

6 Ways To Use
PARDOT
for Nonprofit Marketing



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INTRODUCTION

If you do a little research into Salesforce's products, Pardot and Marketing Cloud, you'll quickly read that Pardot is for Business-to-Business (B2B) communications (for example, a company marketing their products or services to other companies) and Marketing Cloud is for Business-to-Consumers (B2C) communications (for example, T-Mobile selling phones to actual people).

Well, neither of those comparisons are particularly useful for nonprofit organizations or associations and...both Pardot and Marketing Cloud can be transformational for nonprofits or associations. Fíonta presents six practical ways nonprofits and associations can use Pardot to communicate with donors, members, staff, volunteers, and other constituents.

Before we dive in, let's get one thing straight...the pronunciation of Pardot. It's par-DOT with a hard T, not PAR-dough. Be fancy if you want – this author spent the better part of her 15th summer calling Target, tar-ZJAY – but know that it's pronounced exactly as it's spelled.

par-DOT

1

Use Pardot for FUNDRAISING

Most nonprofit organizations fundraise and depend on the generosity of individuals and/or corporate donors. Pardot is a perfect fit for organizations looking to automate funding asks, to reach out to the right individuals at the right time, and to track the success of fundraising campaigns.

In addition to email marketing and customer journeys (described in more depth below), Pardot offers prospect grading and scoring. Scoring is an indication of how interested the prospect is in your organization, while grading measures how strong a fit the individual might be based on their profile. Every action or interaction a prospect takes can be scored both positively and negatively. As they provide information or insight into their behavior, their score may rise or fall. Grades are based on explicit information about the prospect like job title, organization, location, or custom fields that are relevant for your organization.

Your development team decides at what point a user has a high enough score to merit any particular interaction – from a phone call, to an in-person meeting, to an invitation to a coveted event. With the power of Salesforce behind Pardot, the development team can view all interactions along with donation history right at the record level.



MAKE A DONATION

2

Use Pardot to support EVENTS

Pardot has a built-in connector with Eventbrite, the easy-to-use event management tool. If your nonprofit hosts in-person events – fundraisers, capacity-building workshops or training, volunteer events – and uses EventBrite, then you should use the Pardot connector.

All activity and engagement captured by Eventbrite, including RSVP and attendance, is written to the individual’s Pardot record and synced to Salesforce. Engagement can be used to inform future communications. Even knowing that an invitee did not RSVP or didn’t attend an event can be helpful to know, as it may suggest an event didn’t hit the mark or wasn’t of interest. Pardot itself can be used in place of an event tool by taking advantage of segmentation and engagement paths and other event systems can be tied to Pardot through an API or custom programming.

Event attendees can easily be dropped into an engagement path to receive follow-up communications. And, to tie this back to fundraising, your development team can see whether a potential or recurring donor has attended events before reaching out for an ask.



3

Use Pardot to communicate with VOLUNTEERS

Volunteers are often the lifeblood of a nonprofit organization and volunteer managers can find themselves doing repetitive work in support of their volunteer teams. Repeatedly answering the same questions, sending the same documents, following up with volunteers: wash, rinse, repeat.

Identify volunteers by either syncing a custom field in Salesforce or uploading a CSV file to Pardot directly. With these individuals identified, you can easily create dynamic criteria-based lists. All the other information associated with that individual's profile is helpful, too. You may want to target all volunteers in the Washington, DC area or volunteers who have a special set of skills, for instance.

Use Engagement Studio to place volunteers on an onboarding journey. Once a person has been identified as a volunteer, they begin the journey by receiving a welcome email. The email can be personalized with any number of elements like first name, last name, city, organization, and more. A set number of days later, you may want to send a volunteer an email

that answers some commonly asked questions and provides a link to the volunteer feedback section of your website. Use Engagement Studio to "listen" for changes to the volunteer's record, such as when they complete their first volunteer engagement. Pardot can automatically send a thank you or a feedback email a few days thereafter. You can use it to gently prod volunteers who haven't been as involved as expected or schedule check-in emails at a regular cadence. In short, automate common tasks and free up time for your volunteer coordinators with Engagement Studio!



4

Use Pardot for impact REPORTING

Nonprofit budgets – especially for operations – aren’t usually huge. Insert knowing laughter here. Every dollar spent needs to be accounted for, development and marketing need to understand what the return on investment (ROI) was, and the executive director expects to understand how impactful marketing communications have been. At the very surface, Pardot’s email reporting looks quite similar to that of a MailChimp or Constant Contact. Opens, clicks, unsubscribes...these statistics are present and displayed in a graphical manner, easy to quickly digest.

Where Pardot shines, however, is in closed-loop reporting. Closed-loop reporting is tying constituents back to the initial touch. How did that person find your organization, what did they do on your website before they gave you their email address, what local or online events did they participate in, what action precipitated their eventual conversion? With this 360-degree view of constituents, development and marketing can determine the actual dollar cost per person and make determinations about the success (or not!) of an individual campaign.

We haven’t even discussed the power of having your Salesforce data connected to Pardot. Imagine combining campaign impact reporting with any set of fields (data) in Salesforce.

Example queries may be, “How well did our online fundraising events do in Q1 and Q2 with donors who have historically donated between \$250 and \$500 a year?” or “Did we increase the number of volunteers in the Los Angeles area by greater than 15% over the previous year?”. If you can imagine a question, you can get answers with the power of the data captured in Salesforce and Pardot.





Use Pardot in conjunction with WEBINARS

Many nonprofits communicate at scale with volunteers or staff and save a ton of staff time with recorded webinar or training sessions. There's no limit to how creative you can be with a recorded webinar – you can provide software training, convey best practices in donation management and fundraising, or educate staff about the organization's history and values. For constituents, bring an Annual Report to life with video and narrative, show how donations are spent on mission, enable capacity building with focused topic areas, and so on.

How does this tie in with Pardot? Using one of Pardot's webinar connectors (WebEx, ReadyTalk, or GoToWebinar), all activity surrounding the webinar will be recorded to the individual's record. Were invitations opened or clicked on, did a constituent register for a webinar, attend, stay until the end, respond to follow-up emails or a survey? Did that person take an action in the days or weeks afterward that ties in with the webinar topic? Just as you can measure campaign success (as described above), measure the return on webinars or training sessions.



6

Use Pardot to enhance ADVOCACY

Advocacy can take many shapes at nonprofits and associations and Pardot is well primed to support communication and engagement.

Use list segmentation and automation rules to identify supporters by location, interest type, role, or past engagement. Support leaders and organizers by communicating to the right people at the right time.

Create landing pages that are topic- or issue-based and provide volunteers or supporters critical information like talking points, legislative process, downloadable fact sheets or fliers, and more.

With Pardot tracking code in place, you'll have hard data about the utilization of these landing pages which can inform future efforts.

Develop lists of legislators and utilize custom fields to add information about districts, party affiliation, voting records, or any other relevant data. Use dynamic content to send personalized emails at scale to large numbers of policymakers or elected officials.

Encourage voter registration through targeted emails and an engagement path with timed emails, built-in intelligence, and a sharing mechanism.



FIONTA

Fionta is a US-based, national nonprofit-focused Salesforce Premium Partner. We are expert in Pardot, the Nonprofit Success Pack (NPSP), foundationConnect, App integration, migration from legacy systems, and integration of Salesforce with open source CMSs.

As a certified Salesforce.org Premium Partner, you can turn to us for:

- **Evaluation:** Is Salesforce is right for your nonprofit organization, association, or foundation?
- **Documentation:** Requirements for integrated contacts, donations, grants, membership, volunteers, events, marketing automation, etc.
- **Implementation plan and estimate:** Develop strategic plan and estimate costs
- **Project management:** All tasks, including those in support of Salesforce Nonprofit Success Pack (NPSP), Pardot and Salesforce Engage, FoundationConnect, Sales Cloud, and others
- **Customization:** To meet specific needs, such as tracking clients or project data
- **Third-party integration:** Configure Salesforce to work with systems such as online donations, event registration, CMSs, advocacy, and more
- **AppExchange add-ons:** Selection of the “right” AppExchange tools to extend your Salesforce implementation
- **Marketing automation:** Pardot consulting, campaign execution, custom report creation
- **And,** with our award-winning website design and open source website implementation practice, we can address the public and web-facing integration requirements with ease!



These are just a few of the ways that Pardot can demonstrate a measurable impact on your nonprofit organization's fundraising and communications efforts. And that's true no matter how you pronounce it!

RESOURCES

bit.ly/pardotfornonprofits

salesforce.org/nonprofit/e-book-marketing-automation/

salesforce.org/why-do-nonprofits-need-marketing-automation/

salesforce.org/transformed-salesforce-orgs-onboarding-strategy-pardot/

If you have questions, or would like to schedule a Pardot demo, please visit www.fionta.com/contact or email us at info@fionta.com.

thank you