



ANATOMY OF A DECISION – SALESFORCE PARDOT

ANALYST

Rebecca Wettemann

THE BOTTOM LINE

How companies market and sell has evolved significantly in the past decade, as have their needs for digital marketing, from basic e-mail marketing to support for ongoing omnichannel engagement with prospects and customers. In examining the experiences of Salesforce Pardot clients, Nucleus found that integration with the overall Salesforce platform, usability, and analytics capabilities were key factors in their decision to choose Pardot. Adopters benefited from reduced integration costs, increased marketer productivity, and greater sales and marketing alignment.

...

OVERVIEW

Salesforce Pardot is a business to business marketing automation platform, helping marketing and sales teams collaborate to drive personalized marketing campaigns, find and nurture more leads, streamline lead management, empower sales teams to close more deals faster, and maximize – and prove – returns from marketing efforts. Key components of the application are:

- E-mail marketing capabilities include an e-mail editor, mail A/B testing and SPAM analysis, and tools to optimize inbox delivery.
- Lead generation and management features include forms and landing page generators for lead capture, and segmentation and personalization tools.

- ROI reporting features include intelligent customizable reports and dashboards to enable marketers to directly link campaigns to revenues and optimize campaigns based on results.
- Sales alignment features include real-time sales alerts, prospect activity tracking, and sales campaign tracking.

Pardot has three editions and is licensed on a monthly subscription basis. To better understand why business-to-business marketers select Salesforce Pardot instead of other marketing automation solutions, Nucleus conducted in-depth interviews with a number of Pardot customers.

WHY PARDOT

Nucleus found that there were four main reasons why customers selected Pardot: the broader capabilities of the Salesforce platform, usability, analytics, and support for sales alignment.

THE SALESFORCE PLATFORM

Nucleus found that a key reason companies selected Pardot was its position as a Salesforce product on the Salesforce platform. This provides not only deep integration with Salesforce, both from a product perspective and from a support perspective, but also provides benefits for data management because all data is stored and managed using the same platform and tools.

This reduced the need for additional investments in integration and additional tools, and reduced the overall staff needed to support their Salesforce footprint. Users said:

- *"Pardot is one of a few that really integrated with Salesforce. We had already made the Salesforce decision so wanted a product that integrated directly instead of with a custom API. If we want to pivot off a custom object, in another platform it wouldn't be possible or it would take a lot of API configuration. That level of sophistication is particularly valuable to us, because we have more than 50 custom objects in Salesforce."*
- *There was a desire to have closer alignment between marketing and sales and bring all sales tools under one ecosystem. We also benefited from having Salesforce admin support for both. It makes ownership not just on one person, which can be risky for the business."*

- *"Other products don't have the strengths of integration that Pardot does. When you lose integration you compromise on your data. We've broken down the silos between sales and marketing and the Salesforce-Pardot integration enables us to do that."*

Customer profile – academic institution (higher education)

An academic institution that had used a number of different marketing platforms chose Pardot primarily because of its integration with Salesforce, and the ability to integrate various tools – such as social media, Google Analytics, and Eventbrite – seamlessly with Pardot. It found it could perform dynamic segmentation, lead scoring, and page scoring much easier and manage campaigns without worrying about API limits. It also found it was able to almost double its clickthrough rates and have integrated page tracking, providing users with a much fuller picture of prospect engagement.

USABILITY

Users cited usability and the ability to get up and running quickly on Pardot as a key factor in selecting Pardot over other applications. The wizard setup, email templates and editors, and ease of data management all drove faster ramp-up time for new users and greater productivity over time. Customers said:

- *"The wizard setup is a very intelligent tool that simplifies the end-to-end process. It's smartly designed, so it's not as laborious to do our work, and it's easy to train others."*
- *"We can work more and more effectively than before. We can easily integrate with different services like lead pages and landing pages, and data management is just easier."*
- *"Pardot is simply more reliable, easy to train on, and easy to use."*
- *"Previously a complex campaign would take six months to build. Now it takes 2.5 weeks."*

Customer profile: enterprise technology vendor

One Pardot customer Nucleus analyzed moved from a different marketing automation platform to Pardot largely because of usability and the relatively short learning curve that would enable it to rapidly on-board new marketing employees without a significant training effort. It found that the customizable email templates and ability to easily gain visibility into what content prospects found most engaging were particularly useful. Using Pardot, the company was able to grow its overall

number of marketing campaigns without increasing marketing staff, avoiding one additional full-time equivalent while providing sales with more accurate data on prospects' activity.

ANALYTICS

Visibility and the ability to use analytics and reporting to fully understand the impact of Pardot campaigns across the marketing-sales divide were other attractive reasons for companies to choose Pardot over other marketing applications.

One of the biggest challenges cited by clients was the ability to rapidly measure campaign effectiveness and use that data to fine-tune campaigns and prioritize resources. Even for non-technical marketers, Pardot's marketing analytics enabled them to quickly gain insights into data on campaigns without the need to learn complex data science or master more complicated analytical tools. Clients said:

- *"Within Pardot we have access to easy lead scoring and other capabilities that the previous platforms just didn't support."*
- *"For us it's the ability to demonstrate our ROI and real impact on sales. We use it for forms, on our Web site, and on our landing pages. Lead capture flows directly into marketing analytics so we have a clean data flow and bidirectional linked data exchanges keeps reporting up to date."*
- *"Marketers have been talking about 'attribution' for the last decade, but the say/do gap here is huge. Pardot and Salesforce's analytics tools completely turn this around. They make true revenue attribution attainable and give marketers the data they need to demonstrate their impact on sourced and influenced opportunities."*
- *"The whole 'half of my ad spend is wasted, I just don't know which half' line doesn't fly in 2018. We have more data than ever before, and marketers are under immense pressure to quantify the value of what their efforts bring to the table. [Pardot marketing analytics] helps marketing teams prove their worth and sets marketers up to have more strategic conversations about budgets, their contribution to revenue/pipeline, and results."*
- *"Prior to having Pardot as our marketing automation platform, it was difficult to get visibility into campaign performance without having to hunt through multiple reports. Now we've got an all-in-one view and can rapidly adjust to increase campaign performance. And, we will have a much better view on account engagement, which is very important to us in our account-based programs."*

MARKETING AND SALES ALIGNMENT

The ability to streamline data management and provide end-to-end visibility from the beginning of a prospect's marketing engagement across email, landing pages, forms, and other touchpoints, are important capabilities of Pardot that differentiated it from point email marketing tools in the eyes of decision makers.

Users said:

- *"Our previous platform was inefficient and account executives didn't have clear insight into what marketing e-mails and content their prospects were receiving and viewing."*
- *"We've been able to take a lot of work off the hands of sales reps. Before they would have to manually e-mail their contacts whenever a new product came out. With Pardot it's easy to 'spoof' a rep's e-mail address and get a prospect's response directly back to the rep."*

Customer profile – healthcare technology company

A healthcare technology provider moving from another cloud marketing platform to Pardot did so primarily because of the ability to manage its complex cross-functional marketing and sales cycles with one database. Because all data is in Salesforce, the company found that sales has greater visibility into a prospect's engagement and a better understanding of the overall customer journey created by marketing, and sales can easily bring new contacts at a prospect into the journey process. The company was able to reduce the time to build effective campaigns by 30 to 40 percent.

The ability to prioritize leads from Pardot and deliver those insights to business development to optimize resource allocation was a key factor for many clients. Users found the ability to support micromarketing (small outbound marketing campaigns on behalf of specific sales representatives), provide sales users with real-time data on their prospects' engagement across channels, and directly link campaigns with sales results were all capabilities of Pardot and the Pardot-Salesforce integration that drove greater sales and marketing alignment.

CONCLUSION

Business decision makers are targeted through multiple digital marketing channels on a daily basis, and getting above the noise requires not just effective segmentation and targeting but an integrated approach that provides sales with rapid access to insights about how prospects are – or aren't – becoming more engaged.

Nucleus found that customers seeking to better integrate their overall marketing efforts into broader multichannel customer journeys chose Pardot not just because of high usability but because of greater functionality, visibility through Salesforce integration and analytics, and support for sales and marketing alignment.

