Executive Programs - Technical Environments

The systems in use with the Executive Programs Department are primarily:

1. **Basecamp** - The marketing team uses basecamp to track the progress of any projects they are working on. There are no integration points to/from Basecamp.

2. **Pardot** (pronounced like it looks: par-dot) - Pardot is used by the marketing department to nurture prospective participants. Pardot is a cloud-based application and based on the Salesforce platform. Pardot integrates with the SOM instance of Salesforce.

3. **Salesforce** - Salesforce is a data hub for SOM and is used to maintain information about the community overall, not only for Executive Programs, but for Yale SOM undergraduates, graduates, and alumni. For the purposes of Executive Programs, contact records move into Salesforce as a "person type" of ExecEd. Salesforce is the CRM for Executive Programs.

4. **Flatbridge** - Used to manage Executive Ed specific programs, such as selecting venues, hotels, faculty, transportation, and more. Also allows individuals to register for programs and pay for them through PayPal. As noted above, individuals who apply/register for a program have contact records created in Salesforce.

5. **Paypal** - Used by participants to pay during the registration process in Flatbridge, or later through the invoice process if participants choose to pay later.

6. **Qualtrics** - A survey is used by registrants to gather personal preferences (dietary restrictions, jacket size,) and also to update their itinerary (additional stay days).

7. **Canvas** is the learning management system used by the University, and also used by Executive Programs to host course content.

8. **Trello** - Used by the sales teams to track contracts for custom programs.

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**Pardot and Salesforce Synchronization Notes from an Executive Programs Presentation:**
If a prospect gets created in Pardot first:
- It can be pushed to SFDC manually (via "Sync to Salesforce" button)
- It can be pushed to SFDC automatically (via Pardot automation)

If a lead/contact (with email) is created in SFDC first:
- It can be pushed to Pardot manually (via "send to Pardot" button)
- It can be pushed to Pardot automatically (via connector setting)
- Note: Only records that the Pardot Integration User can see are included in the sync

If a record exists in both systems:
- Changes in Pardot get synced to SFDC automatically, and vice versa.

**NOTE:** You can set a ‘master’ database on a field by field level: Pardot or SFDC or latest value

<table>
<thead>
<tr>
<th>#</th>
<th>Object</th>
<th>Sync Direction</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Leads</td>
<td>Bi-directional</td>
<td>Referred to as ‘Prospects’ in Pardot. Default fields automatically synced. Custom fields need to be mapped from Pardot to SFDC Lead. Custom fields need to be mapped from SFDC Lead to Contact. See next slide</td>
</tr>
<tr>
<td>2</td>
<td>Contacts</td>
<td>Bi-directional</td>
<td>Same as above.</td>
</tr>
<tr>
<td>3</td>
<td>Accounts</td>
<td>One-way (SFDC to Pardot)</td>
<td>Accounts automatically sync from SFDC to Pardot</td>
</tr>
<tr>
<td>4</td>
<td>Opportunities</td>
<td>One-way (SFDC to Pardot)</td>
<td>Opportunities automatically sync from SFDC to Pardot (i.e. Open Opportunity, Opportunity Won, Opportunity Lost)</td>
</tr>
<tr>
<td>5</td>
<td>Campaigns</td>
<td>One-way (Pardot to SFDC)</td>
<td>Pardot is able to add a prospect as a member to an SFDC campaign. Note: Pardot campaigns are different from SFDC campaigns.</td>
</tr>
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<td>6</td>
<td>Activities</td>
<td>One-way (Pardot to SFDC)</td>
<td>Pardot is able to create a task for a user in SFDC.</td>
</tr>
<tr>
<td>7</td>
<td>Custom Objects</td>
<td>One-way (SFDC to Pardot)</td>
<td>A custom object can be configured to sync from SFDC to Pardot. Note: The custom object must be tied to a prospect record in Pardot in some way through a prospect ID (i.e. must be linked to Lead, Contact or Account in SFDC).</td>
</tr>
</tbody>
</table>
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