

# Your Marketing Cloud Next Readiness Check on Paper

Ten questions to answer with your team. The same ones as our online self-check, for the meeting room.

## A · Your Licence

|   | Question                                                                                                           | Yes                      | No                       | Not sure                 |
|---|--------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| 1 | Do you run Pardot Growth, Plus, Advanced or Premium? Your order form names it; editions ending in -LP don't count. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Do you run Sales Cloud or Service Cloud Enterprise Edition or higher? Setup → Company Information.                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## B · Your Need

|   | Question                                                                      | Yes                      | No                       | Not sure                 |
|---|-------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| 3 | Do you want to send SMS or WhatsApp messages, not only email?                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Should data from systems other than Salesforce shape your campaigns?          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Do you want to use Agentforce to build campaigns?                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Is a decision due in the next six months, such as a renewal or a new channel? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## C · Your Basics

|    | Question                                                          | Yes                      | No                       | Not sure                 |
|----|-------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|
| 7  | Are your leads and contacts in Salesforce reasonably clean?       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Is Data 360 (Data Cloud) already set up in your org?              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Do you know which of your marketing automations are still in use? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Do you have one concrete first campaign in mind?                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

### Your Result, in Three Steps

1

#### Both answers in A yes?

If not: check your licence first. Your account executive confirms it.

2

#### Two or more yes in B?

If not: stay on Pardot for now. Doing nothing is a valid outcome.

3

#### Three or four yes in C?

Yes: worth a closer look. No: fix the basics first, starting with your no answers.



#### Axel's tip

Every "not sure" is a question for your admin or your account executive. Put them on the agenda of your next meeting.

### The Full Readiness Check

A written plan for your setup.

Scan for the Readiness Check

