Pardot Specialist Certification Study Notes

Summer '15

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12th October 2015

Contents

Visitors 6.7%

Describe how Pardot tracks visitor and prospect data.

- Tracking code embedded on website
- Landing pages
- Forms and form handlers
- Cookies
- IP address and DNS reverse lookup
- WHOIS IP lookup

Describe what a visitor is and limitations to visitor data.

- A visitor is an unidentified person to a website (no email address)
- A visitor can be converted into a prospect

Identify the types of visitor data that are collected.

- IP address and DNS reverse lookup information - Organisation
- WHOIS lookup on IP to see who owns it
- Full legal name and geographic location

Describe the methods for a visitor to become a prospect.

- https://help.salesforce.com/articleView?id=pardot_converting_visitors_to_prospects.htm&type=0
- Capturing information via a form
- Capturing information via a form handler
- Capturing information via a landing page
- Any link click from a Pardot tracked email
- Producing a redirect URL that has the visitor's email in the URL as a parameter
- Manual conversion

Prospects 3.3%

Identify the ways to create prospects in Pardot.

- Manually from the Prospects List
- Import from CSV
- Capturing information form or form handler
- Via CRM (if connector installed)

Given a scenario, apply the appropriate plan of action using Prospect Audits

- Prospect Audits is an audit table against a prospect that displays the Prospect's actions
- The audits are*composed of the name of the action and information which changed in regards to the prospect record T* composed of the name of the action and information which changed in regards to the prospect record
- The list of prospect activity includes:
    - ***Assignment/Reassignment***
      Prospect assignments can happen several ways. If the prospect was assigned to a

user manually by another user, you'll see "Assigned by" and the user's name. Since your CRM is the master record for a prospect's "Assigned User", if there is a conflict of the value, Pardot's assigned user value will be changed to match the owner in your CRM. This change appears in the audits as "Reassignment by CRM"

- ***Prospect Assignment Rule***
  When a prospect matches an assignment rule and is assigned to a user.
- ***Campaign Change***
  Typically, changing the prospects campaign is rare since that is the prospects initial touch point and will allow you to calculate the true ROI for the prospect. If you do need to change the prospects' campaign, the prospects old campaign value will be logged within their audits.
- ***Prospect Created – Form Submission***
  We record which form the prospect submitted when their prospect record was initially created. Within the audit table, you will see "Converted from visitor: 000.00.000.00 via Form or Form Handler: Name of form/form handler".
- ***Prospect Deleted / Restored from Recycle Bin***
  When a prospect is deleted we record the time of deletion in the audits. If the prospect is restored from the Recycle Bin (undeleted) we record the time of the action.
- ***Prospect Default Field***
  The prospect field name will be on the left side of the audit row. The audit will display the old value for the default field.
- ***Prospect Custom Field***
  The custom field name will be on the left side of the audit row. The audit will display the old value for the custom prospect field.
- ***Form Error***
  When a prospect either attempts to submit a form that is either incomplete or contains an invalid format (email or number field), and error occurs. We will log the field which triggered the error and why it was an error. For example, you might see "Form Error – Required Custom Field " within the audit.
- ***List Added***
  The prospect was added to a list. There are several ways that a prospect can be added to a list including, automation and segmentation rules, imports, completion actions, drip actions and manually.
- ***List Removed***
  The prospect was removed from a list. There are several ways that a prospect can be removed from a list including, automation and segmentation rules, imports, completion actions, drip actions and manually.
- ***Opportunity Added***
  If you are using salesforce.com or SugarCRM, we will automatically create opportunities for you in Pardot when you create the opportunity in salesforce.com or SugarCRM. For other CRM integrations, you will manually create the opportunity in Pardot. Once the opportunity has been created in Pardot, the opportunity will be logged in the prospect audit.
- ***Prospect Webinar Sync***
  The date/time a prospect's webinar attendance information (registered, attended, did not attend) was synced from the webinar vendor.
- ***Prospect Geolocation autofill***
  The date/time a prospect's country or state was updated through our geolocation autofill feature. If a prospect's country or state is added to their record based on the location of their IP address we log the change.
- ***Prospect Reviewed / Unreviewed***
  The date/time a prospect was marked as reviewed or unmarked as reviewed.

List Management 3.3%

Distinguish the capabilities of, use cases for, and how to create different types of lists.

- http://www.pardot.com/faqs/segmentation/lists/
- Lists are groups of prospects that can be used to send list emails or to build drip/engagement marketing programs.
- When viewing a particular list, you can easily see the total number of prospects, the number of mailable prospects (those that are not marked as "Do Not Email" or "Opted Out"), and the percentage of mailable prospects (the mailable prospects divided by the total).
- Different list types:
    - Static - Static list that has a fixed list of prospects
    - Dynamic - rule-based lists of prospects that automatically update as prospect data changes
    - Suppression - used to omit a selected group of prospects from list emails or drip programs (lead nurturing). Valuable when prospects may be on more than one list and you want to make sure one of those lists does not receive the email.
      A suppression list can be a static or dynamic list.
    - Test Lists - used to send test emails

Given a scenario, apply the appropriate list management process.

- As above, understand when to use a static list, dynamic list and suppression lists
- Generally based around whether the prospects in the list should change with changes to prospect data or not

Security and Access 3.3%

Identify how to provide Pardot access

- ***Via email:*** Click the Grant Access link to locate the appropriate user group (Support) and choose a date range from the dropdown.
- ***From Pardot (Admins only):*** Hover over email address in the top right of the screen, and then select Grant Account Access to locate the appropriate user group (Support) and choose a date range from the dropdown.

Distinguish between and identify the implications of the four default user roles.

- ***Administrator***: "Power users" - can control broad account settings as well as campaign and prospect management functionality.
- ***Marketing:*** Have control over marketing modules and prospect management, including creating new lists, forms, landing pages, and send list emails. Do <u>not</u> have the ability to edit other users.
- ***Sales Manager:*** Have access to all prospects and visitors but no marketing functionality. Sales Managers may send individual emails to prospects, but cannot send list emails.
    - Sales: Have the simplest interface view and only have access to prospect management functionality but they're only able to view and edit prospects assigned to them. Sales users may send individual emails to prospects, but cannot send list emails. They can only view, edit, and export prospects assigned to them.

Administration	13.3%

Describe the capabilities of and use cases for the Pardot overview tab

The Pardot Overview tab can be found when you hover over Admin-Overview. It displays the email usage as well as Email sending domains.

- ***Email Usage:*** The email usage section is especially helpful when you get an automated notice that you have exceeded your subscription allowance. It shows data for email types such as drip emails, list emails, automated emails, one-to-one emails, and engage emails.
- ***Email Sending Domains:*** Shows all of the verified domains for your Pardot account. From here you can also add a new domain if. This has been moved to Admin > domain management

At the top of the overview tab is a button for Edit Tracking Opt-in Preferences. You can create a custom message that appears to request opt-in from all visitors to track them, or only those from specific countries.

The Overview tab (Dashboard) is the first thing you'll see when you log in to Pardot. From here, you can get a high-level overview of :needed

- ***Notifications***: Important announcements or feature releases
- ***Reporting Graph***:
    - *Prospects Created*: The number of new prospects created, including both archived and unarchived prospects.
    - *Conversions:* The number of previously anonymous individuals submitting a form or landing page to identify themselves as prospects.
    - *Opportunities Created*: The number of new opportunities created at given dates. The data is pulled from your CRM, created manually, or created via the API.
    - *All prospects*: The cumulative total of prospects in your database, excluding those in your Recycle Bin.
- ***Marketing Calendar:*** Shows scheduled and past emails, social posts, events (via Eventbrite), and webinars (via GoToWebinar, WebEx, or ReadyTalk).
- ***Active Prospects for Review:*** Display of up to five Active Prospects for Review (e.g. those that are neither assigned or marked as reviewed and have been active – any activity besides an email send, email open, email bounce, opportunity, or visit). Note this shows all prospects that have had at least one activity, including those prospects that were imported.
- ***Identified Companies:*** Display of up to five of the most recent visitors whose companies could be identified.

Describe how to update the email domains associated with the account.

- In the Admin -> Domain Management
- You can add multiple email domains
- Requires SPF and DomainKey setup
- http://www.pardot.com/faqs/administration/add-sender-id-and-domain-keys-records-to-dns/

Distinguish between the capabilities and limitations of Pardot connectors.

- http://www.pardot.com/faqs/administration/connectors-2-2/

- Connectors allow Pardot accounts to sync with third party applications such as a CRM system or Google AdWords
- Data can be passed back and forth between the two applications allowing a user to manage many formerly disparate marketing channels from within Pardot interface.
- Administration -> Connectors
- Connectors range across
    - CRM Connectors (Salesforce)
    - Webinar Connectors (Webex, ReadyTalk, GoToWebinar)
    - Event Connectors(Eventbrite)
    - Social (FullContact, Data.com, LinkedIn, +AddThis, Facebook, Twitter)
    - Analytics / Web Tracking (Good Data, Google Analytics, bit.ly)Video Connector (Wistia)
    - Business Enhancement Connectors (Olark, Twilio, UserVoice, google Adwords)

Describe the capabilities of and use cases for Page Actions.

- Page Actions trigger completion actions (notifications, field value changes, assignments, etc.) off of specific page views.
- Best practice: Use Page Actions for pages that signal interest or intent to buy, i.e. a prospect viewing your company's pricing page.
- Note:
    - Actions will only be applied if the person accessing the page is already tracked as an identified prospect.
    - Like other completion actions, actions are not applied retroactively. They happen as the page is accessed.
    - Page Actions can be made from pages requiring a login and non visible pages, but pardot tracking code must be found on the page.

Explain how to create, edit, and map custom prospect fields.

- Create custom prospect fields:
    a. Navigate to Admin > Configure Fields > Prospect Fields.
    b. Click + Add Custom Field.
    c. Enter Name. This is internal-only and not visible to prospects.
    d. Leave the Custom Field ID as automatically generated. This is not visible to prospects.
    e. Configure your Field Settings.
    f. When finished, click Create custom field to save.
    g. Note: requires name, type and custom ID
- Edit custom prospect fields:
    a. Navigate to Admin > Configure Fields > Prospect Fields.
    b. Locate the field you'd like to edit and click the gear icon, then select Edit.
    c. Optional: edit Name. This is internal-only and not visible to prospects.
    d. Edit your Field Settings.
    e. When finished, click Save custom field to save.
- Map custom prospect fields: see here (too detailed) http://www.pardot.com/faqs/salesforce/mapping-salesforcecom-pardot-custom-fields/

Identify the two ways to set up and maintain users.

- ***Manually:*** Navigate to Admin > User Management > Users to add/maintain User. Add details and user role. Mark ‘Send Activation Email’ to send an activation link to the new user. They will be prompted to select a password and a security question.

- ***Import:*** If you need to create a large number of users (up to fifty at a time), you can upload a CSV file containing their information. Navigate to Admin > User Management > Users and click Import Users.

Describe how the recycle bin manages Pardot assets.

- When you delete information such as a prospect, campaign, or layout template, the information goes into your recycle bin instead of being deleted forever. This enables you to find the information if you change your mind in the future, and you are able to find it and easily reload it into your system. Note:
    - If you delete a campaign, the prospects associated with that campaign will remain in the system tagged with that campaign.
    - Even when deleted, a prospect will continue to be tracked in the Recycle Bin.
    - If an assigned prospect who is syncing with the CRM is deleted in Pardot, they will be restored in the event that a user clicks “Send to Pardot,” “Send Pardot Email” or “Send to Pardot List” from the syncing record in the CRM.
    - Tags are the only objects that will not be pushed to the Recycle Bin when you select “Delete” in your Pardot account. Tags will be deleted permanently from your instance.
    - Content files as well deleted permanently from your instance

Pardot Campaigns 5%

Explain the application of a Pardot campaign.

- Pardot campaigns are typically thematic touchpoints (similar to “source” in other system). They track the first touch that a prospect has with your online marketing materials.
    - Note: Pardot campaigns are different than lists.

Given a scenario, determine if a Pardot campaign should be changed for a prospect.

- Associating a prospect with one campaign helps with ROI analysis because the associated campaign can be defined as the lead generation and sales vehicle for that prospect, so changing a campaign for a prospect might falsify ROI.
- If wanting to change the campaign to report a prospect for, there is value for changing that prospect

Distinguish between the metrics collected in Pardot campaign reporting.

- ***Name:*** Name of the campaign (clicking this will take you to a graphical representation of the number of visitors on a particular day compared with the number of converted prospects that are tagged with this campaign).
- ***Visitors:*** The number of anonymous visitors captured by the tracking code associated with each campaign.
- ***Prospects:*** The number of anonymous visitors who converted as part of a campaign (see How are prospects associated with campaigns? for more details).
- ***Assigned:*** The number of prospects who are associated with the campaign who have been

assigned to a user.
- ***Cost / Prospect:*** The cost per prospect, which is calculated by dividing the cost for the campaign by the number of prospects for that campaign.
- ***Opportunities:*** The number of prospects with opportunities for each campaign.
- ***Opps / Prospects:*** The percentage of prospects associated with the campaign who have an opportunity. This is calculated by dividing the number of prospects with opportunities by the number of prospects in the campaign.
- ***Cost / Opps:*** The cost per opportunity, which is calculated by dividing the cost for the campaign by the number of opportunities for that campaign.
- ***Value:*** The total value for any opportunities for prospects associated with each campaign (sum of all opportunities), that are not archived.
- ***Revenue:*** The total value for opportunities marked closed-won for prospects associated with each campaign (sum of closed-won opportunities), that are not archived.
- ***ROI:*** The return on investment, which is calculated by dividing the (revenue-cost)/cost.

Pardot Forms 3.3%

Given a scenario, identify the capabilities and limitations of Pardot forms.

- http://www.pardot.com/faqs/forms/forms/
- Form Wizard lets you create a customized form in seconds.
- Use forms on your website to collect information about visitors and turn anonymous visitors into identified prospects.
- Standard Edition accounts are limited to 50 active forms.
- Conditional fields(dependent fields) - fields that display if visitors choose a specific value on another field
- Styling - Pardot's form wizard has built in options to customize your form's styles. Also has the option to style with custom CSS
- Actions - As soon as your prospect completes a form, you can send autoresponders, add to marketing lists, and notify users with completion actions
- Reporting - Reporting ins and outs, and how to see your form's performance–whether the form is on a Pardot landing page or on your own website.
- Redirects - redirect form submissions to a specified page (eg. Thank You page). Supports dynamic redirecting
- SSL and Bot Protection supported
- Wordpress plugin available, and sending data to a 3rd party is available as well.

Distinguish between the metrics collected in Pardot form reporting.

- ***Total Views:*** The total number of times your form has been viewed (including if a page has been viewed more than once by the same individual).
- ***Unique Views:*** If a prospect or visitor has viewed the form more than once, these views are deducted from the "total views" number.
- ***Conversions:*** The number of times that an anonymous visitor successfully filled out the form and therefore "converted" to a prospect.
- ***Total Submissions:*** The total number of times the form has been successfully filled out.
- ***Unique Submissions:*** If a prospect or visitor has submitted the form more than once, these submissions are deducted from the "total submissions" number. This metric is also

represented by a graph to the right of the statistics table.
- ***Total Errors:*** Errors usually occur when a visitor enters an invalid email address, or when they fail to complete all required form fields.
- ***Unique Errors:*** If a prospect or visitor has failed to complete all required form fields in a form more than once, these subsequent errors are deducted from the "total errors" number.
- ***Total Clicks:*** The number of clicks on the links on your thank you page which appears after a form submission.
- ***Unique Clicks:*** If a prospect or visitor has clicked on the links on your thank you page more than once, these clicks are deducted from the "total clicks" number.
- ***Last Submitted:*** The date and time the prospect most recently filled out your form.
- ***Updated:*** The date and time the prospect record was last updated.

- *Click All Form Submissions or All Form Handler Submissions at the top of the Forms Report to view a list of all prospect form or form handler submissions. This report can be filtered by campaign or date range and can be sorted by form/form handler, prospect, company, score, grade, or submission date/time.*

Lead Management 15%

Explain the capabilities and limitations of an Automation Rule.

- http://www.pardot.com/faqs/automation/prospect-actions/
- http://www.pardot.com/faqs/automation/automation-rules/
- http://www.pardot.com/faqs/automation/automation-rule-faqs-troubleshooting/
- Allow you to perform certain marketing and sales actions based on criteria that you specify
- Automation rules run continuously, unlike segmentation rules which are a one-time action
- Automation rules check every prospect in your account every time their record updates to see if they could match
- Once a prospect matches an automation rule, all of the actions that are defined at that time in the rule are applied to that prospect and it is flagged as matching. If you add new actions later, they will not be applied to prospects who have already matched. If you add new criteria to the rule, the rule will not "unapply" actions to prospects who no longer match.
- An automation rule will only affect a prospect one time, and rules will never "un-match" prospects if they no longer meet a rule's criteria. If you want to change a rule and have it affect the same prospects over again, you will want to either delete the first rule and recreate it with the changes, or simply copy the rule and give the copy a unique name.
- When automation rules are created, or an existing rule's criteria is edited, and the rule is unpaused, the rule will search through all prospects in your account to find matches. In this way, rules are retroactive — a prospect could have begun meeting the criteria last week, but if the automation rule is created today the rule will still find them and match them. If you edit criteria, it will not retroactively unmatch prospects.

Identify the main components of creating an Automation Rule.

- Match Type - whether all rules within the rule must be matched, or only 1 of the rules (AND vs OR)
- Rules - Add a single rule or a group of rules. Rules are the criteria required for a prospect to be included in the automation rule

● Actions - The action to take when a prospect meets the criteria of the rule. This will be things like adding to a list, adjustment their score, sending an email etc.
Explain the capabilities and limitations of a Dynamic List.
● http://www.pardot.com/faqs/segmentation/dynamic-lists/ ● Dynamic lists are rule-based lists of prospects that automatically update as prospect data changes ● You can't add or remove prospects manually — instead, you set up list rules and Pardot automatically adds matching prospects and deletes them when they no longer match. ● Dynamic lists, like static lists, can be used as recipient lists or suppression lists for an email newsletter, to seed a drip nurturing program or used in further automation or segmentation criteria ● Static lists can be edited manually; however, you cannot manually add or remove prospects to dynamic lists. Instead, dynamic lists refresh constantly, adding prospects who now match the criteria and removing the prospects who no longer match ● Dynamic lists are most helpful when you are creating a list based on prospect data that will change often ● If you designate a dynamic list as a recipient list in a scheduled email send then the email will be sent to all prospects that are on the dynamic list at the time the email is sent
Identify the main components of creating a Dynamic List.
● Match Type - whether all rules within the rule must be matched, or only 1 of the rules (AND vs OR) ● Rules - Criteria used for matching against prospects. Can include multiple criteria with AND vs OR logic
Explain the capabilities and limitations of a Completion Action.
● http://www.pardot.com/faqs/forms/completion-actions/ ● Automate different activities within an existing element rather than always having to create an automation rule to accomplish the same result ● Available within: ○ Forms ○ Form Handlers ○ Files ○ Custom Redirects ○ Emails ○ Page Actions ● Completion actions are not retroactive and will only apply to activities moving forward once you add them. ● Completion actions execute every time the action is completed except for adjust score and send autoresponder email. ● Completion actions only execute for prospects (they will not affect visitors). ● Completion actions will not execute for image files. ● Completion actions will not execute for filtered activities. ● Actions include: ○ Add tags ○ Add to list ○ Add to Salesforce Campaign

○ Adjust Score ○ Assign prospect via Salesforce assignment rule ○ Assign to queue ○ Assign to user ○ Change prospect custom field value ○ Change prospect default field value ○ Create Salesforce task ○ Increment prospect field value ○ Notify assigned user ○ Notify user ○ Remove from list ○ Remove tags ○ Send autoresponder email ○ Set profile ○ Set prospect's first touch campaign
Explain the capabilities and limitations of a Segmentation Rule.
• http://www.pardot.com/faqs/segmentation/segmentation-rules/ • Segmentation rules allow you to pull a one-time list of prospects based on specific criteria. Unlike automation rules, segmentation rules do not run continuously. • Segmentation Previews - You can preview segmentation rule matches and share a link to the preview with other Pardot users. • Rule Groups - Within a segmentation rule, complex rules can be created by adding a new rule group. Rule groups allow you to construct a combination of criteria while reducing the restriction of "match all" and "match any" requirements.
Identify the main components of creating a Segmentation Rule
• Match Type - whether all rules within the rule must be matched, or only 1 of the rules (AND vs OR) • Rules - Add a single rule or a group of rules. Rules are the criteria required for a prospect to be included in the automation rule • Actions - The action to take when a prospect meets the criteria of the rule. This will be add to/remove from list, add/remove tags/ add remove from SF campaign
Given a scenario, determine which automation tool should be used.
• Understand all the tools as above • Automation rules run automatically, continuously, segmentation rules are a one-time execution • Static lists vs dynamic lists • Suppression lists

Scoring	6.7%
Explain what a Score measures and how it can be applied	
• Scores measure the engagement of your prospects with your marketing materials, and can	

measure a prospect's interest. ● Scores are automatically assigned to prospects when they convert. ● Scores constantly change based on activities and interactions.
Describe the Scoring rule and how it can be updated.
● Pardot provides a default scoring system for online activities (clicks, visits, form submission, etc.) ● The default scoring system can be modified if you'd like to change certain point values. ○ Navigate to Admin > Automation Settings > Scoring. ○ Click Edit Scoring Rules to change any of the current rules. ○ After adding a rule, the approximate number of prospects affected will be displayed. ○ Click Save changes to save the rules and have them start running on your prospects. ○ ***Note**: These changes will be retroactive*
Describe the options available when using automation tools to score prospects.
● ***Automation Rules:*** Scores can also be modified automatically according to automation rules. For example, an automation rule can be set up such that if the prospect has requested a demo or a special white paper, 50 bonus points will be added to their score. Automation rules can both increase and decrease prospect scores, or reset scores to zero (see below). ● ***Forms/Form Handlers:*** Scores can be customised at the Form/Form Handler level by designating an Adjust score Completion Action on Step 4 of the Form Wizard. ● **Engagement Programs:** Scores can be increased or decreased using an action in the Engagement Studio
Given a scenario, determine the optimal workflow using a prospect score.
● If this is your first time setting up a scoring model, don't be intimidated or put it off because you don't think you have enough information. Use Pardot default scoring and pick time at which you will re-evaluate. Will you revisit it the model in three weeks, two months? Ask your sales team about the quality of leads they have received during this time. Come back to Pardot and adjust accordingly.

Email Marketing	6.7%
Distinguish between an Email and an Email template.	
● **Email:** The email holds information and settings about the email, such as the list the email is being sent to, the sender and reply to details. An email is aso attached to an Email Template ● **Email templates:** Allow you to create text and HTML email designs and store them for future use. These can be used to send ad-hoc emails to prospects and lists or used in drip campaigns or as form auto-responders.	
Identify the main components of an Email template.	

● **Building -** the creator / editor of the template content ● **Testing -** test the content and merge data of the template. Send to an individual or a test list ● **Sending -** Set the Sender and Subject details of the email template
Describe the relationships between a recipient list and a suppression list.
● A suppression list is used to omit a selected group of prospects from list emails/drip programs. ● <u>*Any list*</u> can be used as a suppression list during an email send or when building a drip program. ● The selected list will only be used as a suppression list for that particular drip program or email. You could, for example, use a list as a suppression list for one list email and then use it as a recipient list for another email. You would simply select the list as “Recipients” rather than “Suppression Lists.”
Distinguish between the metrics collected in Pardot email reporting.
● ***Total sent:*** The total number of emails sent. ● ***Total queued:*** The number of emails that are waiting to be sent. These emails have been submitted but have not reached the inbox of the prospect. ● ***Soft bounce:*** An email that is recognized by the recipient’s mail server but is returned to the sender because the recipient’s mailbox is full or the mail server is temporarily unavailable. A soft bounce message may be deliverable at another time or may be forwarded manually by the network administrator in charge of redirecting mail on the recipient’s domain. After five soft bounces, the prospect is opted out of emails. ● ***Hard bounce:*** An email that permanently bounced back to the sender because the address is invalid. A hard bounce might occur because the domain name doesn’t exist or because the recipient is unknown. ● ***Total delivered:*** The total number of emails minus hard and soft bounces delivered. The delivery rate is the percentage of the emails that were delivered compared to the number that bounced (soft and hard). ● ***HTML opens:*** The total number of times prospects loaded the images in the HTML version of the email. We will also record an “open” (and run completion actions) if the prospect clicks on a link within the HTML or text email without downloading images since it’s clear they viewed the message. ● ***Unique HTML opens:*** The number of prospects who loaded the images in the HTML version of the email. The Unique opens category counts each recipient only one time, even if the prospect loaded images more than once. ● ***HTML open rate:*** The percentage of unique opens (with images, see above) compared to the total number of emails delivered (sent minus bounces). ● ***Total clicks:*** The total number of clicks for all the links in an email. Each link click is counted separately. For example, if a prospect clicks on two separate links in the same message, it will count as two clicks. If a prospect clicks on the same link on two separate occasions, that will also count as two clicks. Clicks on the unsubscribe link are not counted; neither are clicks on the email preference center variable tag. ● ***Total CTR (Click-through-rate):*** The percentage of visitors who click on links contained in emails delivered (sent minus bounces) to them. With Total CTR, multiple clicks for a same link are counted. ● ***Unique clicks:*** The number of prospects that clicked on a link in the email. The Unique clicks category counts each recipient only once, so even if a prospect clicks on two

separate links in the same message, or clicks the same link on two separate occasions, it will only be counted as one Unique click.

- ***Unique CTR (Click-through-rate):*** The percentage of visitors who clicked on a link (no more than once) contained in an email that was delivered (sent minus bounces) to them.
- ***Click To Open Ratio:*** The number of unique clicks divided by unique HTML opens.
- ***Total Opt-outs:*** Total opt-outs are the total number of prospects that no longer wish to receive emails from your company and have clicked either the unsubscribe link in the email or clicked the email preference page link *and* clicked the "opt out from all email communications" link on that page. They are automatically removed from future mailings. They are however kept on the list they are associated with.
- ***Opt-out rate:*** The percentage of users that have asked to be opted out of future mailings compared to the total number of emails sent.
- ***Total Spam complaints:*** The total number of users that have reported the email as spam. AOL and Comcast automatically opt them out of future mailings, while Gmail and Yahoo do not. If a prospect reports spam in these clients, they are not opted out and do not display in this report. They will however send any future mailing to their spam folder.
- ***Spam complaint rate:*** The percentage of spam complaints compared to the total number emails sent. Clicks per URL are displayed at the bottom of the report. Click the hyperlinked number to view a list of prospects who clicked each specific URL.

Engagement Studio 6.7%

Identify the main components of a Drip Program

- http://help.pardot.com/customer/portal/articles/2426686-engagement-studio-overview
- http://help.pardot.com/customer/portal/articles/2429092-engagement-program-faq
- Engagement Programs allow you to send targeted emails based on real-time buyer behavior and critical qualifying values, providing a personalized and adaptive buying experience for your prospects.
- Use Engagement Studio for ongoing marketing campaigns and to nurture leads that may not be sales-ready.
- Emails sent through Engagement Studio will be recorded in the Prospect Profile as an activity.

Describe the process when updating Drip Program assets

- Once you've paused a running Engagement Program, you can edit all of the aspects of it:
  - Program name
  - Recipient and suppression lists
  - Scheduled start or stop times
  - *Send emails during business hours only* setting and Time Zone
  - **All step types:** You can edit any step, within the same step type — rules can be changed to other rules, triggers to other triggers, and actions to other actions. If you want to change the step type — for example, from an action to a trigger — you'll need to delete the existing step and then add a new one.
  - **Add new steps:** Note that if you add a new step before an End step, only those prospects that haven't reached the end of the program will go through the new step.
  - **Delete steps:** If the step branches, you will need to choose which path should be

deleted (left, right, or both). If you delete an End step, you will be prompted to choose where the path rejoins the program. Note: if you delete a step, anyone that was sitting on that step will progress to the next step after you Start the program again.

- Values, operators, and wait periods: Change values, operators and wait periods on any steps.
- **NOTE:** Unlike Drip programs, Engagement program actions can change a prospect's score, and update field values.
-

Explain the capabilities and limitations of the types of lists used with Engagement Programs.

- Use a static list for a fixed list of prospects to enter into the drip program
- Use a dynamic list for a dynamic list of prospects to enter the drip program based on changing criteria
- Use a suppression list to exclude prospects from the drip program

Explain the capabilities and limitations with pauses during a Drip Program.

- For any prospects that are currently in a step with a wait, the wait is stopped when a Engagement Program is paused. If a prospect has started a step with a wait, they will remain exactly where they are until the program is unpaused. Once the Engagement Program is resumed, the prospect will finish the wait before moving to the next step.
- For example — a prospect is on day 1 of a 4-day wait in a step, and the Engagement Program is paused for 5 days. Once the program is restarted, the prospect will finish the remaining 3 days of the wait before moving to the next step.

NOTE:

- Engagement Studio treats time differently depending on the step type and timeframes you've set on the step.
  <u>Actions</u>
  Immediately: Engagement Studio will apply the specified action once the prospect hits that step.
  Wait: Engagement Studio will apply the action once the specified wait time has elapsed.
  See Engagement Studio Trigger, Action, and Rule Reference for a complete list of actions and definitions.
  <u>Rules</u>
  Immediately: Engagement Studio will evaluate the specified rule criteria once the prospect hits that step.
  Wait: Engagement Studio will evaluate the rule criteria once the specified wait time has elapsed.
  See Engagement Studio Trigger, Action, and Rule Reference for a complete list of rules and definitions.
  <u>Triggers</u>
  Wait up to a maximum of: Engagement Studio will wait for the specified activity/event to occur between the time the prospect landed on the trigger step and the end of the specified

maximum wait period. For example: a prospect started a program on Monday at 3:00 PM and landed on an Email Link Click trigger on Monday at 3:01 PM. In this case, Engagement Studio would listen for an email link click between Monday at 3:00 PM and Thursday at 3:00 PM, because the wait period is set to a 3 day maximum in this example.
Wait: Engagement Studio will hold Prospects on the trigger for a specified period of time. Prospects will not move off the step until the specified amount of time has elapsed. For example: If a prospect started a Program on Monday at 3:00 PM and landed on step B on Monday at 3:01 PM — Engagement Studio would wait until Thursday at 3:01 PM before sending the Prospect down the yes or no path of the Trigger (because there is a 3 day wait period).
Notes:

If the prospect has performed the activity/event on a trigger at any point since entering the program, they will immediately proceed down the Yes path when they reach a trigger with a wait up to a maximum of time specified. For example: Step 5 is a trigger that listens for a prospect to fill out Form D. If a prospect has filled out Form D at any point between starting the program and reaching Step 5, they will immediately proceed down the Yes path when they reach Step 5.
On a trigger with a wait period specified, the prospect will stay on the step until the wait period has elapsed.
If a trigger has a wait of 0 days, all prospects will be sent down the No path.

Landing Pages 6.7%

Identify the main components of a Landing Page

- http://www.pardot.com/faqs/landing-pages/landing-pages-overview/
- A landing page is a specific web page that a visitor typically reaches after clicking a link or advertisement
- This page generally displays content that is specific to the advertisement, search keyword, or link clicked
- Simply driving visitors directly to your home page can be an ineffective method of converting prospects, because they aren't presented with tailored content. A landing page presents a streamlined path designed to elicit a specific action by the visitor.
- Components include:
    - Title - Name
    - Link - The full URL to the landing page
    - Short URL - The bitly shortened URL for the landing page
    - Template - The physical content of the page
    - Form - optionally link a form to a landing page
- Landing Pages can be created either from raw HTML or using a predefined template

Given a scenario, determine when to use a Landing Page with and without a form.

- Use a landing page if no additional information about the prospect is required or desired
- Use a form on a landing page if further details are required
- Simply driving visitors directly to one's home page can be an ineffective method of

converting prospects

Distinguish between the metrics collected in Pardot Landing Page reporting.

- http://www.pardot.com/faqs/reporting/landing-page-report/
- These reports give you insight into the total number of views, submissions, conversions (when an anonymous visitor becomes an identified prospect) related to landing pages.
- You can filter these report numbers by date range.
- Metrics:
    - ***Total Views***
      The total number of times your landing page has been viewed (including if a page has been viewed more than once by the same individual).
    - ***Unique Views***
      If a prospect or visitor has viewed the landing page more than once, these views are deducted from the “total views” number.
    - ***Conversions***
      The number of times that an anonymous visitor successfully completed a form on the landing page and therefore “converted” to a prospect.
    - ***Total Submissions***
      The total number of times a form on the landing page has been successfully completed.
    - ***Unique Submissions***
      If a prospect or visitor has completed a form on the landing page more than once, these submissions are deducted from the “total submissions” number.
    - ***Total Errors***
      Errors usually occur when a visitor enters an invalid email address or when they fail to complete all required form fields on a landing page’s form.
    - ***Unique Errors***
      If a prospect or visitor has failed to complete all required form fields more than once, these subsequent errors are deducted from the “total errors” number.
    - ***Total Clicks***
      The number of clicks on the links that you have on the thank you page, which appears after a form on the landing page has been submitted successfully.
    - ***Unique Clicks***
      If a prospect or visitor has clicked on the links on your thank you page more than once, these clicks are deducted from the “total clicks” number.

Describe how completion actions trigger when a prospect submits a Landing Page

- Completion actions are triggered when a prospect accesses the landing page

Social Marketing 6.7%

List the social platforms that can be used within Pardot.

- Social Posting
    - Facebook - Company page only, no personal pages
    - Twitter

- LinkedIn
- AddThis
- FullContact

Identify the main components of a Custom Redirect.

- http://www.pardot.com/uncategorized/custom-redirects/
- Custom redirects allow you to track any link on your website or a third party site (for example, a link your Twitter page, a banner ad on a third party site, etc.).
- Clicks on the link will show up as an activity on a prospect's profile.
- You can also view a list of all prospects who clicked on a particular link. If you are using Google Analytics parameters, they can be integrated into the link during creation.

Given a scenario, determine when to use a Custom Redirect.

- Banner ads on third party sites — you may want to track a banner ad explicitly and see how many prospects and visitors access it.
- Social sharing — you may share a link on Twitter, LinkedIn, etc. and want to see how it performs
- Links to files that you do not host — your website may link to a file on a third-party site. Custom redirects can point to them and show you how many visitors access the file.

Distinguish between the metrics collected in a Pardot Custom Redirect report.

- *Total Clicks*
  The total number of clicks for the specific redirect. This includes each time unidentified visitors and identified prospects click the link. When a person clicks the link multiple times, each click is counted in this number.
- *Unique Clicks*
  The number of unique clicks for the specific redirect link. This includes the number of unidentified visitors and identified prospects who click the link. When a person clicks the link multiple times, only the first click is counted in this number.

Salesforce Integration 13.3%

Explain the relationship between Pardot and Salesforce.

- Data can be passed back and forward between the two systems
- Pardot acts as the Campaign, Lead, Marketing tool, whereas Salesforce is generally the CRM and for Opportunity / sales processes
- Notes:
  - SF connector must be API enabled in SF
  - SF connector user needs to have Pardot connector user permission set and several standard object permissions (Object change logs, Leads, Contacts, Tasks, Users, Campaigns, Opportunities, and Accounts) before SF connector will function properly
  - Pardot connector user permission set should be applied only to Pardot connector user
  - To view permissions included in each step in SF: Setup>Manage Users>permission sets

List the objects synced between Salesforce and Pardot.
● http://www.pardot.com/faqs/crm/what-syncs-with-crm/ ● Accounts -> Accounts ● Prospects -> Contact and Leads ● SF Opportunity -> Pardot Opportunity ● SF Campaign Members -> Pardot ● The account data will sync down into Pardot automatically when Pardot detects a Contact with a valid Account reference in Salesforce. This sync is one-way and treats Salesforce as the master. ● Pardot does not sync opportunities that are tied exclusively to accounts in your CRM. CRM opportunities must be tied to a syncing contact in order for it to be created in Pardot. ● Notes: ○ Importing prospects into Pardot will cause them to sync with SF after import - even unassigned, BUT WILL NOT create new records in SF if none already exist with same email address.
Identify the main components of the Salesforce connector.
● Data syncs for Prospects to Leads and Contacts in Salesforce ● Campaigns and Campaign Members from SF to Pardot ● Prospects -> Leads ● Accounts and Contacts ● Pardot does not sync opportunities that are tied exclusively to accounts in your CRM. CRM opportunities must be tied to a syncing contact in order for it to be created in Pardot. ● Once you have set up your Salesforce connector, you cannot manually create an opportunity in Pardot. As previously stated, if there is a conflict between the two systems the CRM will always win. ● Notes: ○ Install Pardot Appexchange in SF instance BEFORE setting up 1st CRM connector in Pardot. When 1st CRM connector created in Pardot, all existing prospects in Pardot are auto-queued to sync with connector records in SF, BUT if package not installed 1st, then field values like Pardot Score and Pardot Grade will not sync at this time. ○ SF Users without Pardot user seat will not be able to view Pardot activities on Leads/Contacts ○ If prospect deleted in Pardot, data no longer appears in SF VisualForce pages.
Describe the field mapping process.
● http://www.pardot.com/faqs/salesforce/mapping-salesforcecom-pardot-custom-fields/ ● http://www.pardot.com/faqs/crm/how-do-pardot-fields-map-to-salesforce-com-fields/ ● Default fields map automatically, but can be edited later ● Admin > Configure Fields > Prospect Fields. Create fields and add CRM names ● Mapping Custom Fields in Pardot to SF requires: name, type, custom field ID and SF field name
Describe the capabilities and limitations with field syncing
● You can only have one CRM connected at a time ● Pardot checks for changes in Salesforce and in Pardot every 2 minutes ● The following field types in Salesforce cannot sync to Pardot:

- ~~Formula~~ formula fields can sync! However they do not trigger an automatic sync between SF and Pardot when there is a change in value (source: http://help.pardot.com/customer/portal/articles/2126816-why-won-t-my-field-sync-)
    - Lookup
    - Record type (except Record Type ID)
    - Geolocation - Will sync with latitude and longitude fields separately s
    - Text Area Rich(Will be synced as html)
- If a custom Salesforce field is in use by any Pardot field, it won't display as an option to map.
- If you're using a custom field in Salesforce on both leads and contacts, we pull the name of the Salesforce field from the contact field ID.
- We recommend that each Salesforce custom field you map has its own unique API name as Pardot will not respect case sensitivity when syncing. For example if you have two separate fields called "hair_color" and "HAIR_COLOR," Pardot will not recognize the difference in capitalization and will only sync with one of the two fields.
- Notes:
    - Triggers for syncing from Pardot to CRM: either an existing CRM record or prospect must be assigned in Pardot.

Pardot Menu

Where to find a functionality on the menu ? (not in standard)

- Marketing
    - Folders
    - Automation
        - Automation Rules
        - Drip Programs
    - Calendar
    - Campaigns
    - Content
        - Custom Redirects
        - Dynamic Content
        - Files
    - Emails
        - Drafts
        - Scheduled
        - Sent
        - A/B Tests
        - Templates
        - Tests
        - Preferences Page
        - Unsubscribe Page
        - New List Email
        - New Email Template
    - Engagement Studio

- Forms
    - Forms
    - Forms Handlers
    - Layout Templates
    - New Form
- Landing Pages
    - Landing Pages
    - Multivariate Tests
    - Layout Template
    - New Landing Page
- Search Marketing
    - Keywords
    - Competitors
    - Paid Search
- Segmentation
    - Lists
    - Rules
    - Tags
    - Profiles
- Social
- Site Search

- Prospects
    - Prospect List
    - One-to-One Emails
    - Prospect Accounts
    - Visitors
- Reports
    - Campaigns
    - Connected Apps
        - Events
        - Natural Search
        - Olark
        - Paid Search
        - Site Search
        - Social
        - Webinars
    - Conversions
    - Lifecycle
    - Marketing Assets
        - Content
        - Drip Programs
        - Emails
            - List Emails
            - Emails Templates
            - Email Tests
        - Forms
        - Landing Pages
        - Social
    - Opportunities
    - Scoring Categories

- Admin
    - Overview
    - Automation Settings
        - Page Actions
        - Scoring Rules
        - Visitor Filters
    - Connectors
    - Configure Fields
        - Account Field
        - Opportunity Fields
        - Prospect Fields
    - Custom Objects
    - Import
        - Prospects
    - Recycle Bin
    - Security
    - System Emails
    - User Management
        - Users
        - Groups
        - Roles
        - Editing Sessions