

Example Competitor
Overview

Marketing Automation Provider

Updated December, 2016



Table of Contents











- Industry Overview pp. 3 – 4
- Competitor Overview pp. 6 – 10
- Product 1 Details pp. 12 – 39
- Product 1 Pricing pp. 41 – 54
- Product 2 Details pp. 56 – 75
- Selling Against Competitor pp. 77 - 09

Marketing Automation & Campaign/Lead Management










Competitive Landscape

Big Players

| | | |
|---|--|---|
|  |   |  |
|   |  |   |
|  | | |

Medium Players

| | | | | |
|---|---|--|---|---|
|  |  |  |  |  |
| | | |  |  |

Others

| | | | | |
|---|--|---|---|---|
|  | |  | | |
|  |  |  |  |  |
|  |  |  |  |  |
| |  |  |  |  |

Salesforce Overview

Salesforce Overview

- Headquarters: San Francisco, CA
- Founder/CEO: Marc “Phenomenal” Benioff
- Founded: 1999
- Reputation: SaaS CRM roots, Cloud business software
- Significant Acquisitions
 - 2016: acquired Demandware \$2.8B – closed in June
 - 2013: acquired Exact Target, including Pardot (Digital Marketing) \$2.5B
 - 2012: acquired Buddy Media (Social Media Marketing) \$689M
 - 2011: acquired Radian6 (Social Media Monitoring) \$340M



THE SALESFORCE ECONOMY

salesforce

Salesforce's Global Footprint

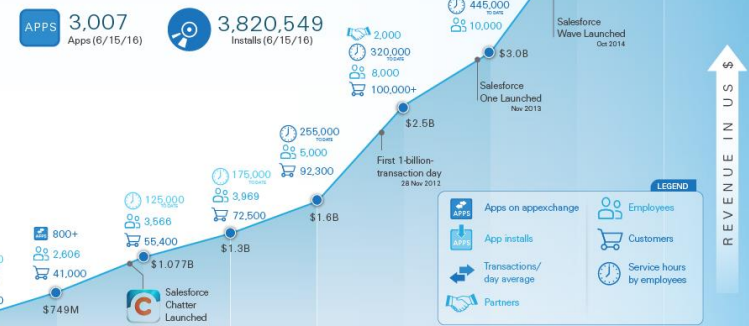


751 Consulting Partners listed on the AppExchange (as of 6/15/16)

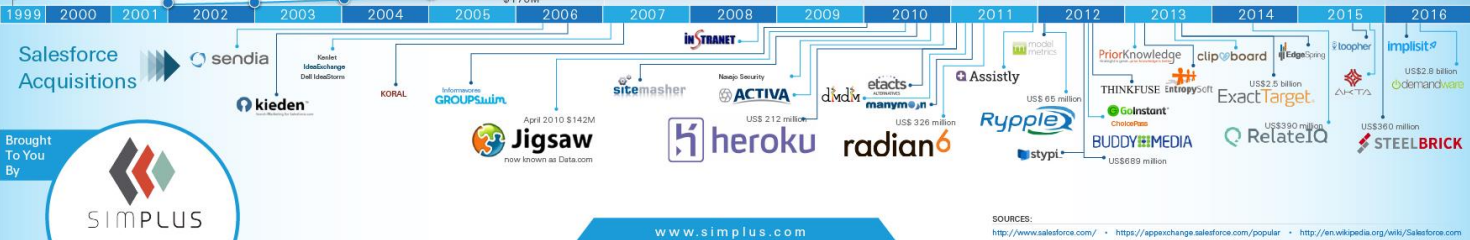
Global Strategic Partners

| | | | | |
|--|---|---|---|---|
| accenture Accenture Listed on 2/19/2010 | bluewolf BlueWolf Listed on 9/8/2009 | Cognizant Cognizant Listed on 6/8/2010 | Deloitte Deloitte Listed on 12/18/2009 | APPIRIO Apprio Listed on 9/2/2009 |
| NTT Group NTT Group Listed on 9/8/2009 | TATA Tata Consultancy Listed on 11/10/2009 | Capgemini Capgemini Listed on 7/8/2010 | pwc pwc Listed on 6/6/2012 | Acumen Solutions Acumen Solutions Listed on 9/9/2009 |

The Salesforce AppExchange



Salesforce's History & Growth



Recent Salesforce Acquisitions

MinHash

- Provides data science for enterprises
- Designed to crawl the internet to pull out relevant trends for marketers and help them create campaigns around those trends

SteelBrick

- Provides "next generation quote-to-cash apps" that are built natively on the Salesforce platform
- Configure Price Quote (CPQ) tool generates sales quotes, proposals, orders and contracts

PredictionIO

- Offers open source machine learning server for software developers to use in creating predictive features such as personalization, recommendation, and content discovery

Your SL

- Specialized Digital Transformation consulting company

MetaMind

- Startup - had been financially backed by Benioff
- Price - \$32.8m
- Was working on deep learning for automated image recognition

Implicit Insights

- 2-year-old startup
- Price = "Tens of millions" of dollars
- Analyzes CRM, calendar, and email data to provide organizations with actionable insights to improve sales
- Can predict the best possible deals and identify those most at risk

Demandware

- \$2.8b - one of the biggest in company's history
- Base for the new Salesforce Commerce Cloud
- Integrated as part of Customer Success Platform
- E-commerce platform

BeyondCore

- Business Analytics platform
- Benioff says bought to enhance the AI capabilities of the Salesforce Analytics Cloud
- Financial terms not disclosed

Quip

- \$582m all-stock acquisition
- Cloud-based word processing application designed to minimize the need to use email for collaboration

HeyWire

- Software, which earlier delivered messages through 1-800 line, will be integrated with Salesforce's Service Cloud business once the deal closes.
- Undisclosed sales price

Krux

- DMP
- \$700m

A horizontal timeline with a blue line and vertical tick marks indicating the acquisition dates for each company listed above. The dates are: December 2015, February 2016, April 2016, May 2016, July 2016, August 2016, September 2016, and November 2016.

December 2015 February 2016 April 2016 May 2016 July 2016 August 2016 September 2016 November 2016

Salesforce Product Ecosystem

Sales

- Sales Cloud
 - Salesforce CRM
- SalesforceIQ
 - Small business CRM
- Salesforce Quote-to-Cash
 - Quotes, proposal, contracts, automate billing
- Data.com
 - Integrate, clean and enhance B2B data

Internet of Things

- IoT Cloud
 - Tools that connect IoT to Salesforce
- Thunder
 - Event processing engine

Industry Products

- Financial Services Cloud
 - SF CRM tailored to Financial Services
- Health Cloud
 - Patient-centric CRM

Marketing

- Marketing Cloud
 - Digital marketing platform
- Pardot
 - B2B marketing automation

Productivity

- Quip
 - Collaborative document production

Community

- Community Cloud
 - Online collaboration platform
- Chatter
 - Employee social tool

Commerce

- Commerce Cloud Digital
 - eCommerce Solution
- Commerce Cloud Store
 - Mobile-first solution for PoS and store management

Service

- Service Cloud
 - Small business customer support app
- Desk.com
 - Customer support app

Analytics

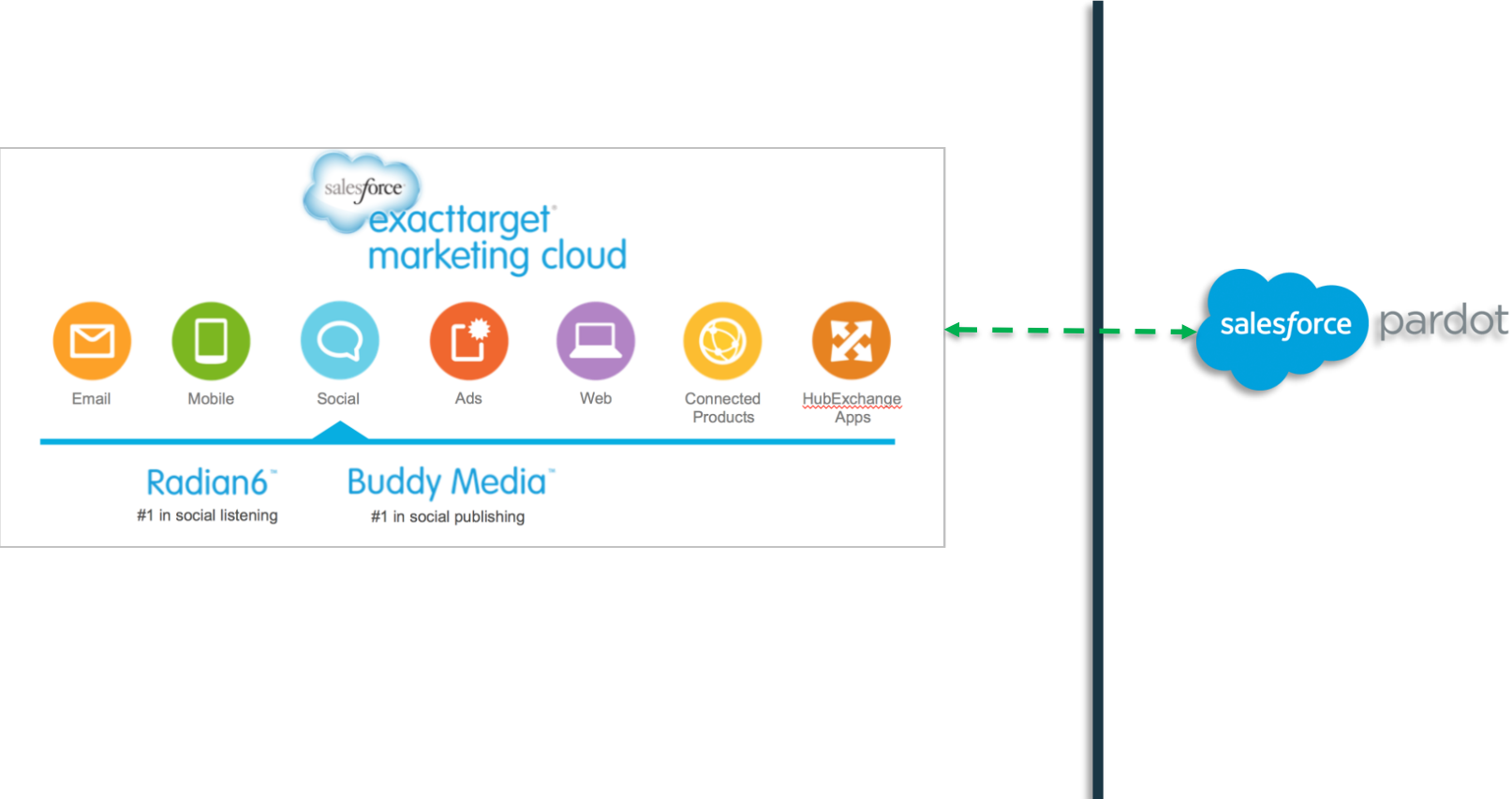
- Wave Analytics
 - Self-service analytics platform
- Sales Wave Analytics
 - Wave Analytics for Sales Cloud
- Service Wave Analytics
 - Wave Analytics for service data

Apps

- App Cloud
 - Tools and services to build apps
- Force.com
 - Build social and mobile apps
- Heroku Enterprise
 - Build scalable, trusted apps



Salesforce for Marketing



Salesforce Marketing Cloud



Salesforce Marketing Cloud (Exact Target)

- B2C-oriented email-marketing product
- Acquired Pardot October, 2012 for \$95.5m
- Was acquired by Salesforce June, 2013 for \$2.5b

Salesforce Marketing Cloud Channels



Email Studio

- Personalize email messages with data from Sales Cloud, Service Cloud, and any other source.
- Send promotional, transactional, and triggered messages.
- Take advantage of powerful segmentation, automation, and predictive capabilities.
- Use powerful reporting tools to understand performance.



Mobile Studio

- Reach customers at the right moment with SMS, MMS, push messaging, and group messaging — based on events, location, proximity, and more.



Social Studio

- Listen, publish, engage, and analyze conversations on social media to understand customers, brands, and competitors.
- Connect social to all areas of your business with the Customer Success Platform.



Advertising Studio



- Activate customer data to power digital advertising and manage ad campaigns.
- Enhance new customer acquisition with lookalikes, re-engage inactive customers, and optimize advertising along the customer journey..




Web Studio

- Create beautiful website and landing pages with personalized content.
- Track every action customers take to analyze behavior and gain insights.

Salesforce Marketing Cloud Platform

| Journey Builder | Audience Builder | Personalization Builder | Content Builder | Analytics Builder | Marketing Cloud Connect |
|--|---|---|--|--|---|
|  |  |  | |  | |
| Use marketing automation to build customer journeys across email, mobile, advertising, website and IoT | Segment subscribers in a drag-and-drop interface using any combination of attributes at scale | Use predictive analytics and modeling to understand customers' preferences and tailor email and web content | <p>Manage and share cross-channel marketing content from one location</p> <p>Message across all digital channels</p> | <p>Customer analytics</p> <p>Campaign Performance</p> <p>Website and mobile engagement</p> | Real-time access data from across Customer Success Platform |

Salesforce Marketing Cloud Platform – How Salesforce presents it to prospect

 Wines 'Til Sold Out

Corporate Edition – Cross Channel Journey Management

| Email | | Mobile | |
|---|--|---|--|
| <ul style="list-style-type: none"> Subscriber Profiles Preference Management Email Performance Reporting Drag and Drop Segmentation Email Templates Email Building Tools Content Repository Dynamic Content & Personalization Advanced Content Tools (Syndication and Scripted Content) Forward to a Friend | <ul style="list-style-type: none"> Social Forward Facebook 'Like' Playbooks Web Collect for List Acquisition Email Basic Reporting / Graphical Reporting A/B Testing Reply Management Sender Authentication Package Including Private IP and Domain Email Approvals | <ul style="list-style-type: none"> SMS Messaging (Inbound and Outbound) SMS Messaging Templates Dedicated SMS/MMS Code Location-based Targeting (Geo-locations and Beacons) Push Messaging Mobile Basic Reporting | |
| Web | | Marketing Automation | |
| <ul style="list-style-type: none"> Intelligent Email (Predictive Email Content)** Intelligent Web (Predictive Web Recommendations)** Cloud Pages – Landing Pages, Microsites, Rich Push (landing pages pushed to mobile app) & Social Tabs | | <ul style="list-style-type: none"> Journey Builder** Automation Studio | |
| Data & Analytics | | Integrations & Data Transfer | |
| <ul style="list-style-type: none"> Email Conversion Tracking Web & Mobile Analytics Relational Data – Contact Builder Advanced Segmentation Tools (Queries, Filters and Measures) | | <ul style="list-style-type: none"> API Access FTP Server Access Service Cloud Integration Multiple Business Unit/Complex Org Management | |

Utilization & Licenses

- Marketing Cloud Platform + Service Cloud Licensing Fee
- API Access
- 360,000,000 Messages
- 500k Contacts
- 100 Users
- 100,000 Automations
- Premier Success Plan

3 year, Annual Billing

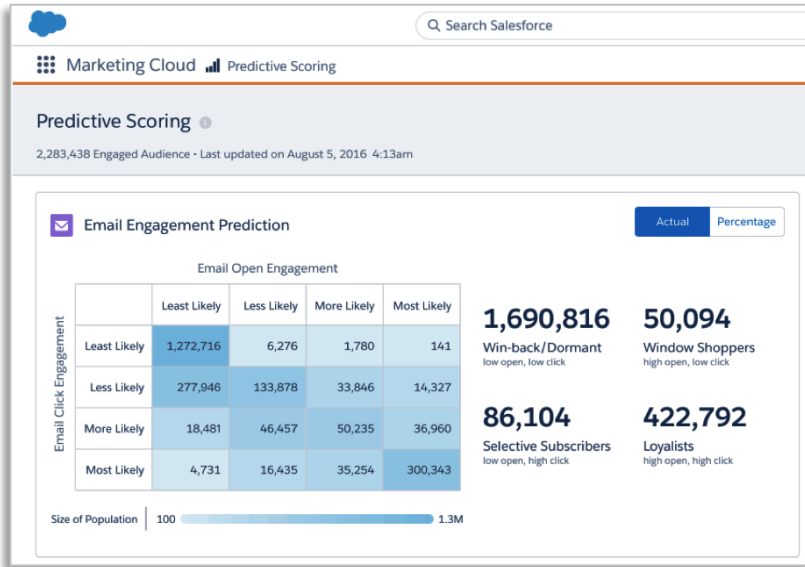
**Implementation Services Required

Web + Email + Mobile + Service

Salesforce Marketing Cloud Editions

| Email, Mobile, and Web Marketing | Social Media Marketing | Advertising | B2B Marketing Automation |
|--|--|---|--|
| <p>Personalize and automate email, mobile, and web journeys for every customer at scale</p> | <p>Listen, engage, publish and analyze. Create 1-to-1 social conversations</p> | <p>Leverage CRM data and manage advertising at scale</p> | <p>Automate and optimize lead-generation and nurturing programs throughout the prospect lifecycle</p> |
| <ul style="list-style-type: none"> • Email marketing • Mobile messaging • Marketing automation • Campaign management • Journey Builder • Personalization Builder • Data and analytics | <ul style="list-style-type: none"> • Social listening and analysis • Content marketing • Community engagement and social care | <ul style="list-style-type: none"> • Facebook, Twitter and LinkedIn Ads platform • Audience management and segmentation • Media campaign management and optimization | <ul style="list-style-type: none"> • Lead generation • Lead qualification • Lead nurturing • Lead tracking |

Salesforce Marketing Cloud Einstein



Mission

- Customer preferences changing in real time - not enough to look backward anymore
- Need insights from historical and real-time data to predict what prospects will do next
- Einstein gives marketers the ability to shift away from using analytics that only look at past behavior to analytics that predict the optimal timing, channel, content and audience for any marketing message

Features

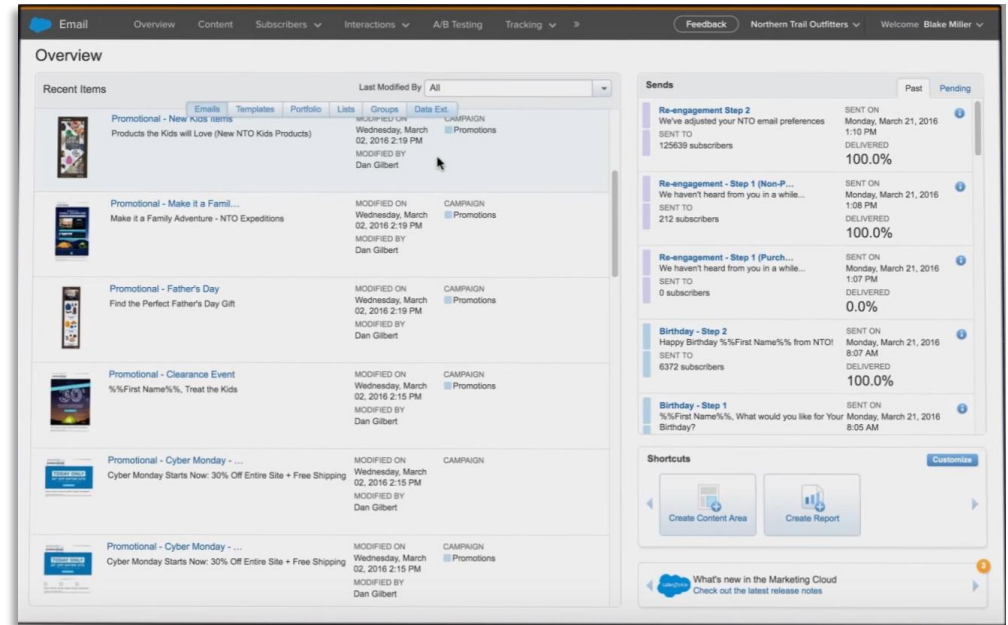
- Predictive Scoring
 - Gauge how likely a customer will engage with an email, unsubscribe or make a web purchase
- Predictive Audiences
 - Use Predictive Scoring to build segments of people with multiple predicted behaviors in common
- Automated Send-time Optimization
 - Automatically deliver messages exactly when subscribers are most likely to engage

Case Study

- Has been in beta for almost a year with good results
- ShopatHome - Coupons and ecommerce company
 - 23% lift in email clicks
 - 30% increase in email opens

Salesforce Marketing Cloud Email Studio

- Drag and Drop
- “Intuitive Scripting language”
- “Predictive Content”
 - Just dynamic content based on behavioral data
- Open platform
 - Can utilize data from any source
- Schedule communication based on events in customer journey
- Format message for any device
- Manage and optimize campaign results
- Mobile app to track results
- Part of Salesforce Platform
- Connects to Sales Cloud and Service Cloud



Email Studio

Select Email Studio from Marketing Cloud home

1. Email That Delivers Results

Email Studio is scalable and comprehensive. Automate and deliver engaging emails – from simple promotional and transactional messages to highly personalized campaigns, including predictive content.

NEXT

| Name | Status | View By Status |
|---------------------|-------------|----------------|
| New Promise Journey | Deployed | |
| New Spring Gear | Deployed | |
| Piking Journeys | Deployed | |
| Spring Journeys | Deployed | |
| Newsletters Program | Deployed | |
| Summer Promotion | In Progress | None scheduled |
| Fall Promotion | In Progress | None scheduled |
| Winter Promotion | In Progress | None scheduled |

Marketing Cloud

Use Drag and Drop Email Builder to create email

2. Build Beautiful, Engaging Emails with Ease

No coding or behind-the-scenes work is needed to send customized emails to your subscribers. Personalize offers with easy-to-use, prebuilt email templates. Drag-and-drop tools let you make changes on the fly to improve campaign results every time.

NEXT

Content Builder

Select template from library (includes mobile-first)

3. Optimize for a Mobile-First World

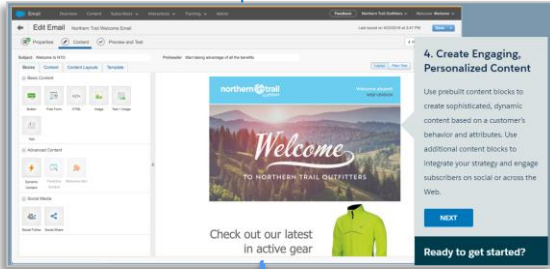
Over half of all emails are opened on a mobile device, so every message must be optimized. Choose from several mobile templates to quickly get started building emails that look great on any device.

NEXT

Content Builder

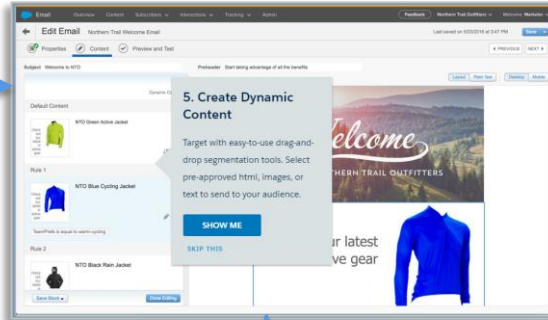
Email Studio

Build email content with pre-built Content Blocks



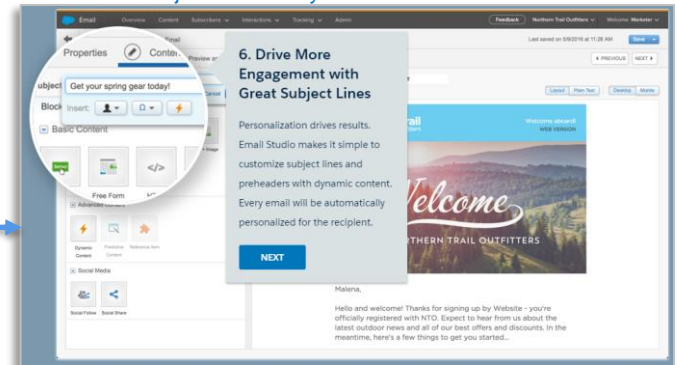
Content Builder

Create dynamic content with pre-approved html, images or text for each persona



Content Builder

Personalize subject line with dynamic content



Content Builder

Email Studio

Create Segment

7. Segment Highly Targeted Audiences

Create audience groups without complicated coding. Simply drag the segment over to create the target. You can narrow the focus with "And" groupings, or make larger by adding "Or."

NEXT

Preview email

9. Double-Check Before Sending

You have created great, targeted content to drive amazing results. Now you need to make sure that everything will reach the subscriber's inbox. Make sure everything looks good and double-check the dynamic content blocks and personalization.

NEXT

Build A/B Testing

8. A/B Test Subject Lines and Content

Eliminate guesswork. Test two versions of your emails, including subject line, content, images, and even time of send. Your audience will let you know what resonates. The winning message will then automatically be used for the rest of your list.

NEXT

Track and report results

10. Track and Report Results

Every marketer needs insights into what is working – and what isn't. With easy-to-read graphical reporting, you can judge performance and make changes to optimize results.

FINISH

Email Studio - Advanced Features

Build audience with data from any source

1. Leverage Data from Any Source

Create highly targeted audiences for your emails - regardless of the amount of data. Get real-time counts of people matching your criteria, and generate targeted lists in minutes. No technical expertise required.

| Segment Name | Count | Percentage |
|---------------------------|---------|------------|
| Other Status | 417,759 | (30%) |
| Browse Category Count | 334,207 | (24%) |
| Purchase Cart Days | 167,103 | (12%) |
| Mobile Push Based on File | 181,029 | (13%) |
| Mobile OS | 48,628 | (4%) |

Refresh Counts | **Refresh Counts**

Audience Builder

Track actions and respond in real time

4. Respond in Real Time

Listen to your subscribers and react immediately. Set up triggered and transactional messages for both online and offline events, and send targeted, dynamic, and predictive emails automatically.

Next

Journey Builder

Build Marketing Automation

3. Maximize Results with Marketing Automation

Do more with less. With advanced automation features, you can easily set up routine campaigns like welcome series or birthday offers, scaling your marketing with your existing team. Schedule or trigger data imports, queries, reports, and more.

Next

Automation Studio

Create Predictive Content based on behaviors

2. Put Data Science in the Hands of Marketers

Create personalized messages based on user behavior with predictive content. Drag to select the predictive content block, select data rules, choose the content to display, and let the system decide which message to deliver when opened.

Show Me

Personalization Builder

Email Studio - Reporting

Email Campaign Results

5. Explore Data in Real Time to Know What's Working

Analyze data and campaign performance, and maximize results. See your campaign from every angle with Email Studio's robust advanced reporting.

[SHOW ME](#)

SKIP THIS

| Campaign Name | Device Name | | | | | Grand Total |
|------------------------------|-------------|-----------|-----------|--------|---------|-------------|
| | BlackBerry | Macintosh | PC | iPad | iPhone | |
| Browse Retargeting Program | 46,917 | 893,892 | 740,386 | 20,272 | 381,490 | 2,025,227 |
| Birthday Program | 18,627 | 309,074 | 292,222 | 7,928 | 151,806 | 799,657 |
| Abandoned Cart Program | 12,491 | 219,687 | 196,360 | 5,326 | 101,662 | 536,816 |
| Welcome Program | 8,822 | 155,062 | 138,393 | 3,763 | 79,115 | 385,155 |
| Post-Purchase Program | 8,714 | 154,793 | 137,936 | 3,866 | 71,348 | 376,617 |
| Promotional Program | 7,868 | 198,111 | 124,684 | 3,407 | 64,394 | 399,064 |
| Cross-Channel Growth Program | 3,668 | 64,248 | 52,211 | 1,576 | 30,111 | 156,814 |
| Winback Program | 3,393 | 57,157 | 51,192 | 1,374 | 26,503 | 139,519 |
| Reengagement Program | 2,213 | 66,543 | 49,714 | 1,389 | 25,937 | 124,589 |
| Win-Loss Program | 3,146 | 53,514 | 49,950 | 1,286 | 24,750 | 130,646 |
| Grand Total | 116,659 | 2,064,811 | 1,834,278 | 50,187 | 952,109 | 5,018,044 |

Drill-Down to campaign detail reporting

Share results with other stakeholders in the organization. [NEXT >](#)

| Device | Count | Percentage |
|------------|---------|------------|
| Macintosh | 157,069 | 41.3% |
| PC | 138,393 | 36.4% |
| iPhone | 72,115 | 19% |
| BlackBerry | 8,822 | 2.3% |
| iPad | 3,763 | 1% |

Email Studio Salesforce CRM Integration

Salesforce CRM Integration Setup

1. Put Your Data to Work

If you already have Salesforce CRM, it's easy to connect Marketing Cloud to create a single view of your customer. This one-time setup simplifies data so you can easily create and automate 1-to-1 journeys across marketing, sales, and service.

Sales Cloud

Email send from inside Salesforce CRM

3. Send Email Directly from Salesforce Screens

Salesforce sales and customer service users can send emails to campaigns, reports, leads, and contacts right from the screens they already know. Personalize each email for every customer with dynamic content, and track results.

Sales Cloud

Salesforce CRM Sync

2. Keep Your Data Connected

Marketing Cloud continuously synchronizes standard objects and custom objects across the Salesforce Customer Success Platform. Select the data you want to sync to personalize every touchpoint of the customer journey.

Email Studio

Email tracking is pushed to Salesforce

4. Track Campaigns and Analytics

Now your team has one place to measure and analyze campaign performance. With Email Studio, anyone can see how a contact, lead, or account responds to email campaigns, all the way down to the specific links that were clicked.

Sales Cloud

Email Studio

Service Cloud Integration

Salesforce Service Cloud Sync

5. Manage Every Touchpoint Across the Enterprise

Marketing Cloud provides everything marketers need to manage each interaction across marketing, sales, and service. It's never been easier to provide 1-to-1 experiences for every individual - regardless of where they are in the customer lifecycle.

FINISH

Journey Builder

Journey Builder

- Launched in 2015
- Plan interactions across the customer lifecycle
- Select target audience and create unique journeys based on how that audience interacts with your business
- Chose channels to send messages
 - Email
 - SMS Push notifications
 - Web and social advertising placements
- Apply Random Splits to do A/B/C/D testing
- Assign engagement splits to communicate to customers who have responded in different ways
- Set goals and follow progress in real time with activity metrics
- Automatically adapt for each customer with predictive intelligence
- Connect touchpoints across Marketing, Sales and Service
- REALLY selling “One seamless relationship”
- Pricing starts at \$5k/year, and rises with number of messages sent



Journey Builder Planning

Access Journey Builder from Marketing Cloud home

1. Leverage One Cross-Channel Marketing Platform

Marketing Cloud is a platform for managing customer journeys across email, mobile, social, ads, websites, and connected devices. See how it can help you deliver the right message, at the right time, on the right channel.

NEXT

| Name | Status | Deployment Date | Create | Campaign Code |
|--------------------|------------|-----------------|-------------|---------------|
| New Phrase Journey | Deployed | May 10, 2016 | May 2 | 320026488 |
| New Spring Clear | Deployed | May 9, 2016 | May 2 | 320026491 |
| Mixing Journeys | Deployed | May 8, 2016 | May 2 | 320026489 |
| Mixing Journeys | Deployed | May 8, 2016 | May 2 | 320026490 |
| Rewards Program | Deployed | May 7, 2016 | May 2 | 320026491 |
| Summer Promotion | In Process | None scheduled | May 2 | 320026492 |
| Fall Promotion | In Process | None scheduled | May 2 | 320026493 |
| Winter Promotion | In Process | None scheduled | May 2, 2016 | 320026494 |

Design Journey, listen for activity and automatically respond

2. Plan, Personalize, and Optimize Journeys

Journey Builder manages 1-to-1 Interactions across channels. You can design customer journeys, listen for customer activity, and automatically respond with customized communications.

NEXT

- Journey map illustrates interactions across customer lifecycle
- Can show all assets
- Interactive canvas – drill down to see interaction info

3. Map the Journey Across the Lifecycle

Journey Builder has the tools to create interactive customer journeys. Illustrate how customers will experience your brand across channels – reaching them no matter where they are in the customer lifecycle.

NEXT

Drill-down from Journey Builder goes to interaction view

You have direct access to all of the details to support the plan. **FINISH**

Journey Builder

Personalized interactions

Journey defines trigger events, channels, messages and timing

1. Automate 1-to-1 Personalization

This completed interaction plan shows the journey for an abandoned shopping cart. It defines what events will trigger a journey, what channels will be used, which messages will be sent, what the timing will be, and more.

NEXT

Automatically place customers into journeys based on defined behavior

2. Select the Event

Journey Builder is event-driven. Listen for defined customer behavior and automatically place customers into journeys based on their activities. Examples include new purchases, loyalty program sign-ups, and webinar registrations.

NEXT

Send emails created in Email Studio

4. Send Dynamic Emails at Scale

Orchestrate and send emails created in Email Studio. The platform offers hundreds of features, from basic email creation, sending, and tracking, to advanced predictive content recommendations.

NEXT

Access and send Mobile Push and SMS messages

5. Execute a Mobile-First Mindset

Connect with on-the-go customers at just the right time and place. You can access and send both push and SMS messages created in Mobile Studio to deliver alerts, transactional notifications, and more.

NEXT

Integrates with Salesforce CRM – shares interactions

7. Create One Relationship Across the Lifecycle

Marketing Cloud integrates seamlessly with your other Salesforce products. For example, automatically create a sales lead when a prospect responds favorably to a survey, or create a service case if an existing customer responds negatively.

FINISH

Select channel and drag onto canvas

3. Choose the Channels

Today's customers use a variety of channels and devices. Identify which channel is right for your message, and drag it on to the canvas.

NEXT

Schedule targeted advertising

6. Continue the Journey with Targeted Advertising

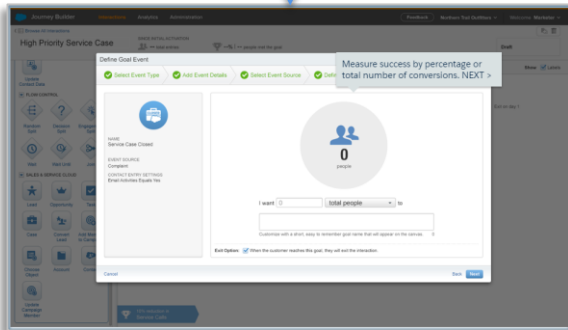
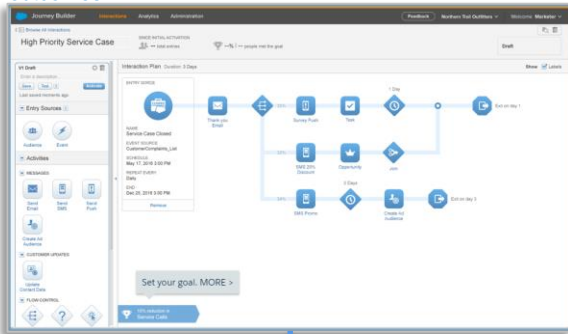
Drive more engagement with targeted, personalized advertising within the customer journey with the Active Audiences activity. Unlock your CRM data to securely and precisely reach each individual customer with timely and relevant ads.

SHOW ME

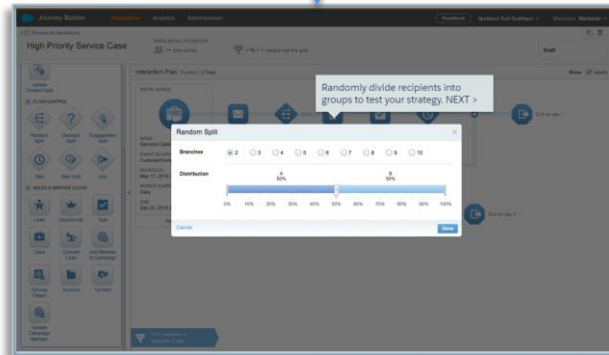
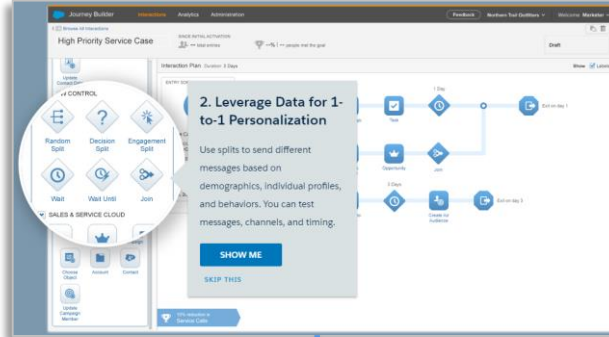
Journey Builder

Optimize campaigns

Define a specific business goal and measure how factors like frequency, timing, channel and message influence outcomes



Use random splits to send different messages based on customer characteristics and behaviors

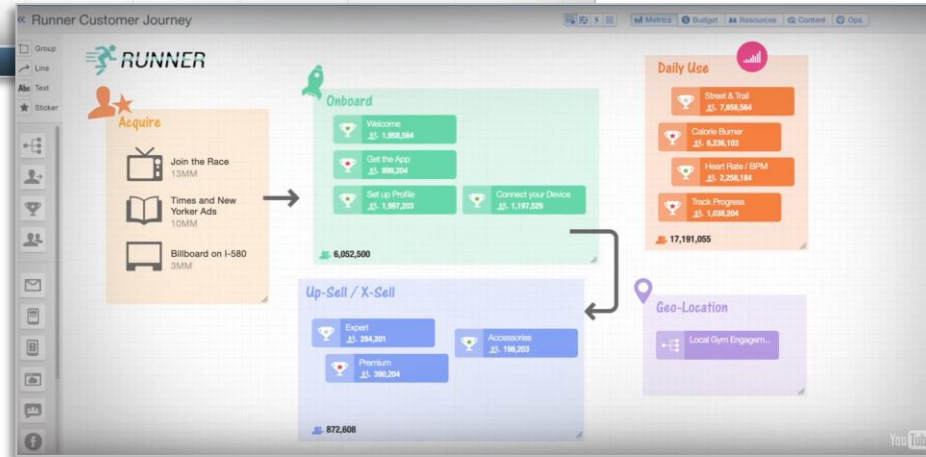
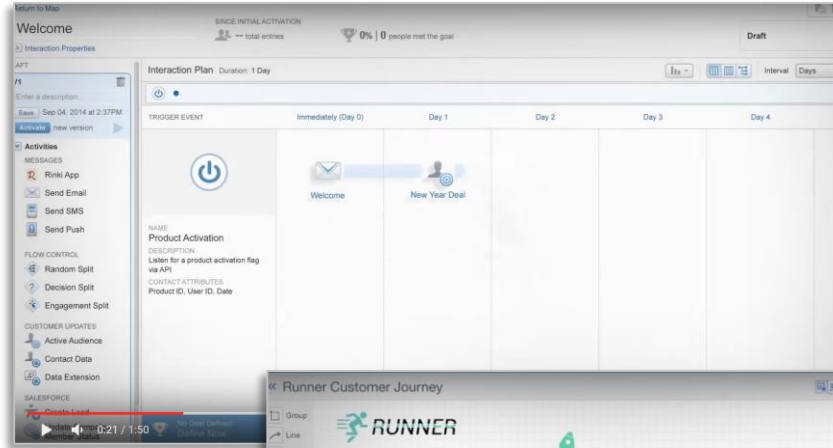


Track effectiveness of interactions



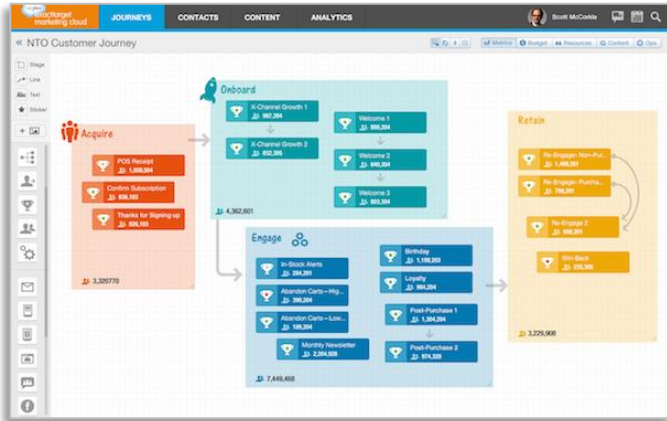
Journey Builder for Apps

- Lets marketers share personalized content and messages with app users
- Triggered by physical location
- Apps can:
 - Send emails
 - Targeted ads
 - Push notifications
 - SMS messages
- Prompted by any kind of data
- Can set wait times, and splits, like any other Journey Builder program
- SDK for developers
- Can provide chat support within app



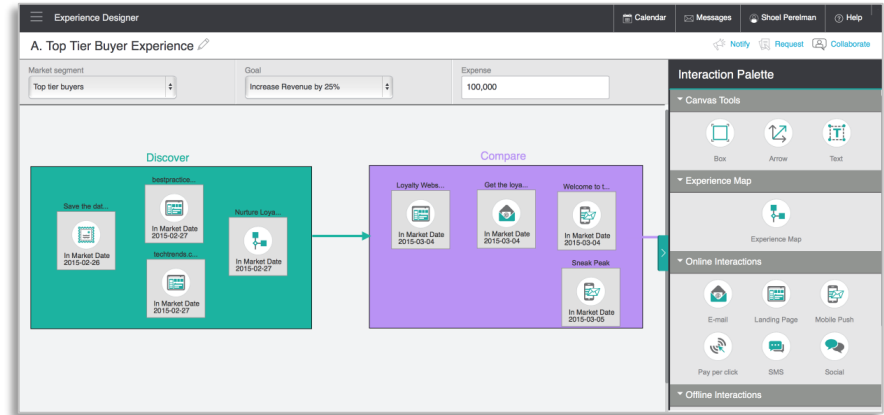
Comparing “Journeys” (apples to oranges)

Salesforce Journey Builder



- An extension of ExactTarget with a heavy emphasis on designing email journeys; approval system is limited to email only.
- Constrained to only digital channels that SFDC ET can execute through
- More comparable to Marketing Cloud programs

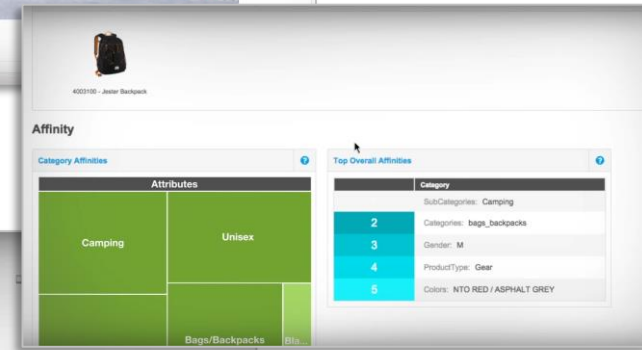
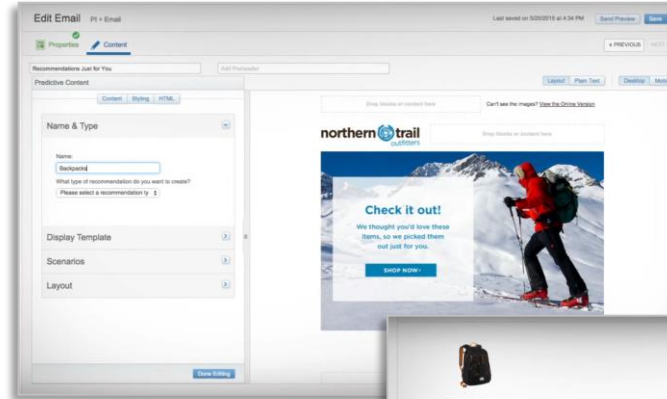
IBM Journey Designer



- Emphasis on **DESIGN** and **COLLABORATION**
- Together with Journey Analytics and UBX, we **are making journey design REAL**
- Solves the pain point of marketing teams designing several disparate channel-specific journeys

Predictive Intelligence

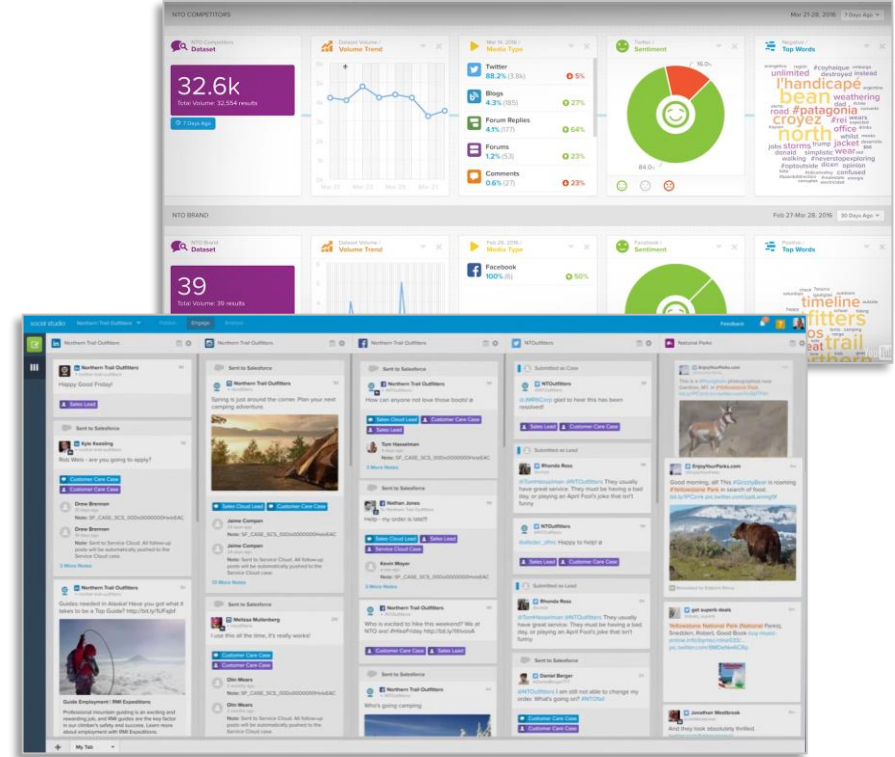
- Observe visitor behavior and build profile of preferences for each customer
- Can track for anonymous and known visitors
- iGoDigital acquisition
- Essentially comparable to IMC Web Tracking
- Anonymous behaviors tracked for 90 days – focused on web behaviors
- They claim it is real-time; the Data is in fact captured real time, but only refreshed nightly and therefore not immediately accessible to the end user.
- Not tied to other ET databases – essentially functions like a third party solution.



The screenshot shows a customer profile for 'Brian Smith', a 25-year-old male from Indianapolis, IN. The profile includes contact information and a list of events. Below the profile, there are two treemap charts: 'Demographics' and 'Category Affinities'. The 'Demographics' chart shows segments for 'Age', 'Gender', 'Language', 'City', 'State', and 'Zipcode'. The 'Category Affinities' chart shows segments for 'Camping', 'Unisex', 'Gear', and 'Bags/Backpacks'.

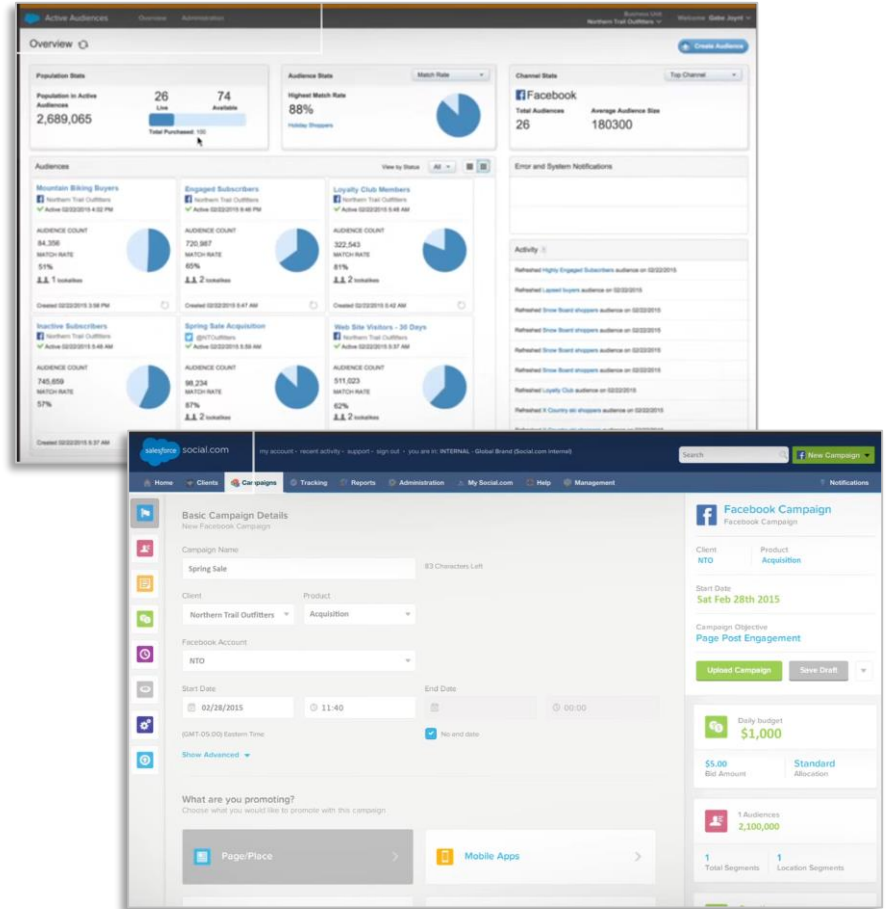
Social Studio

- Comprised primarily of acquired technology:
 - Social media monitoring and intel (Radian6)
 - Social media marketing (Buddy Media)
 - Social advertising (Social.com – Brighter Option components of Buddy)
- Connects marketing, sales and service teams to customer through social channels
- Track brand and competitors
- Act on insights with posts to social through integrated partner apps (Facebook, Twitter, etc.)
- Built-in photo editor to customize images
- Manage social advertising
- Approval workflow and user permissions
- Social team can share highest performing content for other teams to use
- Mobile app to track and respond through this tool
- Can route a social post into Service queue, where service rep can respond directly



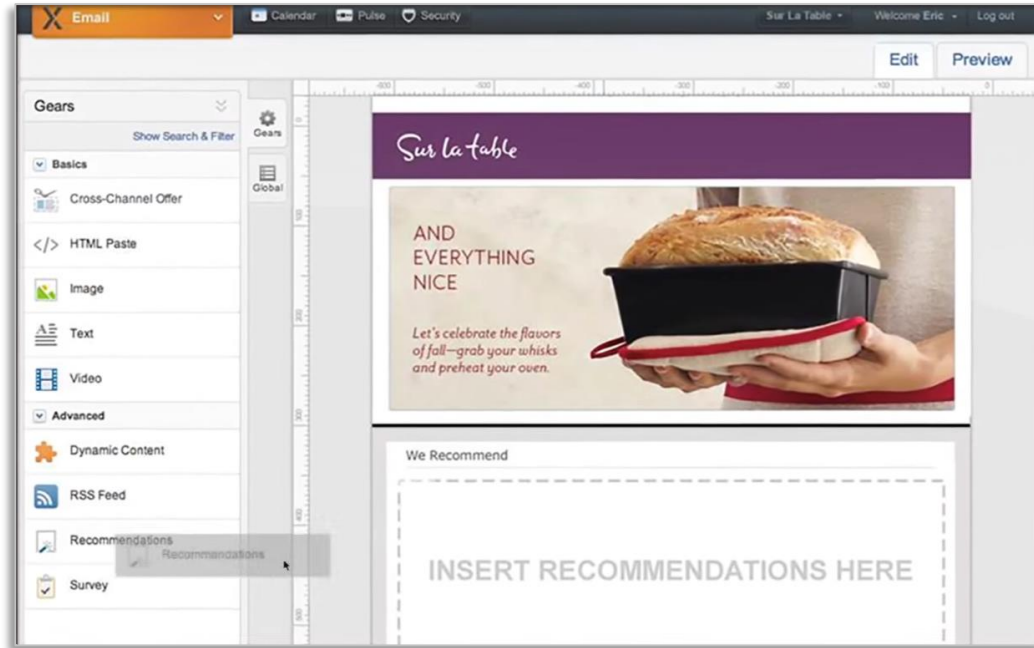
Advertising Studio

- Social.com
- Platform for scheduling and publishing Social Media ads and paid search ads
- Active Audiences
- Lookalike Audiences
 - Allows marketers to use what they know about their best customers to connect to new ones
- Find inactive subscribers and re-connect in a new channel
- Build audiences from social topics, then use social.com to create campaigns and track success
- Sophisticated targeting
- Advertising performance reporting
- Customer insights feed into Active Audiences
- Integrates with SF CRM for targeting
- “You’ll know your data is secure, because it never leave the trusted environment of Salesforce”



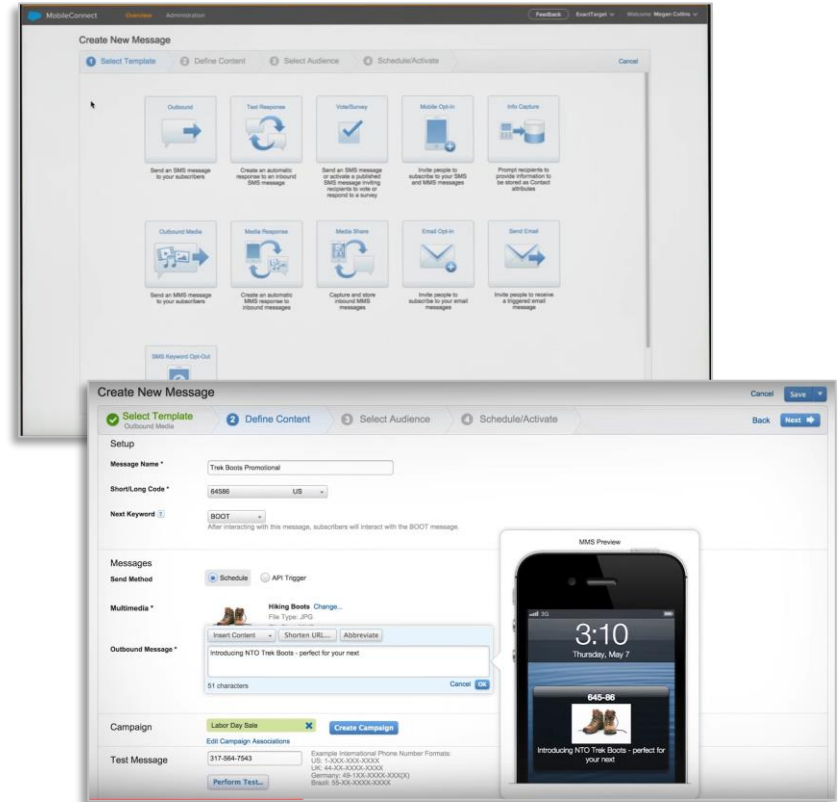
Web Studio

- Delivered through ET Marketing Cloud
- Dynamic web content using predictive analytics to serve up personalized web content
- Use web behaviors to trigger emails
- Build new landing pages and web sites
- Integrated with Sales Cloud, Service Cloud, and the ET messaging platform



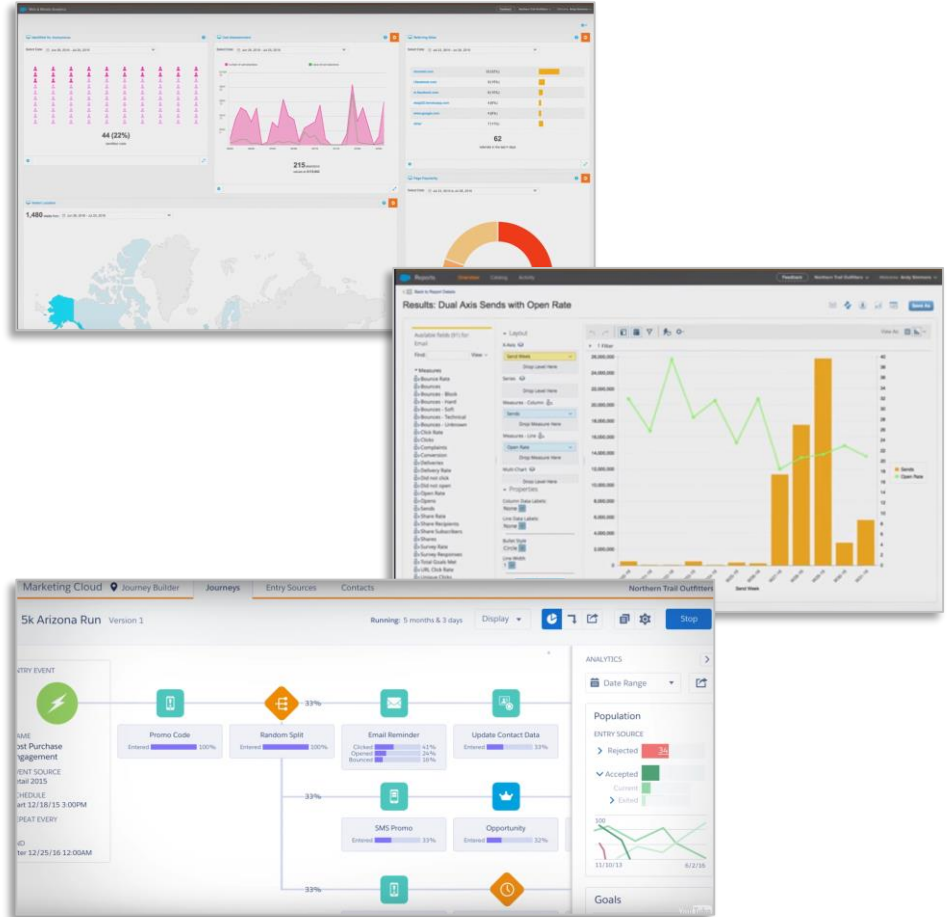
Mobile Studio

- Offer Mobile Push, Group Messaging, and SMS capabilities – comparable to IMC offerings, but an less mature solution.
- Push only included in higher end packages and is a standalone application.
- SMS Transactions are part of packaged “Super Messages”, but not a one to one message
- Use pre-made templates for any type of mobile send
- Messages can include photos, tutorials, and audio clips
- Appointment confirmations
- Mobile surveys
- Geo-fenced offers
- Beacons – Send offers based on location in store
- Connect on their favorite messaging apps with personalized announcements and offers
- All managed with Journey Builder



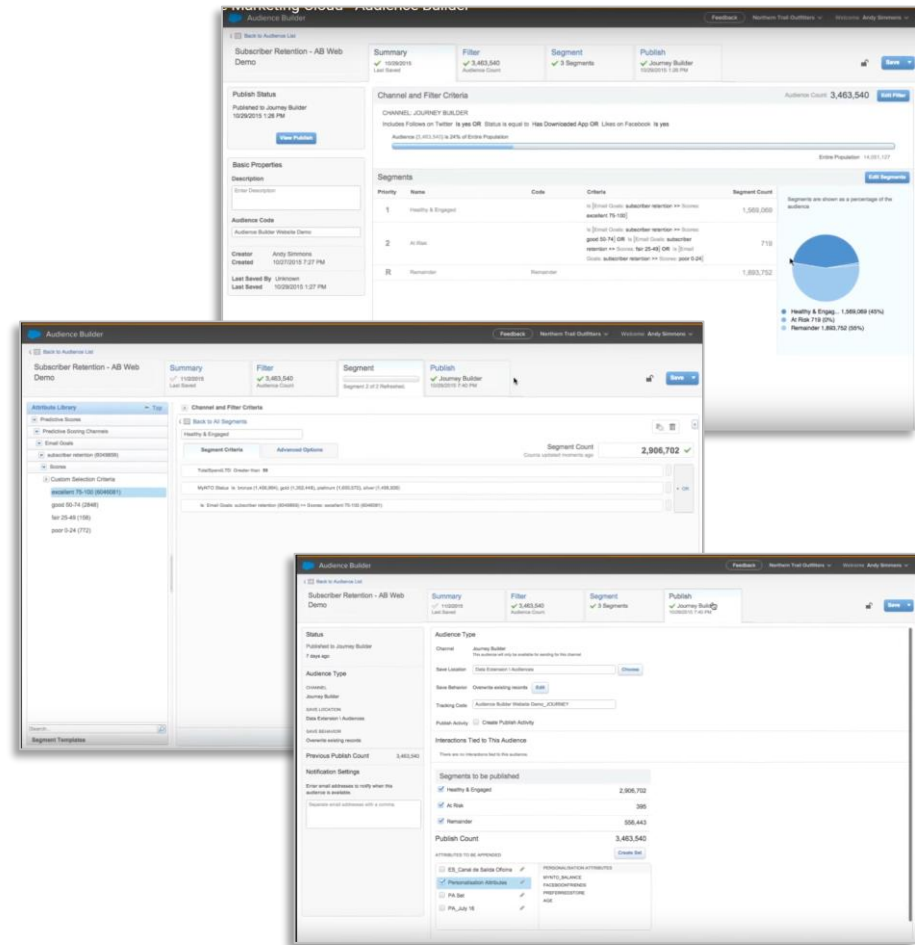
Analytics Builder

- Out-of-the-box reporting
 - Mobile
 - Email
 - Social
 - Ads
- Real-time behavior from website and mobile apps
- Easily build custom reports
- Drag-and-drop attributes
- Create new visualizations
- Share reports with rest of organization
- Predictive Analytics
 - Who is likely to make a purchase
 - Likely to unsubscribe



Audience Builder

- Lets marketers target the appropriate audience
 - 1st party
 - 3rd party
 - Predictive
- Drag and drop
- Drive customer journeys that automatically adjust as customer engagement or segment status changes
- SFDC pitches Audience Builder for Segmentation (for a hefty price)
- Sellers will pitch a “Phase 1” cost for AB, but not tell the customer there will be additional costs for ongoing management and maintenance.
- Each attribute in Audience Builder is custom built and costs \$1500-3K per – and if they want to change an attribute, that requires an SOW
- Typically implemented by a 3rd party (internal svcs team doesn't have the right skill-set)



Integration with Service and Sales Clouds

- Gives marketer access to customer data across all 3 solutions
- Listen for changes in Sales and Service clouds to inform marketing activities and automatically add customer to Journey with record is created or updated
 - Onboarding
 - Satisfaction follow-up
- Initiate action for employee through Journey
- Reps can send personalized Marketing Cloud messages at scale directly from Sales and Service Clouds
- Enhance SFDC profile with complete interaction history

The screenshot displays the Salesforce Marketing Cloud interface. The top section, 'Data Designer', shows a central 'Contacts' node with 112 attributes, connected to various data sources: Salesforce (8 attributes), Salesforce (230 attributes), Salesforce (23 attributes), Salesforce (96 attributes), Salesforce (78 attributes), Salesforce (33 attributes), Salesforce (20 attributes), Salesforce (2 attributes), Salesforce (18 attributes), Salesforce (48 attributes), Salesforce (118 attributes), and Salesforce (112 attributes). The bottom section, 'Email Sends', shows a table of email sends with columns for Action, Email Send Number, Email Name, Business Unit, Created Date/Time, Send Status, Status Date/Time, From Name, From Email, and Campaigns. Below the table is the 'Individual Email Results' section, which shows details for a specific email send, including the email name 'Monthly Newsletter' and 'Welcome - Step 1'.

| Action | Email Send Number | Email Name | Business Unit | Created Date/Time | Send Status | Status Date/Time | From Name | From Email | Campaigns | Reports |
|------------|-------------------|------------------------------------|---|-------------------|-------------|--------------------|-----------------|--------------------------|-----------|---------|
| Edit Del | 00000077 | Re-engagement - Step 1 (Purchaser) | Northern Trail Outfitters Supplier Management (1319876) | 6/10/2016 3:01 PM | Completed | 6/12/2016 6:35 PM | Record Owner | | | |
| Edit Del | 00000078 | TSD1 Confirm Subscription | Northern Trail Outfitters Supplier Management (1319876) | 6/6/2016 5:00 PM | Completed | 6/8/2016 6:29 PM | Record Owner | | | |
| Edit Del | 00000079 | Welcome - Step 1 | Northern Trail Outfitters Supplier Management (1319876) | 6/4/2016 3:01 PM | Completed | 6/5/2016 6:30 PM | Northern Trails | thrschey@exacttarget.com | | |
| Edit Del | 00000080 | Promotional - Summer Seasonal | Northern Trail Outfitters Supplier Management (1319876) | 5/9/2016 2:01 PM | Completed | 5/9/2016 6:31 PM | Record Owner | | | |
| Edit Del | 00000082 | Re-engagement Step 2 | Northern Trail Outfitters Supplier Management (1319876) | 5/2/2016 3:01 PM | Completed | 5/22/2016 11:09 PM | Northern Trails | thrschey@exacttarget.com | | |
| Edit Del | 00000149 | Re-engagement - Step 1 (Purchaser) | Northern Trail Outfitters Supplier Management (1319876) | 4/25/2016 3:30 PM | Completed | 4/25/2016 6:35 PM | Record Owner | | | |
| Edit Del | 00000150 | TSD1 Confirm Subscription | Northern Trail Outfitters Supplier Management (1319876) | 4/9/2016 3:17 PM | Completed | 4/11/2016 6:29 PM | Record Owner | | | |
| Edit Del | 00000151 | Welcome - Step 1 | Northern Trail Outfitters Supplier Management (1319876) | 4/5/2016 1:30 PM | Completed | 4/5/2016 6:30 PM | Northern Trails | thrschey@exacttarget.com | | |
| Edit Del | 00000152 | Promotional - Winter Seasonal | Northern Trail Outfitters Supplier Management (1319876) | 2/17/2016 4:17 PM | Completed | 2/18/2016 6:31 PM | Record Owner | | | |
| Edit Del | 00000154 | Re-engagement Step 2 | Northern Trail Outfitters Supplier Management (1319876) | 1/9/2016 3:17 PM | Completed | 1/9/2016 5:25 PM | Northern Trails | thrschey@exacttarget.com | | |

Salesforce Marketing Cloud Pricing

Salesforce Marketing Cloud

Email/Web/Mobile

Package Pricing

Basic
Send Personalized Promotional Emails

Pro
Create 1:1 Email Campaigns for the Entire Customer

Corporate
Expand the Customer Journey to Channels Beyond Email

Enterprise
Manage Customer Journeys with Built-In Controls Across Brands and Geographies

Marketing Cloud Editions

Capacity included in each edition

| EDITION | Basic | Pro | Corporate | Enterprise |
|----------------------------------|-----------------|----------------------------|----------------------------|----------------------------|
| Segment | Email Marketer | Single Channel | Multi-Channel Journeys | Complex Org |
| Platform Fee (\$/yr) | \$4,800 | \$15,000 | \$45,000 | \$300,000 |
| Included Contacts | N/A | 15,000 | 45,000 | 500,000 |
| Included Super Messages | 250,000 | 2,500,000 | 10,000,000 | 150,000,000 |
| Limit: API Calls | 0 | 2,000,000 | 6,000,000 | 200,000,000 |
| Limit: Automations | n/a | 15,000 | 45,000 | 100,000 |
| Limit: Data (GBs) | 1 | 15 | 45 | 100 |
| Included Users | 5 | 15 | 45 | 100 |
| Additional Contacts | N/A | \$0.10/Contact | \$0.20/Contact | \$0.30/Contact |
| Additional Super Messages | Tiered CPM Rate | Tiered Discounted CPM Rate | Tiered Discounted CPM Rate | Tiered Discounted CPM Rate |

Partner end-user pricing – assumed to be same as direct



Social Pricing and Packaging

| | | | |
|---|---|---|---|
| Basic Start Your Social Marketing Journey with Listening and Engagement | Pro Listen, Publish and Engage Across Social Networks | Corporate Social Marketing and Social Customer Service for Multiple Brands or Product Lines | Enterprise Maximize Results at Scale Across Teams, Brands and Geographies |
| \$1,000/mo. (BILLED ANNUALLY) | \$4,000/mo. (BILLED ANNUALLY) | \$12,000/mo. (BILLED ANNUALLY) | Call for details |

What is a Salesforce Super Message?

- Any type of message sent to a customer
- Includes:
 - Email
 - High Priority Email
 - Landing Page Impression
 - CloudPage Impression
 - Predictive Intelligence Web or Email Impression
 - Push Notification
 - SMS Message
 - MMS Message
- Number of Super Messages consumed per message varies by type of message

Salesforce Super Message Usage

| Message Type | Super Message Usage per message – Start date before 3/1/2015 | Super Message Usage per message – Start date after 3/1/2015 |
|---|--|---|
| Email | 1 | 1 |
| High Priority email | Not included | 4 |
| Landing page impression | 1 | 1 |
| CloudPage impression | Not included | 1 |
| Predictive Intelligence impression (includes email and web) | 1 | 1 |
| Push notifications | 1 | 1 |
| GroupConnect Reseller message | Not included | 10 |
| GroupConnect Transactional message | Not included | 3 |
| SMS message | Sent or received US - 10 Non-US to Non-US - 25 | Tiered, based on destination |
| MMS message | Sent or received US - 10 (Only available within US) | Tiered, based on destination |

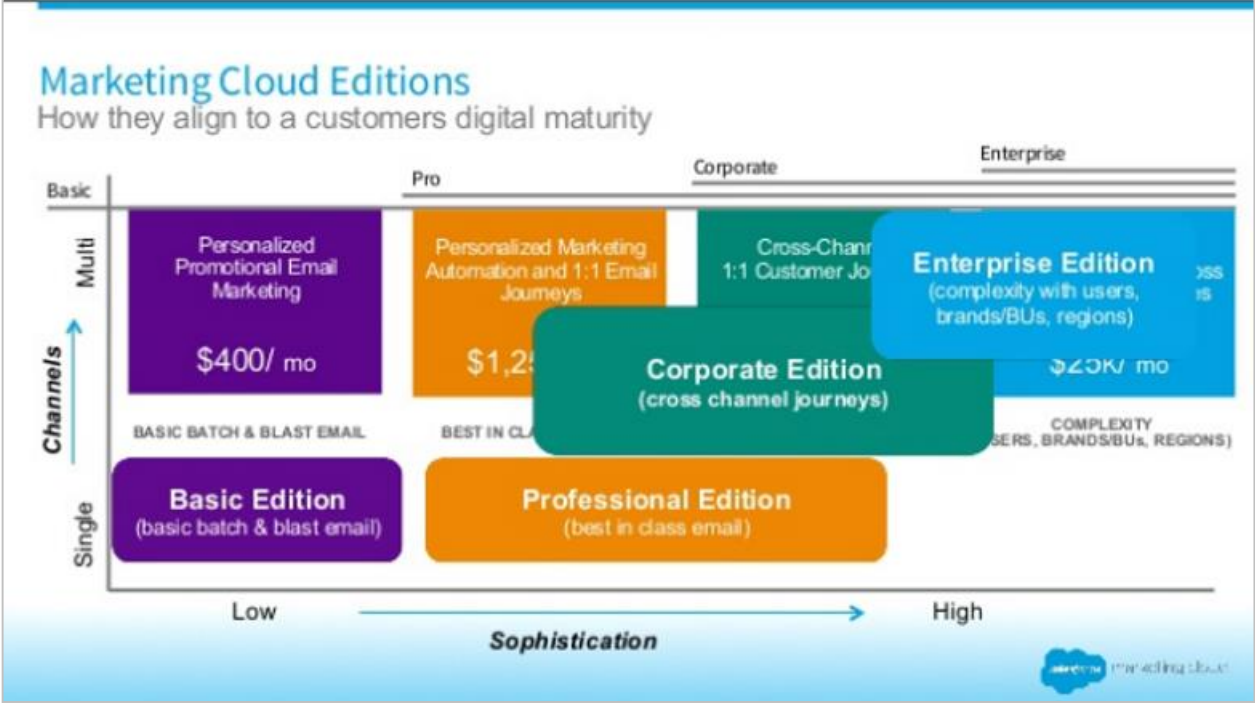
SMS/MMS Super Message Usage Tiers

| Tier 1 | Tier 2 | Tier 3 | Tier 4 | Tier 5 | Tier 6 |
|-----------------|-------------------|-----------------|-----------------|-----------------|-----------------|
| Multiplier = 10 | Multiplier = 25 | Multiplier = 35 | Multiplier = 40 | Multiplier = 45 | Multiplier = 50 |
| USA | Albania | Bahrain | Australia | Brazil | Germany |
| | Belgium | Cyprus | Austria | France | Hungary |
| | Bosnia | Czech Republic | Bulgaria | Italy | Israel |
| | Canada | Greece | Croatia | Japan | Jordan |
| | Denmark | Iceland | Finland | Netherlands | Kuwait |
| | Egypt | India | Latvia | Portugal | Liechtenstein |
| | Estonia | Sweden | Norway | Spain | Malaysia |
| | Ghana | UK | Slovakia | | New Zealand |
| | Hong Kong | UAE | Switzerland | | Oman |
| | Ireland | | | | Qatar |
| | Lithuania | | | | South Korea |
| | Luxembourg | | | | Zimbabwe |
| | Macau | | | | Base Price |
| | Paraguay | | | | |
| | Phillipines | | | | |
| | Poland | | | | |
| | Saudi Arabia | | | | |
| | Serbia | | | | |
| | Singapore | | | | |
| | Slovenia | | | | |
| | Taiwan | | | | |
| | Thailand | | | | |
| | Trinidad & Tobago | | | | |
| | Turkey | | | | |
| | Ukraine | | | | |
| | Vietnam | | | | |



Salesforce Marketing Cloud Sales Strategy



Salesforce Marketing Cloud Sales Strategy



Salesforce Marketing Cloud Sales Strategy

 Save  Clip slide


Basic Edition

For email marketers who need basic personalized promotion messaging


We're just getting started with our digital strategy, but we plan to invest heavily and grow this capability over time.

I need a more efficient way to manage my customer segments and send personalized message.

Our emails should be optimized for mobile and desktop experience. Ideally using templates to avoid reinventing the wheel!




Karen
Marketing Specialist



Alek
Marketing Designer

Pricing starts at \$400/month



Salesforce Marketing Cloud Sales Strategy

Pro Edition
For enterprise marketers who want best-in-class segmentation and automation for targeted email marketing journeys

I want to improve my click rate from emails by serving up relevant content the customer is likely to take action on!

I want to trigger personalized emails based on my subscriber list and point of sale data.




Roger
Marketing Manager



Justin
Digital Specialist

Automate email prep and send processes to allow me to do more without expending my resources.



Salesforce Marketing Cloud Sales Strategy


Corporate Edition
For companies that want to create personalized 1:1 cross-channel journeys


Clip slide


We are exploring other ways to engage without customers beyond email

I want to send my customers targeted messages across the lifecycle


I want to improve my conversation rate on my eCommerce website



Roger
Director of Digital Marketing


Trisha
Digital Manger

 marketing cloud

Salesforce Marketing Cloud Sales Strategy


 Save

 Clip slide

Enterprise Edition


For enterprise marketers who want to create cross-channel journeys that span multiple brands, geographies, and complex orgs

We need to increase revenue by 10% with cross selling across businesses.




Roger
CMO

I want the content from corporate but I need to customize the digital experience for customers in my region!

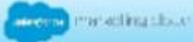


Trisha
Region Marketing Leader

It's too complicated to quickly identify customers in segments we want to target



Justin
Head of Digital Marketing

 Marketing Cloud

Salesforce Marketing Cloud Sales Strategy

Pick the right edition, then consider additional capacity & features

90% of customers will need additional contacts, 50% will need more super messages



Contacts

Does the customer need more contacts?



Super Messages

Does the customer need additional super messages?

Salesforce Marketing Cloud Sales Strategy

Pick the right edition, then consider additional capacity & features

Other edition add-ons to consider



Edition Limits

Does the customer need more APIs, users, automations, storage?



Features

Does the customer need additional features?



Customer Success

Does the customer need Premier or additional services?



Salesforce Marketing Cloud

Sales Strategy

Enhance other digital investments your customer is making

Other products that will be valuable to your customers

Social studio

Listen, analyze, publish and engage on social channels

Social.com

Social advertising management across Facebook, Twitter and LinkedIn

Active Audiences

Activate your data to power customer journeys through advertising



Salesforce Pardot



Salesforce Pardot



- Acquired as part of Exact Target acquisition in 2013
- Simple-to-use Marketing Automation capabilities
- Not integrated directly with Salesforce Marketing Cloud, only with the CRM system

Salesforce Pardot Packages & Pricing

| Standard | Professional | Ultimate |
|---|---|---|
| <p>Standard marketing automation</p> <p>\$1,000</p> <p>USD/month/up to 10,000 contacts (billed annually)</p> <p>CONTACT US</p> <ul style="list-style-type: none"> Email marketing In-depth prospect tracking Lead nurturing Lead scoring and grading ROI reporting Forms and landing pages Standard CRM integration | <p>MOST POPULAR</p> <p>Advanced marketing automation</p> <p>\$2,000</p> <p>USD/month/up to 10,000 contacts (billed annually)</p> <p>CONTACT US</p> <p>Get all Standard features PLUS</p> <ul style="list-style-type: none"> Advanced email analytics Email rendering preview and spam analysis Email and landing page A/B testing Advanced dynamic content Google AdWords integration API access – up to 25K calls/day Multiple scoring categories Integrated marketing calendar Social profiles Chat support | <p>Customizable marketing automation</p> <p>\$3,000</p> <p>USD/month/up to 10,000 contacts (billed annually)</p> <p>CONTACT US</p> <p>Get all Pro features PLUS</p> <ul style="list-style-type: none"> Custom user roles Custom object integration API access – up to 100K calls/day Dedicated IP address Phone support |

Get insight, explore your data, act on your analysis.

Marketing analytics

\$300

USD/month/per 5 users (billed annually)

[CONTACT US](#)

Get powerful insights from your data and maximize your marketing and sales efforts with Wave for B2B Marketing.

Includes the following features:

- Customizable dashboards
- Connect to third party data sources
- Share insights from any device

Be first. Be relevant. Be productive.

Sales & marketing alignment

\$50

USD/month/per user (billed annually)

[CONTACT US](#)

Empower Sales to connect early, often and effectively with Salesforce Engage for Pardot.

Includes the following features:

- Engage Alerts
- Engage Reports
- Engage Campaigns
- Engage for Gmail

Salesforce Pardot Campaign Creation

- Pardot campaign can start with email, white paper, Google ad, or any other marketing channel

Campaign Creation

The screenshot shows the 'Create Campaign' interface in Salesforce Pardot. On the left is a blue sidebar with navigation icons. The main content area is titled 'Create Campaign' and includes a 'Cancel' link in the top right. The form fields are: 'Name*' (text input), 'Folder*' (dropdown menu showing 'Campaigns' and a 'Choose' button), 'Tags' (text input with 'add a tag' placeholder), 'Cost' (text input), and 'Archive Date' (calendar icon and 'YYYY-MM-DD' placeholder). A note below the date field states: 'Archive Date is only used for sorting and doesn't affect module usage'. At the bottom are 'Create Campaign' and 'Cancel' buttons.

Salesforce Pardot Build Form

Build Form

- Drag fields into order you want
- Completion Actions
 - Actions that automatically trigger when form is submitted
 - Completion Actions available
 - Add tags
 - Add to list
 - Add to SF campaign
 - Adjust score
 - Assign prospect via SF active assignment rule
 - Assign to group
 - Assign to queue
 - Assign to user
 - Change prospect custom field value
 - Change prospect default field value
 - Create SF.com task
 - Increment prospect field value
 - Notify assigned user
 - Notify user
 - Notify user via Twilio (phone)
 - Register for webinar
 - Remove from list
 - Remove tags
 - Send autoresponder email
 - Set profile
 - Set profile's source campaign

Form Builder

The screenshot shows the Salesforce Pardot Form Builder interface. At the top, there is a navigation bar with five steps: 1. Name (active), 2. Fields, 3. Look and Feel, 4. Completion Actions, and 5. Confirm & Save. The main content area is titled 'Name' and contains the following elements:

- A text input field for 'Name' with the value 'LenoxSoft White Paper'.
- A 'Tags' section with a dropdown menu showing 'add a tag' and a note: 'Note: Tags are applied to the form only'.
- A 'Folder' section with a dropdown menu showing 'Lead Gen Forms' and a 'Choose' button.
- A 'Campaign' section with a dropdown menu showing 'marketing campaign' and a 'Choose' button.
- At the bottom, there are 'Next >' and 'Cancel' buttons.

Salesforce Pardot Landing Page & Email

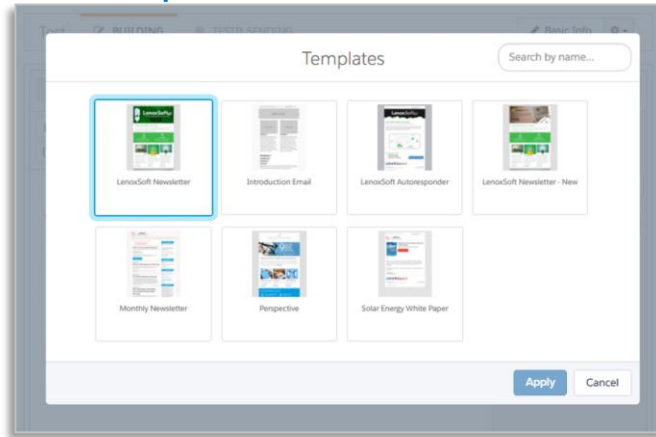
Build Landing Page and Email

- WYSIWYG builders
- No knowledge of HTML necessary

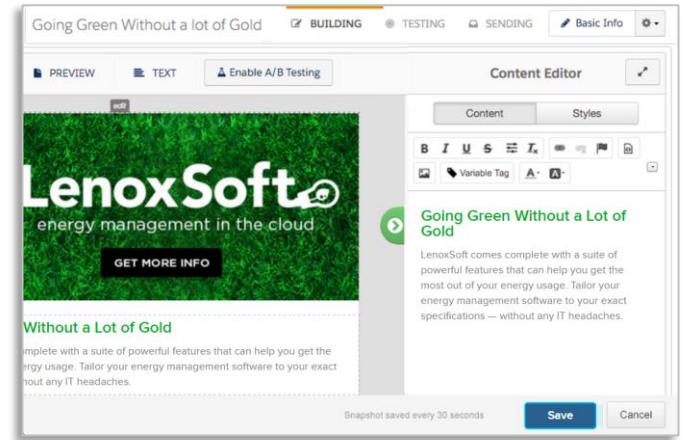
Landing Page Builder



Email Template Selection



Email Builder

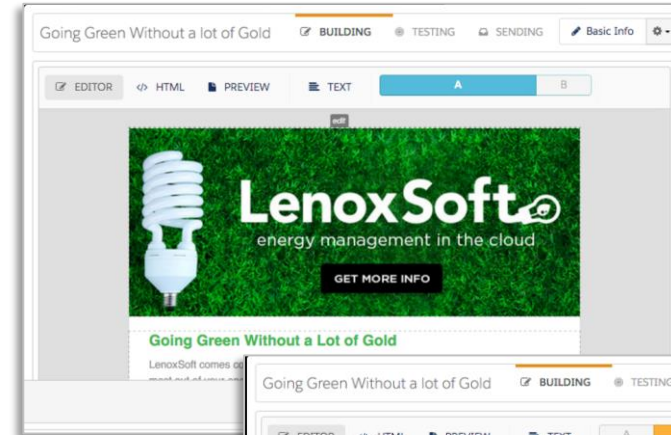


Salesforce Pardot A/B Testing

A/B Testing

- Deploy alternate versions of email, and measure results of each
- No mention of capability to automatically deploy winner, or other higher-level functions

Selection "A"



Selection "B"



Salesforce Pardot Scoring/Grading

Scoring/Grading Model

- Grading
 - Letter grade assigned to each lead, based on implicit factors, such as Industry, Location, Job Title, and Company Size
- Scoring
 - Number assigned to each lead, based on factors such as Page Views, Site Searches, Downloads, Email Clicks



Salesforce Pardot Email Rendering

Email Rendering Preview

- Displays test version of email in top email clients

Detail of drill-down



Thumbnails of all clients available

| | | | |
|-----------------------------|-----------------------|------------------------|-----------------------|
| AOL Mail (Explorer) | AOL Mail (Firefox) | Gmail (Explorer) | Gmail (Firefox) |
| | | | |
| Outlook.com (Explorer) | Outlook.com (Firefox) | Yahoo! Mail (Explorer) | Yahoo! Mail (Firefox) |
| | | | |
| MOBILE EMAIL CLIENTS | | | |
| | | | |
| Android 2.3 | Android 4 | iPad (Retina) | iPad Mini |
| | | | |
| iPhone 6 | iPhone 6 Plus | | |

Salesforce Pardot Send Email

Send Email

To Choose who gets your email.

Lists (Send To) *

Suppression Lists (Don't Send To)

Monthly Newsletter **Partners**

From Choose who your email is sent *from*.

We'll set the From address using your first option below. If it's not available for a given prospect, we'll send from the next option.

Sender A *
+
> Name:
> Email:

Sender B *
+
> Name:
> Email:

Save **Cancel**

Salesforce Pardot Prospect Profile

Prospect Profile

The screenshot shows the 'Prospect Profile' for Jeremy Jones. The interface includes a top navigation bar with 'Edit', 'Delete', and 'Show Social Data' buttons. Below the name, there are tabs for 'OVERVIEW', 'LISTS', 'PROFILE', 'RELATED', 'ACTIVITIES', 'AUDITS', 'LIFECYCLE', 'OPPORTUNITIES', and 'RELATED OBJECTS'. The 'Contents' section on the left lists fields: Name (Jeremy Jones), Email (jeremy.jones@impulse-analysis.com), Company (Impulse Analysis Systems), Account Name (No Account), and Source Campaign (Multivariate Test: Buyer's Guide Landing Page - Adwords). The 'Insight' section shows a Score of 10,354, Grade A, and Assigned User Adam Blitzler. The 'Prospect Activities' section on the right is filtered by 'Any Type' and lists several activities, with 'Visit: 5 page views' highlighted in blue.

Drill-down detail

The screenshot shows a drill-down detail for 'Visitor Page Views' for Jeremy Jones. It features a table with the following data:

| URL / Title | Type | Time on Page |
|--|-------------|--------------|
| http://www.lenoxsoft.com/blog/increase-your-revenue Blog - LenoxSoft | Exit Point | 15 minutes |
| http://www.lenoxsoft.com/faqs/energy-savings Energy Savings - LenoxSoft | Page View | 2 minutes |
| http://www.lenoxsoft.com/whitepapers/10-energy-saving-tips 10 Energy Savings Tips White Paper- LenoxSoft | Page View | 5 minutes |
| http://www.lenoxsoft.com/resources Resources - LenoxSoft | Page View | 30 seconds |
| http://www.lenoxsoft.com Search Results - LenoxSoft | Entry Point | 1 minute |

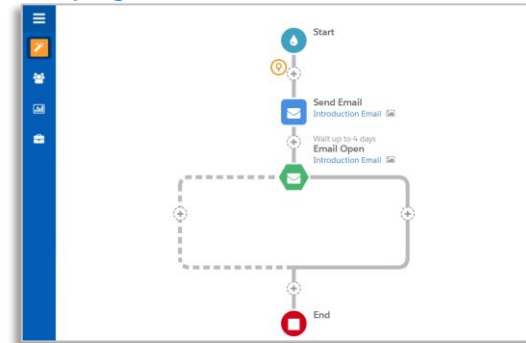
At the bottom of the table, it indicates 'Showing 5 of 5' and 'Page 1 of 1' with a 'Next' button.

Salesforce Pardot Engagement Campaigns

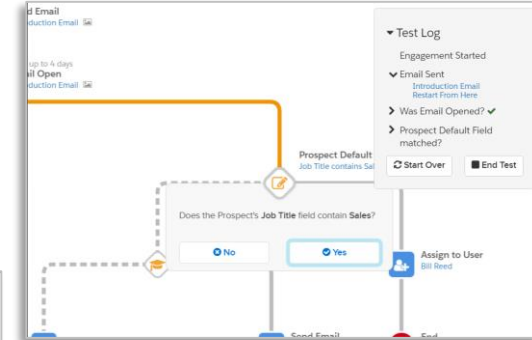
Engagement Campaigns

- Lead Nurturing
- Personalized and dynamic, allowing marketer to build relationships at scale
- Visual campaign canvas makes campaign easy to understand
- Engagement Studio
 - Add Triggers
 - Add Rules
- Can perform a walk-through test of campaign in Engagement Studio

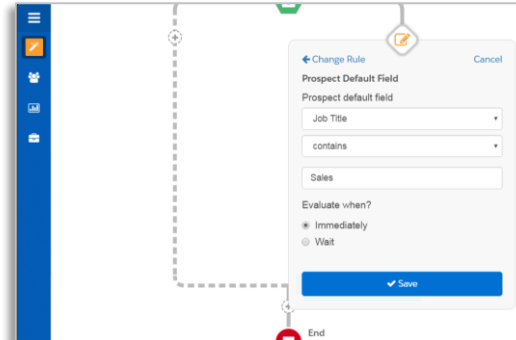
Campaign Build



Campaign Testing



Rule Definition

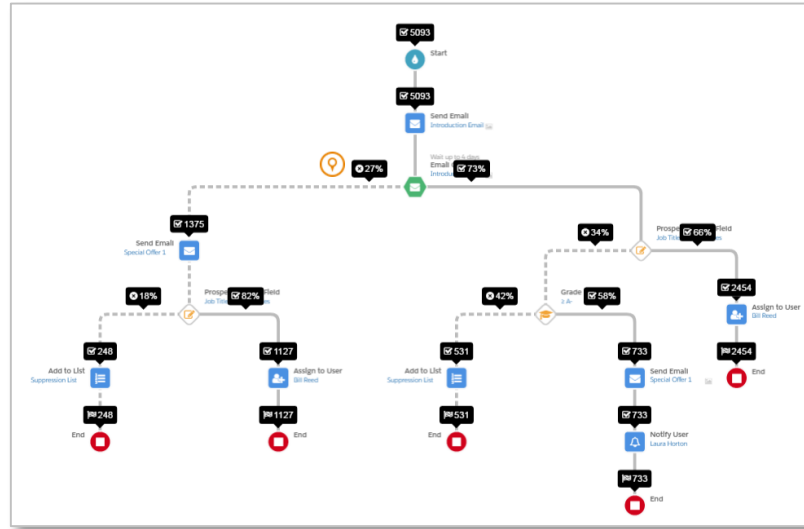


Salesforce Pardot Engagement Studio

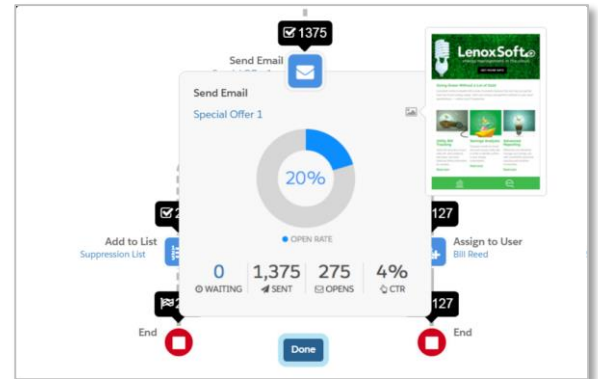
Engagement Studio

- Can see status of each step at a glance
- Click on step to see drill-down info

Campaign View



Drill-down to Campaign Step Detail



Salesforce Pardot Lead Assignment

Assign leads to sales

- Uses automation Rules to specify assignment criteria and Actions to automate lead assignment

Build Automation Rules

The screenshot shows the 'Build Automation Rules' interface. At the top, there's a 'Rules' section with a 'Match type' dropdown set to 'Match all'. Below this, there's a note: 'Automation Rules are retroactive and affect all prospects that meet the selected criteria.' The main area contains two criteria rows. The first row has a '+ Add' icon, a dropdown for 'Prospect score', a 'is greater than' operator, and an empty input field. The second row has a '+ Add' icon, a dropdown for 'Prospect grade', a 'is greater than' operator, and a dropdown menu. At the bottom, there are two buttons: '+ Add new rule' and '+ Add new rule group'. A 'Next >' button is located in the bottom right corner.

Assign Actions

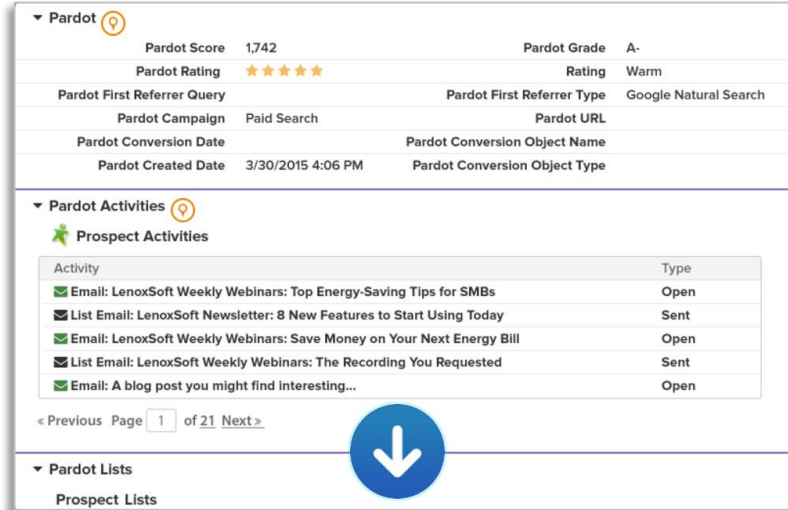
The screenshot shows the 'Assign Actions' interface. At the top, there's an 'Actions' section with a '+ Add' icon and a dropdown menu set to 'Assign prospect to user'. Below this, there's a '+ Add new action' button. A section titled 'Execute in Real Time' has a checkbox that is unchecked. Below this, there's a note: 'We recommend against running automation rules in real time unless the action is very time sensitive. Intensive, real-time rules could cause slower load times for forms and landing pages. Rules not running in real time will be processed in batches regularly.' At the bottom, there's a blue banner with the text: 'Your automation rules will be saved in Paused mode. Unpause them when you are ready to start the automation rules.' At the very bottom, there are two buttons: 'Create automation rule' and 'Cancel'.

Salesforce Pardot Sales View

Sales View in Salesforce

- Pardot passes marketing info to Salesforce for the use of the Sales team

Pardot info in Salesforce



The screenshot displays the 'Pardot' record in Salesforce. It is organized into several sections:

- Pardot**: A summary table with fields like Pardot Score (1,742), Pardot Grade (A-), Pardot Rating (5 stars), and Pardot First Referrer Query (Paid Search).
- Pardot Activities**: A section for tracking prospect interactions, including a table of recent activities.
- Pardot Lists**: A section for managing prospect lists.

A blue circular icon with a white downward arrow is overlaid on the bottom right of the screenshot.

| Pardot | |
|-------------------------------|-----------------------|
| Pardot Score | 1,742 |
| Pardot Grade | A- |
| Pardot Rating | ★★★★★ |
| Pardot First Referrer Query | Paid Search |
| Pardot First Referrer Type | Google Natural Search |
| Pardot Campaign | Paid Search |
| Pardot Conversion Date | 3/30/2015 4:06 PM |
| Pardot Conversion Object Name | |
| Pardot Created Date | 3/30/2015 4:06 PM |
| Pardot Conversion Object Type | |

| Pardot Activities | |
|---|------|
| Prospect Activities | |
| Activity | Type |
| ✓ Email: LenoxSoft Weekly Webinars: Top Energy-Saving Tips for SMBs | Open |
| ✗ List Email: LenoxSoft Newsletter: 8 New Features to Start Using Today | Sent |
| ✓ Email: LenoxSoft Weekly Webinars: Save Money on Your Next Energy Bill | Open |
| ✗ List Email: LenoxSoft Weekly Webinars: The Recording You Requested | Sent |
| ✓ Email: A blog post you might find interesting... | Open |

< Previous Page 1 of 21 Next >

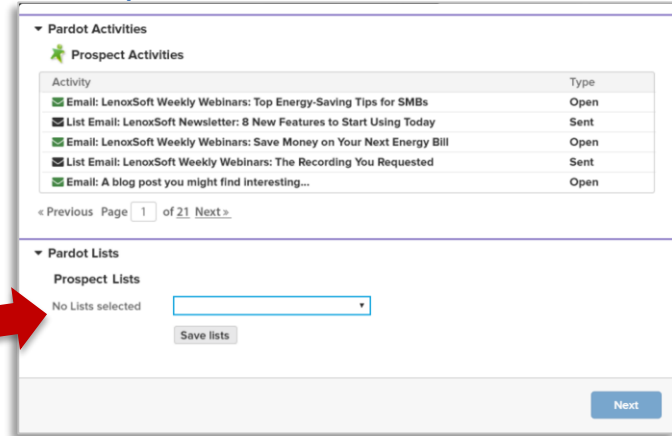
▼ Pardot Lists
Prospect Lists

Salesforce Pardot Add to List

Add Salesforce Prospects to Lists

- Add individual prospects to lists from within Salesforce
- Allows Sales reps to enroll prospects in nurture campaigns

Add Prospect to Pardot List from Salesforce



The screenshot shows the 'Add Prospect to Pardot List from Salesforce' interface. It is divided into two main sections: 'Pardot Activities' and 'Pardot Lists'.

Pardot Activities: This section contains a table of prospect activities. The table has two columns: 'Activity' and 'Type'. The activities listed are:

| Activity | Type |
|---|------|
| Email: LenoxSoft Weekly Webinars: Top Energy-Saving Tips for SMBs | Open |
| List Email: LenoxSoft Newsletter: 8 New Features to Start Using Today | Sent |
| Email: LenoxSoft Weekly Webinars: Save Money on Your Next Energy Bill | Open |
| List Email: LenoxSoft Weekly Webinars: The Recording You Requested | Sent |
| Email: A blog post you might find interesting... | Open |

Below the table is a pagination control: '< Previous Page 1 of 21 Next >'. A red arrow points to the 'Prospect Lists' dropdown menu in the 'Pardot Lists' section.

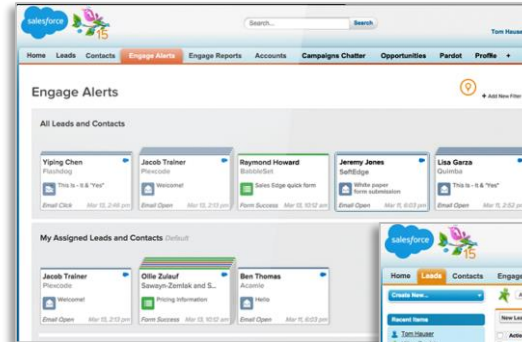
Pardot Lists: This section is titled 'Prospect Lists' and contains a dropdown menu with the text 'No Lists selected'. Below the dropdown is a 'Save lists' button. At the bottom right of the interface is a 'Next' button.

Salesforce Pardot Engage

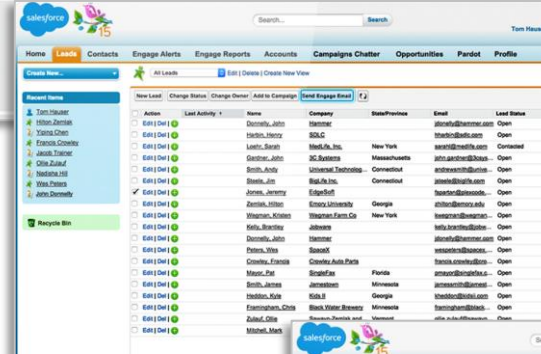
Salesforce Engage

- Allows sales to:
 - Keep tabs on active prospects
 - Send 1:1 emails to prospects using pre-approved templates or plain text
 - Report on the success of these emails

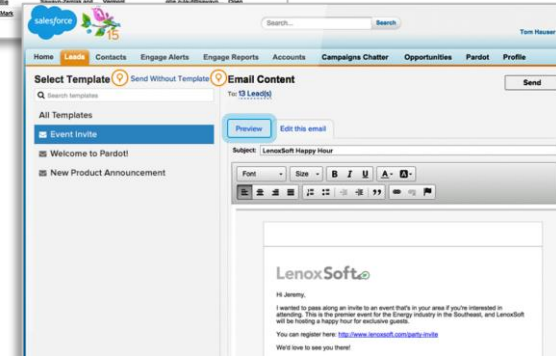
Select Lead



Select Email



Personalize Email

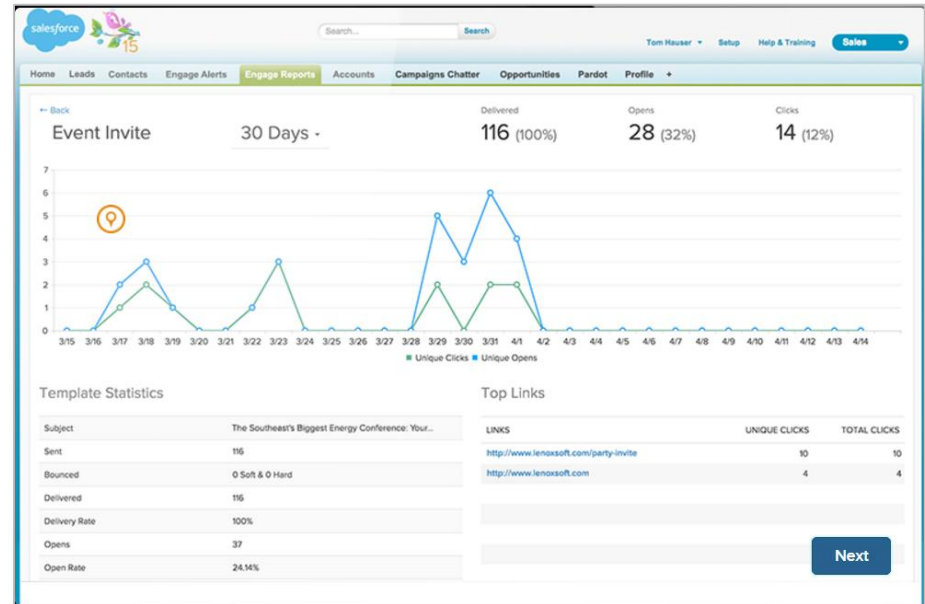


Salesforce Pardot Engage Reports

Engage Reports

- The Engage tool has reports with metrics for emails sent through Engage (by Sales)
- No other reports mentioned – just the one displayed here

Engage Activity Report

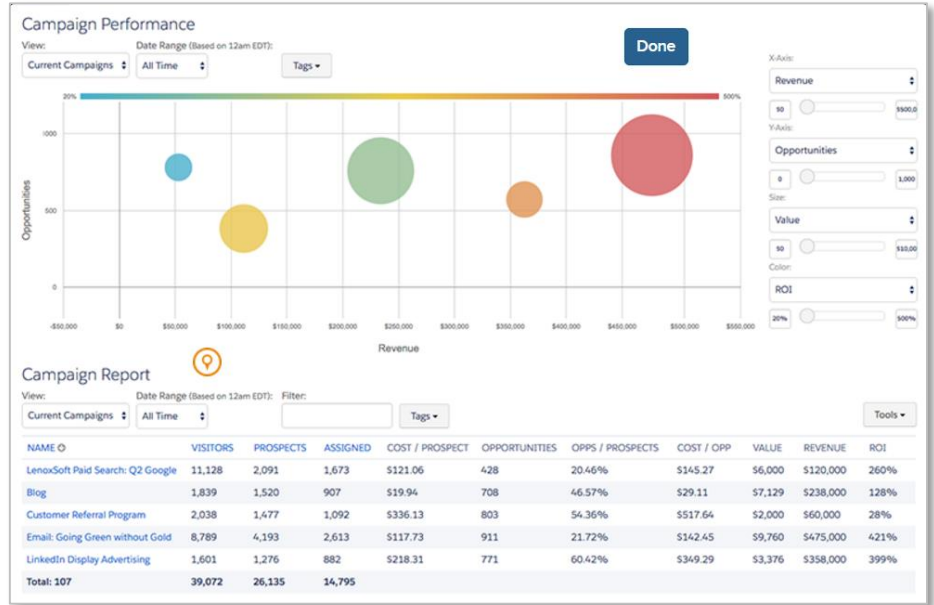


Salesforce Pardot Pardot Reporting

Campaign Performance Overview

- Gives high level overview of campaign's overall health in comparison to other campaigns
- Can adjust report by altering values on the four axes

Campaign Performance Overview Report



Salesforce Pardot Pardot Reporting

– Advanced Email Report

- Provides insight into email engagement, email clients and devices used by recipients, deliverability rates, and more
- Other views available
 - Click-through Rate Report
 - Interaction
 - Email Clients
 - » Shows read, skimmed or ignored
 - Email Clients
 - » Clients, browsers and devices used to open email

Email Report



Interaction Report



Click Through Rate Report



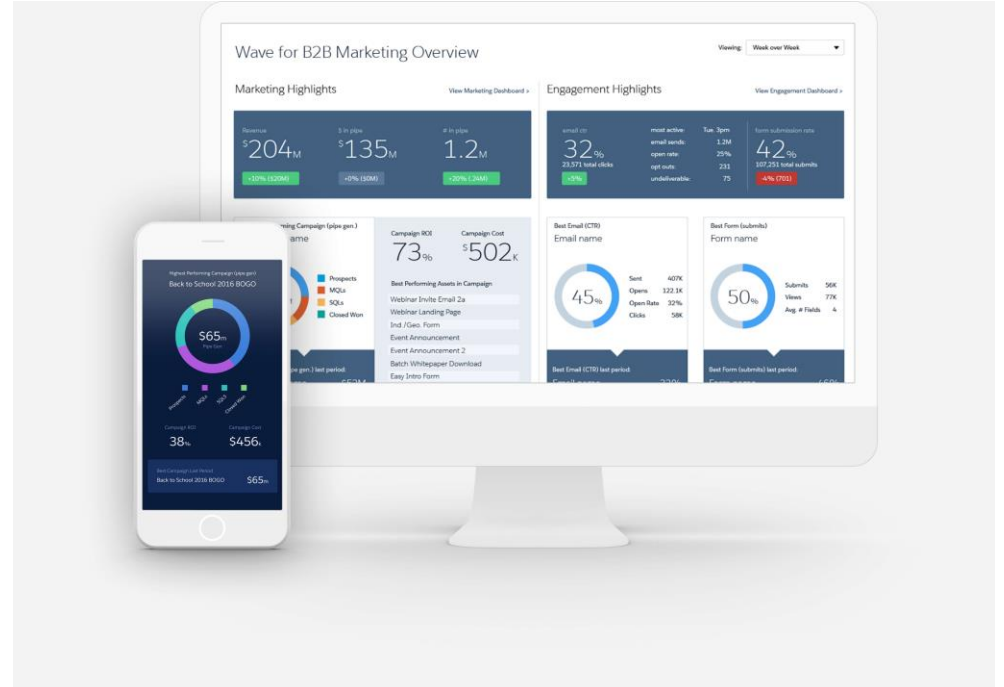
Email Clients Report



Salesforce Pardot Pardot Reporting

– Wave Analytics for B2B Marketers (not part of Pardot base package)

- Enables marketers to drill into:
 - Lead volume
 - Lead-to-opportunity conversion rates
 - Pipeline velocity
 - Campaign ROI
- Can combine that data with third-party sources, including Google Analytics and event management platforms
- Is in beta - GA scheduled for October, 2017



Selling against Salesforce

Offensive Strategies - Competitive Advantages

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Selling against Salesforce Marketing Cloud (ExactTarget)



Marketing Cloud: Sales Tactics



- Heavy **discounting** (as much as 70%) to get the business
- Offering **short-term** (3 month) contracts
- Leverage existing **relationship** – CRM and Marketing Cloud
- “**Bundling**” to give away email, and sometimes services, for new CRM clients
- Bringing **CEO** in to close deals
- Using **Social** to get in the door and knock us out of deal (often at the 11th hour)
- Demos are really **slideware** – they rarely do an actual demo of the product.
- **Additional costs** are not discussed at the time of sale – customer often finds out that they will have to spend extra to do simple things like get data out of their system.
- They will invite your clients and prospects to their **events**
- Convincing prospects that, because Salesforce acquired ET and Pardot, their SFDC **integrations** are, by default, easier and stronger than other providers
- Selling prospect on necessity of **tokenization** for security purposes

Marketing Cloud: Strengths



Sales

- Solid sales team; Good at painting the marketer's vision
- Extremely aggressive on pricing

Product

- Customers express satisfaction with UI and user experience
- Multi-lingual interface (German, French, French-Canadian, Brazilian, Portuguese, Japanese)
- Interactive Marketing Hub
- Marketing Calendar for planning
- Audience Builder for segmentation
- Journey Builder for campaign management
- Tokenization
 - After a User initiates a Send, a message goes through the normal build process, which includes a Contact's token.
 - Finally, the message is injected into the Marketing Cloud MTA's for sending to its recipient.
 - Just before an email is sent, the SFMC Send Engine calls the customer's API and exchanges the token for an email address and related attributes used to personalize the message.
 - Sensitive data received from the token exchange is discarded from memory and not retained in the Marketing Cloud, however, all tracking and deliverability data is available in the Marketing Cloud, which can be identified by the Subscriber Key.

Company

- Solid company with strong brand awareness; Considered the safe choice by many marketers
- Strong rankings with Analyst firms

Partners

- Extensive suite of 3rd party relationships; Integrated via API; Strong hub of solutions

Marketing Cloud: Weaknesses



Sales

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Product

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.



Marketing Cloud: Weaknesses



Support

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Marketing Cloud: Offensive strategies



Strategy 1

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Strategy 2

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Strategy 3

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.



Marketing Cloud: Offensive strategies



Strategy 4

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Strategy 5

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Strategy 6

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Strategy 7

- IMC has been winning against ET based on our industry knowledge and expertise, especially in gaming, retail, and non-profit space

Marketing Cloud: Offensive strategies



Deliverability

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Complex modular development

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Strong reporting and analytics

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Marketing Cloud: Defensive strategies



Comprehensive Platform

- *Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.*
- *Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.*
- *Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.*

Usability / Marketer Friendly

- *Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.*
- *Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.*
- *Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.*



Marketing Cloud: Defensive strategies



CRM Footprint

- *Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.*
- *Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.*
- *Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.*

Artificial Intelligence

- *Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.*
- *Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.*
- *Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.*



Marketing Cloud: Defensive strategies



Pricing

- *Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.*
- *Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.*
- *Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.*



Salesforce CRM Integration

- *Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.*
- *Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.*
- *Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.*

Salesforce Pardot



Pardot: Sales Tactics



- Heavy **discounting** (as much as 70%) to get the business
- Offering **short-term** (3 month) contracts
- Leverage **existing relationship** – CRM and Pardot
- “**Bundling**” to discount or give away email for new CRM clients
 - Tactic is especially prevalent with Pardot
 - Setting up email as a “little something extra” when setting up CRM
- **Cross-sell** to ET customers, to add automation to their stack
- Demos are really **slideware** – they rarely do an actual demo of the product.
- Convincing prospects that, because Salesforce acquired Pardot, their SFDC **integrations** are, by default, easier and stronger than other providers
- Selling less tech-savvy prospects on **ease-of-use**

Pardot: Strengths



- Easy to use, with straightforward **UI**
- Good for **B2B marketers** new to Marketing Automation, with low functionality needs
- Includes ability to execute **drip campaigns**, which are easy to set up
- Has had many wins based on **customer perception** that Pardot-SFDC integration will be simpler because both solutions offered by Salesforce

Pardot: Weaknesses



- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Pardot: Offensive Strategies



B2B Platform Sophistication

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Support and Services

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Product

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.



Pardot: Defensive Strategies



Salesforce CRM Integration

- *Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.*
- *Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.*
- *Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.*



Competing with Salesforce: Industry-Specific



Financial Services

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Non Profit

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Gaming

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Salesforce: Top Competitive Takeaway Targets



- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Why we win



“Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.”

“Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.”

“Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.”

“Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.”

Capabilities

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Quotes from a recent wins from SFDC

Support – “Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.”

SMS – Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Ease of Use – Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

