

The Essential Guide to Integrating and Customizing Pardot

What's Inside:

The best practices for integrating
and customizing Pardot.

1

Ease of Use, Customizations and System Design: How easy is Pardot to use, customize and integrate? What are the best features, how do they work and what can they do for your team?

2

How to get Data into Pardot: How do you get data into Pardot from your CRM, email, webinar app and other apps? What integrations are available and how well will they suit your needs?

3

Syncing Data out of Pardot: On the flip side, how do you sync data back out to update the other systems your business – and your teams - run on? (we're looking at you, CRM)

4

Useful Pardot Integration Hacks: What does the Pardot integration landscape look like? Are there free, out of the box native integrations? We'll talk about 3 potential use cases that will make your usage of Pardot much more awesome.

5

Overall: Bottom line - How good of a system is Pardot for your business?

Introduction

Consider yourself a Pardot expert?

Then you can probably skip this page.

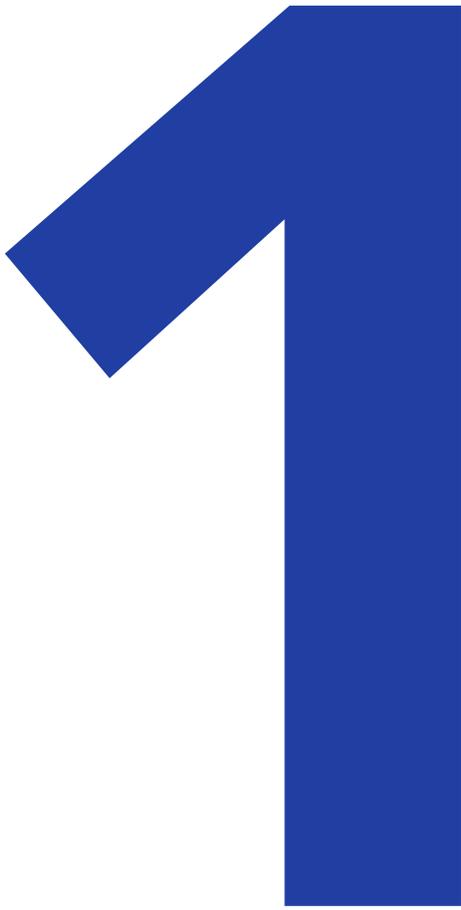
Acquired by Salesforce back in 2013, [Pardot](#) is a B2B marketing automation software that gives sales and marketing teams across the globe the opportunity to achieve greater efficiency in their online lead nurturing campaigns.

The Pardot suite of products include lead management, batch email marketing, automated drip marketing and real-time sales alerts. While Pardot is most utilized by small and medium sized businesses, they offer an Enterprise edition with more advanced capabilities such as custom security controls, increased storage space and a dedicated IP address.

Pardot facilitates the sales pipeline and automates lead qualification by assigning prospects to sales reps, and populating the information into a compatible CRM (Customer Relationship Manager), like Salesforce, SalesforceIQ, SugarCRM, and Microsoft Dynamics (don't currently use any of these systems? We're here to help!)

The platform is recognized for its excellent lead scoring capabilities, and its marketing and sales reporting, including tracking important KPIs like Return On Investment (ROI), amongst many others.

source: <http://www.pardot.com/about-pardot/>



Ease of Use, Customizations and System Design

What we like about Pardot is that, although it is armed with a slew of powerful features, they still figured out how to package all of them into one easy-to-use-interface. Its WISIWYG (What You See Is What You Get) email templates, for example, is super helpful when building out emails. Geared with a number of cleanly designed email templates, it helps even a basic user to get started.

Since Pardot comes with a suite of products, it certainly brings a learning curve for the beginner marketer, but we think that the multi-product software is what makes it such an appealing offer. What we also love about Pardot is that it comes with an entire store of apps which you can connect your Pardot data to (and from), whether it be an email tool, bookkeeping, CRM, event apps, and more.

Pardot comes with a slew of customization features across the platform, from landing page customization, email templates, forms and more. In addition, when Pardot's default fields don't capture the prospect data you need, you can create your own custom fields. These custom fields can be created for their corresponding objects and can be synced with your connected CRM.

source: <http://www.pardot.com/faqs/forms/custom-fields/>



Getting Data Into Pardot

Initially getting data into Pardot is an easy process via an import, where you can simply import a CSV or Excel file into Pardot. But what about ongoing integrations for records you're generating from your website or other marketing (event, webinar, email, etc...) systems?

Here are some options available to you:

Manual Integrations: Nobody likes manual integrations, least of all the entry level employee or intern you've hired to do data entry for you. Manual integrations are manual exports and imports, typically using Excel and require a level of data manipulation in the middle. These types of integrations are time consuming, expensive and frustrating ... BUT may suffice for you if you only need to load data at very infrequent time intervals and have staff that is willing to bite the bullet on these data loads.

One Way / One Off Integrations: One-way integration platforms have

risen in popularity with the development of apps like "Zapier" and other apps that are similar to this service. These services can be useful to you for simple integration points, but they are hard to maintain, they don't continuously update your data, and data only flows in one direction.

Native Integration: Native integrations are those that are written and maintained in house, by Pardot. Pardot offers a few different native integrations at the time of this writing, including CRMs: Salesforce, Microsoft Dynamics CRM, SugarCRM, and SalesforceIQ. But...what if you're not using any of these systems?...

Automated Data Integration (from Bedrock Data) – Let's face it: the ideal scenario is to configure an automated integration that will continuously pipe contacts into AND OUT of Pardot and update data as it changes in your other systems. Don't believe us? Try it yourself for [free!](#)

3

Syncing Pardot Data to Other Apps

Syncing data into your Pardot account is great on the one side, but what about syncing data back out to your CRM, Events apps or other systems that you're using? This is especially an interesting question when it comes to Pardot Prospect and Account data, which your marketing and sales teams are updating as deals progress through your marketing and sales funnel.

Integrations and Pardot APIs:

If you're considering engineering an integration with Pardot in-house, you'll find that their APIs are pervasive across essentially all system objects. This means that you can pull data out of prospects, visitors, activities, opportunities, and other custom field data in Pardot. If you're planning on [writing a Pardot integration in-house](#), you'll find an easy to use API and some client libraries that will help your developers get started developing on top of

the Pardot platform.

Again, the bidirectional nature of an integration to allow you to sync data not only from Pardot to your other business systems is great, but also the ability to sync data back from your other systems as it's changing, to update Pardot is very helpful. It will give you peace of mind that your data will always be in sync and your team can get use out of it.

Certain integration systems (like [Bedrock Data](#)) will allow you to de-duplicate contact records by their email addresses when syncing data out, as well as configure your own custom field mappings at no added cost.

4

Useful Pardot Integration Hacks

Bedrock makes your Pardot instance more useful by allowing you to keep your Pardot prospect and account data consistent and in sync with the other systems your business is using. What does this mean? It means that as data changes in Pardot or another system, your data will be continuously and automatically updated in near real-time.

We thought it would be useful to provide a few interesting integration features that you can achieve with a [Pardot integration](#). So let's jump right in!

Sell to your Most Qualified Prospects: When you sync Pardot prospect data out to your CRM, a sales rep will be able to sort prospects based on Pardot's lead grade and score. Sell to your most qualified and engaged prospects with the highest lead grade and score, speed up your pipeline and generate increased ROI. Example integration: [Pardot and Zoho](#).

Trigger marketing automation campaigns in Pardot: As data is updated in your CRM, a Bedrock Data integrations allows marketer and reps to trigger automated campaigns to those prospects from Pardot. Example integration: [Pardot and HubSpot](#)

Email Online Store Prospects and Customers with Pardot: When a prospect registers to your store or they become a customer, you'll now be able to engage them with relevant emails sent directly from Pardot. Example integration: [Pardot and Shopify](#)

Nurture Event or Webinar Attendees with Pardot: After your webinar or in-person event is over, how do you keep in touch and nurture them to become a customer? A Bedrock Data integration makes it easy to add your event registrants automatically to Pardot as prospects so that you can start nurturing them after the event concludes. Example integration: [Pardot and Eventbrite](#).

5

Overall Takeaways

[Pardot](#) remains a very powerful marketing automation tool for the SMB who is looking to reap the same benefits of a larger organization. Given the breadth of functionality, the range of app integrations, the intuitive user-interface, analytics tracking, and their commitment to marketing and sales alignment, we are convinced that Pardot is positioned for continued growth and development.

The objects of the system are simple and aligned with other business apps, whether it be a CRM, events, email, finance or other app your business is using. And while the out of the box native integration options are limited, Pardot integrations become easy when making use of a [Bedrock Data integration](#), as outlined in this guide.

Pardot's product is packaged into three pricing tiers: Standard (\$1k/mo.), Pro (\$2k/mo.), and Ultimate (\$3k/mo.), and are based on the levels of customization, analytics and support you seek. They also offer Salesforce Engage, which is sold as a "sales and marketing" alignment tool, providing advanced tools to sales reps. The caveat of "Salesforce Engage", however, is that it only works if you are currently using Pardot and Salesforce.

In the end, Pardot is a competitive choice when selecting a marketing automation tool. Now owned by Salesforce, we believe that this tool will remain on the front lines of innovation and will be able to evolve with the needs of marketers and sales reps alike.

Source: <http://www.pardot.com/pricing/>

**It's simple,
we put the
right data in
the right place.**