



MOLINA RANA

Portfolio evidence file · molinarana05.github.io/portfolio

MARKETING AUTOMATION · SFMC + PARDOT

Journeys that know who they're talking to.

The automation and segmentation logic I ran at Grant Thornton Bharat (Jul 2022 – Jun 2023): Salesforce Marketing Cloud + Pardot powering Budget 2023, Dealtracker, GST Compendium and event programs.

Prepared by Molina Rana. Flows shown are representative reconstructions of live programs; client data, verbatim copy and internal dashboards are abstracted.

ENTRY

Insight downloads (Dealtracker, GST Compendium, Budget microsite), webinar & event registrations, newsletter opt-ins — each tagged with source, service line and industry at capture.

WELCOME (D0–D7)

Two-touch orientation: what GT Bharat publishes, one flagship insight matched to the visitor's service line. Engagement Studio scores every open/click.

NURTURE TRACKS

Service-line journeys (Tax, Advisory, Growth) with decision splits on content consumed. Budget-season entrants get the rapid-response track: pre-Budget expectations -> day-zero analysis -> sector deep-dives.

SCORE & GATE

Grade = firmographics (industry, size, role). Score = behaviour. Only A-grade + threshold-score contacts become MQLs — the rest keep learning.

HANDOFF

MQLs route to the right partner/BD desk with full context: pages read, events attended, themes followed. No cold internal handovers.

Four axes decide every send.

INDUSTRY

Manufacturing, financial services, healthcare, consumer, technology — mapped to GT sector desks so a Dealtracker M&A story lands with the sector it covers.

ROLE

CFO / tax head / founder / board — copy depth and CTA change by seat: analysis for operators, headlines for boards.

LIFECYCLE

Subscriber -> engaged reader -> event attendee -> client contact. Journeys never treat a 3-year client like a stranger.

ENGAGEMENT BAND

Rolling 90-day score bands set frequency caps. Dormant contacts enter re-permission before any campaign rejoin. DND and unsubscribe honoured at the platform level.

Result: Budget 2023 analysis reached tax leaders the morning after the speech; Dealtracker reached deal-makers monthly; nobody got both unless they asked for both.

PROGRAMS & MEASUREMENT

BUDGET 2023 RAPID RESPONSE

Pre-Budget expectation notes, day-zero newsletter within hours of the speech, sector follow-ups across the week. Live proof: the Union Budget 2023 edition on GT Bharat's LinkedIn (GT Weekly Insights).

DEALTRACKER MONTHLY

M&A/PE digest automated end-to-end: audience refresh, send windows, partner-ready summaries. grantthornton.in owns the "dealtracker" SERP to this day.

EVENTS & WEBINARS

Invite -> confirm -> remind -> no-show recovery, all in Engagement Studio; attendance synced back to scores for the next journey.

WHAT GOT MEASURED

Insight downloads, newsletter engagement by sector, event show rates, MQL-to-meeting conversion — reported by service line, not vanity opens. The insights hub served ~10K readers a day at peak seasons.