



Salesforce.com Pardot Implementation

Orange Cloud CRM Pardot implementation package is inclusive of discovery, Pardot core configuration, marketing quick start and training

Discovery Sessions of your Marketing & Sales operations

- ☁ On-boarding questionnaires to prepare for discovery workshops
- ☁ Two one-hour web conferences discovery sessions, one for Sales and one for Marketing
- ☁ As an outcome of the discover sessions, Orange Cloud CRM will deliver a written implementation plan designed to align your marketing and sales teams. This will serve as the blue print to complete the configuration items outlined below

Pardot Service Configuration

- ☁ Technical set-up (support for your implementation of web tracking, email authentication, and vanity domain)
- ☁ Modify existing Salesforce configuration (Leads, Contacts, Accounts and Opportunities)
- ☁ Modify page layouts for above mentioned Salesforce objects
- ☁ Install Pardot application in your Salesforce CRM deployment including custom buttons
- ☁ Install and configure your Salesforce Connector along with up to 3 additional Pardot Connectors
- ☁ Create Pardot users, assign roles, enable single sign-on
- ☁ Create and map custom Pardot Prospect fields, map to Salesforce CRM, enable GoodData reporting
- ☁ Prepare Salesforce CRM data for import to Pardot
- ☁ Configure Lead Deck





Marketing Configuration

- ☁ Configure Folders and devise naming conventions for marketing components
- ☁ Configure key Lists
- ☁ Configure Basic Permission Center
- ☁ Configure 5 key Automation Rules
- ☁ Configure 2 key Forms
- ☁ Configure 1 Scheduled email
- ☁ Configure 1 Drip Program
- ☁ Configure 1 GoodData Report

Training

- ☁ Train-the-Trainer - 1 hour training session via web conference with documentation
- ☁ Sales Training - 1 hour training session via web conference with documentation
- ☁ Check-in session after 30 Days to ensure successful on-boarding

Limitations

This service does not include data cleansing or transformation services. The implementation is based on features of Pardot and Salesforce which are generally available. Service covers only salesforce.com Professional, Enterprise, Unlimited or Performance editions. The implementation price does not include the Salesforce CRM or Pardot license fees

Cost: \$8,975 CAD

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