

Plan Your Pardot Implementation

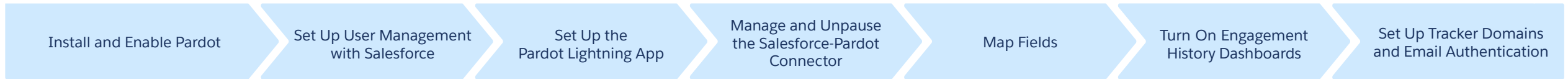
Print or save this worksheet to help you map out your implementation from start to finish. If you're using multiple Pardot business units, make a copy for each one.

Information

Business unit name: _____ (your company name or other identifier)

Implementation coordinator: _____

Intended completion date: _____ (goal for handoff to your marketing team)



Example

TASK	REQUIRED ROLE + PERMISSIONS	OWNER	NOTES
<i>Create users</i>	<i>Salesforce admin</i>	<i>John Smith, jsmith@lenoxsoft.com</i>	<i>Back up admin Anne Jones</i>

Install and Enable Pardot

TASK	REQUIRED ROLE + PERMISSIONS	OWNER	NOTES
Install the App Exchange Package	Salesforce Admin		
Enable Pardot in Salesforce	Salesforce Admin		

Set Up User Management with Salesforce

TASK	REQUIRED ROLE + PERMISSIONS	OWNER	NOTES
Identify or create Salesforce users who need Pardot access	Salesforce Admin		
Transfer user management to Salesforce	Pardot Admin		
Update profile-to-role mapping table <i>(Optional)</i>	Pardot Admin		

Set Up the Pardot Lightning App

TASK	REQUIRED ROLE + PERMISSIONS	OWNER	NOTES
Enable the Pardot Lightning App in Salesforce	Salesforce Admin		
Remove the Pardot Classic app	Salesforce Admin		

Manage and Unpause the Salesforce-Pardot Connector

TASK	REQUIRED ROLE + PERMISSIONS	OWNER	NOTES
Enable Connected Campaigns	Pardot Admin		
Define Marketing Data Sharing rules <i>(Pardot Advanced and Premium customers only)</i>	Pardot Admin		
Configure and unpause the Salesforce-Pardot connector	Pardot Admin		

Map Fields

TASK	REQUIRED ROLE + PERMISSIONS	OWNER	NOTES
Map Pardot Custom Lead Fields to Contact Fields	Salesforce Admin		
Create Pardot custom fields	Pardot Admin		
Map Salesforce custom fields to Pardot custom fields	Pardot Admin		

Show Pardot Data in Salesforce	Salesforce Admin		
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Turn On Engagement History Dashboards

TASK	REQUIRED ROLE + PERMISSIONS	OWNER	NOTES
Turn on Engagement History dashboards	Salesforce Admin		

Set Up Tracker Domains and Email Authentication

TASK	REQUIRED ROLE + PERMISSIONS	OWNER	NOTES
Add a tracker domain(s)	- Pardot Admin - IT team (recommended)		
Implement tracking code	- Pardot Admin - IT team (recommended)		
Implement DKIM and SPF authentication	- Pardot Admin - IT team (recommended)		

Marketing Team Checklist

After initial setup is complete, your marketing team can take over. Help them plan for optional features and marketing assets that may be needed for your business. Here are some recommendations and resources to get started.

TASK	OWNER	INTENDED COMPLETION DATE
Set up Pardot folder structure		
Upload files to be hosted in Pardot		
Import prospects		
Set Up Prospect Scoring and Grading		
Create forms and form handlers		
Create landing pages		
Create email templates		

TASK

OWNER

INTENDED COMPLETION DATE

[Create reusable content](#)

[Set up automations](#)
*(completion actions, page actions,
automation rules, segmentation rules)*

[Build Engagement Studio programs](#)

Notes