

Marketing Automation implementation example



Let's consider the following scenario:

ABC, a distributor in the ready-made clothing industry, would like to increase its sales in the premium sector, in the Lisbon and Tagus Valley region. To do so, it could use a joint Salesforce solution with Pardot.

In Pardot, you can define an email marketing campaign, with the creation of 2 email templates (a generalist, but targeted at the public in question, for those cases where we do not yet have information from the end customer; and another, more customised, where the email will be filled with data previously collected by the customer).

In addition, you can have a campaign with a landing page, where you will be asked, through a form, some information from the visitor, so that he can receive some information about ABC products (such as brochures of premium products and some promotional videos).

José Silva, interested as the owner of a ready-made clothing company, but not a client of ABC Company, visits ABC's website and spends some time there.

José Silva visits the ABC company website during some time.

By visiting the website and accepting their cookies, José becomes identified as a visitor. The ABC company does not own any information about that visitor, but knows that there was someone interested and where was browsing in the website.

A few days later, José sees an ABC ad and decides to click on it.

José Silva sees and clicks a ABC company ad.

The ABC company understood that the visitor (identified through website navigation) keeps his interest by clicking on the advert.

By clicking on the advert, the visitor is redirected to a landing page, with informative material and is asked to fill a form with data like name, company, email and region.

After joining the form data with the visitor's information, the ABC company now knows what José Silva is interested and is on the pretended segment.

At this moment, José Silva could have a 45 point score:
- 15 by browsing on the website;
- 30 after filling a form.

After submitting his data, José will receive an email with links and documents, which he views.

After understanding that José gets interested by the email content, the ABC company applies 35 point to José's Prospect Score.

Now José Silva has a 80 point score:
- 15 by browsing on the website;
- 30 after filling a form;
- 35 for browsing in the sent information.

➤ This allows the solution to understand that this Prospect is a good lead and transfer him back to Salesforce, creating an automatic follow-up task, so that a sales team can continue the qualification of the sale in a closer way.

➤➤ All the scoring, information matching, and integration is done by the Pardot/Salesforce solution, with ABC defining the email content, landing pages, forms and the campaign flow.

➤➤➤ We can then conclude that using Salesforce and Pardot we get the ability to take a 360° look at our customers; from marketing strategy to sales.

This allows us to more effectively manage the acquisition and maintenance of lead quality, check opportunities and improve the results of ongoing marketing campaigns.