

Salesforce
+ Pardot Marketing Automation
Greater customer insight & sales

Salesforce allows us to store and access valuable customer information

- **Contact names and titles**
- **Addresses**
- **Contact info**
- **Types of business our clients write**
- **Amount of business they write**
- **And other relevant info**

Pardot Marketing Automation

Pardot marketing automation enables us to gather additional insight into our customers and connect with them

- **Learn which products they are interested in**
- **What other products they are buying**
- **New contact info or changes in the organization**

This information can then be placed into Salesforce for you to use

Benefits of Pardot

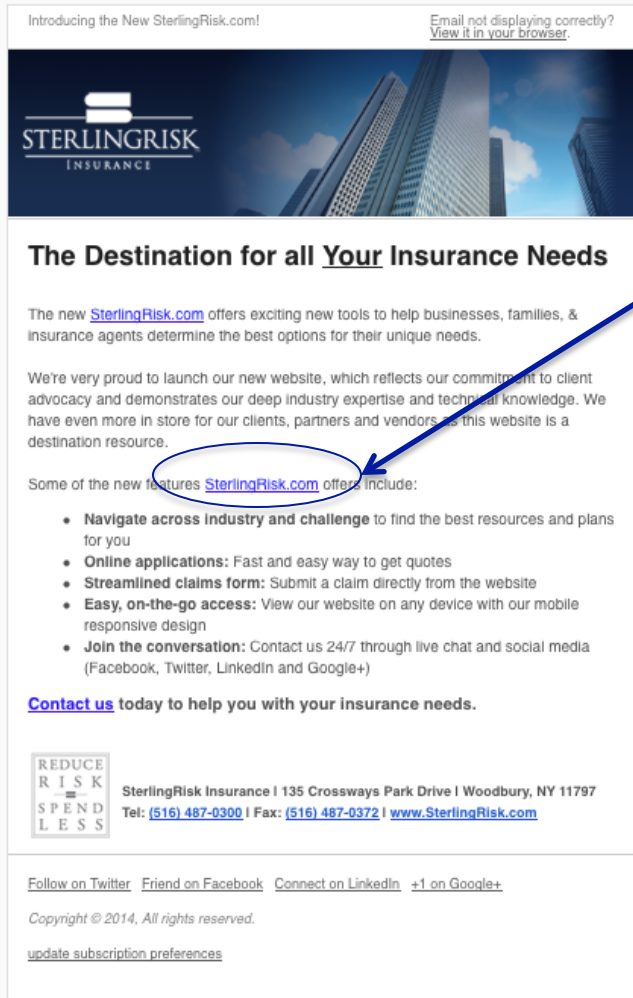
- **Helps to identify promising leads and automatically advance them to sales**
- **Prioritize your time by reaching out to engaged prospects first**
- **Shorten sales cycles by highlighting “buying signals”**
- **Saves sale efforts by automatically nurturing non-responsive or early stage leads**

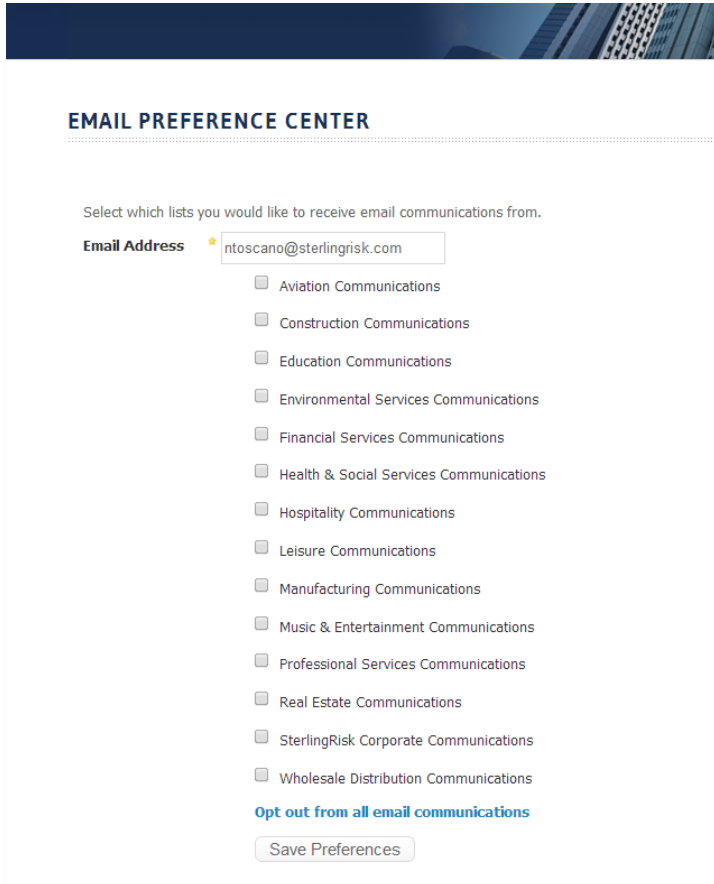
- We currently have thousands of leads and contacts in our system
- By learning who has recently visited our website and shown an interest in any of our products, you can focus on prospects with a higher chance of closing
- This ideally makes our entire sales process more efficient resulting in higher sales.

- The actions of our audience help us determine which product messages we should be sending and provides discussion topics for conversation
- If we send an Umbrella e-blast and the reader clicks on the link to our web site and spends time reviewing the product pages, you will know they have an interest in this product.
- The reader simply clicking on the web site link will also signal marketing to send future communications regarding that topic to them.

The Process

- An email from SterlingRisk is deployed
- Prospect clicks on website link
- Account owner notified via email of prospect activity
- Prospect added to future e-mails





EMAIL PREFERENCE CENTER

Select which lists you would like to receive email communications from.

Email Address ★

- ☐ Aviation Communications
- ☐ Construction Communications
- ☐ Education Communications
- ☐ Environmental Services Communications
- ☐ Financial Services Communications
- ☐ Health & Social Services Communications
- ☐ Hospitality Communications
- ☐ Leisure Communications
- ☐ Manufacturing Communications
- ☐ Music & Entertainment Communications
- ☐ Professional Services Communications
- ☐ Real Estate Communications
- ☐ SterlingRisk Corporate Communications
- ☐ Wholesale Distribution Communications

[Opt out from all email communications](#)

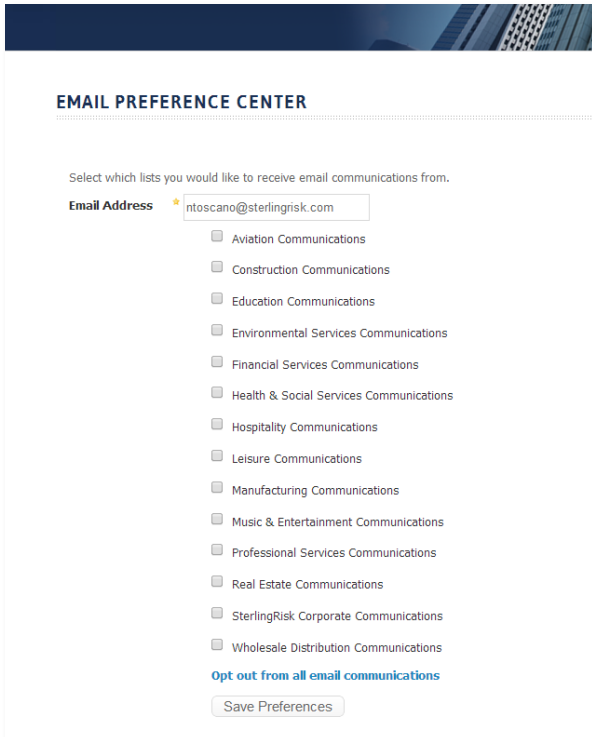
- User clicks on our web page
- Downloads a piece of literature
- We can then automatically add them to all email communications on that topic

The Process

- If the prospect clicks any other link in the email, this will be noted in their activities
- Alerts are being setup to automatically go out to the account owner once someone has clicked on an e-mail so they can follow up with that contact in real time. In addition, if there are contacts/prospects that should NOT be included in future email communications, we need to opt them out.
- The owner of any account will also be the owner of all contacts within that account

The Opt-Out Process

- Prospects can opt-out themselves through the SterlingRisk Preference Center.
- Account owners can opt-out prospects within Salesforce.



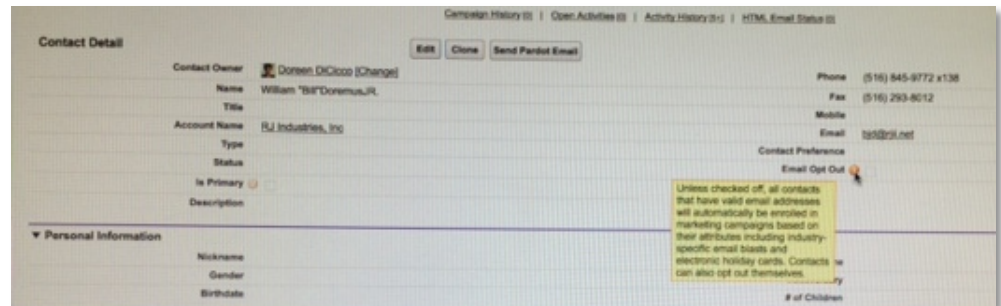
EMAIL PREFERENCE CENTER

Select which lists you would like to receive email communications from.

Email Address *


- ☐ Aviation Communications
- ☐ Construction Communications
- ☐ Education Communications
- ☐ Environmental Services Communications
- ☐ Financial Services Communications
- ☐ Health & Social Services Communications
- ☐ Hospitality Communications
- ☐ Leisure Communications
- ☐ Manufacturing Communications
- ☐ Music & Entertainment Communications
- ☐ Professional Services Communications
- ☐ Real Estate Communications
- ☐ SterlingRisk Corporate Communications
- ☐ Wholesale Distribution Communications

[Opt out from all email communications](#)



Campaign History (0) | Open Activities (0) | Activity History (0) | HTML Email Status (0)

Contact Detail

Contact Owner  [Doreen O'Cloze \[Change\]](#)

Name William "Bill" Doremus, JR.

Title

Account Name BJ Industries, Inc.

Type

Status

Is Primary ☐

Description

Phone (516) 945-9772 x138

Fax (516) 293-8012

Mobile

Email bill@bj.net

Contact Preference

Email Opt Out ☐

Unless checked off, all contacts that have valid email addresses will automatically be enrolled in marketing campaigns based on their attributes including industry-specific email blasts and electronic holiday cards. Contacts can also opt out themselves.

Personal Information

Nickname

Gender

Birthdate

of Children



Daily Prospect Report for Scott Chirls - 05/01/2014 for Account: SterlingRisk

Dear Scott Chirls,

This is the list of your prospects with activities within the last 24 hours.

Prospect	Score	Grade	Activity
David Platschek david@realestateinsurance.us JM & ADA Associates LLC	7		Email Tracker: http://SterlingRisk.com May 1, 2014 8:52 PM
Cathy Sariana csariana@milestonepromise.com Milestone Risk Management &	14		Email Tracker: http://SterlingRisk.com May 1, 2014 6:48 PM
Dana Randall dana@bbtfactory.com Built by the Factory LLC	7		Email Tracker: http://www.sterlingrisk.com May 1, 2014 5:51 PM
Tammy M. Berberich tberberich@markelcorp.com Markel Insurance Company	3		Email Tracker: ...om/company/sterling-&-sterling May 1, 2014 5:34 PM
Fred Jove fjove@thflorida.com Tanenbaum Harbor of Florida	11		Email Tracker: http://SterlingRisk.com May 1, 2014 5:27 PM
Bob Bermack bob@bclus.com Bermack, Champion & Lewine, Inc	16		Email Tracker: http://SterlingRisk.com May 1, 2014 4:59 PM
Dee Price deep@insurasset.com Snyder Insurance Services, Inc	3		Email Tracker: http://SterlingRisk.com May 1, 2014 4:40 PM


E-mail notification
example

Sample Prospect in Salesforce from Pardot email notification

▼ Pardot

Pardot Score	9	Pardot First Activity	5/1/2014 6:43 PM
Pardot Campaign	Website Launch-Brokers CL	Pardot Last Activity	5/12/2014 8:00 PM
Pardot URL	http://pi.pardot.com/prospect/read?id=12382645		
Pardot Comments	Pardot Notes		






Social Data

 Name: Allen Herman
Website: N/A
Description: N/A
<https://www.facebook.com/allenherman64>

Prospect Lists

No Lists selected

Prospect Activities

Activity	Type	Campaign	Score	Date / Time
 Visit: 1 page views	Visit	SterlingRisk Website Tracking	1	May 1, 2014 6:43 PM
 Visit: 1 page views	Visit	SterlingRisk.com Website	1	May 3, 2014 9:30 AM
 Visit: 1 page views	Visit	SterlingRisk.com Website	1	May 12, 2014 8:00 PM
 Email: Introducing The New SterlingRisk.com: Your Resource for Insurance, Risk Management & Benefits	Open	SterlingRisk.com Website	0	May 1, 2014 6:42 PM
 List Email: Introducing The New SterlingRisk.com: Your Resource for Insurance, Risk Management & Benefi	Sent	SterlingRisk.com Website	0	May 1, 2014 2:50 PM

« Previous Page of 2 Next »

- E-mail was sent on May 1 and this prospect opened it at 6:42 pm. We can also see that he visited the website on May 1, May 3 and May 12.
- We can manually add this prospect to additional e-mail lists.

Sample Prospect in Salesforce from Pardot email notification

Allen Herman

Hide Feed

Post File Link New Task

Write something...

Share

Followers

No followers.

Show All Updates

There are no updates.

Back to List: Accounts

Campaign History [0] | Open Activities [0] | Activity History [2] | HTML Email Status [0]

Contact Detail

Edit Clone **Send Pardot Email**

Contact Owner [Lori Konikoff](#) [Change]

Name Allen Herman

Title Owner

Account Name [Emerald Coast Insurance Services](#)

Type

Status

Is Primary ☐

Description

Phone (850) 215-0700

Fax

Mobile (850) 819-4561

Email aherman@emeraldcoastins.com

Contact Preference

Email Opt Out ☐

- **Manually opt-out this prospect from ALL marketing emails.**
NOTE: Please be careful when using this feature.
- **Send this prospect an email directly from Salesforce.**

Benefits of Sending e-mails to prospect within Salesforce

- These emails will be tracked through Pardot, so all activities will be noted in the prospect's history.
- Easy access to "design template" emails without leaving Salesforce contact view
- If you want to track your prospects, all Pardot emails include a unique link that places a cookie on the prospect's machine. If there were any activities the prospect participated in since the inception of Pardot with our website (April 24th, 2014) this will be automatically populated.

Sending e-mails to prospect within Salesforce

Send Pardot Email Send email Preview Cancel

Email Information

To: schirls@sterlingrisk.com From: MaryBeth Coursen (mcoursen@sterlingrisk.com)


Email Template: One Click Thank You Template

Subject: SterlingRisk Insurance

Email Content

Message

Format Font Family Font Size B I U



Dear %%first_name%%,

Thank you for taking the time to meet today. We hope you came away from our meeting with a better understanding of the capabilities of SterlingRisk.

We look forward to the opportunity to review additional policies for you. Please email/fax us copies at your earliest convenience.

Call or email us with any questions.

Sincerely,
%%user_html_signature%%

REDUCE

- Drop down menu of templates to choose from
- Automatically populates with name
- Edit as you like and send without leaving the Salesforce prospect window.

Scores – This is based off the audience’s actions, which helps identify their level of interest

- **Did they click on our e-mail**
- **What product pages did they view on our site**
- **How much time did they spend on our site**
- **What did they download**

- **Scoring Criteria Example:**

- 1 point = Page click
- 3 points = Click on a program link in e-mail
- 3 points = Click on e-mail contact link
- 2 points = Enter site through Google Search

- **XYZ receives an Umbrella e-mail blast gets a score of 10 by doing the following:**

- 3 points = clicks on the Program Umbrella for Real Estate link in the e-mail
- 4 points = Visits four other pages on our site
- 3 points = Goes back to the e-mail and clicks on the e-mail contact link

Client XYZ now has:

Score: 10

This would be placed into the clients record and a notification would be sent to you, letting you know of his/her recent activity and updated score

Based off that, you might want Client XYZ to be one of your next calls

Scoring

▼ Pardot

9

Pardot Score	
Pardot Campaign	Website Launch-Brokers CL
Pardot URL	http://pi.pardot.com/prospect/read?id=12382645
Pardot Comments	

Score
Increases as more
activity is taken

Social Data




Name	Allen Herman
Website	N/A
Description	N/A


 <https://www.facebook.com/allenh>


Pardot Campaign
First touch point
with marketing
efforts


Prospect Activities


Activity

 Visit: 1 page views

 Visit: 1 page views

 Visit: 1 page views

 Email: [Introducing The New SterlingRisk.com: Your Resource for Insurance, Risk Management & Benefits](#)

 List Email: [Introducing The New SterlingRisk.com: Your Resource for Insurance, Risk Management & Benefits](#)

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Scoring

▼ Pardot

Pardot Score 9

2382645

Activity
Email, form, landing page, browsing activity and much more!

Type
Specific activity

Campaign
Pardot campaign associated with activity

Score
Point associated with activity

Date/Time
When the activity occurred

Social Data

Name: Alle
Website: N/A
Description: N/A
https://www.facebook.com/alle

Prospect Activities

Activity	Type	Campaign	Score	Date / Time
Visit: 1 page views	Visit	SterlingRisk Website Tracking	1	May 1, 2014 6:43 PM
Visit: 1 page views	Visit	SterlingRisk.com Website	1	May 3, 2014 9:30 AM
Visit: 1 page views	Visit	SterlingRisk.com Website	1	May 12, 2014 8:00 PM
Email: Introducing The New SterlingRisk.com: Your Resource for Insurance, Risk Management & Benefits	Open	SterlingRisk.com Website	0	May 1, 2014 6:42 PM
List Email: Introducing The New SterlingRisk.com: Your Resource for Insurance, Risk Management & Benefits	Sent	SterlingRisk.com Website	0	May 1, 2014 2:50 PM

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Program Communication Lists

- In Salesforce, we can provide you with the ability to add or remove your leads/contacts from our e-mail lists.
- Is this something you think is useful?



SCREEN SHOT OF OPT-OUT
CHECKBOX

Guidelines For Contacting Leads

We don't want our leads or contacts to think we are spying on them so when contacting someone because you saw they were on our web site, always use discretion!

If they showed interest in a product other than what you have previously spoken to them about, steer the conversation in that direction. For example:

- **Do any of your clients live in the city?**
- **Do you have any interest in environmental protection for one of your properties?**
- **Did you know we have a great program called CREPE that has competitive rates and terrific coverage?**

Next Steps

- **We will set you up as users in Pardot over the next week.**
- **You can view the activity information tracked by Pardot in the contact level in Salesforce.**
- **You will be receiving a daily e-mail report of all of your prospects' activities from the day before.**

User Settings

- **You can adjust your user settings as needed:**
 - **Selecting Email Alerts and Daily Reports**
 - **HTML/Text Signatures**
 - **Adding More User Info**
 - **Verifying your salesforce.com Username**



SCREEN SHOT OF DEFAULT
SETTINGS

Questions

Pardot has a library of webinars on utilizing data for sales.

Any Questions?