

A Leading Medical Devices Manufacturer Transformed Its Marketing Campaigns To Improve Lead Generation and Conversion With Pardot Revamp

Optimal Utilization of Pardot. Insights-based Marketing Campaign Planning. Enhanced Brand Image.



Client Profile

Founded in the year 1961, the client is one of the most prominent research-based manufacturers and sellers of healthcare solutions and medical devices, especially breastfeeding accessories and baby products. As a trusted name in the industry, the company's innovative technologies and dedication to maternal health have solidified its position as a leading medical devices manufacturer underpinned by 20 subsidiaries across the Americas, Australia, Asia, and Europe and with a global distribution network in 100+ countries.

The Challenge

The client was encountering a myriad of challenges stemming from a single source: underutilization of Salesforce's Pardot instance and lack of awareness toward its multiple functionalities.

Inefficient utilization of the existing Salesforce Pardot

instance: The client's marketing team was struggling to utilize Pardot to its maximum potential despite its powerful marketing automation capabilities. This resulted in limited accuracy in customer segmentation, missed lead generation opportunities, ineffective campaigns, underutilization of the instance, and RoI loss.

Limited awareness about Pardot's features: The team lacked the necessary understanding of Pardot and its multiple features which hindered their capability to automate and streamline daily tasks and track performance effectively.

Failure to track campaign performance: The marketing team failed to use Pardot to track the performance of different campaigns and generate business-critical insights through reports that would have been, otherwise, impacted the marketing strategies in a fruitful manner.

Steep learning curve: Some team members experienced a steep learning curve in understanding the new functionalities of the Pardot features.



Underutilization of Salesforce Pardot



Lack of clear understanding of Pardot and its features



Lack of visibility into the campaign performance



Challenge of data integration between Salesforce CRM & Pardot



Absence of business-critical insights for the marketing team

The Solution

Damco's Salesforce experts carefully analyzed pain areas of the client to understand the underlying issues and decided to perform an end-to-end Salesforce Pardot revamp, starting with a complete audit of Pardot instance. Based on the audit findings, Pardot instance was optimized and integrated with Salesforce CRM to align sales and marketing objectives.

Setup the initial audit of existing Salesforce Pardot instance

- Our Salesforce team carried out a thorough audit of the existing Pardot instance to pinpoint areas of improvement and scope for optimization.
- This comprehensive audit helped the team to understand client's existing setup and the bottlenecks and devise a strategic roadmap for the revamp.

Reconfiguration and upgradation of the Salesforce Pardot instance

- Based on the audit findings, Damco's Salesforce team reconfigured and fine-tuned with technical implementation and setup, which allowed the client's Sales org to align with marketing objectives and led to overall improvement in the system performance.
- The reconfiguration and upgrades included optimization of account engagement setting, DKIM/SPF setup, authentication and validation and email sending domains, and data syncing with Salesforce CRM.

Data Synchronization between Salesforce and Pardot

- Seamless data integration between Pardot and Salesforce CRM was ensured after careful planning
- The huge data volumes were synchronized to help the marketing team generate meaningful insights using Einstein builder

Setting up accounts and users to drive secured usage of Salesforce Pardot

- We reconstructed the client's Pardot account to streamline user access, permissions, and roles.
- Marketing assets were segregated into folders and access was defined on the basis of hierarchy.
- This new setup improved the collaboration among team members and helped them execute marketing campaigns efficiently while maintaining the marketing data security.

Setting up and guiding execution of marketing campaigns

- The team further redesigned client's marketing campaigns within Pardot and aligned them with their unique buyer personas and customer journeys.
- To help the client's marketing team, we provided them a detailed help document which guided marketing team members for easy navigation through the Instance and helped them leverage features such as Engagement History Setup, Preference Page, Templates, AB Testing, which earlier had limited usability.
- This further helped them in creation of targeted and personalized content, lead segmentation, and setting up automated prospect nurturing at each stage.

Leverage Einstein platform for campaign optimization

- Our experts enable Pardot Engage and B2B Marketing Analytics (B2BMA) to equip the client's marketing team with advanced Einstein tools for personalized email marketing campaigns and data-driven insights for campaign optimization.

Live training sessions

- To ensure optimal user adoption, Damco's experts conducted live training sessions and provided one-on-one user support while addressing all the related queries of the client's marketing team.

The Benefits

The successful revamp of Salesforce Pardot with new features had a transformative impact on the client's marketing efforts and overall business performance as they experience significant improvements in lead generation, lead nurturing, and customer engagement.

- **Increased Lead Conversion Rate:** Significant increase in the lead conversion rate due to highly targeted and personalized marketing campaigns, which further translated into improved sales numbers.
- **Enhanced Customer Engagement:** Substantial improvement in customer engagement with Pardot Engage-powered personalized content and effective lead nurturing.
- **Improved Decision Making:** Optimized marketing strategies based on real-time data as the new B2BMA feature provided detailed actionable insights into campaign performance.
- **Improved Efficiency and Team Collaboration:** The revamped setup of Pardot and streamlining of account and user management improved the efficiency and collaboration of the client's marketing team.
- **Enhanced Brand Image:** Significant improvement in client's reputation in the healthcare industry as the highly professional and personalized marketing assets impacted client's brand image in the most positive manner.

Salesforce Pardot Audit & Revamp for Improved Efficiency of Marketing Campaigns, User Adoption, & Brand Image

[Talk To Our Salesforce Team](#)

About Damco

Damco Solutions is a strategic Salesforce Gold Consulting Partner and holds expertise across the Salesforce ecosystem. Damco helps businesses boost productivity and realize the true potential of their Salesforce platform to maximize their investments. Contact Damco to learn more about the services and solutions that can help transform and build a customercentric digital-first organization.

Contact us for more information on Damco's Offerings.

☎ +1 609 632 0350

✉ info@damcogroup.com

🌐 <https://www.damcogroup.com/>