Optimal Business Consulting

Jeff Kemp

★Salesforce Certified Pardot Consultant★ | Marketing & Web Consultant

optimal BUSINESS CONSULTING

SALESFORCE CERTIFIED

Pardot Consultant

Pardot Marketing Automation Consulting

Optimal Business Consulting is a boutique Marketing Automation Consulting Agency specializing in the Salesforce Pardot platform.

Our years of experience within Marketing, Business, Marketing Automation, and specifically the Salesforce ecosystem (Pardot, Sales Cloud, etc,) along with our 'always learning' attitude and our modern, data-centric technology driven approach provides our customers with the competitive edge they need and the opportunity to grow!

Jeff's Bio

As *Founder and Agency Team Lead,* <u>Jeff Kemp</u> is a data-driven "**Strategic doer**" providing strategic and tactical leadership in execution of modern process automation, marketing, and web initiatives by generating Marketing Qualified Leads (MQL) and optimizing lead-to-sales conversion processes to grow revenue and scale business to the next level.

Possessing a unique blend of effective STRATEGIC PLANNING combined with successful hands-on TACTICAL EXECUTION, Jeff is highly capable within many areas including Marketing, Marketing Automation (Sr. Salesforce Certified Pardot Consultant), Web Technology (WordPress Expert), SEO, Analytics, Operations, Project Management, Data Management, and Business Development.

As an experienced *Marketing Automation Consultant,* Jeff helps organizations to integrate web, marketing, and CRM workflows and solutions to optimize Marketing Lead Funnels that will generate highly qualified sales leads and build customer loyalty to greatly enhance existing marketing efforts and streamline business operations for improving the bottom line.

Using industry best practices Jeff can help to strategically map out your ideal Customer Journey, then tactically execute on setting up that journey with innovative Sales and Marketing Automation processes and Lead Nurturing Campaigns that will attract and nurture prospects to become your ideal customer.

Jeff can also set up Account Based Marketing (ABM) customer nurturing programs that will increase customer retention and loyalty and even restore dormant customers.

Jeff helps organizations to strategically PLAN, tactically DEVELOP, EXECUTE, OPTIMIZE, and REPORT on successful and adaptive Marketing Plans, Campaigns, and other initiatives custom tailored to fit company goals for true ROI.

A Denver based 'General Technologist', Jeff Kemp has over 30 years of business-to-business (B2B) Marketing, Web Development, and Technology experience both strategically and tactically. Jeff has insight into several industries including online (SaaS/Ecommerce), high-tech, software, aerospace/aviation, manufacturing, finance, consumer electronics, professional services, printing/publishing, real estate/mortgage, healthcare/medical, and higher education.

Pardot and Salesforce Project Experience

Alliance Defending Freedom | End User Client (Arizona) Q3 2021 - Q2 2022 (current)

Pardot Managed Services for Pardot optimization and support, including Pardot Audit and improving data collection and prospect management process.

"Jeff and team are definitely the best option when it comes to Pardot consulting. I think he knows Pardot better than any of the Salesforce representatives and his organizational skills are unmatched.

My team handed Jeff a knotted ball of yarn and his patient persistence has us seeing incredible results with new found organization.

I'm excited about the opportunities we now have, thanks to Jeff and his team opening up new doors for us."

Sadie Joutras, Director of Digital Direct Response (Digital Marketing) | Alliance Defending Freedom

Monetary Metals | End User Client (Arizona) Q4 2021 - Q1 2022 (current)

Pardot Managed Services for Pardot optimization and support.

NuAge Experts | Salesforce Partner (Colorado) Q1 2021 - Q2 2021 (current)

Pardot Solutions Architect for Pardot optimization and support. Designed new Lead Flow process.

Level Access | End User Client (Virginia) Q4 2020 - Q4 2021 (current)

Pardot Solutions Architect for Pardot optimization and support. Designed new Lead Flow process.

CloudQnect | Salesforce Partner (Virginia) Q4 2020 (open)

Pardot Solutions Architect to lead Pardot implementation and support with their clients.

Antero CRM | Salesforce Partner (Colorado) Q1 2020 - Q3 2020 (open)

Pardot Consultant to lead Pardot installations and provide Pardot support, requirements gathering, lead process flow diagrams, project management, client engagement with several end user clients.

Ninety10 Salesforce Partner (Rhode Island) Q3 2019 - Q4 2020 (open)

Senior Pardot Consultant as SME to lead Pardot installations and provide Pardot support with several end user clients. Implementations included Pardot Business Units implementation with 7 discrete business units. Creation of SOW and budgetary proposals, requirements gathering, client meetings, hands-on implementation, creation of Pardot assets, lead process flow diagrams, and training.

Pardot and Salesforce Project Experience

***InterSystems (Europe)* | End User Client** (Germany) Q3 2019 - Q2 2020

Ongoing Pardot Managed Services with Pardot Support centered on complex 'value added' journeys based on prospect lifecycle stage and prospect engagement with asset triggering.

***The Tambellini Group* | End User Client** (Virginia) Q2 2019 - Q2 2020

Pardot Consultant and Business Consultant to Higher Education Research SaaS client optimizing existing Pardot installation and automating operational processes. Introduced TaskRay Project Management, Quip smart document collaboration, and Campaign Calendar for Salesforce-centric management and collaboration. Developed Customer Onboarding Journey. Created Pardot marketing assets. Managed Pardot campaigns. Developed Lead Management Process involving custom MQL triggers, diagrams, and journey. Optimized Salesforce platform with Global Picklists, Custom Fields, Object Views, User Permissions, Reports, Dashboards, Extensions.

"Jeff and Optimal Business Consulting helped us think through the strategy for our lead generation process. From connecting our Salesforce and Pardot instances, mind mapping our MQL journeys, and training our employees, Jeff became a member of our marketing team. I am happy to recommend him as a Salesforce expert for those looking to think through a strategy and implement the technology to make it possible."

Chris McNamee, VP Marketing | The Tambellini Group

***Peergenics (CSS-Tec)* | Salesforce Partner & Staffing** (Pennsylvania) Q3 2019 - Q2 2021 (open)

Pardot Solutions Engineer & Technical Lead for Pardot implementations and optimization for several end user clients.

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Pardot and Salesforce Project Experience

Syncroness | End User Client (Colorado) Q4 2018 - Q2 2020

Pardot and Salesforce Sales Cloud Consultant to Engineering end user client to optimize existing Pardot installation with ongoing Pardot and Salesforce Managed Services.

SOW with Project Plan/Project Management, requirements gathering, client meetings, hands-on implementation and creation of custom fields, email templates including newsletter template with latest blog posts, gated content forms, dynamic autoresponders serving up download links, layout templates, automations, connectors, lists, lead scoring, lead management, landing pages, end user training, and coordination with various teams including Marketing, Salesforce Admin, IT, and third party Business Development and website vendors. Salesforce optimization/administration including custom Process Builder automations, Triggers, and Apex programming.

"Your level of knowledge has been great from a consulting side because you understand how we work. You've been able to understand our challenges with unique solutions based on your knowledge of how each different platform works and how they can potentially work together. While you are remote you seem to be pretty responsive to be able to get things done when we need it."

Kate Van Gorden, Marketing Manager | Syncroness

Roostify | End User Client (California) Q1 2018 - Q4 2018

Pardot Technical Lead to Online Mortgage end user client for CRM migration from SalesforceIQ to Salesforce Sales Cloud with full lifecycle of Pardot implementation. Heavy involvement with third party Salesforce vendor and internal Business Development and Sales teams to coordinate data management and end-to-end lead management processes.

Pardot Audit, requirements gathering, migration strategy, full data prep and data migration with ETL (Extract Transform Load) via Dataloader, functional specification documentation, client meetings, Project Plan/Project Management, hands-on implementation including connectors, custom fields, email templates, layout templates, forms, lists, users, roles, automations, lead scoring, lead management, campaigns, Engagement Programs, creation of Salesforce custom fields with data validation, Salesforce campaigns, Salesforce lead queues, Salesforce reports, Salesforce dashboards, Salesforce notifications, and training.

"Jeff is a consummate professional and understands the sensitive database and sync interactions between Salesforce and Pardot better than most "experts" in the field. He was instrumental in the system ops setup at Roostify, working cross-functionally with sales, marketing and operational leadership to ensure the lead funnel was fully optimized. I wouldn't hesitate to recommend Jeff for any marketing automation task."

Heidi Elgaard, VP Marketing & Tech Startup Advisor

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Pardot and Salesforce Project Experience

TA Digital/TechAspect | Salesforce Partner (California) **Q1 2018 - Q2 2018 (open)**

Pardot Sr. Architect for Pardot implementation for Salesforce integration services company with globally distributed team working with international pharmaceutical client in India.

Pardot Audit, discovery/requirements gathering, migration strategy from triggered Salesforce email sending including Pardot adoption, platform process flow diagrams including client specific use case involving Salesforce Custom Objects and Cases, technical documentation, client meetings, Project Plan/Roadmap, and Technical Lead for full hands-on implementation.

RSM US, LLP | Salesforce Partner (Colorado) **Q1 2018 - Q1 2018**

Pardot Technical Lead for migration to Pardot from SMC Salesforce Marketing Cloud (ExactTarget) including full Pardot implementation for Salesforce integration services company.

Pardot Audit, extensive requirements gathering and migration strategy, platform Architectural Diagrams, functional specification documentation, client meetings, Project Plan/Roadmap, hands-on implementation and training.

"I'm very pleased to have invited Jeff to help me deliver a Pardot project. He's a senior consultant who can listen and understand business need. Jeff's technical skills extend beyond automation to prescribing Pardot architecture in respect of a client's data and desired sales, and marketing processes. I look forward to our next collaboration."

Sy Nayman, Consulting Practice Manager -- RSM US LLP

Flatirons Solutions | End User Client (Colorado) **Q4 2015 - Q4 2017**

As Web & Marketing Consultant, headed full Pardot implementation for Enterprise Software end user client involving migration to Pardot from Act-On, strategy and hands-on execution including Salesforce integration, list segmentation, lead scoring, dozens of gated content forms and form handlers, email templates including dynamic autoresponders, lead management, campaign management, automations, Engagement Programs, dynamic website content, website conversion optimization, marketing funnel optimization, and ongoing Pardot administration and campaign management.

WordPress website management and conversion optimization in coordination with international teams involving structural and content updates, optimization, web hosting and site maintenance, SEO, and project management for two 200 page web properties in various languages.

"Jeff is detail oriented and thorough. He is committed to helping his clients succeed and loves tackling new challenges and learning new technologies. He's been invaluable to our team in getting our web, marketing, and analytic capabilities up to snuff, and I would recommend him strongly to others seeking a utility player with strengths in pure marketing, digital marketing technology, and industry best practices."

Patrick Dawson, VP Solutions Marketing -- Flatirons Solutions

2008-2009, 2013-2015 Salesforce configuration and marketing automation for various clients.

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More Client Testimonials

"Jeff has the unique capability of both understanding strategic digital marketing planning as well as the technical expertise to implement and fine-tune marketing tools and processes to support digital marketing programs. The advantage this brings to his clients is that he can either lead and contribute to strategic planning and/or implement marketing technology (web content management and analytics tools, marketing automation platforms, SEO tools, etc.) that enable marketing teams to execute on digital marketing programs. Jeff's technical knowledge and natural curiosities about marketing tools are phenomenal; he's like a Google or Siri for marketing technology. When I have a question, I often turn first to Jeff and ask for his opinion or instruction on how to use a particular tool. He's passionate about marketing and has the chops to back it up."

Julie Fouque, - Director of Channel Marketing -- Flatirons Solutions

"Jeff Kemp is a well-rounded marketing professional that really excels in Marketing Automation and Pardot Technical Architecture. Jeff's thorough approach to complex problems makes him a highly effective consultant and strategist."

Charles Cunningham, Co-Founder -- Creative and Corporate

"He has incredible ideas, shared in the project as a collaborative partner, and he has executed on everything promised with great results. In short, Jeff Kemp Rocks this Diva's World!"

Lori Ruff -- Keynote Speaker & Author

Over $2M Commercial General Liability and Errors & Omissions (Technology Services) Insurance Coverage.

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Pardot and Salesforce Experience

Strategy

Discovery/Platform Audit/Requirements Gathering (Pardot and Salesforce)
Architectural Diagrams including client specific use cases
Defined overall implementation strategy and goals
Defined and mapped out marketing qualification process MQL/SQL
Defined and implemented complex lead funnel management
Helped define sales process
SOW, Project estimation (LOE), Proposals, Project Management, Project Plan and timelines
Client meetings

Pardot/Salesforce Architecture Diagram

Lists/Prospects

Dynamic/static segmentation lists
Suppression lists
List scrubbing, data normalization, list importing
Grew prospects from 20K to 120K
Managed prospect sync to Salesforce
Fixed sync errors

Nurture Campaigns

Email nurture campaigns/journeys
List email campaigns
Salesforce-Pardot Connected Campaigns
Created parent and child Campaigns hierarchy in Salesforce
Created multiple Engagement Studio automation programs running drip nurture email campaigns
Complex customer journeys with multiple conditional paths

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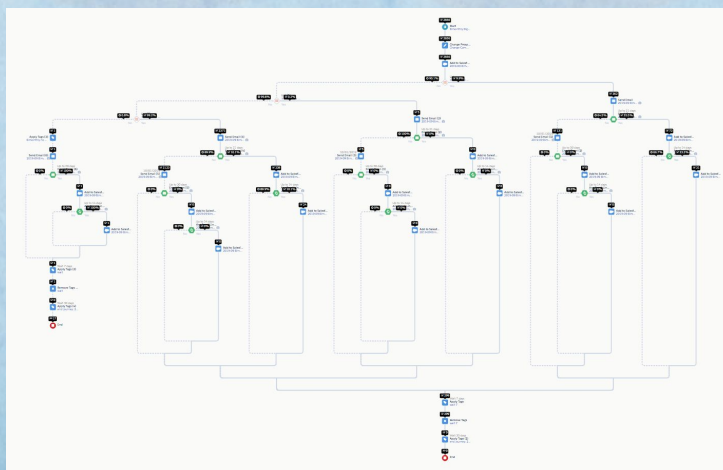
Email

HTML/CSS responsive email templates (with defined editable and locked down regions for team)
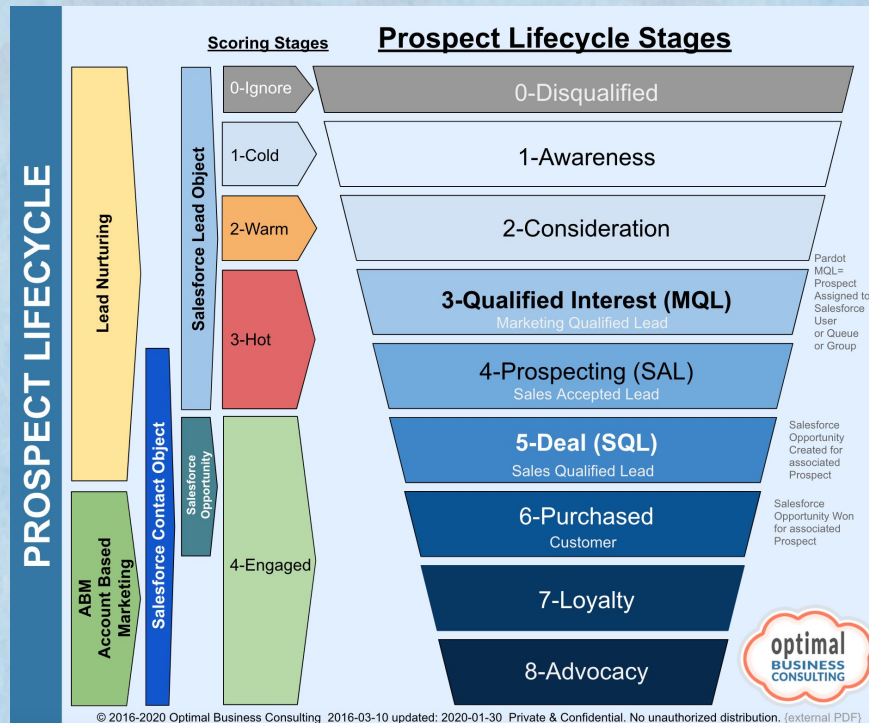Email Templates with personalization via Dynamic Content
IP Warming
A/B Testing

Automations

Engagement Studio workflows for lead nurturing, MQLs, Lifecycle Stage management, and client onboarding
Automation Rules for lead characterization, form management, and list management

Scoring

Lead Scoring rules
Content scoring, Scoring Categories
Prospect Profiling/Grading

Custom Fields

Custom Fields in Salesforce (Leads, Contacts, Accounts, Opportunities) with matching pick lists to Pardot
Custom Fields in Pardot (Prospects, Accounts, Opportunities) for managing prospects, lists, and lead funnels

Forms

Hundreds of Forms with automation Completion Actions
Form Handlers using automations to manage multiple forms sending to single Form Handler
Layout Templates
Gated Content Forms with dynamic autoresponders serving up links to requested downloads
Dynamic Universal Success Page with dynamic content passed from forms
Progressive Profiling
English and French language versions of dozens of forms and autoresponders
Styled web forms to client brand with CSS (including iframed content)

Pardot and Salesforce Experience

Content

Custom Redirects with Completion Actions for link click tracking of content downloads
Dynamic Content used within universal web thank you pages, etc.
Landing pages in Pardot and WordPress with focus on usability, SEO, and conversion
Custom Branded Email Preferences Page
Custom Branded Unsubscribe Page
Layout Templates
Managed Keywords for Search Marketing tied to overall SEO strategy

Reports

Closed loop reporting between Pardot and Salesforce for Revenue Attribution through Campaigns (Custom Member Responses, Cost, Budgeted, Revenue, ROI)
Marketing Funnel Reporting
Custom Lead and Campaign Salesforce Reports for KPI reporting
Custom Salesforce Dashboards for Marketing Leads Dashboard, Sales Dashboard, and KPI summary
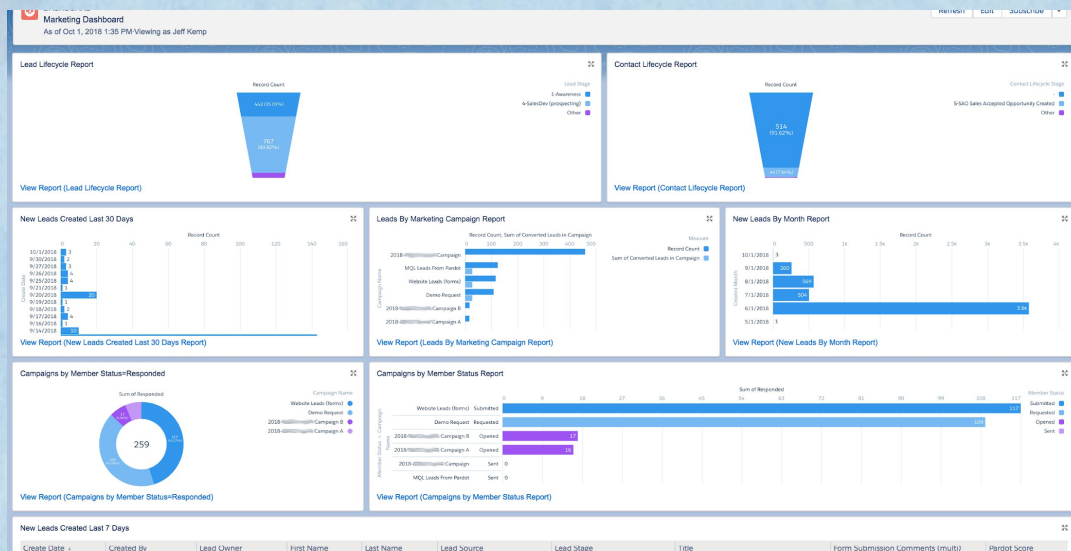
Admin/System

Platform Audit
Pardot Multiple Business Units with 7 business unit implementation
SPF and Domain Key DNS records with client instructions
Pardot Connectors
Prospect Imports with standardized import template
Extensive spreadsheet data manipulation
User and Role management
Continued Pardot admin and optimization
Salesforce views for access to Pardot info by sales members

Knowledge Transfer

User training of several teams including dozens of Marketing Team members
Created series of instructional training videos on Pardot & WordPress for Marketing Team
Compiled and continue to maintain active *Pardot & Salesforce Knowledgebase*
Held *Lead Management Workshop* for client's Marketing Team outlining the complete Buyer's Journey and all lead/customer nurturing touch points
Created online *Marketing Campaign Initialization Request Web Form*
Created online *Marketing Campaign Tracking* solution with *Marketing Calendar*
Created online *Keyword Tracking* solution

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Pardot and Salesforce Experience

Salesforce Sales Cloud

Platform Audit/Health Check with documentation
Users, Profiles, Roles
Permission Sets
Assign Object Permissions
Set field level security
Custom Fields: Leads, Contacts, Accounts, Opportunities, Campaigns
Custom Record Types (Campaigns, Opportunities)
Field validation rules
Global picklists
Salesforce Lead Assignment Rules with Sales Notification
Setup Campaign Hierarchy for Roll-up Reporting
Update Salesforce Object Views/Page Layouts
Custom Reports & Dashboards
Database maintenance
List management
Sandbox setup and testing
Data Loader for data migration
Installation of AppExchange apps
Set up TaskRay from AppExchange for Project Management
Set up Quip from AppExchange for collaboration
Data enrichment
Automations: Workflow | Process Builder | Flow
Contact Role validation class

Authored 40+ documents often shared with clients during Pardot implementation

- Pardot Audit
- Pardot Setup Checklist
- Prospect Lifecycle Stages (Marketing & Sales Funnel)
- Scoring Stages Diagram
- Pardot Lead Scoring Strategy, Setup & Recommendations
- MQL Strategy Recommendations
- Pardot Tracking Domains & Recommendations
- Pardot-Salesforce Architectural Diagram
- Implications of Single Sign-On (SSO)
- Non-Unique Email IDs (AMPSEA)
- Customer Journey Mindmap
- Pardot Form Options & Recommendations
- Pardot Feature Feasibility Timeline
- Client Lead Management Questionnaire
- Pardot vs. Act-On Feature Comparison
- Pardot Engagement History
- CSS targeting of Pardot Form iframes
- Pardot/Salesforce Data Model

- Pardot-Salesforce Data Merge And Delete Scenarios
- Pardot Prospect Import Template
- Pardot Connector Setting Options, Implications & Recommendations
- Pardot Reports
- Salesforce Marketing Reports
- Pardot Configuration Worksheet
- Ideal Client Profile & Grading
- Marketing-To-Sales Process Flow Diagram
- Pardot-Salesforce Sync Rules
- Pardot Rule Comparison Cheat Sheet
- Salesforce Campaign Implementation Guide
- Pardot Training Program
- Recommended Nurture Campaigns & Segmentations
- Pardot Business Units Implementation Planning Worksheet
- Pardot Prospect Import Template
- Pardot Web Tracking Code
- Pardot Tracking Domains, DNS Entry, and SPF Record Instructions
- Pardot Platform Audit Outline

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