

PARDOT HEALTH CHECK



Accelerator Overview



A very powerful marketing automation tool that tightly integrates with Salesforce.

Over time a few things can happen that impact the effectiveness of the tool and your return on investment.



Old or unused assets



Hidden issues with Salesforce connector and sync



Stale Prospect records



Lack of compliance with email deliverability standards



Build up of outdated content



Lack of use of new features



With our Pardot health check we will audit your Pardot implementation and point out opportunities to improve.

Health Check Overview

Review high level usage stats

- ✓ Document all available features in instance
- ✓ Document degree of usage of features
- ✓ Advise on areas to explore (unused features/new features, etc...)
- ✓ Advise on areas near limit and advise on strategies to address

Review Salesforce Connector

- ✓ Analyze settings
- ✓ Analyze syncing fields (custom and standard)
- ✓ Review Pardot elements in Salesforce (fields, features) and advise on issues and areas to explore
- ✓ Advise on potential issues



Review user access/setup and advise on potential issues or improvements



Review Email deliverability settings and notify of issues



Review organization of assets and advise on best practices for structure



Deliver health check via Go to Meeting and provide slide deck from session (1 hour meeting)



Discuss roadmap for next steps