

HOW TO: PARDOT:

Manage Leads

Implement custom lead management processes.

Learn how to implement an effective lead management process with Pardot. Customize your lead scoring, personalize your lead grading, automate lead assignment, and identify lead maintenance strategies for ongoing success.

What it can do for you.

- Improve sales and marketing alignment
- Increase productivity

How it works.

A Certified Specialist will guide you through the process via three calls totaling 2.5 hours over 1 week.

Discovery

- We'll discuss your unique needs to ensure this accelerator is tailored for your goals.

Learning the Essentials

- We'll provide a conceptual overview of lead management topics to ensure foundational understanding.

Establishing Lead Management

- We'll get hands-on and customize your scoring profile, establish your grading profile, and create an automation rule for grading. We'll also review lead assignment and maintenance methods.

ADDITIONAL INFORMATION

Premier for Pardot

Time you will spend on this Accelerator: 2.5 hours

GOAL

Increase Revenue

INTENDED USER

Pardot customers who need a thorough review of lead management setup and best practices

PREREQUISITES

- Must have Pardot Premier Success Plan attached to Pardot account
- Implemented Pardot account
- Assigned Pardot administrator
- Willingness to complete a customer satisfaction survey at the conclusion of the Accelerator

To schedule your 1-on-1 Accelerator, [visit our Help Portal](#), or contact your account executive or success team today!

Corporate Headquarters

The Landmark @ One Market Street
Suite 300
San Francisco, CA 94105
United States
1-800-NO-SOFTWARE
www.salesforce.com/services-training/add-ons/accelerators

Global Offices

Latin America +1-415-536-4606
Japan +81-3-5785-8201
Asia / Pacific +65-6302-5700
EMEA +4121-6953700

