READINESS PACK · ACCOUNT ENGAGEMENT

The 60-day adoption process for Account Engagement teams

Keep Account Engagement running, prove the foundation, pilot first. Use the 60 days to build confidence, not to move everything.

Keep Account Engagement running

Programs, forms, scoring and the Salesforce sync continue while the team learns Next.

Prove the foundation

Data 360, identity, consent, permissions and reporting are validated before anything scales.

Pilot first

One familiar, measurable B2B use case becomes the way of working for what follows.

THE PROCESS

Five phases, one decision

01 Assess — PRE-KICKOFF

Map your setup: campaigns, assets, forms, lists, engagement programs, consent and reporting. Pick one B2B use case with a known audience and a simple KPI.

You get: An inventory, and a pilot brief with one KPI

02 Prepare — DAYS 1-20

Set up Data 360, connect it to Account Engagement, and assign the Next features. Agree a credit budget, and estimate the pilot's use before it runs.

You get: Access in place, and a credit estimate

03 Align — DAYS 1-20

Consent matching between the global opt-out and subscriptions per channel. Start with one email subscription, test both ways, and name an owner.

You get: A consent model both platforms respect

04 Pilot — DAYS 21-40

Build the use case in Next: segment, flow, content, QA path and measurement. Copied assets arrive as plain HTML, so choose what to copy and what to rebuild.

You get: A live, measured use case your team built with us

05 Decide — DAYS 41-60

Launch, learn and measure results and actual credit use. Then decide what stays in Account Engagement for now, and what Next takes on next.

You get: A sequenced roadmap your board can read

WHAT TO TAKE INTO THE FIRST 60 DAYS

Start with

- → A known audience and a simple KPI
- → Clear consent and suppression logic
- → Reusable content, or a small new set

Avoid at first

- → Replacing Account Engagement
- → A preference centre redesign
- → Custom-heavy segmentation before the data is trusted

Decide early

- → What stays in Account Engagement for now
- → What needs Next capabilities
- → Who owns consent, QA, launch and reporting

It can end in "not yet". This process is independent. If the pilot shows Account Engagement serves you well for now, that is a valid result. Talk it through with Debra Devied, Engagement Partner: ded@atcore.com