Master Cheat Sheet for:

SALESFORCE CERTIFIED PARDOT CONSULTANT

The Salesforce Certified Pardot Consultant has **at least six months** of hands-on experience implementing the Pardot application and associated tools. The Salesforce Certified Pardot Consultant possesses facilitation and consultative skills to gather the business requirements, design solution alternatives, and implement them to meet business needs.

The Salesforce Certified Pardot Consultant candidate **has the experience, skills, knowledge, and ability to:**

- Identify and understand a customer's current marketing to sales strategy.
- Map customer goals to Pardot features.
- Design a strategy to meet customer business needs based on an analysis of key performance indicators.
- Recommend automation processes to achieve business objectives.
- Recommend Pardot tools and features (Salesforce Engage) to implement marketing to sales strategy.
- Develop and recommend a data and content migration strategy.
- Articulate the implications and importance of technical setup.
- Analyze existing lead qualification strategy and make recommendations for translating into Pardot.
- Analyze existing lead nurturing strategy and make recommendations for translating into Pardot.
- Analyze existing lead generation strategy and make recommendations for translating into Pardot.
- Develop and recommend a scalable way of organizing data and assets in Pardot.

- Analyze data generated in Pardot Reports to make recommendations for system optimization.
- Invest time in studying the resources listed in the Salesforce Pardot Consultant Study Guide and any additional study materials provided by Pardot.

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EVALUATION (17% Weighting)

Given a scenario that includes an assessment of a customer's current software solutions and tools, analyze and prioritize first steps in Pardot.

Given a scenario that includes an assessment of a customer's current Salesforce setup and existing automation processes, analyze and prioritize first steps in Pardot.

Given a scenario that includes an assessment of a customer's data (marketing assets, leads & contacts, etc.), analyze and prioritize first steps in Pardot.

Provided customer goals, map these goals to features in Pardot.

- Design a strategy to meet customer business needs based on an analysis of key performance indicators.
- Given a scenario that includes an assessment of a customer's current Salesforce and Pardot landscape as well as business objectives, analyze and make recommendations on a path forward.

Design a strategy to identify customer business needs based on marketing trend using currently available tools and methods.

Pardot Calculator: www.pardot.com/roi-calculator/
Statement of Work

Salesforce Blueprint for B2B Marketing Engagement

Discovery Questionnaire

1. Make the relevant people in the organisation aware of their role: MKT, IT, Web, Sales, CRM Admin, Senior management, Users
2. Technical setup: Tracking code, SPF & DKIM, Custom Page Scoring, CName, Whitelist IPs
3. Build: templates, forms, landing pages
4. Import prospects
5. Set up connector and optional product Engage
6. Upload your Assets
7. Lead assignment / distribution
8. Connect other accounts: Social media, Adwords..

Learn about Performing a **Permission Pass:**
http://help.pardot.com/customer/portal/articles/2126071-performing-a-permission-pass
https://help.salesforce.com/articleView?id=pardot_email_permission_pass_parent.htm&type=5

Mapping LenoxSoft's Goals to Pardot Features: http://pardot.org/clients.html
https://www.pardot.com/blog/how-to-map-your-marketing-content-to-align-with-your-customer-journey/

ACCOUNT CONFIGURATION (20% Weighting)

Articulate the implications and importance of technical setup.

Implement **Tracking Code** Pardot provides a General tracking code that is added to any page that you may want to monitor and any actions will be recorded for your analysis, much like any other popular web analytics tool.

Custom Page Scoring Pardot provides a baseline scoring model that helps marketing and sales objectively identify the best leads based upon their activity. The default scoring can be customized but page specific customization can be easily done through Page Actions.

Create Tracker Domains Create a tracker domain for each domain you want to serve content from. Designate one as your primary tracker domain, which Pardot will use for your vanity URLS and link rewriting.

Forms and landing pages allow you to capture new leads by converting anonymous visitors into identified prospects. Prospects are also identified when they click on tracked links within Pardot emails.

Email Templates Pardot utilizes email templates as autoresponders, list emails and within drip marketing programs. Please identify the email templates that you currently have or that you would like to create using the email template builder.

Forms Pardot provides hosted forms (built using a form builder) and form handlers (integrated with your existing website forms).

Documentation Series: Technical Setup /
http://help.pardot.com/customer/en/portal/articles/2128478-technical-setup-overview

Check your IP reputation for example with: MX Toolbox

Adding your SPF and DomainKeys to your domain's DNS records will help your emails out of spam folders, is critical to having good deliverability.

Develop and recommend a data and asset migration strategy.

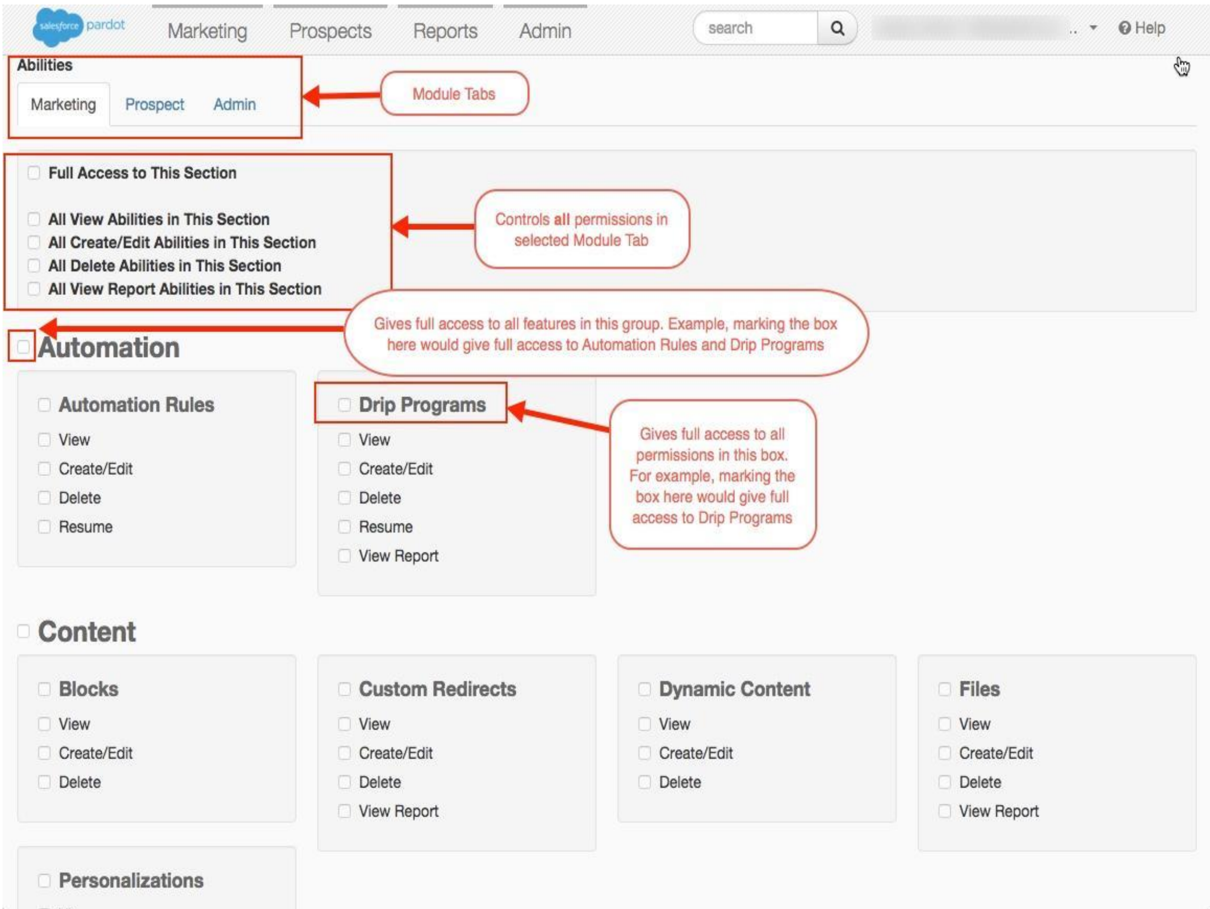
Implementation Guide: http://help.pardot.com/customer/portal/articles/2133517-implementation-guide
https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/pardot_implementation_guide.pdf

Your Guide to Easy Data Migration with Marketing Automation (Part 1)
Your Guide to Easy Data Migration with Marketing Automation (Part 2)

Understand and explain how to create a custom user role.

Custom User Roles are included with Advanced and Premium editions and available as an add-on for Plus editions.

The main abilities available relate to creating, viewing/editing, deleting, and reporting of a specific Pardot feature or functionality. Custom roles do not replace the default roles which Pardot provides. You can either create a new user role or start with a default role and then customize the role based on your needs.



<u>Understand and explain how to create custom objects.</u>

Custom Objects allow Pardot to run automation around any custom or default objects in your CRM that are not default objects to Pardot. All custom objects must be tied to a prospect record in Pardot in some way through a prospect id. You can make a custom object from anything that is linked to a contact, lead, or account in your CRM.

You can not force default objects in Pardot to become custom objects. In order to sync custom objects from Salesforce, the Salesforce connector user must have administrative rights.

Note: Custom Object Integration is included with Advanced and Premium editions and available as an add-on for Plus editions. Custom Object Integration includes unlimited custom objects but objects are provisioned based on a client's needs.

IN SALESFORCE: Navigate to Setup > Create > Objects.

IN PARDOT: Navigate to Admin > Custom Objects.

In Automation Rules select **Prospect custom object**

** If your account has Custom User Roles enabled, for new custom objects, the default for any Custom User Role is “no access”. You must grant access to these items at the Custom User Role level. Custom Object abilities will be located under the Admin tab within custom user role.

- Custom objects are read only
- Variable tags are not available for custom objects
- Sync follows the same pattern of other

Given a scenario, recommend the sequence in which to configure Pardot and Salesforce.

Video: Salesforce Connector Introduction
Downloadable Content: Salesforce Connector Set Up Guide
Downloadable content: Salesforce Engage Admin User Setup: A Guide for the Admin User
Documentation Series: Best Practices: Pardot and Salesforce Campaign ROI /
http://help.pardot.com/customer/portal/articles/2128589-best-practices-pardot-salesforce-campaign-roi

Installing Salesforce Connector V2 :
https://help.salesforce.com/articleView?id=pardot_sf_connector_setup_v2_parent.htm&type=5

INSTALLING THE SALESFORCE CONNECTOR
A summary of the 13 steps in the Salesforce Connector guide (see guide for screenshots etc)

1.In Salesforce, **install the Pardot connector**, downloadable from the AppExchange
The Pardot Connector auto installs a custom app, tab, as well as fields for leads & contacts.
To check the install in Salesforce, go to:
Setup > Build > Installed Packages and check if this is the most recent version.

2. **Give SF users permission to access Pardot elements:**
In SF, go to
Setup > Manage Users > Permission sets > Pardot Connector > Manage assignments and select the users to apply the permission set to

3. **Whitelist IP ranges**
In SF, go to
Setup > Security controls > Network Access > New and enter the trusted IP range

4. **Add Salesforce to Pardot using the Salesforce Connector**
In Pardot, go to
Admin > Connectors > [Add Connectors] and choose the Salesforce connector > click [Create]
Enter the connector user credentials for the Salesforce login and click [Allow]

5. In Pardot, **map fields between Pardot and Salesforce** i.e. Leads to Contact
As well to map custom Pardot Lead fields to the Contact object in Salesforce for Lead conversion in Salesforce

6. Next, **display Pardot data in Salesforce:**
In Salesforce, go to
Setup > Customize > and choose either Leads or Contacts > select a layout and click [Edit]
Add a section (and call it "Pardot"), then drag on the Pardot fields you want onto the layout

7. Then **add Pardot activities to Salesforce**:
Drag a new section onto the layout and call it "Pardot Activities"
Select the category "Visualforce Pages" in the layout editor and drag the following onto the layout:

Pardot Lead Activities
Pardot List Membership
Pardot Social Data

8. **Add the following buttons** to the Salesforce Lead and Contact detail screen:

[Send to Pardot]
[Send Pardot Email]

In the layout editor, select Buttons and drag and drop the 2 buttons onto the button bar in the Salesforce layout

9. **Add the button [Add to Pardot List] to the Campaigns detail page** in Salesforce:
Go to Setup > Customize > Campaigns > Buttons, Links & Actions > and select New Button or Link (enter the button label as "Add to Pardot List")
Select 'Detail Page Button' as the display type and choose 'Display in existing window'
For source url, copy and paste the following code:

```
https://pi.pardot.com/list/pullCrmCampaign/ fid/{!Campaign.Id}/campaignName/ {!URLENCODE(Campaign.Name)}/leadCount/
{!Campaign.NumberOfLeads}/contactCount/ {!Campaign.NumberOfContacts}?sessionid={!$Api.
Session_ID}&serverurl={!$Api.Partner_Server_URL_90}
```

(the code above is taken from the Salesforce Connector Guide)

Then, on the campaign detail page in Salesforce add the new button by dragging it on the the layout's button bar

10. **Map Pardot & Salesforce fields to each other:**
In Pardot, go to
Admin > Configure Fields > Prospect fields and click [+Add custom field] and enter the name of the custom field that is in Salesforce (the name must be the api name)
Do this for fields in the following objects:

- Account
- Opportunity
- Contact

11. **Map Salesforce users to Pardot users**:
In Pardot, go to
Admin > User Management > Users and click the gear icon on the user record to edit and then select the Salesforce user
Repeat for all Salesforce users

12. **Enabling Salesforce and Pardot Single Sign On (SSO)**
In Pardot, go to
Admin > User Management > Users > and select [Enable Single Sign On with CRM] for each user (a user can also set their own SSO from their settings in Pardot)

Finally, log into Salesforce and click the Pardot tab to ensure the data and features are visible.

Now you are ready to import leads and contacts into Pardot from Salesforce:

13. **Import prospects from Salesforce:**
In Salesforce, export a csv file of leads or contacts
In Pardot, go to Admin > Import > Prospects and upload the csv file
Map the fields on the import file (you can map just the email field as all others can update when Pardot syncs with Salesforce)
Before clicking the [import] button, create a campaign to attach the new prospects to (you could call it 'Prospects from Salesforce')
Select the import action as 'Import and add to list' and import.

Given a usage governance plan, develop and recommend an organizational strategy that addresses naming conventions, user roles, and folder structures.

Are available in all Pardot Editions, although for what I have seen they are not always in use. Folders I find are a great tool, you can:

- Get organized
- Lock access
- Scoring Categories

Note assets can only be in one folder at a time and works on a top-down structure so you can segment and nest elements.

Describe the benefits of connected apps (Google Adwords, GoToWebinar, Webex, ReadyTalk, FullContact).

GoToWebinar allows you:

- Register attendees
- Registrations and Attendance as activities
- Report on those activities
- Pull prospects Automatically to Pardot

ReadyTalk allows you:

- Register prospects for ReadyTalk events from Pardot forms via completion actions
- Display registrations and attendance as activities in the prospect record and score them
- Report on registrations and attendance for ReadyTalk events
- Automatically pull in prospects who exist in ReadyTalk but not yet in Pardot

FullContact:
This has been removed as a valid connector -
https://help.salesforce.com/articleView?id=000352023&language=en_US&mode=1&type=1

Online Course: Tracking Google Adwords in Pardot
Pardot integrates with your Google AdWords account to synchronize AdWords' data with individual Pardot prospects. Pardot can then link opportunity data to these prospects and give you a comprehensive Paid Search ROI report.

You can find more information about Pardot Connected Apps:
https://www.pardot.com/resources/apps/
https://help.salesforce.com/articleView?id=pardot_connectors.htm&type=5

Connector Category	**Name**
Webinar	GoToWebinar ReadyTalk WebEx
Social Posting	Facebook | LinkedIn | Twitter
Other	bit.ly Eventbrite GoodData Google Analytics Olark Twilio UserVoice Wistia

How does the Sync works for person accounts
Pardot can sync with Salesforce person accounts. Contact Pardot Support to enable this functionality. Available in: All Pardot Editions
How you sync Pardot with person accounts depends on whether you use Salesforce leads.

- **Syncing with Leads and Person Accounts**

Pardot creates records in Salesforce as leads, but when the leads are converted into person accounts, Pardot syncs with the person account. Pardot doesn't create more Salesforce leads for the synced prospect.
With this syncing arrangement, a single Salesforce person account record syncs to two different records in Pardot: a prospect record and a prospect account record. Pardot doesn't display the two records as one, unlike in Salesforce. Although the field mapping remains the same.

Contact-level fields map to prospect fields, and Salesforce account-level fields map to Pardot prospect account fields. However, the account owner syncs to both the Assigned User field on the prospect account and the Assigned User field on the prospect in Pardot. The CRM ID of the Salesforce record that converted to a person account displays under the Contact ID field on the prospect record in Pardot.

- **Syncing with Person Accounts Only**

Pardot syncs only to person accounts and doesn't create leads. A Salesforce person account syncs to a Pardot prospect record that is associated with an account in Pardot. Pardot doesn't combine the two records into one view as in Salesforce.

The field mappings remain the same. Contact fields map to prospect fields, and Salesforce account-level fields map to Pardot account fields. The Contact ID for the Salesforce contact ID that has become the Person Account appears on the prospect record.

- **Add Pardot Data to Person Account Layouts**

To use person accounts with Pardot, add Pardot elements to your person account page layouts.
Add the Send to Pardot Button for Person Accounts
The Send to Pardot button makes it easy to sync person account records with Pardot prospects. Add the button to your person account page layouts.
Add the Send Pardot Email Button for Person Accounts
The Send Pardot Email button makes it easy to email Pardot prospects from Salesforce. Create and add the button to your person account page layouts. Don't add this button if your layout has the Send Engage Email button.

LEAD MANAGEMENT(12% Weighting)

Given a customer scenario, develop and recommend a lead generation strategy.

Find from sales what a hot lead looks like, if noticed any trends of successful deals. Look on your CRM data. (if you use the connector you can show pardot activities)

You have default scoring model. If you want your own think of:

- List of prospect behaviors to score
- Consider individual assets separately, form, download, click
- Measure implicit interest, above how each counts interest
- Work to a Score of 100

Define purchase readiness on their engagement, so how close to sale is a prospect that takes that X action, this helps you to work out the points to add per action.

Then HOW to adjust prospect scores:

- Editing **Baseline Scoring Rules** (Admin > Automation Settings > Scoring Rules)
- Completion Actions on Forms or Form Handlers
- During Import
- Manually from Prospect record

For implementations leave the default as it is for the first 30 to 60 days before any changes.
* Note changes 1 Will rescore everyone and 2 may affect automation rules running on score!

You can modify **score on completion actions** (rather than automation score rules)
So for example from a File you can add completion actions to increase prospect score.
You can do many other things on completion actions: add tag, add to list, add to SF campaign, adjust score, assign prospect, change campaign, change custom field value, create SF task, increment field value, notify user spec or assigned, remove from list, remove tags, send autoresponder, set profile

Identify the steps to create a form handler.

Online Course: Form Handlers
Documentation Series: Forms and Form Handlers

Integrate Pardot Form Handlers with Web-to-Lead Forms

If the client has a current Web to Lead integration with Salesforce and they wish to post the data to Pardot as well. You must ensure

1. Enable data forwarding to the success location is **ticked**. When Pardot receives the post, the same data post is transferred to the success location.

AND

2. From the Success Location dropdown, select Specific URL and enter the Salesforce post address URL from your Web-to-Lead form code.

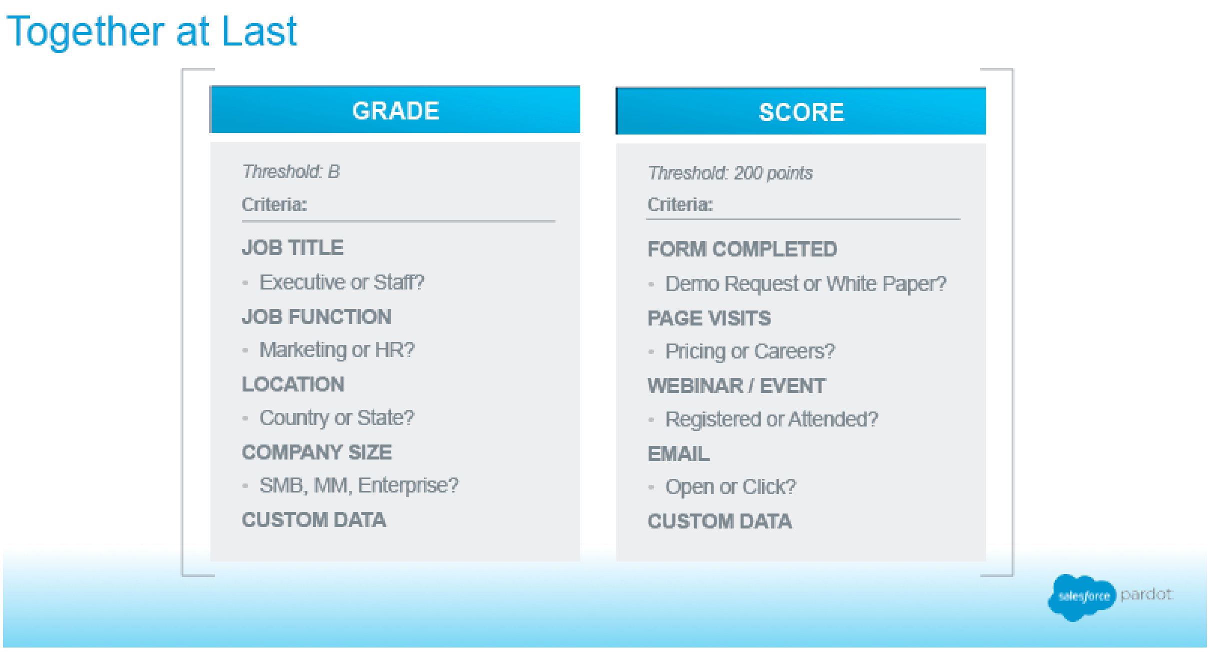
Difference between Scoring and Grading

One of the flaws of a lead qualification system that relies solely on lead scoring, which uses a prospect's activities to gauge their interest in your product.
A **lead score** provides a **numeric** value that correlates with a prospect's **interest** level — the higher the lead score, the more interested they are, and vice versa. The problem with this one-sided model is that it's difficult to differentiate between the leads who are legitimately interested in your product and the leads who are on your site because their friend suggested they check out career opportunities, or because they're doing industry research in your resources section.

This is why lead grading is so critical. **Lead gradin**g, which is reflected as a **letter** grade, looks at the flip side of lead scoring: how interested are **you** in your leads? By comparing each lead's demographic data to your ideal prospect profile (including industries, job titles, company size, and more), you can determine whether or not the lead will be a good fit for your product. This prevents sales reps from wasting their time on leads who ultimately have no intention of making a purchase.

It's important to understand the meaning of C Level Jobs. In the exam this is an area that does get mentioned:

- C-level jobs are the top executive or highest level corporate positions in a company. For example, a CEO (Chief Executive Officer) holds a C-level job.



Have a play with the Pardot Scoring Grading Lab & watch the Scoring & Grading Webinar recording.
Knowledge Article: Grading Overview
Knowledge Article: Prospect Scoring
Trailhead Learning Module: Trailhead Pardot lead scoring and grading

* Brilliant post on Form tricks: https://hub.uberflip.com/blog/marketing-automation-hacks-6-creative-tricks-for-building-better-pardot-forms

Generally for forms 4 steps for lead gen

1. Ask Relevant Questions
2. Connect with useful Content
3. Targeted **Journeys**
4. Move to Next Action

Don't ask too much info, reduction of 5% fill per field on a form over 4.
Use journeys if any drop down as 'other', to refine the real value presenting new other options.

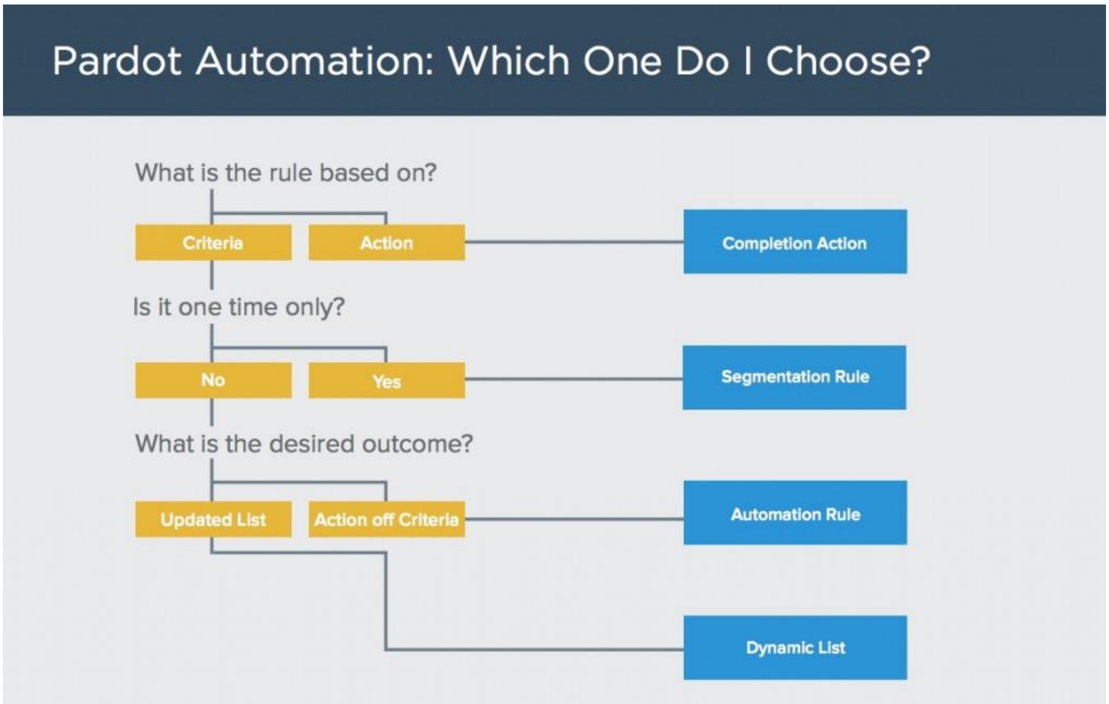
Ways of Lead Gen

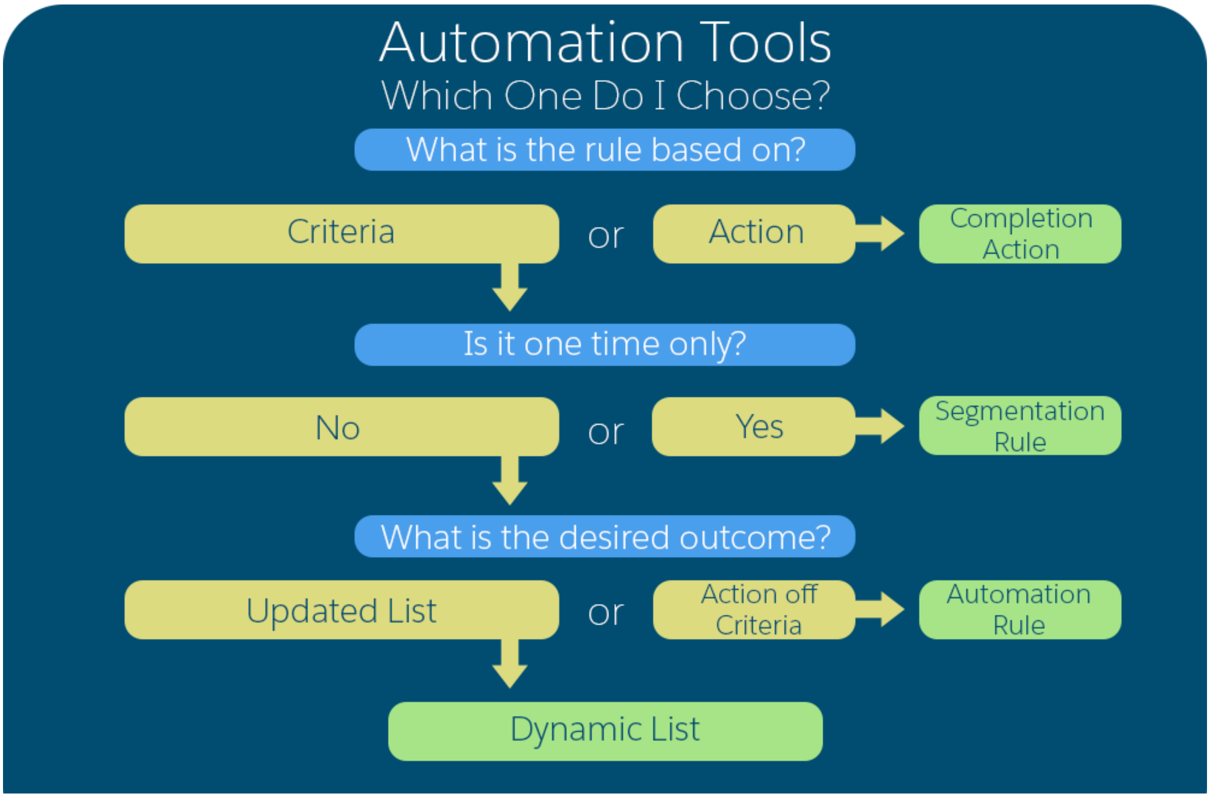
- Tracking Links
- Forms and Form Handlers
- Multivariable Tests

AUTOMATING BUSINESS PROCESSES (17% Weighting)

<u>Given a scenario, recommend the best automation tool(s): automation rule, segmentation rule, dynamic list, completion action.</u>

Best visual to understand which Automation tool to use:





https://help.salesforce.com/articleView?id=pardot_automation_choosing_the_right_tool.htm&type=0

Documentation Series: Automations

Actions available for **Completion Actions:**

- Add or remove prospects to from a list
- Add or remove tags
- Add / Change prospect to SF campaign
- Adjust prospect Score / Adjust prospect score for Scoring Category
- Assign prospects to queue, user, group, via SF assignment rules
- Change custom or default field values / increment field value
- Create SF task
- Notify specific user or assigned
- Register for Webinar
- Send Autoresponder
- Set Profile

** **Completion Actions** CANNOT: Allow Deleted CRM lead/contact to recreate from Pardot, Do not sync with CRM, Mark as Reviewed.

Actions available for **Segmentation Rules:**

- Add or remove prospects to from a list
- Add or remove tags
- Add prospect to SF campaign
- Add List: add prospects that matches to a new list.

** **Segmentation Rules** CANNOT: Change SF Campaign, Adjust Score, Allow Deleted CRM lead/contact to recreate from Pardot, Do not sync with CRM, Mark as Reviewed, Assign, change fields values, create SF task, notify users, send email or autoresponder, register for webinar

Actions available for **Automation Rules:**

- Add or remove prospects to from a list
- Add or remove tags
- Add / Change prospect to SF campaign
- Adjust prospect Score / Adjust prospect score for Scoring Category
- Allow Deleted CRM lead/contact to recreate from Pardot
- Assign prospects to queue, user, group, via SF assignment rules
- Change prospects profile criteria or prospect profile
- Change or clear custom or default field values / increment field value
- Create SF task
- Do not sync with CRM
- Mark as reviewed
- Notify specific user or assigned
- Send prospect email

** **Automation Rules** CANNOT: Send Autoresponder, Register for Webinar

Actions available for **Dynamic List**:

- Only list membership NOT to take additional actions outside of segmentation

You can trigger Completion Actions from **Page Actions**. *Things like: add or remove tags, add to or remove from list, add to SF campaign, assign prospect, change custom or default field, create SF task, increment prospect field value, notify specific user or the assigned user, set source campaign.*
Note that changing a Page Action's Scoring Category is retroactive. For example, if you assign the "Generators" Scoring Category to a Page Action, and you later decide to assign the "Power Drills" Scoring Category instead, all the points originally attributed to the "Generators" category will switch to "Power Drills".

Completion Actions are available for:

- Forms
- Emails
- Files
- Custom Redirects
- Page Actions

Automation Rules vs Completion Actions Video

Custom Redirects are used by:

- Banner Ads
- Social Sharing
- Link to Files you don't host

Given a scenario, design a sequence of events in Pardot to complete a marketing initiative (assets, trigger points, notifications, etc.).

* Learn on Automation Rule changes with Repeat Rules.
This new feature allows the User to determine if an Automation Rule should be allowed to match a prospect more than once.

* A brilliant post creative ideas to use Automation Rules must read!

* Learn at a glance about Autoresponders and how to incorporate in your content strategy.

Troubleshooting Automation Rules:

- Has completed running once?
- Has already matched Prospect? As Automation rules don't match prospects more than once even if you edit and change actions, better copy rule and edit instead.
- Has the rule already matched a prospect with the same email address? Automation Rules match the first prospect not necessarily the one with most recent activity for the others you will see "Not Applied: Duplicate Email" instead of the action timestamp.
- Automation rule on Form? If the form is hosted on a Pardot landing page you will want to base your rule around the landing page. Landing page "Was completed Successfully" OR "Was Viewed"
- Automation Rule on Form? If the form is hosted on an external page (a page you host) you will want to base your rule around the form. "Was completed Successfully" OR "Was Viewed"

EMAIL MARKETING (10% Weighting)

Given a scenario, develop and implement an email marketing strategy.

Good bounce rate is anything lower than 10%

To email prospect manual user or via Automation Rule, Drip Program (or Completion Actions but only 'AutoResponders')

HOW to avoid your email going into spam:

- Text Version
- Add domainkeys & SPF
- Avoid spammy words
- Check image to text ratio

Video: Email Overview
Online course: Building an Email
Online course: Testing Emails with A/B Testing
White Paper: The Complete Guide to B2B Email Marketing
Documentation Series: Email Sending
(Forms?)
http://help.pardot.com/customer/en/portal/topics/845072-forms-form-handlers/articles
Documentation Series: Email Compliance and Deliverability

Given a scenario, develop and implement a lead nurturing strategy.

Organizations that excel at Lead Nurturing sees **50% more sales** at **33% lower cost**.

On Lead Nurturing timing between emails ideally between 6 and 30 days.

* Learn on types of Lead Nurturing Campaigns.

White Paper: Complete Guide to Lead Nurturing

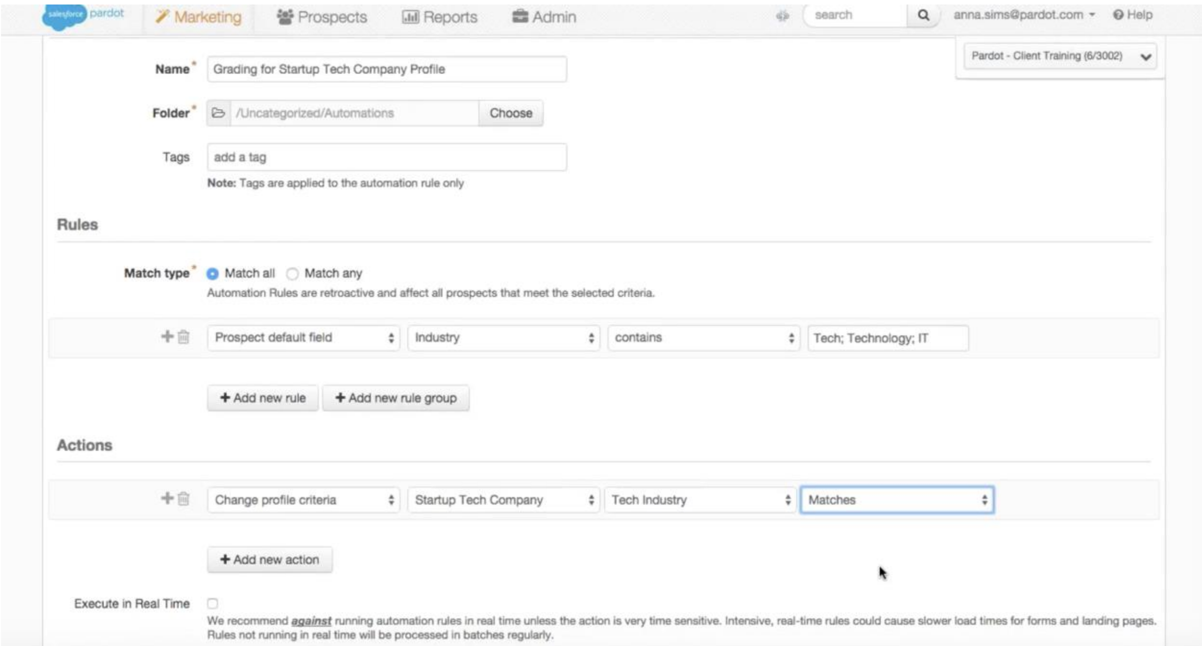
Profiles

Profiles are used to grade your prospects based on your ideal customer profile. You can set criteria such as location, company size, job title, and other factors that you will use to tier your prospects before assignment. Pardot starts you with a **default profile** but you may edit its criteria or create any additional profiles that meet your business needs.
(*You cannot rename or delete the Default profile.*)

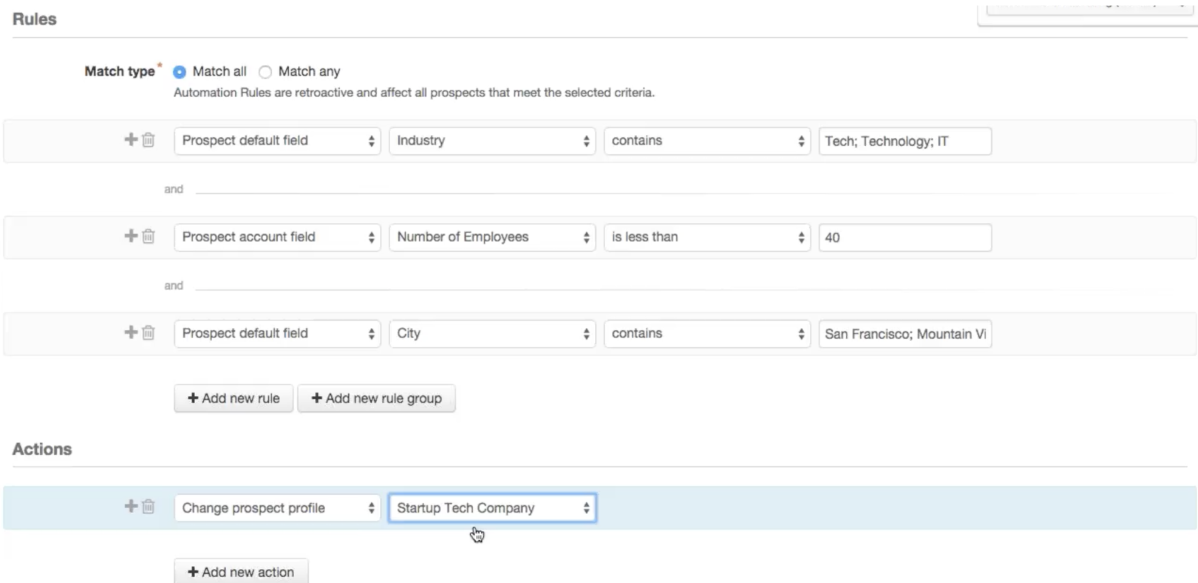
You may also use multiple profiles if you target several different audiences. For example, you may have different grading criteria for your technical prospects and your executive prospects. You can set profiles:

- Manually from prospect edit
- Completion Action ‘Set Profile’
- Automation Rule triggered by event such as job title change on form.
- Page Actions via the tracking code on your webpage. Name on Profile > view Javascript.

Mostly via Automation Rules, including criteria from the profile so it can be applied and it’s grading. It doesn’t have to match all profile criteria but some:



Or to be a complete match for the profile, then the action is to be **Change prospect Profile** (rather than change prospect criteria):



Automation rules are really the best way to adjust across your account, really ‘cherry pick’ those prospects that are going to be a great match.

Similarly to scoring you can aswell change grading manually from prospect page.

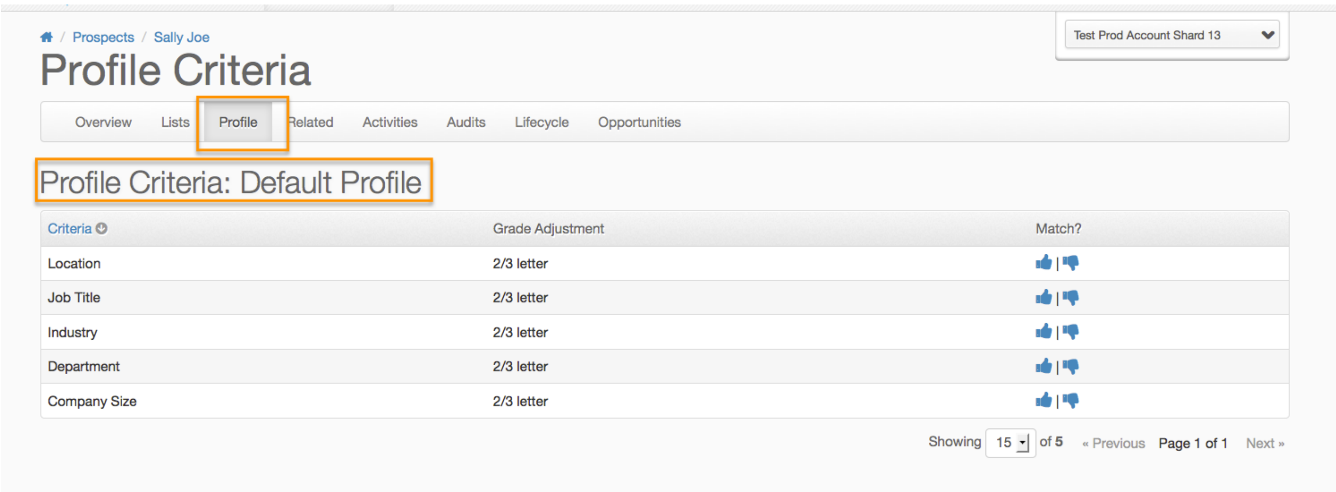
LEAD MANAGEMENT(14% Weighting)

Develop and implement a Lead Qualification strategy (including use of multiple scoring categories, profile creation, and grading automation).

Given a lead qualification standard, classify qualified and unqualified leads/prospects.

Given a scenario, recommend a model to route qualified and unqualified leads across the business.

Note that **All** prospects will be associated with the **Default profile** unless they are re-assigned a different one.
You can set the profile criteria within a prospect record to Match (thumbs up), or Not Match (thumbs down).
Matching a profile criterion within a prospect record will cause an **increase** in grade by the amount (1/3, 2/3, or 3/3 of a letter grade) specified in the profile associated with the prospect.
Selecting Not Match on a profile criterion within a prospect record will cause a **decrease** in grade by the amount (1/3, 2/3, or 3/3 of a letter grade) specified in the profile associated with the prospect.
You can use **automation rules to Match or Not Match** criteria to grade all prospects appropriately.

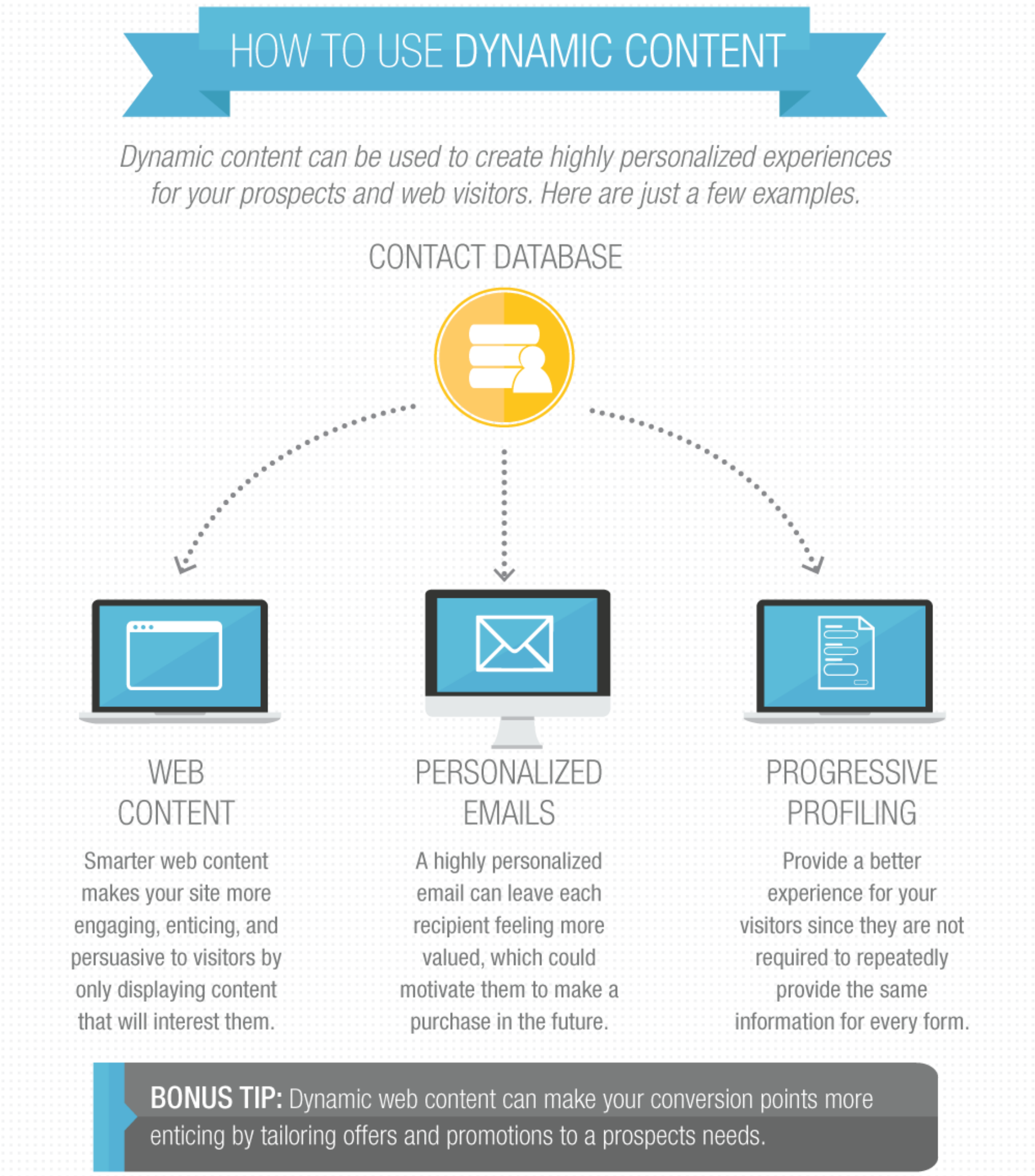


PERSONALIZING THE PROSPECT EXPERIENCE (8% Weighting)

Create advanced dynamic content in Pardot. Given a lead qualification standard, classify qualified and unqualified leads/prospects.

Dynamic content is any email or web content that can be tailored to a specific viewer based on data gathered about that viewer. The most common example of dynamic content is personalized greetings on mass emails, where a recipient's name is retrieved from a contact database and inserted into the email.

However, dynamic content is not limited to contact information. Experiences can be tailored to individual viewers based on demographics, past behavior, and even preferences, to create completely unique content experiences.



Which fields/objects you can run dynamic content on,
Dynamic content can be run on all default and custom prospect fields.
* Note: Advanced Dynamic content is included in the Plus, Advanced, Premium editions, and is available as an add-on for the Growth edition.

when you'd use specific variable tags on layout templates for landing pages?

Documentation Series: [Dynamic Content]
Documentation Series: [Scoring]
Documentation Series: [Grading]

Given a scenario, recommend ways to personalize the prospect experience (including use of dynamic content and application of content marketing best practices).

Content Marketing Best Practices
Plenty of posts on content marketing: http://www.pardot.com/category/content-marketing/

Variable Tags
Customers are more likely to engage with your messaging when it's personalized. With variable tags, you can use content from your prospect records to personalize your emails. You can also use variable tags to insert standard information into your email templates, such as your company name and address.

- If a prospect's record doesn't have a value for a field, nothing is displayed. To avoid empty fields, you can define a default value to use when information isn't available.
- You can't use custom fields that record and display multiple responses as variable tags. Fields that record and display multiple responses don't appear in the variable tag dropdown when building emails.
- You can use a multi-select or a checkbox field as a variable tag. The value displayed is the last value listed for that field in the prospect's record.
- To use variable tags in email subject lines, use the Advanced Subject Composer in your email draft.
- When a prospect clicks the view online link, the variable tags are populated with the values that are the prospect's record at that moment.

Knowledge Article: Inserting URLs in Emails with Variable Tags

REPORTING, METRICS & ANALYTICS (11% Weighting)

Given a scenario, including data generated in Pardot Reports and customer goals, recommend system changes for optimization.

Documentation Series: [Pardot Reporting Overview]()
Knowledge Article: [Conversions Reporting]()

Compare and contrast Form versus Landing Page Reporting attribution.

Both forms and landing pages have reporting on submissions and conversions.

Navigate to **Reports > Landing Pages or Reports > Forms** and click on the specific form or landing page to see its detailed report.

A **conversion** is when an anonymous visitor successfully fills out the form or completes the landing page and thus "converts" into a prospect, in other words a visitor with a known email address.

A **submission** is when the form or landing page has been successfully completed. This submission could be by an existing prospect or an anonymous visitor (who will then "convert" to a prospect upon completion).

** Unique Views and Unique Submissions are based on Visitor ID. If prospect fills out a form or form handler, clears their browser cookies, and then later submits same form, that will count as two unique views and submissions.

FORMS REPORT METRICS
Form Statistics Table:

- Total Views
- Total Submissions
- Submission Rate
- Total Errors
- Error Rate

From Individual Form Report:

- Total Views
- Unique Views
- Conversions
- Total Submissions
- Unique Submissions
- Total Errors
- Unique errors
- Total Clicks
- Unique Clicks
- Last Submitted
- Updated

Form Handler Statistics Table:

- Total Submissions
- Unique Submissions
- Conversions

Individual Form Handler Report:

- Conversions
- Total Submissions
- Unique Submissions
- Last Submitted
- Updated

LANDING PAGE REPORT METRICS

Landing Page Statistics Table:

- Total Views
- Unique Views
- Conversions
- Total Submissions
- Unique Submissions
- Total Errors
- Unique Errors
- Total Clicks
- Unique Clicks

** The submission rate is the ratio of the number of submissions to the overall number of views. In other words, what percentage of the views led to a form on the landing page being successfully completed.
** The error rate is the percentage of views that led to an error during the process of entering information into a form on the landing page.
** The statistics in the report may be higher than the number of prospects displayed in the resulting table. This is because prospects may have submitted a form on the landing page multiple times, cleared their cookies between submissions, have been deleted/archived or taken the action anonymously (as visitors).

SALESFORCE ENGAGE (3% Weighting)

Configure Salesforce Engage for sales use.
Downloadable content: [Salesforce Engage Admin User Setup: A Guide for the Admin User]

Describe the benefits of Salesforce Engage.

Salesforce Engage provides the exact insights you need at the right moment, empowering you to:
- effortlessly build tailored campaigns with marketing-curated content
- deliver a phenomenal buyer experience
- close deals faster

Product demo Video

Lives within Salesforce, for access to sales reps and they can send emails from SF 'engage emails' accessing there within SF marketing approved content like templates already with all mail merge, the emails are actually sent from Pardot so all analytics are accessible such as opens, clicks etc

1. Engage Campaigns

Deliver the right message, every time. A library of marketing-approved email templates and nurturing tracks empowers sales to run their own campaigns from Salesforce CRM, the Salesforce1 Mobile App, or Gmail.

2. Engage for Gmail

With a plugin, you can send engage emails from gmail
accessing marketing approved content, and all traceability will be still available in pardot.
Chrome Plug in. More info & Pardot Outlook Add-in Versus Salesforce for Outlook

3. Engage Reports

From the tab in salesforce 'Engage Reports' you can see opens clicks, deliverability … all available for reps with full visibility on what's happening to those emails. Interactive, graphical dashboards.

Engage reporting lets each Engage user track how leads and contacts interact with their Engage Campaigns. Use Engage Reports to discover which emails and templates performed the best over the last week, last two weeks, last 30 days or a custom date range.

4. Engage Alerts

Lets sales reps know in real time when their prospects becomes active, knowing which activity how much info he has on the product what interest are how often etc
So reps have full context of prospect, prepare how to engage, where next prospect may need help with to ultimately to close deals

5. Engage for Salesforce1

All info activities from their phone, as well more prospect info. Check Marketing Actions tab on how prospect is engaging with your brand and content.
From mobile you can 'Add to Engagement' adding the prospect to a nurture list.

Overview deepdive [Video]

SAMPLE EXAM QUESTIONS

The following questions are representative of those on the Salesforce Certified Pardot Consultant exam. These questions are not designed to test your readiness to successfully complete the certification exam, but should be used to become familiar with the types of questions on the exam. The actual exam questions may be more or less difficult than the questions below.

1. LenoxSoft has had a Product Interest form live on their website for the past 3 months. They would like to make sure that, moving forward, every time the form is submitted, a custom field is updated. They also want to update that custom field for anyone who has submitted the form before today.

What combination of automation tools should LenoxSoft use to achieve this?

Choose one answer

A. Automation rule and completion action
B. Segmentation rule and completion action
C. Dynamic list and automation rule
D. Completion action and dynamic list

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2. LenoxSoft's marketing team shares a list of company names of all external visitors on their website with the regional sales managers. The regional managers use this list for cold calling and for insight on whether any recent opportunities are active on their site.

Which sequence of steps should the Pardot Administrator take to automate this process?

Choose one answer

A. Enable Send daily prospect activity emails (for all prospects); Enable Page Actions to notify managers.
B. Enable Visitors Filters for a specific IP range; Enable Page Actions to notify managers.
C. Enable Visitor Filters for a specific IP range; Enable Send daily visitor activity emails.
D. Enable Send daily visitor activity emails; Enable Send daily prospect activity emails (for my prospects).

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3. LenoxSoft would like to implement a re-engagement program for prospects who are no longer active on their website.

How should a Pardot marketer design an engagement program focused on providing exclusive offers and content to re-engage prospects?

Choose one answer

A. Create an automation rule that adds prospects to a list with the criteria Prospect time :: last activity :: greater than :: 180 days ago. Add the list as the recipient list to an engagement program that leads re-engaged prospects to a promotional offer.
B. Create a dynamic list that matches prospects with the criteria Prospect time :: last activity :: greater than :: 180 days ago. Add the list as the recipient list to an engagement program that leads re-engaged prospects to a promotional offer.
C. Create a segmentation list that matches prospects with the criteria Prospect time :: last activity :: greater than :: 180 days ago. Schedule a list email that includes a promotional offer to autosend every Friday going forward to re-engage prospects.
D. Create a dynamic list that matches prospects with the criteria Prospect time :: last activity :: greater than :: 180 days ago. Schedule a list email that includes a promotional offer to autosend every Friday going forward to re-engage prospects.

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4. The “related” tab of the prospect record displays prospects that have what in common?

Choose one answer

A. Email Domain
B. Company
C. Assigned user
D. Score

ANSWERS TO SAMPLE EXAM QUESTIONS

1. A
2. C
3. A
4. A

If you think you are ready, I would say take the time to view most of these videos, they're very useful and will reinforce some concepts and ideas you may have not yet done loads of/with.

The exam is a tough cookie so better be safe than sorry.

http://pardot.hubs.vidyard.com/

GOOD LUCK!