READINESS PACK · ACCOUNT ENGAGEMENT

# Account Engagement and **Marketing Cloud Next**

Salesforce's guidance, summarised for Account Engagement teams. Keep what runs, switch on what you need, and know what it costs to run.

Salesforce does not present this as a one-step move. The direction is phased adoption: your programs, assets and campaigns keep running in Account Engagement, while you add Marketing Cloud Next features that run on Data 360.

## WHAT THE GUIDANCE POINTS TO

- → **Keep Account Engagement running.** Campaigns, assets and engagement programs stay in place while you adopt Next features.
- → **Plan consent early.** Account Engagement and Next use different consent models.
- → **Use Data 360 as the bridge.** It carries audience logic, reporting context and future activation.
- → **Modernise in phases.** This is not a lift and shift. Add use cases as the foundation proves itself.

## WHAT YOU CAN SWITCH ON

### You may already own part of Marketing Cloud Next

Account Engagement Growth, Plus, Advanced and Premium include Marketing Cloud Next features through permission set licences. You need Sales Cloud or Service Cloud Enterprise Edition or higher, and availability depends on region. All of them run on Data 360.

#### Segments beyond the CRM

Build audiences in plain language on Data 360, using data from inside and outside Salesforce.

#### SMS alongside email

Event reminders, renewals and follow-ups by text, without a third-party tool.

#### Personalisation from related records

Cross-object merge fields and rule-based dynamic content: the product bought, the webinar attended, the open case.

#### Campaign drafts with Agentforce

A brief, assets and email copy from one prompt. Your marketers review and edit every step.

## WHAT IT TAKES TO SWITCH ON

1. **Set up Data 360**
   Every Next feature runs on it, so enable it first in your Salesforce org.
2. **Connect it to Account Engagement**
   So both platforms work from the same prospect data.
3. **Give access and set a budget**
   Assign the features, and agree a credit budget. Use beyond what is included is paid as you go.

WHAT CHANGES, WHAT STAYS

# Everything lands in one of three columns

Adding Next does not mean moving Account Engagement. The work is deciding what stays, what you add, and what needs a decision before the first send.

### Stays in Account Engagement

**Engagement programs.** Your running nurtures keep going.

**Forms, form handlers and landing pages.**

**Scoring and grading.**

**The Salesforce sync** and your campaigns.

### Added from Next

**Data 360 segments** that reach beyond the CRM.

**SMS** as a second channel.

**Personalisation** from related records.

**Agentforce** for campaign drafts.

### Decide first

**Consent.** How opt-outs match between the two.

**Content.** Assets can be copied across, but arrive as plain HTML without merge fields or dynamic content. Choose what to copy and what to rebuild.

**Ownership.** Which use case runs where, so nobody is messaged twice.

**Reporting** across both platforms.

**A credit budget** for Data 360, SMS and AI.

CONSENT FIRST

# Get consent right before the first send

Account Engagement tracks one global opt-out. Marketing Cloud Next manages consent per subscription and channel. Consent matching keeps the two in step. Under GDPR, this is the part to design and test first.

ACCOUNT ENGAGEMENT
**Global opt-out**
One setting per prospect, for all email

← Consent matching →

MARKETING CLOUD NEXT
**Subscriptions per channel**
Consent per topic and channel

- ☐ **Start small.** Match one simple email subscription before adding channels.
- ☐ **Test both ways.** Unsubscribe on each side and confirm the other follows.
- ☐ **Name an owner.** One person answers for consent across both platforms.

### What to clarify first

- → Which use cases stay in Account Engagement for now
- → Which new use cases need Next capabilities
- → Whether Data 360 is available and ready
- → How consent, subscriptions and preferences will be governed

### Risks to manage

- ! Assuming consent works the same way in both products
- ! Moving too much before Data 360 and governance are ready
- ! Mixing old and new campaign processes without clear ownership
- ! Expecting Next to replace every Account Engagement function from day one

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### Want to know what you already own?

Thirty minutes, no slides. We look at your licence and setup, and tell you honestly what to switch on first, including if the answer is "not yet".

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Book 30 minutes →

*Based on Salesforce guidance for Marketing Cloud Next for Account Engagement, available as of September 2026. Requirements depend on edition and region.*