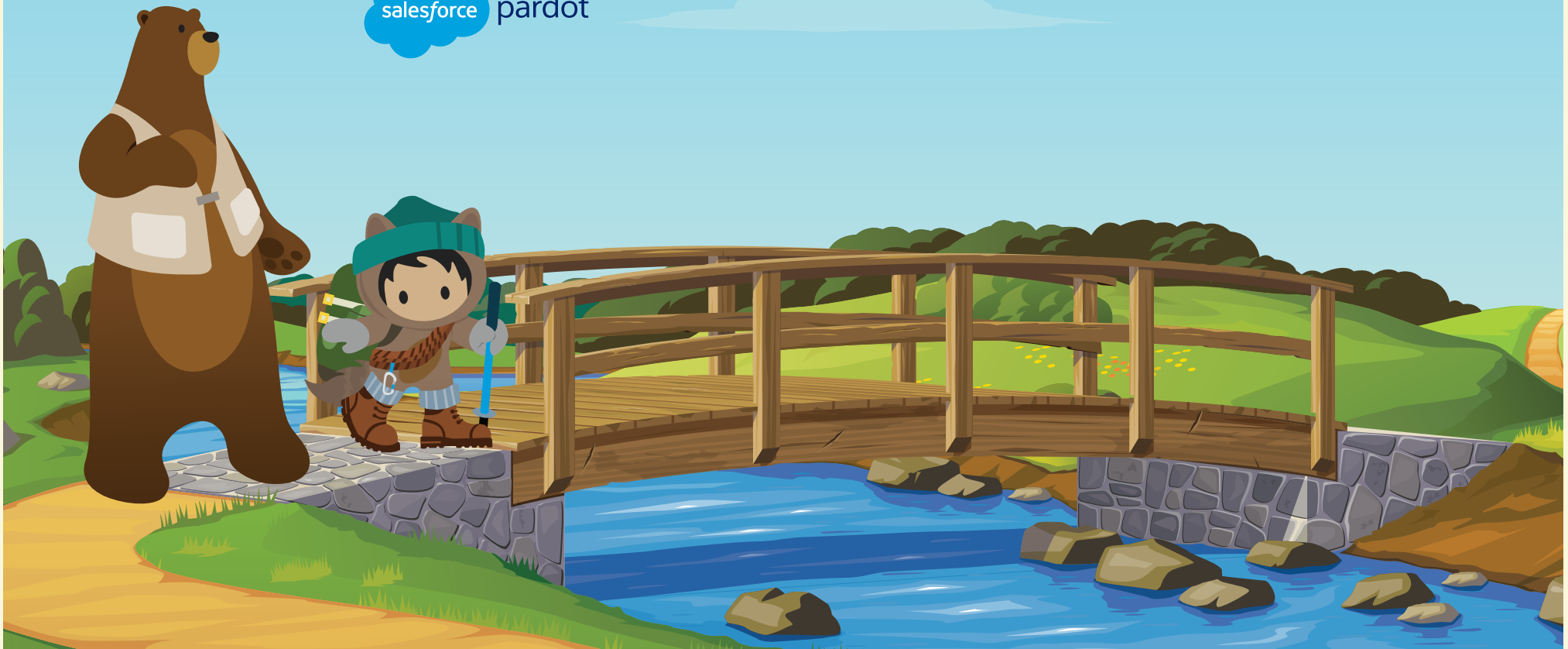


THE PARDOT TIME-TO-VALUE GUIDE

HOW INSIDEVIEW SWITCHED TO PARDOT AND SAW VALUE IN 60 DAYS

salesforce pardot



CONTENTS

- Rewriting the Book. 2
- Introduction 3
- Marketing Pioneers Need Trailblazing Tools 4
- Service Issues, Lack of Innovation Limited Progress 5
- A Drain on Marketing Operations, Too. 7
- Pardot to the Rescue 8
- Blazing a New Trail 9
- Enlisting the Help of an Experienced Guide 11
- Managing the Migration 12
- On Pardot in an Instant. 13
- A New Beginning with Surprising Benefits. 14
- With Pardot, InsideView Is Living Happily Ever After 16

- SIDEBAR:
 - Chart a Course to Better Marketing Automation. 17

- SIDEBAR:
 - Are You Ready for a Change of Course? 18

REWRITING THE BOOK

When your CMO literally wrote the book on sales and marketing alignment, it's no wonder InsideView had such high expectations for its marketing automation platform. But as the existing platform became more and more of a resource drain, the company assumed there were no other viable options and simply slogged on.

Then Pardot introduced a new chapter to its story.



INTRODUCTION

InsideView helps sales and marketing teams better target and engage with opportunities. It has built its reputation on providing the most accurate market-targeting data and insights, and it has one of the industry's most progressive CMOs leading the charge to grow and expand its own markets. That means InsideView's marketing team is constantly pushing the envelope with new tactics and techniques.

But even with a cutting-edge approach to marketing, InsideView was bogged down with a marketing automation platform that was cumbersome, complex, and frustrating to use. The platform itself lacked innovative and modern usability features, adding unwelcome complexity to even the most trivial tasks. And a clunky Salesforce Sales Cloud integration resulted in slow data synchronizations and occasional hiccups, causing problems for both demand generation and marketing operations. Adding to the frustration, the platform's frequent outages made it unreliable, and the vendor assigned a new account rep almost quarterly.

So when a Pardot account executive reached out, InsideView's CMO quickly realized that nearly all of its marketing automation problems could be solved. This realization turned into an urgency to migrate to Pardot, and InsideView was shocked at the ease and speed of switching.

Now, living happily ever after with Pardot, InsideView's marketing team works faster and does more, no longer relies on marketing operations support, and gets campaign insights they never thought possible. It's given them back hours per week and elevated their overall marketing performance.

This is their story.



MARKETING PIONEERS NEED TRAILBLAZING TOOLS

InsideView helps B2B companies accelerate growth through what it terms “Targeting Intelligence”. Using proprietary data aggregation technologies, along with artificial intelligence, its products identify new market opportunities and give sales and marketing the data, insights, and connections to know who to target, when to reach out, and how to engage. And they keep sales and marketing data clean, accurate, and up-to-date so every effort hits the mark.

InsideView’s CMO, Tracy Eiler, is a marketing superstar. She’s been named a B2B Demand Marketing Game Changer, is one of the Top 20 Women to Watch in Sales Lead Management, and is listed on the Top 30 Most Influential Women in B2B Marketing Technology. She is also the co-author of *Aligned to Achieve*, a best-selling business book that urges companies to bring sales and marketing together to form an unstoppable engine for growth.

Tracy is one of the top B2B marketers in the business, so keeping sales happy with a solid pipeline of leads isn’t just a task; it’s a point of pride and a testament to her marketing mastery. As with any pioneer, she and her marketing team put some of the most progressive marketing approaches to work building and expanding InsideView’s success. They are also die-hard proponents of account-based sales and marketing (ABM) techniques, which demand more data on prospects, more insights on accounts, and better targeting accuracy from marketing automation.

To be effective, however, every marketing team needs to know how their efforts are performing so they can make improvements quickly and precisely. Analytics have to be easy to use and clearly presented. But then those insights have to be turned into action with tweaks to campaigns, adjustments to templates, and honing of targeted lists.

For InsideView, the need to create and execute highly targeted and successful campaigns isn’t only a growth imperative; it is the essence of its business. Without insights, and the tools to put them to work, InsideView’s marketing didn’t just risk being ineffective; they risked undermining their own message. Yet they struggled to put their marketing expertise to work because they lived with a marketing automation product that was complex, cumbersome, and frustrating to use.



SERVICE ISSUES, LACK OF INNOVATION LIMITED PROGRESS

InsideView's marketing team couldn't be delayed by their marketing automation, so they relied on the technical expertise of marketing operations. That not only pulled operations away from more strategic projects, it relegated these technical experts to building lists, fixing campaigns, running reports, and double-checking templates. Adding to their issues, InsideView's marketing automation vendor was experiencing internal upheavals, which resulted in slow customer service, inexperienced support staffing, and even product outages and quality issues.



On their previous marketing automation solution:



“It was just so clunky and difficult to use in almost every respect,”

said Megan McConnell,
InsideView's former Director of
Customer Lifecycle Marketing.

“There was no way marketing could create a campaign from scratch, which is why we leaned on marketing operations so heavily.”



**On their previous
marketing automation solution:**



“It was not at all user friendly,”

added Jyothsna Durgadoss, Product Marketing Manager at InsideView.

“Just formatting an email was tough. Even if we started with an existing email, we would have issues with text or fonts or alignments. Nothing was intuitive, reporting was really hard, and I couldn’t even find email response rates—that’s a basic metric. We couldn’t do anything we wanted without pulling in our marketing operations manager.”

Pain, delays, and aggravation lurked around every corner for InsideView and its marketing automation. From creating monthly newsletter emails to generating campaign reports, nothing ever seemed fast or simple. And while the team needed to run highly targeted and personalized programs for their ABM campaigns, their marketing automation made it extremely difficult to execute. InsideView had the data and the ideas, but the marketing automation just wasn’t built for modern marketing techniques. Furthermore, once campaigns were underway, marketing couldn’t easily see detailed performance metrics. They didn’t have the insights to adjust campaigns on the fly or even make adjustments for the next campaign.



A DRAIN ON MARKETING OPERATIONS, TOO

Kevin Downing is InsideView's Senior Marketing Operations Manager, and he felt the brunt of the company's marketing automation's shortcomings. He also served as the direct conduit to the marketing automation vendor when they encountered the all-too-frequent roadblocks. He was spending nearly all of his time working on the marketing automation, which took him away from other, more strategic projects.

"I was either helping marketing build or fix campaigns, or helping them run reports," Kevin explained. "But it started to get worse, especially the vendor's technical support. They shuffled a lot of junior people through, so we would have to re-explain our problems and that delayed the time to fix. It was astounding to me the number of hours we had to devote to this system."

Deeper technical issues also fueled InsideView's frustration. There were data transfer delays between the marketing automation platform and Sales Cloud. API call limits sometimes held up hot leads as they moved to InsideView's eager sales team. Fees for data transmissions were becoming an issue. A recent product change by the vendor adversely impacted InsideView's lead scoring model. And the vendor's inconsistent treatment of lead data created artificial delays in synchronizations, ultimately forcing Kevin to create workarounds.

It all combined to turn marketing automation support into Kevin's full-time job. "It took us eight steps just to create a landing page," Kevin recalled. "Everything took so much effort that we thought twice before trying something new. We'd hesitate on experimenting, and that's not the way we like to operate at InsideView."

"There was frustration all around," added Megan.

.....
InsideView needed a hero.
.....



PARDOT TO THE RESCUE

InsideView knew full well the opportunity cost of its marketing automation. The system was so complex, marketing couldn't build and run campaigns on their own, always requiring support from marketing operations. This didn't just slow their efforts; it took time away from other projects for both marketing and marketing operations. Their marketing automation was hurting the productivity of two teams, not to mention the ripple effect on downstream programs and sales efforts.

Frustration continued to build, but InsideView's marketing automation vendor had a strong market presence so the company assumed other platforms wouldn't be as sophisticated. It never considered migrating to another platform.

"I had been a customer of theirs for more than 10 years, and I sat on their CMO advisory board," Tracy explained. "But even as we were getting frustrated with their slow support, I never considered switching to another platform. I assumed they were the heavyweight for a reason. I also had the incorrect perception that Pardot was a lightweight solution for small companies, and I think most CMOs have that same perception."

So when Pardot initially reached out, Tracy and her team were uninterested. But after a quick meeting, InsideView's marketing world was turned upside-down. "Pardot blew us away in that initial meeting," Tracy recalled. "Super professional and buttoned up. They actively listened to us, brought in experts familiar with our current vendor, and were able to point out differences specific to our situation. It was clear that they did their homework before meeting with us."



BLAZING A NEW TRAIL

InsideView immediately started investigating a potential move to Pardot. Tracy's team looked forward to a day when they could regain the time lost struggling to create every campaign and report. And marketing operations marveled at the potential of turning their efforts back to systems development and optimization. But they didn't just say "Okay".

"Cost was a concern," explained Tracy. "We were told that it was reasonable, but it was still unplanned. And then there was the migration risk. Can we do this? Should we do this? We had a lot to think about."

Tracy set out three points for her team to investigate in determining if Pardot was truly their savior.

- 1 Technically, would Pardot give them better performance?
- 2 Would marketing be self-sufficient in campaign creation and reporting, and could marketing operations be freed from their support obligations?
- 3 Was it worth the cost?

.....

"We didn't just want a one-for-one replacement. Switching out a marketing platform is risky, expensive, and all-consuming—at least that's what we thought at the time."
- Tracy Eiler, Chief Marketing Officer



First, it was up to Kevin to dig into InsideView’s technical needs to determine if Pardot was the right choice. Pardot’s asset file tracking, use of a customer’s existing web domain, and ease of data integration with Sales Cloud all stood out as Kevin dug deeper.

“Pardot’s WordPress plug-in is an obvious benefit to operations,” Kevin said. “Because we wouldn’t need to rely on subdomains, we could do everything on our own domain and eliminate additional pages required by the old platform. Since files were hosted in Pardot, we could even track access, run automated campaigns based on that access, and see the effectiveness of specific assets. We never had that kind of visibility. And as far as integration, there is none. Pardot is built right in.”



TECHNICAL? CHECK!

In the effort to make marketing more independent, Megan found that Pardot could solve nearly all of their issues. “I left the first Pardot meeting thinking this would make my life so much easier,” she recalled. “It was clear that Pardot could cover my two biggest pain points: building campaigns and generating reports. As I learned more, I was convinced that Pardot was the right choice and that any disruption from the migration was going to be worth it.”

MARKETING? CHECK!

Finally, InsideView talked with Cheshire Impact, a top Pardot and Salesforce implementation partner. When Tracy explained her initial fears about the cost of migration, Cheshire’s team laid out a reasonable budget and answered Tracy’s last question.

COST? CHECK!

At one of their final meetings to decide on moving forward, Tracy asked the team about other marketing automation options in the market. But solutions from other vendors were either too complex or too basic. “Talking through the other choices was maybe a 10-minute conversation,” said Tracy. “Each one we mentioned was either too bloated and unwieldy, which we already had, or not robust enough to meet our needs.”

THE DECISION WAS MADE: PARDOT!

ENLISTING THE HELP OF AN EXPERIENCED GUIDE

Everything pointed toward Pardot. It solved all of InsideView's problems and met all of its technical needs. All the company had to do was switch.

Tracy and team needed to migrate a plethora of existing data and campaigns without annoying customers and prospects, or harming opportunities. They set out a timeline of a few months, but when they consulted with Cheshire Impact, their timeline was compressed to just 8–10 weeks. That seemed optimistic, but given the excitement and determination Tracy saw from her team, it seemed doable.

“There's never a good time to do something like this,” said Tracy. “We had a new product launch coming up. We had dozens of in-process campaigns that couldn't be disrupted. But we felt like we were in very good hands with Cheshire Impact.”

InsideView's marketing team laid out their plan. Cheshire Impact became their sage guide and worked to expedite the process. It took over the heavy lifting of migrating individual campaigns, easing any differences in lead scoring, and ensuring campaign lists were properly mapped. But when questions came up, Cheshire didn't just ask for a yes or no; they asked why.

“They've done hundreds of these migrations, so it was a very smooth process,” Tracy recalled. “Along the way, they really pushed us to think about what was and wasn't important, which was great.”

Kevin echoed the importance of bringing on the expertise of a firm to guide you through the difficult spots. Plus, as Kevin put it, they know where potential pitfalls lie and can head off costly mistakes before they happen. “They knew Pardot so well, and that helped to get us up and running right out of the gate,” he added.



MANAGING THE MIGRATION

As InsideView's migration to Pardot gained steam, marketing operations pushed more and more content over to the new platform. At each step, they re-evaluated every asset and every approach. It was a good time to rethink every program and campaign, but this never slowed down the migration.

In total, and even with what Kevin termed "a considerable amount" of content, it took just 3 weeks to complete the asset migration to Pardot. He and Cheshire Impact took on most of the work, and the migration went so smoothly that the marketing team had to devote just a few hours per day. That freed them up to focus on the essence of their marketing programs, evaluate messaging, and improve tactics.

"The learning curve with Pardot was so much easier than expected," recalled Megan. "The more we worked with Pardot, every day was just further validation that we made the right decision."

Over the 3-week process, InsideView's marketing team spent just 30% of their time on the actual migration. This was crucial, since no campaigns were interrupted, a key webinar didn't need to be rescheduled, and the important product launch stayed on track.

Marketing operations saw additional benefits of moving to Pardot, especially due to the platform's handling of assets and domains. For each individual campaign, InsideView was able to reduce the number of webpages by 75%, from four down to one. That meant each form, landing page, and thank you page could be combined into a single asset, and that

asset would be served on InsideView's domain and share the same look and feel. Plus, by eliminating reliance on external domains, InsideView expected data, security, and downstream management benefits as well.

"The way Pardot handles assets and domains is an obvious benefit for any operations team," said Kevin. "For me, this is a huge game changer."

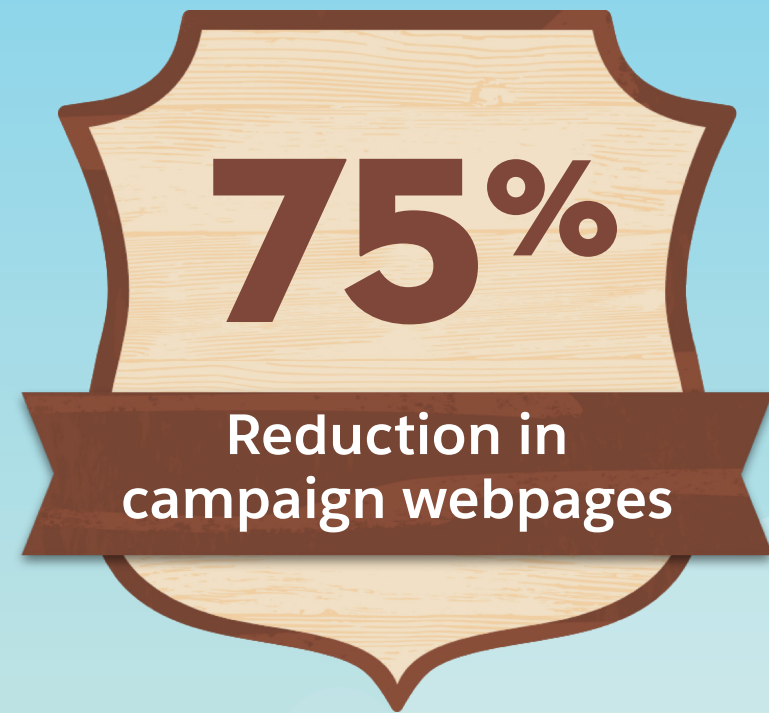


ON PARDOT IN AN INSTANT

In just a little over two months, the migration was done. InsideView's marketing team marveled at the speed and simplicity of the migration process, and Kevin was as surprised as anyone. "I've done migration work in the past, and I've never seen anything go as fast as when we moved to Pardot. It was insane."

When it was time to throw the switch, they scheduled it for a Friday evening, as operations teams often do. There weren't any marketing activities happening over the weekend, and it would allow a couple days for troubleshooting in case of any issues. But InsideView never needed any of it.

"We went live silently," said Franklin Fredrik, InsideView's Director of Business Applications. "Nobody even realized it happened. The move to Pardot took just one evening. It was a total non-event."



A NEW BEGINNING WITH SURPRISING BENEFITS

When InsideView's marketing team came to work on Monday morning, it was as if a heavy weight had been lifted from their backs. After spending countless hours fighting with their old marketing automation, they now had the robust, easy to use, enterprise-grade Pardot at their fingertips.

Now, marketing can build entire campaigns, from scratch, in less than half the time it previously required—and that's not counting the additional hours saved by marketing operations. Using Pardot's Engagement Studio, and its visual, easy-to-navigate interface, Jyothsna can also bring sales into the process and walk them through a campaign. In the past, she would have to recreate a campaign's flow in a presentation so it was easy to visualize. Now, marketing can easily show the highlights of every campaign without ever leaving Pardot.

"Building a campaign takes about 50% of the time it used to, and that's a lot of hours I get back every month," said Jyothsna. "But even more than the time, the frustration level is way, way lower. Since I'm the one building the campaigns, that means more to me than anything."

That increase in usability remains a huge benefit across InsideView. From the basics of formatting an email template to building executive reports, Pardot makes it easy.

"InsideView's previous platform was too complex, too bloated, and too difficult to use day to day," said Jyothsna "We're used to working in intuitive, straightforward web apps, like Google Docs. That's Pardot. Things are so much easier, so everything goes much faster. We don't have to spend time fixing small, frustrating things in Pardot. We just do it and it works and we move on."





“We used to struggle to get even the most basic metrics.”
Jyothsna said. “With Pardot, every metric is so easy
to access and understand.”
- Jyothsna Durgadoss, Product Marketing Manager

Megan added that the lack of frustration gave them renewed confidence that campaigns would work as expected. “With Pardot, we just have 10 times the peace of mind. The old platform was so complex that marketing operations had to look at everything, just to be sure. Not in Pardot. Just being confident that things are going to work as expected is as valuable as the time savings.”

Now that InsideView is building better campaigns in less time, it has bandwidth to actually dig into the metrics with Pardot’s powerful reporting capabilities. Jyothsna can now run reports on pipeline attainment, account-based performance, and across campaigns. Best of all, Pardot’s visual campaign metrics let them see, instantly, how campaigns are performing at every step of even their most complex programs.

InsideView marketing can also deliver the output of every campaign—those hot new leads—over to sales much faster with Pardot. There’s no more waiting for data to sync since Pardot data is already in Salesforce.



WITH PARDOT, INSIDEVIEW IS LIVING HAPPILY EVER AFTER

Pardot offers an advanced, enterprise-quality marketing automation platform built on Salesforce, the world's #1 CRM. Ease of use is a core feature of Pardot, but that doesn't mean the platform is limited. Its intuitive interface is what makes it effective, and lets you build, launch, and track your marketing efforts.

InsideView's marketing team discovered those benefits, and more, from the moment they started using Pardot. Getting to that point, InsideView's marketing operations team discovered the speed and simplicity of migrating to Pardot. Now their marketing team is self-sufficient, works faster and with more agility, and gets more visibility into how their campaigns are performing. And marketing operations can get back to being a vital component of the broader go-to-market team at InsideView.

"Pardot is offering a product that is second to none, especially if you're already using Sales Cloud," said Kevin. "For InsideView, we quickly saw reductions in operational costs and time. It's a no-brainer to move to Pardot."

Tracy is also now completely confident that Pardot can handle the workload of any enterprise, large or small. Even as InsideView works with huge volumes of data, runs large and complex campaigns, doubles down on its ABM strategy, and pushes the boundaries of what marketing can accomplish, Pardot makes it happen.

"This move seemed daunting and risky at the outset, but that couldn't have been further from the reality," Tracy said. "We felt in very good hands with Pardot the entire time, and the performance we're seeing daily proves that it was worth it."

So now that InsideView's marketing team is once again humming with Pardot, they're realizing even more benefits than they could have imagined. One surprising and pleasing benefit is the uninterrupted sound of work getting done.

"What's most noticeable to me is the absence of complaints," concluded Tracy. "I used to hear the constant frustrations, about things not working as expected. I don't hear anything now, and that's one of the ways I know Pardot is working just great!"



CHART A COURSE TO BETTER MARKETING AUTOMATION

Switching to a new marketing automation platform doesn't need to be an immense undertaking, especially if you prepare. InsideView did it in just a couple of months, and with minimal disruption to its marketing campaigns and key initiatives. Here's how you can prepare for your move to Pardot.

- **Detail Your Requirements:** Determine what you really need, what are must-haves and nice-to-haves, and what issues you want to solve.
- **Research the Options:** Talk to real users of other marketing automation platforms, consult with the analysts, and read the online reviews.
- **Review Your Data:** Make data cleansing and right-sizing a key part of the migration.
- **Pick a Partner:** You'll only do this once, so trust someone who's done it hundreds of times.
- **Evaluate Your Assets:** Look at every marketing asset you have, from campaigns to pages to PDFs, and determine which ones you truly need to keep.
- **Build a Plan:** Put a timeline in place and get everyone working toward your go-live date.



ARE YOU READY FOR A CHANGE OF COURSE?

InsideView never considered switching its marketing automation platform until Pardot came along. It just lived with the pain, delays, and frustration. Once people started asking questions, the choice was clear.

Don't waste time hoping for better results from your marketing automation. Ask yourself the same questions InsideView used to support its move to Pardot:

1. How much time does marketing spend building each campaign?
2. Can marketing build a campaign without technical or other support?
3. Can marketing get the metrics they need?
4. Do you experience delays in data transfers between marketing automation and your CRM?
5. How much time does marketing operations spend on your marketing automation platform?
6. Does your marketing automation platform require multiple web domains to facilitate landing pages and other assets?
7. Does your team complain about your marketing automation platform?
8. Are you paying for marketing automation features that you'll never use?
9. Is your marketing automation vendor responsive to your needs and requests for help?
10. Could your marketing data and assets benefit from a right-sizing?



B2B Marketing Automation on the World's #1 CRM

Your customers are smarter, more capable, and better informed than ever before. This new breed of consumer demands a better breed of marketing, and the Pardot platform has the capabilities to get you there.

WATCH DEMO

