ProTech Professional Technical Services, Inc.

Drive Sales with the Pardot Lightning App PDX-101

Course Summary

Description

Discover how to drive more qualified leads, nurture prospects through the sales cycle, and sell more effectively using the Pardot Lightning App. In this 3-day class, Pardot experts will show you how to design and implement marketing workflows in the Pardot Lightning App to make data-driven decisions and drive your company's business forward. Learn how to create and automate dynamic emails, generate and qualify leads, and leverage reports and data to boost sales.

Objectives
At the end of this course, students will be able to:

- Enable the Pardot Lightning App.
- Explain the relationship created between Pardot and Salesforce once the Pardot Lightning App has been enabled.
- Generate leads with Pardot Lightning App's various lead generation tools including forms, landing pages, and custom redirects.
- Manage leads with Pardot Lightning App's lead management tools including page actions, automation rules, segmentation rules, dynamic lists, and completion actions.
- Engage leads with Pardot Lightning App's lead engagement tools including email, personalization, dynamic content, and Engagement Studio.
- Qualify leads with Pardot Lightning App's scoring and grading functionality.
- Interpret data generated via Pardot Lightning App's reporting capabilities.
- Design and execute successful end-to-end marketing workflows using the Pardot Lightning App.

Topics

- Course Introduction
- Salesforce Integration
- Admin
- Visitors and Prospects
- List Management
- Personalization and Email Marketing

- Forms and Landing Pages
- Lead Management
- Lead Qualification
- Lead Nurturing
- Capstone
- Course Wrap

Audience

This course is designed for Pardot Marketers and Salesforce Administrators responsible for designing, building, and implementing marketing workflows and reports in the Pardot Lightning App. It's also for Business Users looking to learn more about the Pardot Lightning App. This course is a great foundation builder for anyone looking to take the Salesforce Pardot Specialist Certification Exam.

Prerequisites

There are no prerequisites for this course.

Duration

Three days

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Course Outline

I. *Course Introduction*
  A. Course Objectives
  B. Learner Expectations/
  C. Housekeeping
  D. Additional Course Resources
  E. Course Case Study

II. *Salesforce Integration*
  A. Pardot Salesforce Relationship
  B. Syncing
  C. Enabling the Pardot Lightning App in Salesforce
  D. Custom Fields
  E. Salesforce Campaigns

III. *Admin*
  A. Pardot Dashboard
  B. Email Domains
  C. Connectors
  D. Recycle Bin
  E. Users and User Groups
  F. Usage Governance

IV. *Visitors and Prospects*
  A. Visitors
  B. Prospects

V. *List Management*
  A. List Types
  B. Static Lists
  C. Test Lists

VI. *Personalization and Email Marketing*
  A. Variable Tags and Advanced Dynamic Content
  B. Email Marketing
  C. Email Templates
  D. AB Testing
  E. Email Reports

VII. *Forms and Landing Pages*
  A. Forms
  B. Landing Pages
  C. Forms and Landing Page Reports
  D. Custom Redirects
  E. Custom Redirect Reports

VIII. *Lead Management*
  A. Page Actions
  B. Completion Actions
  C. Segmentation Rules
  D. Automation Rules
  E. Dynamic Lists
  F. Choosing an Automation Tool

IX. *Lead Qualification*
  A. Scoring
  B. Grading

X. *Lead Nurturing*
  A. Building an Engagement Program
  B. Engagement Program Reports

XI. *Capstone*

XII. *Course Wrap*