATION FEATURES:

Email Plug-Ins, Email Flow, Salesforce Integration

Pardot offers several options — Email Flow, plug-ins, and a powerful integration with Salesforce — that allow users to send emails from their preferred interface. Send one-to-one and HTML emails from within Pardot, send tracked Pardot emails from your own email client with the push of a button, or send emails from within Salesforce and record them as an Activity.

ADDED AUTOMATION BONUS:

Using Salesforce, sales reps can choose to create emails from scratch, preview them, and send them to a prospect. If the prospect does not already exist in Pardot, it will automatically be created behind the scenes, synced with Salesforce, and assigned to the user sending the email.

TRACKING



GOAL:

Use email data to inform marketing and sales strategies.

GO-TO MARKETING AUTOMATION FEATURES:

Link Tracking, Activity Tracking, Salesforce Integration

Use Pardot to track emails on the individual level. See detailed metrics like open rates, read rates, and the breakdown of email clients. With link tracking in place, your sales reps can see who is engaging with their emails. Real-time notifications of this email engagement, combined with the prospect records in Pardot and Salesforce, allow reps to make informed calls, not cold calls.

STATISTICS



Email marketing was reported as the #1 most-effective tactic for lead nurturing by top-performing B2B marketers. (*Forrester Research*)

Email marketing has an ROI of 4,300%. (*Direct Marketing Association*)

THE SALESFORCE ADVANTAGE

Automatic syncing between Pardot and Salesforce makes it easy for marketers and sales reps to send tracked emails using whichever interface is most comfortable for them. Track email responses in real time within either interface, and reach out with even more relevant messages based on the email data collected.

Ch 5. Sales Intelligence

Marketing no longer has just one customer. Enabling the sales team should be a top priority for modern-day marketing departments, and marketing automation can help. 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.

From monitoring prospect activities to nurturing leads to sales-readiness, marketing automation has the power to become your sales team's new secret weapon.

MARKETING AUTOMATION USE CASES

PROSPECT MONITORING



GOAL:

Give sales greater insight into prospect activities.

GO-TO MARKETING AUTOMATION FEATURE:

Prospect Tracking & Activity Alerts

Your sales team can go beyond basic demographic information with Pardot. Detailed behavioural data, like the pages your prospects are visiting and the types of content they're downloading, is recorded in the Pardot prospect record and the Salesforce lead or contact record. Sales reps can see a log of these touchpoints, giving them unparalleled insight into their prospects' motivations, interests, and pain points.

PERSONALISED SALES PITCHES



GOAL:

Help sales tailor phone calls and pitches to each buyer.

GO-TO MARKETING AUTOMATION FEATURES:

Prospect Tracking & Real-Time Activity Alerts

Using real-time activity alerts delivered via email, Salesforce CRM, or Pardot's desktop application, sales reps can see when prospects are visiting your pricing page, downloading a white paper, and more. With this detailed information, sales reps can do more than strike while the iron is hot— they can provide more personalised and relevant sales communications.

ADDED AUTOMATION BONUS:

Pardot's sales application, LeadDeck, delivers real-time alerts of prospect activity so that sales reps are never more than one click away from the most up-to-date information. LeadDeck is free to all Pardot users.

Personalised emails generate up to 6 times higher revenue per email than do non-personalised emails.

- Experian Marketing Services

LEAD PRIORITISATION



GOAL:

Quickly identify which leads are ready for immediate follow-up.

GO-TO MARKETING AUTOMATION FEATURES:

Lead Scoring and Grading, Daily Prospect Activity Digests

With Pardot, sales reps can begin their day by reviewing a Daily Prospect Activity Digest, which delivers a list of active prospects right to their inbox. Prospect scores and grades allow sales reps to prioritise their leads at a glance. Combined, a lead score and grade can objectively qualify a lead — so reps always know which leads need to be followed up with, and which should be nurtured further by marketing (see more about nurturing for sales on [page 11](#)).

Sales and marketing professionals agree that lead quality is far more important to revenue than lead quantity.

- Aberdeen Group

STATISTICS



Research shows that 35-50% of sales go to the vendor that responds first. (*InsideSales.com*)

70% of the buying process is now complete by the time a prospect is ready to engage with sales. (*SiriusDecisions*)

THE SALESFORCE ADVANTAGE

Armed with a store of prospect and buyer data, sales reps can target their conversations in ways they couldn't in the past. Give your sales reps the tools they need to sell faster and more effectively by using Salesforce as a central database and filling it with valuable, tracked data collected by Pardot.

Ch 6. ROI Reporting

Tie Pardot marketing automation to Salesforce for more detailed reporting, from individual email tracking to closed-loop ROI reporting, opportunity tracking, and more. See how your marketing campaigns are impacting revenue, make sure revenue is attributed to the right team, and better understand the health of your sales funnel.

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

-The Lenskold and Pedowitz Groups

MARKETING AUTOMATION USE CASES

CAMPAIGN REPORTING



GOAL:

Report on campaigns to see how they influence revenue.

GO-TO MARKETING AUTOMATION FEATURES:

Closed-Loop ROI Reporting, Salesforce Campaigns

Tie closed deals back to the campaigns that created them using Pardot and Salesforce campaigns.

Closed-loop reporting allows you to judge campaign influence, attribute revenue to campaigns, associate opportunities with campaigns, track marketing spend, accurately measure ROI, and build complex reports.

REVENUE ATTRIBUTION



GOAL:

Make sure revenue is attributed to the right team.

GO-TO MARKETING AUTOMATION FEATURE:

Closed-Loop ROI Reporting

Closed-loop reporting helps clear up the gray area between marketing and sales when it comes to revenue attribution. With Pardot tracking and Salesforce Influence Reporting, where a lead originated and what influenced them along the way is never a mystery — so the right team always gets credit for their work.

ADDED AUTOMATION BONUS:

Automation rules and completion actions in Pardot make it possible to automatically assign prospects to campaigns based on their actions or their first marketing touchpoint.

B2B marketers who implement marketing automation increase their sales-pipeline contribution by 10%.

- Forrester Research

SALES FUNNEL HEALTH



GOAL:

Better understand the health of your sales funnel.

GO-TO MARKETING AUTOMATION FEATURES:

Lifecycle Reporting

See more than just campaign success with Pardot; gauge the health of your sales funnel, too. Use the Lifecycle report to see how many prospects are in each stage of your sales funnel, how long they're in each stage, and important opportunity data pulled from Salesforce. 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.

Closing a deal is no longer the responsibility of a lone sales rep or sales team. As the purchasing process becomes more complex for buyers, marketing and sales activities across the entire funnel play into a company's close rate.

STATISTICS



77% of CMOs at top-performing companies indicate that their most compelling reason for implementing marketing automation is to increase revenue.

(Gleanster)

63% of survey respondents indicate that the ability to set measurable objectives for each of their campaigns is the biggest value driver of marketing automation. *(Gleanster)*

58% of top-performing companies (defined as those where marketing contributes more than half of the sales pipeline), have adopted marketing automation. *(Forrester Research)*

THE SALESFORCE ADVANTAGE

The efforts of your marketing and sales teams are meaningless without a way to track and measure their success. Use Pardot and Salesforce to create Campaign ROI reports that show the number of opportunities tied to campaigns, the number of won opportunities, the cost of campaigns, campaign ROI, and the average cost per customer.

PARDOT IS SALESFORCE FOR B2B MARKETERS.

Pardot offers a software-as-a-service marketing automation application that allows marketing and sales departments to create, deploy, and manage online marketing campaigns that increase revenue and maximise efficiency. Pardot features a certified CRM integration with salesforce.com, empowering marketers with lead nurturing, lead scoring, and ROI reporting to generate and qualify sales leads, shorten sales cycles, and demonstrate marketing accountability.

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 at salesforce.com/au/pardot

REQUEST A DEMO



UP NEXT... THE CMO TOOLKIT

The CMO Toolkit explores the issues that you find most important, like how marketing automation can be used to increase ROI, drive sales, and accelerate the funnel. The Toolkit includes important industry research and statistics provided by top analyst firms [...]

GET FREE E-BOOK

UP NEXT... 10 TIPS FOR ACCELERATING YOUR PIPELINE

Over 25% of sales cycles take 7 months or longer to close (Harvard University). That's why it's important for marketers and salespeople alike to start thinking about the health of their sales cycle — because the longer your sales cycle, the longer it takes to bring in revenue [...]

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