

PARDOT CHECKLIST

Technical Setup		Done?
Tracking Code	Implement your unique Pardot tracking code on all pages you want to track.	
Tracker Domain	Create a tracker subdomain (CNAME) for Pardot to generate a URL that appears as your main website.	
Email Authentication	Add TXT entries to your DNS to authenticate Pardot sending emails on your domain's behalf.	
Custom Fonts	Grant Pardot permission to use your website's custom fonts on your Pardot forms and landing pages.	

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___ / 04

PARDOT CHECKLIST

Salesforce.com Implementation		Done?
Read Before Connecting	Review things to know before activating your CRM connector.	
Create Connector	Create your salesforce.com connector in Pardot and install the composite application.	
Add Users	Add your users to Pardot.	
Setting Single Sign-On	Enable immediate access to Pardot information in your CRM.	
Test Connector	Complete a few tests to ensure that the connector is syncing in the manner that you expect.	

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___ / 05

PARDOT CHECKLIST

Emails		Done?
Creative	Provide creative for unsubscribe and email preference center pages.	
Content	Provide text and/or HTML versions of the email templates to implement.	
Segment	Segment your prospects on lists.	
Test	Internally test your emails to ensure expected results.	
Warming Your IP Address	Ramp up your sending with Pardot to establish a great sending reputation.	
Send	Send your first email to a segmented list	

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___ / 06

PARDOT CHECKLIST

Forms and Landing Pages		Done?
Create Forms	Designate forms or form handlers to implement.	
Deploy Forms	Embed the Pardot hosted form HTML code on your webpage where you would like the form to appear or integrate the form handler code with your existing form.	
Landing Pages	Design and develop landing page templates.	

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___ /03

PARDOT CHECKLIST

Import Existing Information		Done?
Marketable and Unsubscribed Prospects	Import previously opted-out prospect to ensure they will not receive any Pardot sent emails.	
Lead Qualification		Done?
Prospect Scoring	Develop scoring metrics for prospect activity and behavioral data	
Lead Grading	Customize a grading model to qualify a prospect's demographic information	
Automation		Done?
Automation Rules	Establish logic to automation actions like lead assignment, email alerts, segmentation, etc.	
Alerts	Configure alerts to be sent to sales reps when a prospect completes a specified action.	
Segmentation	Create one-time-only segmentation rules to optimize email marketing efforts	
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___ / 06

PARDOT CHECKLIST

Content		Done?
Files	Upload images to be hosted and other resources (white papers, data sheets, etc) for hosting and tracking.	
Dyanmic Content	Display certain HTML content on your website or Pardot forms, landing pages, layout templates and emails based on a prospect's score, grade, or field value for default fields or custom fields. As people match the criteria set for your advanced dynamic content, a variation of content will display where you embed the generated code on your website or email.	
Custom Redirects	Create trackable links that are unique to specific campaigns, ads, and content either on your site or third party sites.	

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___ /03

PARDOT CHECKLIST

Additional Features		Done?
Site Search Integration	Create a hosted site search or integrate a third-party search to record the terms searched.	
Social Messages	With Pardot Social Posting, you can schedule and simultaneously post updates to multiple Twitter, Facebook, and LinkedIn accounts and company pages and gather insight on link clicks, replies, comments, retweets, and likes. When you include a link beginning with http:// or https:// in a Pardot social post, Pardot re-writes the link as a trackable link with your company's custom bit.ly pro URL (if applicable).	
Page Actions	Trigger completion actions or set priority pages off of specific URL page views.	
Keyword Monitoring	Designate keywords that are important to you to track how your site ranks in Google/Bing.	
Competitor Monitoring	Track how well your site stacks up against your competitors in SEO terms.	
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___ /05

PARDOT CHECKLIST

Sales Tools & Resources		Done?
Email Plug-In	Track emails sent from your daily email client by using the following links for various email platforms.	
LeadDeck Real-Time Prospect Monitor	Receive desktop alerts when your prospects become active.	

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___ /02

PARDOT CHECKLIST

Connectors		Done?
Eventbright Connector	Track emails sent from your daily email client by using the following links for various email platforms.	
GoodData Connector	Receive desktop alerts when your prospects become active.	
Google AdWords Connector	(Included with Enterprise & Ultimate Editions) Pardot can hook into your Google AdWords account and track prospects that reach you through paid search. You can tie cost data from AdWords to opportunity data from your CRM to determine your true cost per qualified lead and search engine marketing ROI. (http://www.pardot.com/help/faqs/administration/google-adwords-connector) Note: Once the connector has been verified, your AdWords campaigns will be automatically imported and your AdWords destination URLs will be updated slightly to include a tracking parameter. Some Items to be aware of before you set up the connector	
Google Analytics Connector	This will pass the campaign name, medium, source, content, and term from Google Analytics Keyword Tags to Pardot and can sync these fields to a compatible CRM if desired.	
Olark Chat Connector	Olark is a very easy to use business chat solution that lets your reps chat with visitors and prospects who are on your site and record the conversations.	

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___ /05

PARDOT CHECKLIST

Connectors cont.		Done?
Social Connectors	Add social connectors for Twitter, Facebook and/or LinkedIn accounts to post to one or more accounts simultaneously.	
Twilio Connector	Twilio is a service that will alert users of a form submission with a phone call. The user can even choose to call the prospect immediately. Twilio will automatically connect the user directly if desired.	
UserVoice Connector	Pardot syncs bidirectionally with UserVoice, a suggestion tracking and support ticketing system.	
Wistia Connector	Wistia is a commercial service for hosting and sharing videos online that helps measure the engagement of your content with awesome analytics tracking.	
Webinar Connectors	Pardot syncs bidirectionally to seamlessly register attendees for events, report on attendance, and display and score activity with GoToWebinar, ReadyTalk, & WebEx.	

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___ / 05