ETUMOS

Account Engagement Implementation Checklist

Quick guide: steps to follow when implementing a new Marketing Cloud Account Engagement (formally Pardot) Subscription

Getting Started

- [ ] Downloadable [User Guides for Account Engagement](#)

Define Project Objectives and KPIs

- [ ] Define and Document: MCAE Implementation Objectives
- [ ] Determine Key Performance Indicators (KPIs) of Objectives

Data Strategy

- [ ] Data Cleanup and Migration

Account Configuration and Technical Setup

- [ ] Install and Enable MCAE in Salesforce
- [ ] User Management Setup
- [ ] Enable Connected Campaigns
- [ ] Define Marketing Data Sharing Rules
- [ ] Configure and Unpause Salesforce-MCAE Connector

- [ ] Field Mapping
- [ ] Domain Setup
- [ ] Implement Tracking Code
- [ ] Activate Native Integrations
- [ ] Import Prospects from Salesforce

Marketing Setup

- [ ] Folder Structure and Tags
- [ ] Forms / Form Handlers
- [ ] Customize Email Unsubscribe Page
- [ ] Email Templates
- [ ] Landing Page Templates
- [ ] Segmentations

- [ ] Snippets
- [ ] Emails
- [ ] Landing Pages
- [ ] Automation Rules
- [ ] Scoring
- [ ] Grading

Training and User Enablement

- [ ] [New Account Engagement User Mini Guide](#)
- [ ] Join Trailhead
- [ ] Review [Marketing Cloud Account Engagement (MCAE) Basics Trailhead](#)