Emails: Using Salesforce and Pardot to Improve Data Storage

By Ariel Miller

Subject: Thoughts on improving our data storage: Salesforce and Pardot

To: John Mason (john.mason@educase.edu)

From: Ariel Miller (ariel.mason@educase.edu)

Dear Mr. Mason,

Over the last ten years, EduCase has undergone several changes and as a result, it has grown immensely. As EduCase grows and as technology advances, we need to revamp our information management and record storage system.

While EduCase has grown as a company, we have not yet made sufficient advances in terms of our record keeping and storage. I have organized a task force with three other Educase colleagues, Gianna Jameson, Thomas Fredericks, and James Johnson to conduct research and ultimately choose a program that will efficiently store our data. We think that a combination of the software programs Salesforce and Pardot would help EduCase store and track our data effectively. By using these products, we could access our data remotely.

Salesforce is the market leader in Customer Relations Management and promotes an active user community. Pardot also promotes the voice of their users and has impressive customer satisfaction. Salesforce and Pardot are also efficient because of their portability, as we could access them from any wireless network. I compiled the information below on each company, so we can make an informed decision regarding the products that will help us consolidate our data.

Salesforce:

Salesforce's software is accessible from anywhere through a Wi-Fi network, making it cloud-based.

- *Aim:*
  - o Control everything on one platform

- *Services:*

  - o AppExchange and Service Wave Analytics – would help store and analyze our data.
  - o The Lightning Console - Their customer service management solution would consolidate our information in one console, helping us keep track of our data easier. We could track customer history and view dashboards in one view.

- *Strengths:*

  o   Most recent CRM market share analysis report shows Salesforce as clear market leader o Salesforce promotes an active user community: monitors social network and provides online venues for customers to speak openly.

- **Weaknesses:**

  o   It's the highest priced product in cloud CRM industry

Pardot:

Pardot is Salesforce's Business-to-Business marketing software, which allows marketing and sales departments to create, use, and manage online marketing campaigns from one platform.

- *Aims:*

  o   Help companies exceed their income goals o Better align sales and marketing teams

- *Strengths:*

- o Delivers the most complete version of Google Analytics, a marketing analytics and measurement tool o Customers' overwhelming satisfaction is impressive

  - o Their team of specialists provides product training, implementation assistance, best-practice recommendations, and ongoing support.

- *Weaknesses:*

  - o Pardot's investments in research and development are much less than their direct competitors. In this way, their lack of innovation could hinder efficiency. Thus, they're risking being at the cutting edge of service to their customers.

Please let me know what you think of Salesforce and Pardot for our company. I'll be in touch soon to discuss.

Thank you so much for your time and consideration.

Sincerely,

Ariel Miller

Subject: Revamping our data storage: Salesforce and Pardot

To: Staff Members of EduCase

From: Ariel Miller

Dear Staff Members of EduCase,

I am so grateful to work with such a dedicated and dynamic group of people. I admire your tireless efforts everyday to improve children's education. Over the past ten years, EduCase has undergone many changes and as a result, it has grown immensely. As EduCase grows and as technology advances, we need to revamp our information management and data storage system.

While EduCase has grown as a company, we have not yet made sufficient advances in terms of our record keeping and storage. I have organized a task force of myself as well as three other Educase colleagues, Gianna Jameson, Thomas Fredericks, and James Johnson to conduct research and ultimately choose a program that will effectively and efficiently store our data.
After doing extensive research on several cloud-based software companies, with the help of the Chairman of the Board, it seems to me that a combination of Salesforce and Pardot would best suit the needs of EduCase. We think that a combination of these software programs would help EduCase figure out a more efficient way to store and track our data. By using these products, we could access our data remotely.

Salesforce:

- Uses cloud-based software, which is accessible anywhere via a Wi-Fi network. Their software would allow us to consolidate our information on one platform.

    Services:

    o AppExchange and Service Wave Analytics – would store and analyze our data.

    Strengths:

    o Additionally, Salesforce's active user community allows us to have a say in our business relationship with them. On the most recent Customer Relationship Management market share analysis report,
    Salesforce is the clear market leader.

Pardot:

- Salesforce's business-to-business marketing software. Their team of specialists provides product training as well as assistance with how to use their software.

    Strengths:

    o They also deliver the most complete combination of Google Analytics and Adwords, which will further enhance our data usage.

Also, Pardot's customer reviews are overwhelmingly positive.

The strengths of Salesforce and Pardot outweigh their weaknesses. Salesforce is the market leader in Customer Relations Management and promotes an active user community. Pardot also promotes the voice of their users. They have impressive customer satisfaction. Pardot delivers the most complete version of Google Analytics, which would help us store and keep track of our marketing performance. Salesforce and Pardot are also efficient because of their portability. My team and I compiled the information above on each company so we can make an informed decision and choose the products that will help us consolidate our data.

Please feel free to email me if you have any questions, thoughts, or suggestions concerning Salesforce and Pardot. Thank you.

Sincerely,

Ariel Miller