READINESS PACK · MARKETING CLOUD ENGAGEMENT

Is your Engagement setup **ready for Marketing Cloud Next?**

A working guide for your architect and marketing operations. The worksheet and questions are fillable: complete them before your first planning meeting, and you scope this once, and scope it right.

Moving to Marketing Cloud Next is bigger than a platform change. Data, segmentation, activation and governance evolve together, so the readiness questions are as much about how you work as about what you run.

WHERE YOU ARE HEADING

What good looks like

1
Strategy first
Marketing tied to revenue, retention and lifecycle goals.

2
One environment
Salesforce, customer data and activation working together, not in silos.

3
Usable data
Customer data that supports segmentation, identity, consent and personalisation.

4
Moments that matter
Activation across the customer lifecycle, not isolated sends.

5
Controlled change
Engagement keeps running while new capabilities are added step by step.

YOUR OPTIONS

Four ways forward. Pick one on purpose.

Every Engagement team lands on one of these paths. The worksheet on the next page points you to the one that fits.

PATH 1

Stay for now

Fits a script-heavy setup that works well. Set a review date, and stop building new CloudPages in the meantime.

PATH 2 · MOST TEAMS

Run both side by side

Proven journeys keep sending from Engagement while new work starts in Next. MCE+ is Salesforce's stepping stone: both products in one licence, with credits shared.

PATH 3

Start new units on Next

Launching a new brand, market or business unit? It is the lowest-risk place to learn the platform.

PATH 4

Move

Fits a simple setup: few templates, light scripting, and identity already keyed to the CRM.

SIZING WORKSHEET

How big is the step? Count what has no equivalent.

Template count says little. The effort sits in the parts of your setup that work differently in Next. Type your counts straight into the right-hand column.

IN YOUR ENGAGEMENT SETUP	WHAT HAPPENS IN NEXT	YOUR COUNT / NOTES
Carries over		
Running journeys	Keep sending, and can be triggered from Next flows	*no count needed*
Formatting AMPscript	Conditions, dates, text and number formatting	*no count needed*
Your Salesforce org	Users, permissions, sales and service data	*no count needed*
Gets rebuilt		
Templates and content blocks	By hand, as there is no conversion tool yet	
Data extensions	Remodelled as Data 360 objects, or synced into Next	
Automation Studio SQL	As Data 360 transformations or flows	
Business units	As data spaces	
No direct equivalent		
Emails with AMPscript lookups	Data reaches the message through data graphs instead	
Server-side JavaScript	Logic moves to flows or integrations	
CloudPages	Preference centres and forms move to Experience Cloud or your website	

READING YOUR NUMBERS

Which path do your counts point to?

Path 4 · Move
Under 10 emails with AMPscript lookups, no server-side JavaScript, 3 or fewer CloudPages, and subscriber keys that already match your CRM IDs.

Path 2 · Run both
10 to 50 emails with lookups, some server-side JavaScript, or a handful of CloudPages. Most Engagement teams land here.

Path 1 · Stay for now
More than 50 emails with lookups, or preference centres and core processes built on CloudPages and server-side JavaScript.

Path 3 · New units
Launching a new brand, market or business unit within 12 months? Start it on Next, whatever your counts say.

These are starting points from our experience. The pilot confirms the path on your real setup.

GOOD TO KNOW

What you can leave as is

→ **Your integrations.** Data extensions can be synced into Marketing Cloud Next, so what feeds Engagement today keeps working while new use cases are built in parallel.

→ **Your journeys.** They keep sending from Engagement and can be triggered from Next flows. Nothing needs switching off during a pilot.

→ **Your Salesforce org.** Users, permissions, and your sales and service data are already where Next lives.

READINESS QUESTIONS

For your architect and marketing operations

Work through these in order. The first two groups decide most of the effort. Tick what you can answer today, and name an owner for the rest.

1 Operating model

OWNER

- [ ] Who owns data, segmentation, activation, consent and reporting today?
- [ ] Who governs the change, and how are priorities set between marketing, CRM, data and IT?

2 Data foundation

- [ ] Which sources feed Engagement, and which one is the source of truth for a person?
- [ ] Are subscriber keys the same as your CRM contact or lead IDs?
- [ ] Is Data 360 provisioned, and who administers it?

3 Platforms and processes

- [ ] Which integrations call Engagement APIs, and which can move to a data extension sync?
- [ ] Which processes can continue as is, and which should be built around Next flows and segments?
- [ ] Where do your preference centres and forms live today?

4 Consent under GDPR

- [ ] How is consent captured and stored per channel today?
- [ ] Do opt-outs match between Engagement and your CRM?
- [ ] Who signs off the consent model before the first send from Next?

5 Cost and credits

- [ ] How many profiles will Data 360 hold, and roughly what share changes each day?
- [ ] How often does data really need to refresh: daily, every few hours, or in real time?
- [ ] Who owns the credit budget, and who watches actual use in the Digital Wallet?

Estimate your credits with the Atcore calculator → Two minutes, Salesforce's published rates.

6 Reusable frameworks

- [ ] Which journeys could become reusable frameworks rather than one-off rebuilds?
- [ ] How is content structured for local markets and languages?

WHERE TEAMS OFTEN GO WRONG

Five mistakes worth avoiding

- × Starting with tools before strategy
- × Rebuilding one-off campaigns instead of reusable frameworks
- × Underestimating governance, ownership and operating model decisions
- × Treating customer data, insights and activation as separate workstreams
- × Assuming Engagement must be fully replaced before Next can add value

YOUR NEXT STEP

Turn the worksheet into a decision

Estimate your credits

Put your profile count and refresh needs into the calculator. It shows what drives the number.

Open the calculator →

Plan the 60 days

The 60-Day Plan in this pack shows how one real use case answers the path question on your data.

See the 60-day pilot →

Talk it through

Bring the filled-in worksheet to a 30-minute call. No slides, no obligation.

Book 30 minutes →

Notes for your planning meeting

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Want a second pair of eyes?

Send us the filled-in worksheet. We tell you honestly which path fits, including if the answer is "not yet".

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Book 30 minutes →

Based on Salesforce guidance available as of September 2026, and Atcore's own experience. Capabilities evolve; check current availability for your edition and region.