60-Day Action Plan

Marketing Cloud Engagement &
Agentforce Marketing Adoption Plan

Forward-looking statements

This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to our ability to consummate the pending acquisition of Informatica on a timely basis or at all; our ability to meet the expectations of our customers; uncertainties regarding AI technologies and their integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation and our ability to compete in the markets in which we participate; and our ability to maintain and enhance our brands.

The 60-Day Action Plan goal:

Quickly and safely build a foundation that adds value and sets up success to adopt next-gen capabilities.

Introducing the
MCE+ 60-Day Action Plan

Chapter 0

Educate & prepare

Pre-kickoff

Chapter 1

Setup, configure, & execute

Days 0-60

Chapter 2

Review & expand

Beyond 60 days

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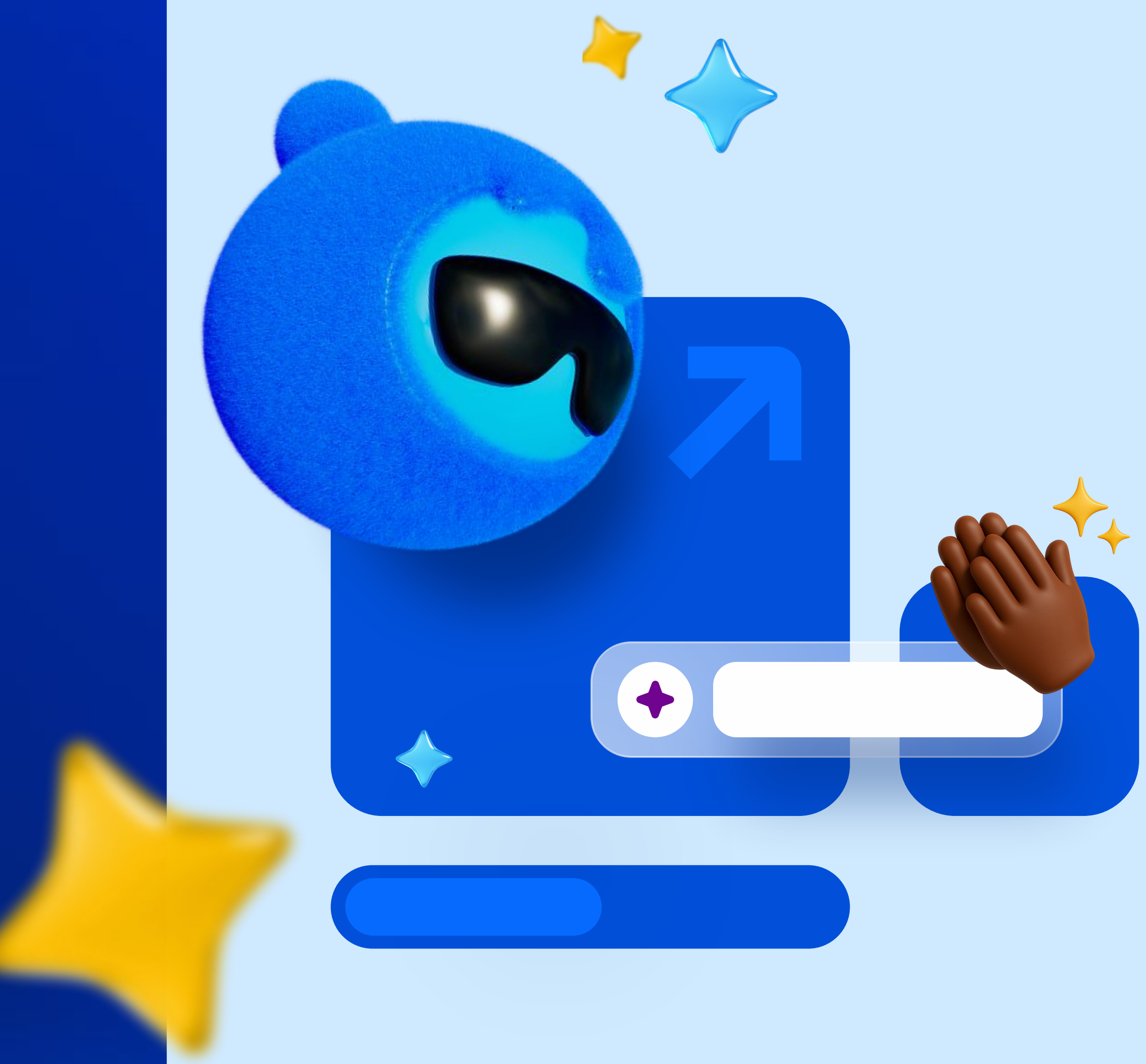


Chapter 0

- Chapter 0 checklist
- Your first 60 days with Next-Gen Marketing
- Low-lift use cases explained
- Business unit strategy
- Recommended team structure for success
- Timeline for 0-60 days
- Learning map
- More MCE+ setup resources

Chapter 0 Checklist

Educate & prepare (Pre-Kickoff)

Key Activities	Deliverables	Success Criteria	Responsible Role
☐ Identify Core Team	**Team:** Identify 2-3 key stakeholders (Marketing Champions & Admins) and 1 Executive Sponsor.	Individuals are formally assigned and allocated time for adoption.	CSM & AE
☐ Product Deep Dive	**Problem/Solution Fit:** Clear understanding of new product capabilities and pain points; recommended features & roadmap.	Core team ranks capabilities based on organizational priorities.	Marketing Champion & Salesforce Team
☐ High-Level Plan & Define Low-lift use cases	**Your Roadmap:** Create a tentative timeline (e.g., 30-60-90 days) & define low-lift use cases. Determine your "default" Business Unit *and* the Business Unit for your first use case.	Kick-off meeting held; goals documented and approved by Executive Sponsor	Marketing Champion & CSM
☐ Get Access	**Commercial Access:** Procure required licenses and entitlements.	Marketing Champion and Sponsor ensure the account has all required licenses.	AE & Executive Sponsor

Your first 60 days with Agentforce Marketing

Continue using MC Engagement

Keep existing campaigns, channels, and data running. **No migration or disruption.**

Admins start simple with Data 360

This does not require a full implementation of Data 360. Admins sync out-of-the-box data bundles and use OOTB settings; later expand as you scale such as syncing Data Extensions & custom settings.

Marketers familiarize with Lightning

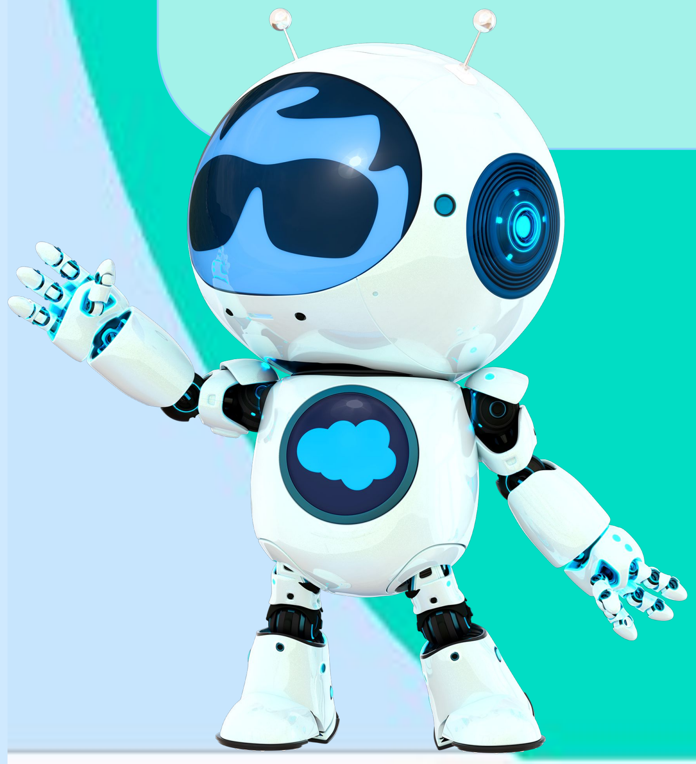
Marketers get familiar with navigation of the next-gen Marketing app on Lightning. **Marketers view out-of-the-box analytic dashboards & take simple actions** such as connecting Journeys to the Campaign workspace.

Launch first low-lift use cases

Extract immediate value & **get familiar with Agentforce Marketing through interoperable, quick-win use cases that compliment what you're already doing** in MC Engagement, such as Unified Reports, Flow Orchestration, Segmentation, and more.

Bottom Line

You're gaining *new capabilities* that *add next-gen functionality* to your **existing investment** in Marketing Cloud

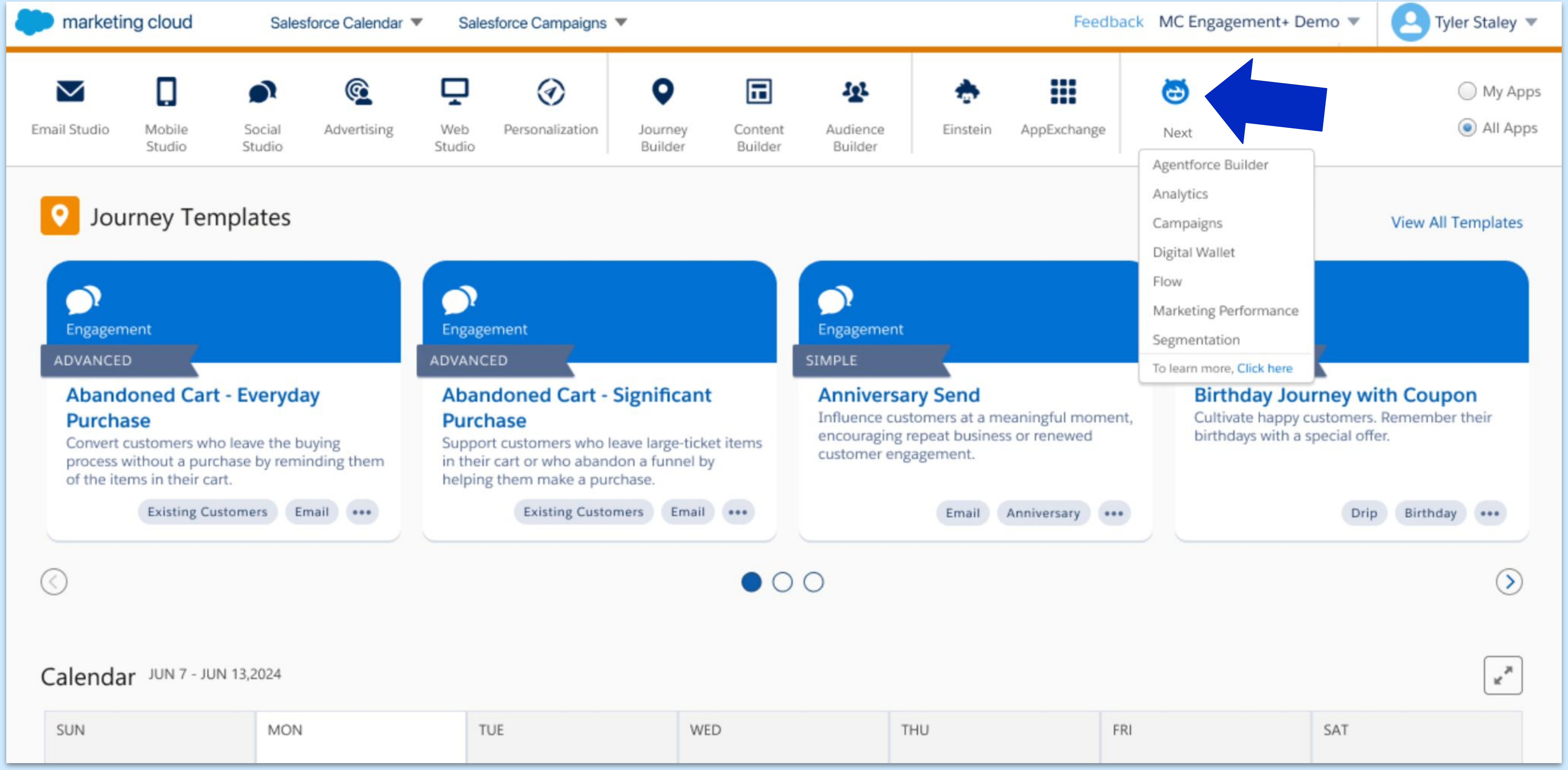


Access next-gen features within your account

The bridge to next-gen marketing

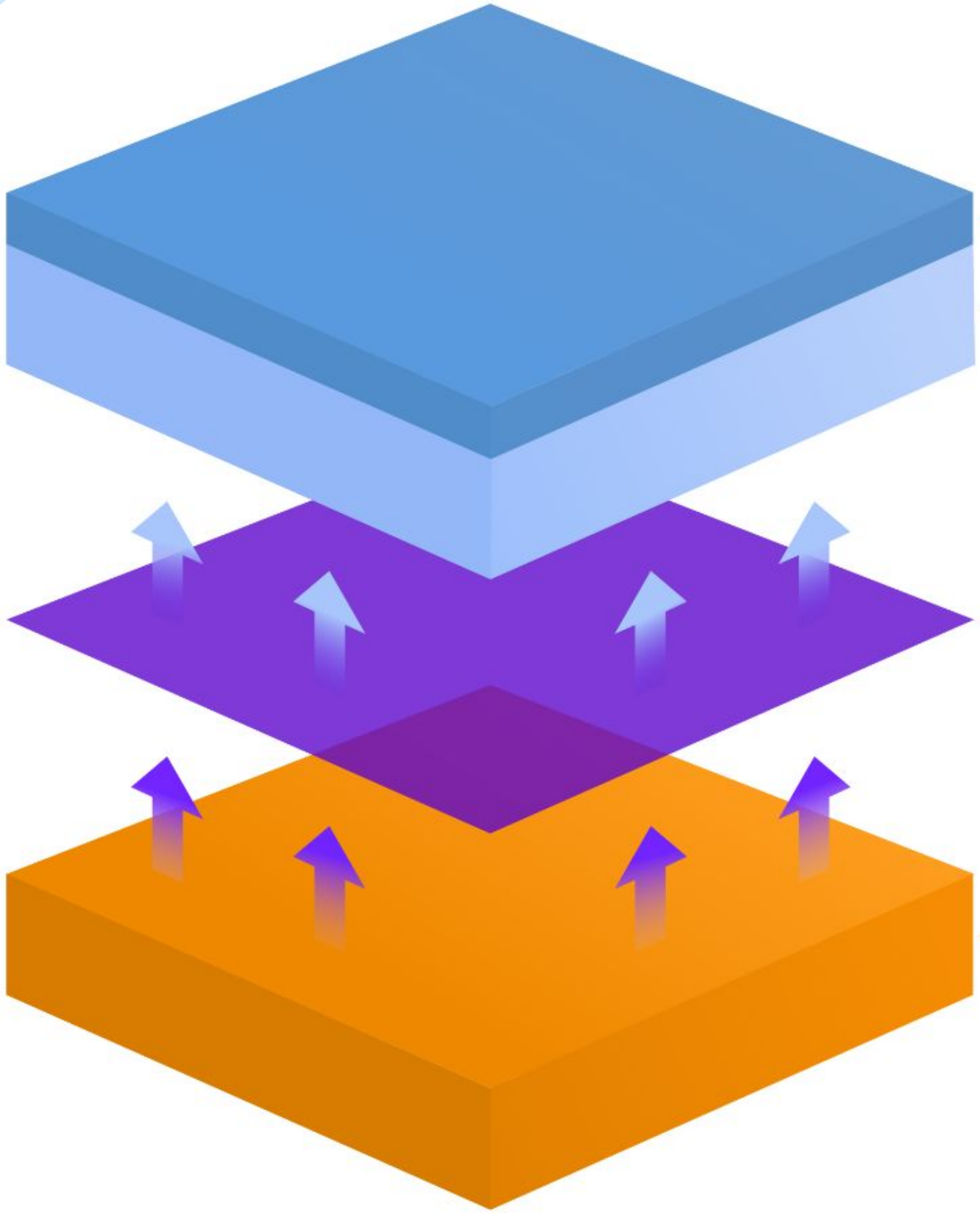
The new “**Next**” icon in your top navigation bar provides access to a suite of next-gen marketing capabilities built on Lightning.

Think of the new icon as the bridge, connecting your existing Marketing Cloud Engagement instance into the broader power of the Salesforce Customer 360.



Agentforce Marketing

Builds on top of your existing implementation



Agentforce

Deliver smarter marketing faster with marketing agents

Unlocked Salesforce Innovations

Access your MCE journeys, content, channels, & data within Lightning to connect every department & personalize every moment across Marketing, Sales, Service & Commerce

- Flow integrated with Journeys, Channels, & Data
- AI Analytics & Agents for your campaigns
- Centralize & search across your campaigns

Data 360 fabric, built-in

Unify your data; Seamlessly integrate your data with built-in Data 360 and enable Marketing Cloud Engagement objects to be used throughout the Customer 360

Marketing Cloud Engagement

- Journeys
- Content & Channels
- Data Extensions
- AMPScript

How to get started with Agentforce Marketing

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Gradual Adoption

Continue building on MCE while incrementally adopting Agentforce Marketing for select use cases and operational processes.

Why? Adopt at your own pace while getting immediate benefits that enhance your existing MCE account.

Today's focus & recommended strategy

Accelerated Adoption

Build *all new* campaigns & operational processes on Agentforce Marketing while maintaining MCE instance for existing campaigns and operations.

Why? Get all the benefits of Agentforce Marketing without disrupting your operations.

Low-lift use cases explained

The Reality

- You're likely very excited about the art-of-the-possible, we are too!
- New capabilities come with a learning curve. Without the right approach, teams can feel overwhelmed, slowing down adoption and delaying value.
- Some use cases can more-easily be accomplished with upcoming releases (H2 2026). Defer them to reduce complexity or throw-away work.

Our recommendation for the first 60 days

Start with low-risk, low-lift use cases that build confidence and familiarity through quick wins (start small, learn fast), setting your team up for sustained adoption and long-term success with Agentforce Marketing.

Traits of a Successful Use Case

What we've learned from early successes:

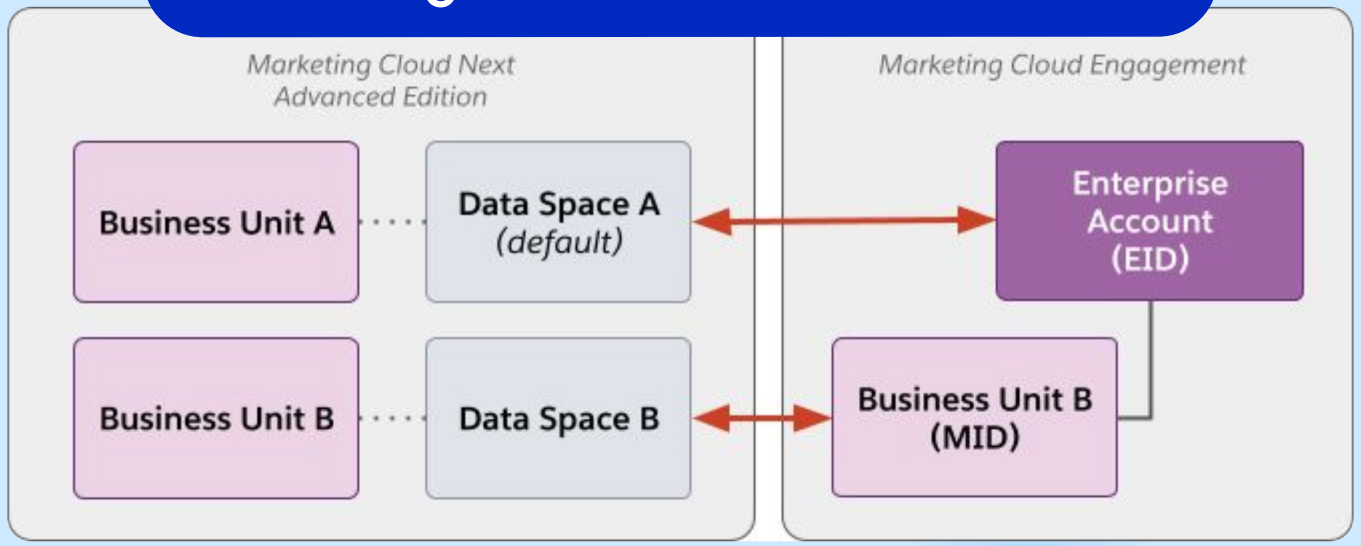
- **Built on familiarity**
  Execute use cases the team already understands.
- **Reuse what you already have**
  Leverage existing Marketing Cloud data & components.
- **Start with recommended features**
  Focused on functionality outlined in this deck.
- **Start with standard configurations**
  V1 used out-of-the-box features (not customizations).

Business unit strategy

Background

- Next-gen marketing features on Lightning operate within their own business unit concept (aka Data Space).
- Connect your existing MCE business units (MCE BUs) to sync data and make it available for next-gen functionality.
- Generally, we recommend creating a 1:1 mapping between an existing MCE BU and a Data Space (next-gen BU).

Getting started recommendation



Learn more

Our recommendation for the first 60 days

Get started by focusing your use case and effort by connecting only 1 or 2 business units from Marketing Cloud Engagement. During next-gen Setup:

1. Ensure each MCE BU maps 1:1 to an equivalent Data Space (next-gen BU).
2. Be intentional which 1 or 2 Data Spaces (next-gen BUs) you select to install next-gen Marketing Cloud app. You cannot later uninstall Marketing Cloud.
   - Recommend installing into a Data Space (next-gen BU) that is linked to a production-grade MCE BU (not a "test" MCE BU; test with Sandbox Orgs).

Important to know

- **Your business unit strategy**
  Start by having each MCE BU map 1:1 to an equivalent Data Space (next-gen BU). Mapping 1:1 is safe, easier to evolve, and avoids unintentional data mixing that can occur when multi-mapping.
  - You can easily *add* BU mappings later.
  - *Removing* a MCE BU mapping (if accidentally map multiple MCE BUs to a single Data Space) is tedious and will also remove all of the historical MCE BU data from the given next-gen BU, impacting use cases that depend on it.
- **Multi-business unit mappings**
  BU mapping is highly flexible. You can map a single MCE BU to many different Data Spaces (next-gen BUs) within a single Org or across separate Orgs. Be thoughtful when mapping multiple MCE BUs to a single Data Space, as it can lead to unintentional consequences (see above).
- **Functionality of next-gen business units**
  While there are many similarities, next-gen business units currently have some unique functional differences than MCE BUs. Learn more in documentation.

Recommended team structure for success

Core Team (Internal Roles)

Executive Sponsor
Provides strategic alignment and secures resources for the 60-day MVP.

MC Engagement Admin
Co-own Data 360 items with CRM Admin. Responsible for connecting MCE business units, data bundles & users.

CRM Admin
Co-own MCE Admin items. Handles Data 360 provisioning, identity resolution rules, and platform permissions

Marketing Champion
Leads the "Low-Lift" use case definition and validates results.

Success Resources (External Support)

Customer Success Manager*
Provides prescriptive direction, shares official materials, and connects the team with Success resources.

Account Executive (AE)
Validates SKU entitlements and assists with commercial access.

Cloud Experts*
A dedicated team of Specialists, Guides, and Architects who provide strategic and technical leadership tailored to customer's use cases. The experts lead 1:1 engagements included expert coaching, onboarding, complex solution reviews, and reliability assessments - ensuring architectures remain scalable, resilient, and aligned with core business objectives.

Resources Aligned with Customer's Success Plan or Success Resources Tailored by Plan Entitlements
Not Listed: Professional Services for advisory & advanced scenarios

Adoption timeline for 1-60 days

Path to success for MCE+

	Step 1	Step 2	Step 3
Building the foundation Day 1–20	**Turn on Next-Gen & Reporting** 1. CRM Admin installs Data 360 2. CRM Admin creates user for MCE Admin 3. MCE Admin deploys MCE data bundles and maps 1 MCE BU to Data 360 4. CRM Admin installs Marketing app & Data Kits 5. CRM Admin installs Marketing Perf. app	**Data Setup for Flow** 1. MCE Admin creates Identity Resolution 2. MCE Admin optionally syncs 1-2 MCE DEs to Data 360 3. MCE Admin creates Data Graph	**Permission & User Assignment** • MCE Admin bulk-creates users & assigns permission sets to marketers
Setup & configuration Day 21–40	**Explore OOTB Features** 1. View OOTB Digital Wallet dashboard 2. View OOTB Marketing Performance dashboards 3. Connect Journeys to Campaign workspace and view the analytics	**Begin Building Low-lift Use Cass** • Begin execution of v1 use case	**Finish v1 of Low-lift Use Case** • Complete execution of v1 use case
Build, execute, & review Day 41–60	**QA the Use Case** • Test, validate or iterate v1 use case	**Deploy the Use Case** • Launch the use case	**Measure & Debrief** • Monitor impact and retrospect and iterate internal processes with stakeholders

Learning Map

Important help documentation

Walkthrough demos

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Start

- Access the Features of Marketing Cloud Next for Engagement
- Where to Start with Marketing Cloud Next for Engagement
- Message Sending Recommendations

Configure

- Connect Marketing Cloud Engagement
- Set Up Marketing Performance
- Configure Data 360 Components
- Assign User Access

Campaigns and Flows

- Add a Journey to a Campaign
- Send Flow Members to a Journey
- Create and Use the Journey Decisioning Agent
- How Campaigns and Flows Work Together
- Working with Campaigns and Flows

Analyze unified data

- Concepts and Terminology
- View Engagement and Delivery Data
- Create Custom Analytics Reports
- Key Data Model Object Fields
- Troubleshoot Reporting Issues

Understand your marketing spend

- Track Message Usage in Digital Wallet
- Salesforce Message Credits

More setup resources

[What's Next for Engagement Overview]

[Salesforce Learning Map]

[Getting Started Guide]

[Begin learning with Trailhead]

[MCE+ Feature Demos]

Introducing the
MCE+ 60-Day Action Plan

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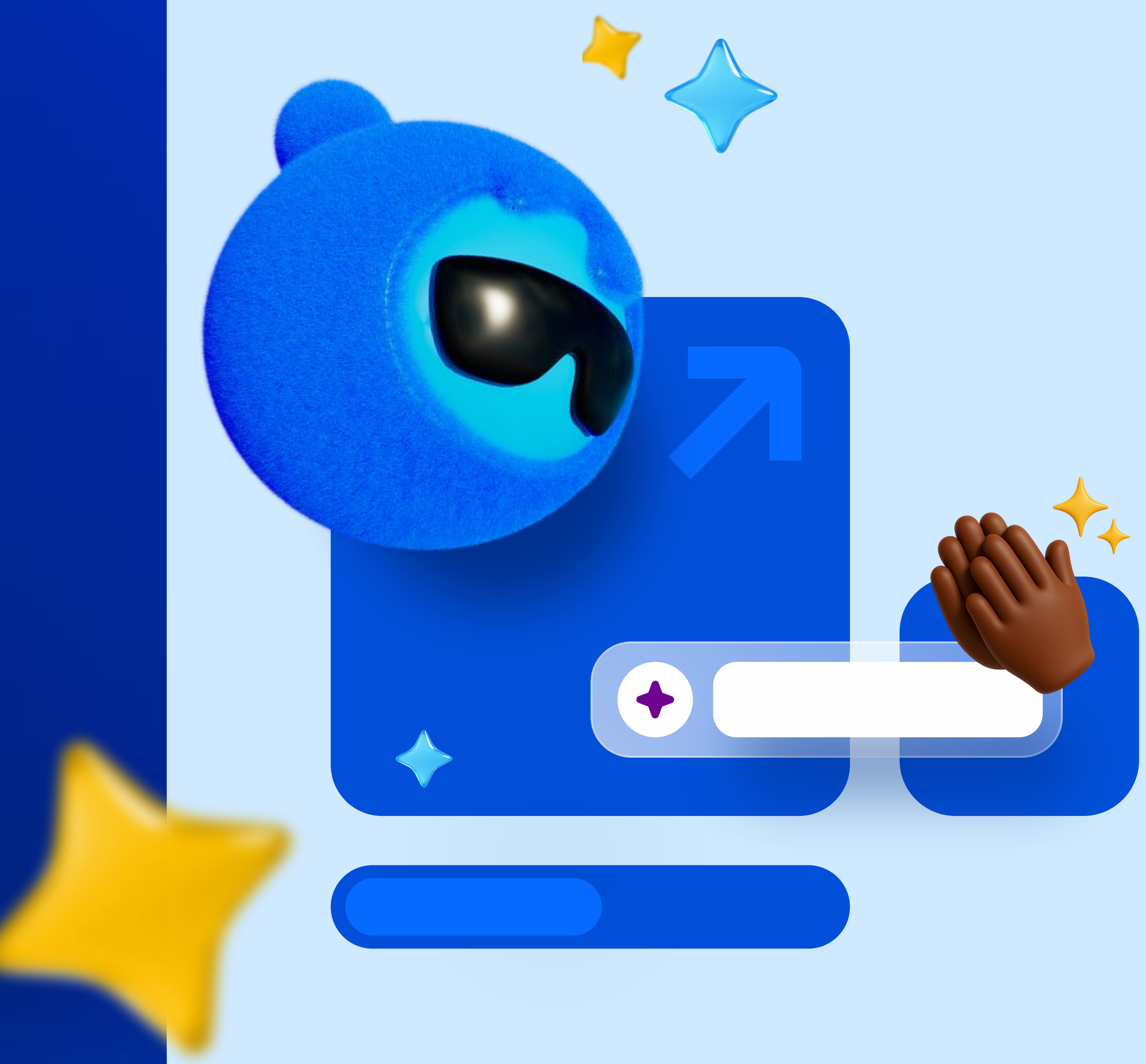


Chapter 1

- Chapter 1 checklist
- Technical milestones
- Overview of MCE+ use cases
  - Build unified reports
  - Build Flow orchestrations
  - Build segments
  - Customize Campaign workspace
  - Agentic Decisioning

Chapter 1 Checklist

Setup, configure, & execute (Days 0–60)

Key Activities	Deliverables	Success Criteria	Responsible Role
☐ Core Team Training	Complete formal or self-guided training on basics (e.g., Admin Onboarding).	Core Team executes core workflows independently within the tool.	MC Admin & CRM Admin
☐ Define Use Case	Define details for a non-critical, "low-lift" Flow or custom Report.	Requirements written and/or E2E use case mocked up.	Marketing Champion
☐ Setup & Build	Complete MCE-DC-AFM setup, user provisioning, and data configuration.	Successful use case completion demonstrating tool viability in a limited context.	CRM Admin & Data Architect
☐ Share Lessons	Core team collects and shares qualitative feedback with the broader organization.	Formal feedback session documented; plan for next steps created.	Marketing Champion & CSM
☐ Build & QA v1 of Use Case	Run a small, non-critical project or workflow within the tool to test functionality.	Successful use case completion demonstrating tool viability in a limited context.	Core Team
☐ Iterate & Deploy Use Case	Refine the use case and deploy to internal or external audience.	[depends on use case]	Core Team

Technical milestones

Getting started using the Setup Assistant

Initial Configuration

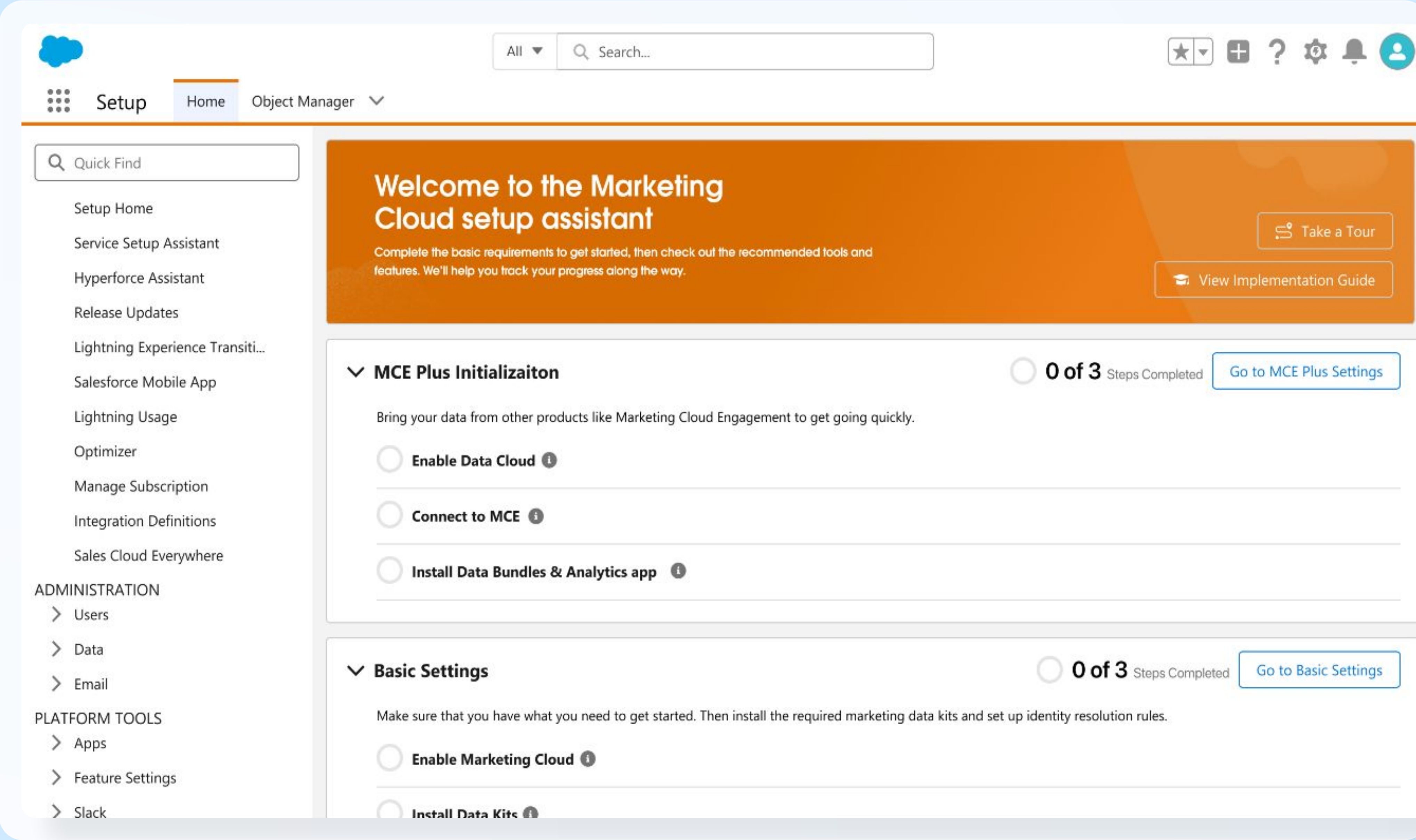
- ☐ Enable Data 360
- ☐ Create **User for MCE Admin**
- ☐ Create Data Spaces
- ☐ Turn on **OOTB Data Bundles for MCE & map MCE BUs**
- ☐ Enable next-gen app & **OOTB Analytics Dashboards**
- ☐ Add new Marketing users to Core, assign **OOTB Marketing Cloud Permission Sets**

Layer in Flow Builder

- ☐ Configure and run **Identity Resolution**
- ☐ Create a **Data Graph**

Optional

- ☐ Sync key MCE Data Extension(s) to Data 360 DMO
- ☐ Create an **Activation Template** for Flow



Example Use Cases

Overview: Initial MCE+ Use Cases

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Get started with the first use cases after setup is complete.

Explore

View Digital Wallet *Requires MCE+ SKU (not MCA SKU)
Analyze OOTB dashboards & consumption message trends, forecast budget & set alerts.

Use Campaign workspace
Use OOTB workspace to organize campaign information, activities, & reporting on journeys.

View Unified Reporting
Review OOTB dashboard & agents to analyze performance & deliverability.

Build use cases (this deck's focus)

Build Unified Reports
Use the unified reporting toolset to create customized reports to analyze performance

Build Flow Orchestrations
Orchestrate real-time customer experiences across the whole of the Salesforce platform, including MCE

Build Segments
Build targeted audiences with clicks, no code

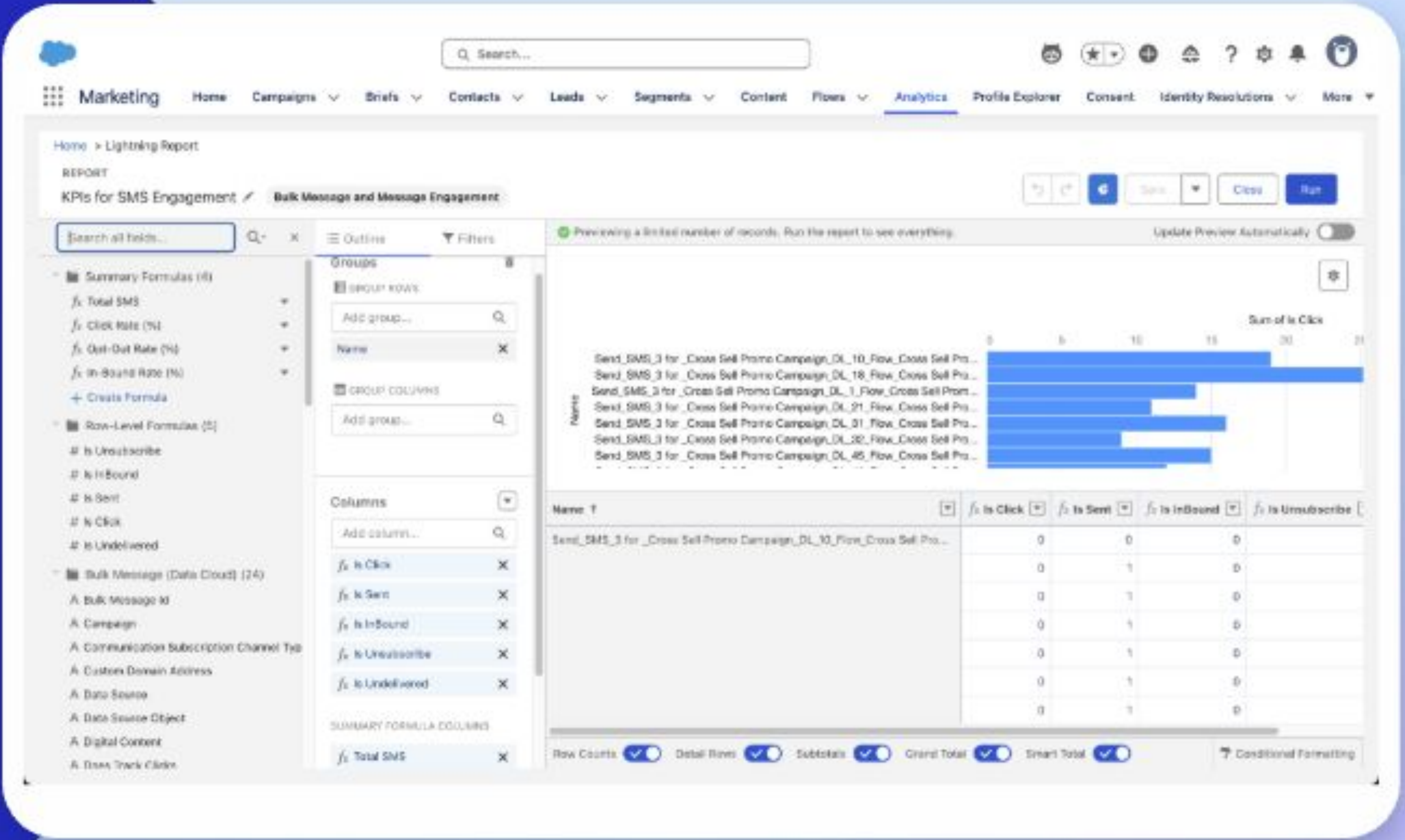
Customize Campaign workspace
Create SSOT & organize related campaign activities into one connected workspace

Agentic Decisioning
Power Agentforce to guide customers to the next-best journey based on real-time context

Unified Salesforce Analytics

Connecting Email, SMS, Push, WhatsApp, and Journeys data with the rest of the Salesforce platform

Custom report-building with clicks, no SQL



Getting Started with *Unified Reporting*

Use a unified reporting toolset to more-easily create customized reports that analyze performance and troubleshoot across Engagement, Agentforce Marketing, CRM, and Data 360.

What's different?

Engagement native reporting feels disjointed, Next-Gen provides a single view of performance.

Next-gen reporting enables marketers to the use drag-and-drop builder to:

- Inspect subscriber-level data for troubleshooting)
- View higher-level KPI metrics
- Build visual charts based off reports.
- Access to additional fields & datasets

Example capabilities

- Use a single UI to build reports that breakdown performance across email, mobile, digital ad platforms, and custom datasets; as well as Sales & Service Clouds.
- Inspect or troubleshoot specific subscribers (eg: why they didn't get a send) with drag-and-drop fields and filters.
- Use OOTB functions and filters such as CONTAINS, DOES NOT EQUAL, SUMs, COUNTs, & LAST X DAYS.
- Customize charts such as Bar, Column, Line, Funnel, and Scatter Plot.
- Organize and share reports with other Salesforce users.

Initial setup

Step 1: Connect MCE to Data 360 and sync OOTB MCE datasets (Journeys, Send, Asset data)

Step 2. Install Next-gen Data Kits

Step 3: Install Marketing Performance app & its underlying data model (SDM)

Step 4: Grant user access

Step 5 (optional): Sync MCE DEs or CRM objects to D360 for additional customization

Key Considerations & Things to Know

- Initial MCE-DC connection backfills 90 days of send and engagement data from MCE.
- Custom data sets should have way (ID) to tie back to SubscriberKey.

Use cases for *Unified Reporting*

Credit Consumption Guide: Data 360 Credits

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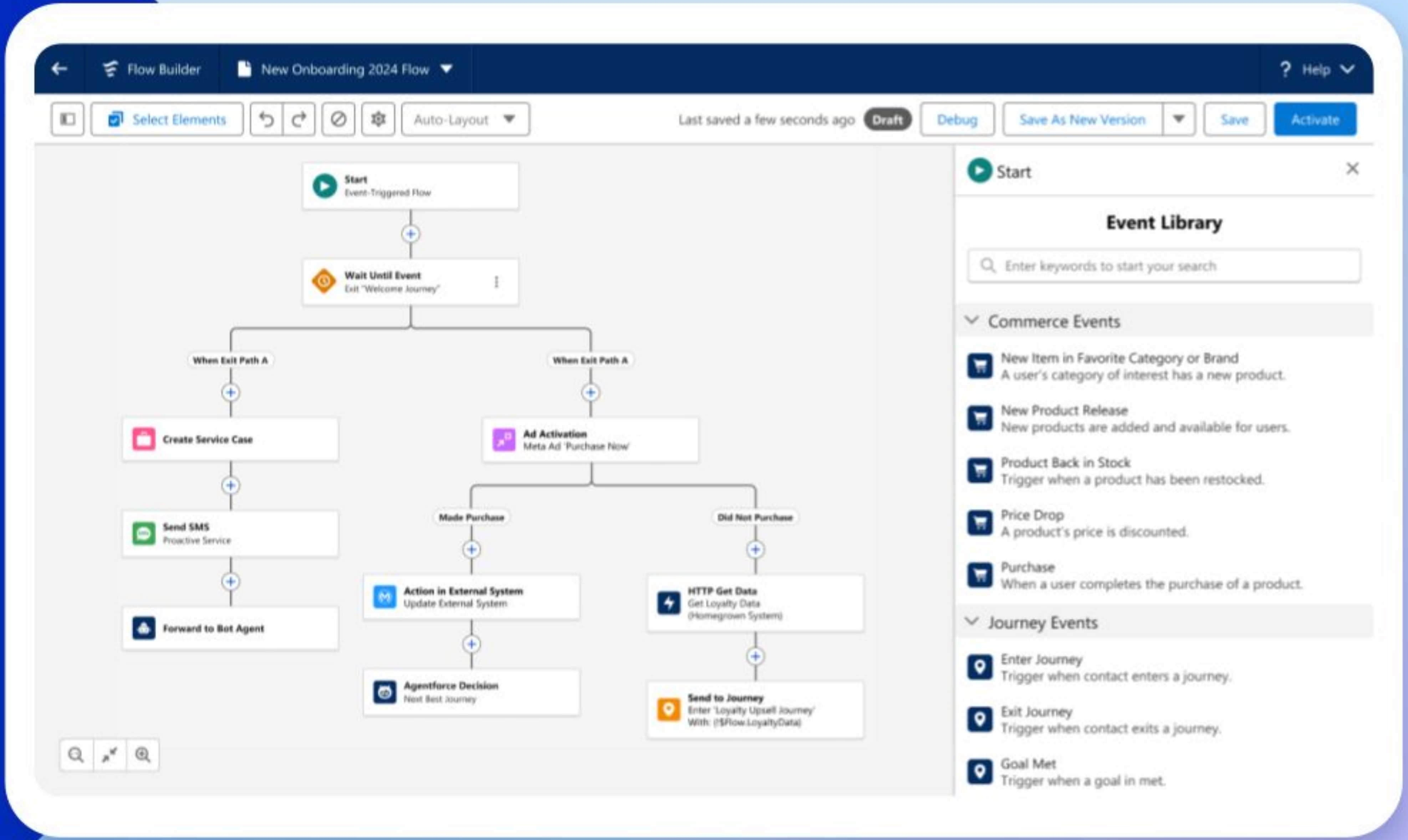
	Level 1	Level 2	Level 3
	Build a report that uses out-of-the-box MCE channel data.	Import MCE DEs or SendLog to D360 DMOs & join with OOTB data.	Import and join data across Engagement, CRM, and D360 Data.
Planning Questions	What MCE channel reports, fields, or metrics do you use the most? What MCE reports require SQL Data Views, downloads to manual spreadsheets, or are the most time-consuming to put together? What data do you SQL for troubleshooting individual Subscribers?	What Subscriber attributes from MCE DE or SendLog do you want to overlay on *existing* MCE reports? Do you use SQL to do that today? What 1-2 key DEs have the most interesting Subscriber profile or event data for reports?	What CRM Objects or Fields do you want to overlay on existing MCE reports? What cross-departmental reports do you need to provide to stakeholders? What custom datasets are in AWS, GCP, Azure, or Homegrown that could augment marketing reports?
Example Use Cases	• List every Email bounce or not sent reason for Subscriber A in last 30 days • Pie Chart top Email error reasons • List of top SMS sends & CTR • SMS Keyword opt-in/out over time • Count Push geofence entries/exits • WA send error reason per Subscriber	• CTR performance for Male vs. Female, US vs. FR, VIP members, Use Product X vs Y, etc • Count of Subscriber Purchases over time • Troubleshoot Subscriber A with more details such as subscription preferences, opt-in statuses, etc	• CTR performance based on Lead/Contact status, demographics, or Account • List of sends and number of Registration signups (custom field) • Bucket data based on Contact/Lead Titles, Account Regions, etc • Create List Views of above, and include email, phone, and other applicable details for Sales teams

Cross-Journey Orchestrations

Use Flow to move faster and unify customer experiences across Journey Builder, Agentforce, Sales Cloud, Service Cloud, Data 360, and External Systems.



Getting Started with *Flow Orchestrations*

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Orchestrate real-time customer experiences across the whole of the Salesforce platform.

What's different?

Flow is designed to orchestrate across many workflow types, including CRM processes, marketing processes, and external systems.

Through Flow, marketers can use one UI to easily create, maintain, and troubleshoot high-scale marketing-specific AND cross-departmental (CRM) uses cases which previously required SQL, scripting, hack workarounds, or IT engagement.

Example capabilities

- Use one UI to action and orchestrate on data across Sales, Service, Marketing, D360, or External Systems.
- Easily create real-time orchestrations with OOTB Events Triggers and Waits; or define your own Events using data in Salesforce.
- Use clicks to prioritize and move individuals from journey A to journey B. Configure decision splits that check an individual's Segment Membership.
- Use OOTB Agentforce actions or invoke your own custom Agents to augment your workflow.

Initial setup

Step 1: Connect MCE to Data 360 and sync OOTB MCE datasets (Journeys, Send, Asset data)

Step 2. Install Next-gen Data Kits

Step 3 (optional): Sync MCE DEs or CRM objects to D360 for additional customization

Step 4 (optional*): Unify your data through Identity Resolution

Step 5: Configure a Data Graph to make use case data accessible to Flow

Step 6: Create your audience and events

Step 7: Grant user access

Key Considerations & Things to Know

- Journey Builder isn't going anywhere! Your existing Engagement journeys will continue to function as designed. Now, Flow can build on top of your Journeys to orchestrate experiences that were previously difficult or impossible to automate.
  - Flow can trigger Journeys and Email sends in Engagement (content personalization and send execution lives within Engagement).
    - Recommend initial use case are low-risk use cases of audiences <1 million an hour.
  - Flow can listen to data and events from Engagement, such as Journey Entry, Exit, & Goal Met. This data has latency of 15 mins - 1 hour delay.
- When creating a Flow, you must first select a Flow type. Flow types generally represent what entry source type is used. Most use cases will use either Segment-triggered Flow type, Event-triggered Flows type, CRM-triggered Flow type, D360-triggered Flow type, or Activation-triggered Flow type

Use cases for *Flow Orchestrations*

Credit Consumption Guide:
- Data 360 Credits
- Message Credits

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	Level 1	Level 2	Level 3
	Create a Flow to trigger a single MCE journey or MCE email.	Create a Flow to connect 2-3 existing MCE journeys or MCE emails together.	Create a Flow that updates Sales, Service, or external while triggering an MCE journey or email.
Planning Questions	What is a low risk MCE journey or single email send? What is its schedule (one-time ad hoc, recurring hourly, event-based, etc.)? Is there an audiences we can target based purely on MCE data? (eg: everyone who Entered X journey or Sent Y email should be retargeted) Is there an audience where we can reuse a DE?	What is an existing experience or series made up of multiple journeys (onboarding, post-purchase, loyalty, nurture)? Do you have any logic that says if they were sent to, or met goal, or exited, then move them to the next journey?	What is an existing CRM-related process or journey in MCE you have scaling issues, want better CRM routing, or want richer segmentation? What external systems or data do you use that could enrich a process or experience?
Example Use Cases	• Flow enters Segment of everyone who opened Promotional Email. Then Flow triggers and sends Follow-up Email from MCE • Flow triggered by Event of everyone who entered Welcome Journey. Then Flow triggers and routes them to Nurture Journey in MCE	• Flow to orchestrate overall customer journey experiences by chaining together (daisy-chaining) existing MCE journeys • Flow prioritizes which journey a customer should enter when eligible to enter many	• Flow updates Contact record in Sales Cloud, then enters person into MCE Journey • Flow decisions on Case object in Service Cloud, then sends MCE Email • Flow updates order/inventory management, reservation data, ticket information, & sends MCE message

Use cases for *Flow Orchestrations*

Level 1

Create a Flow to trigger a single MCE journey or MCE email.

(quickly get familiar with Flow)

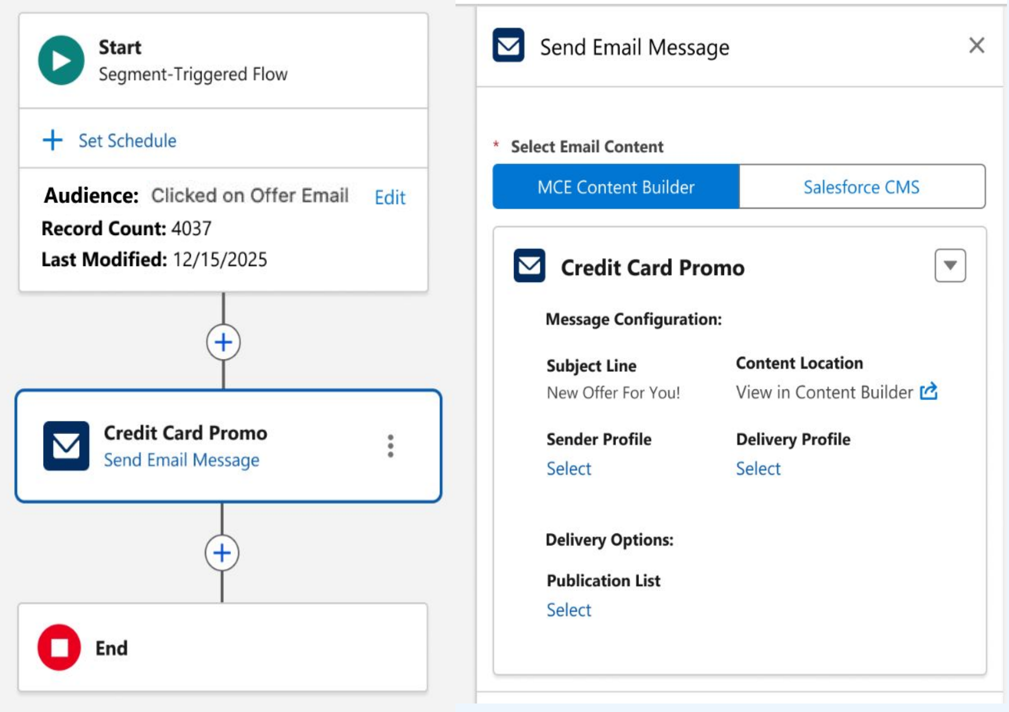
Level 2

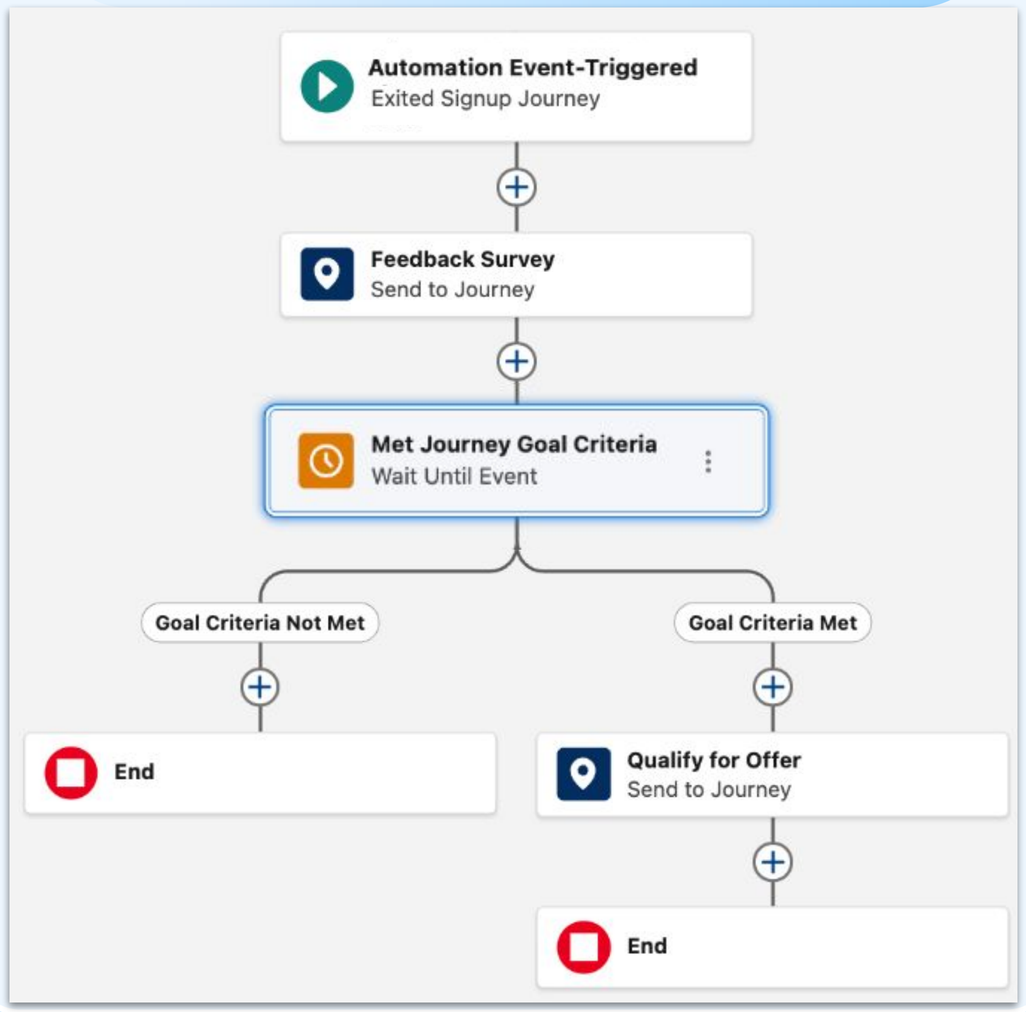
Create a Flow to connect 2-3 existing MCE journeys or MCE emails together.

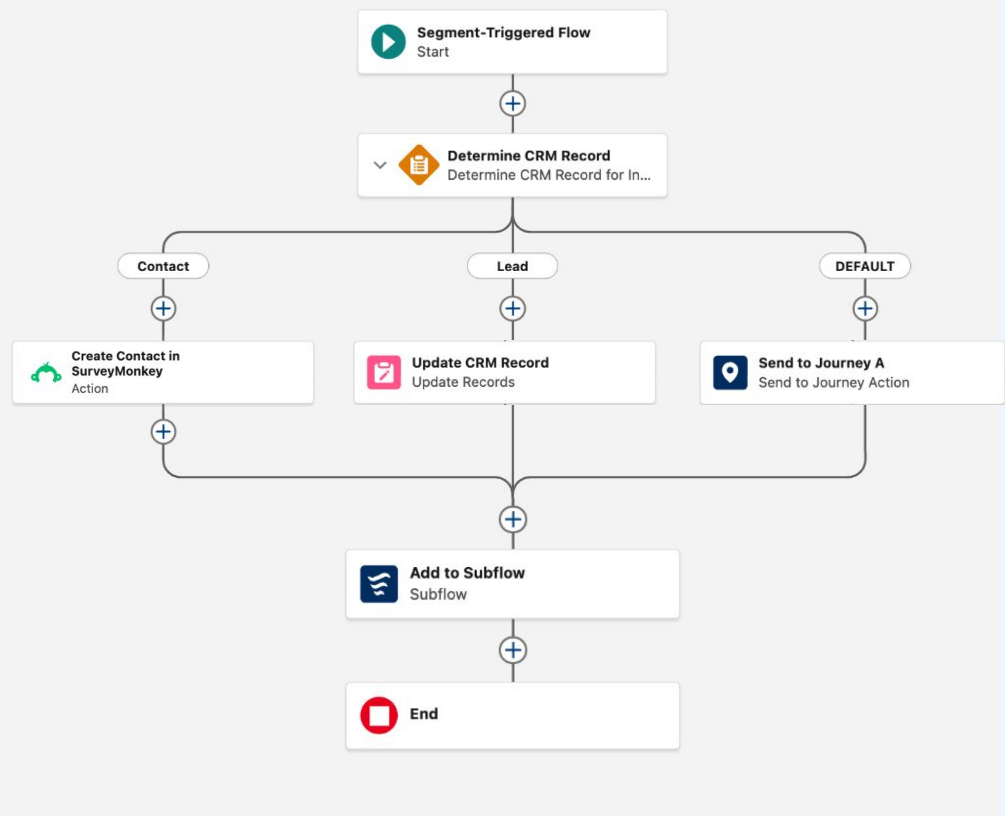
Level 3

Create an integrated Flow that updates Sales, Service, or External while also triggering an MCE journey or MCE email.

Visual Examples







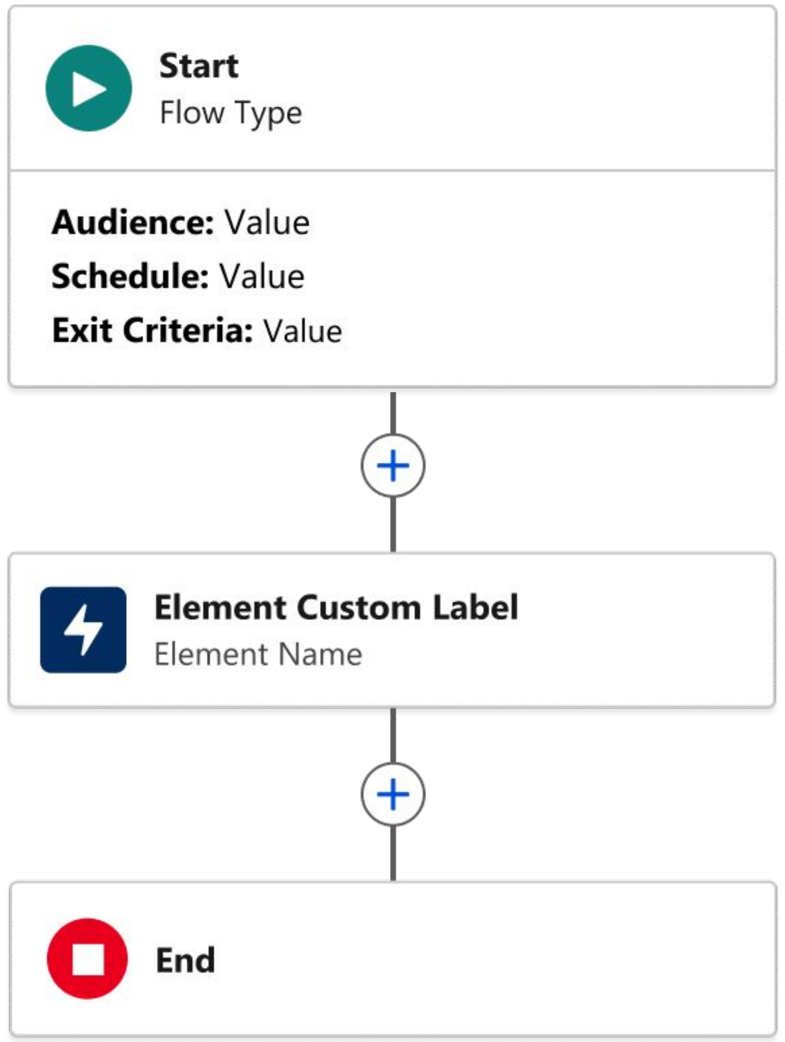
Flow Use Case Outline Framework

Example Use Case Outline

Use Case Overview	• Name • Description • Components • Team Required (which people in your org need to get involved?)
Flow Audience	• An event or segment? • What existing MCE audience should we reuse or modify to use for Audience? • Which existing journey(s) should we listen to / use to trigger the Flow? Which events (Exit, Goal Met, or Entry)? • What filters or criteria should we apply to audience for pilot use case (use test/internal Subscribers; or events from last X days)?
Flow Schedule	• What schedule (run once or recurring?) • What entry settings should the Flow have (always re-enter, never, or after completion)?
Communication #1 **(eg: first journey trigger)**	• What content / message(s) do we want to trigger first? • Does this content / data already exist in MCE or do we need to build it? Do we have data and skillset (AMPScript) for it already? • What journey (micro or robust) will that message live in?
Flow Decision	• Is this applicable for the use case? • Will we use a custom or standard Wait Until Event? Which journey(s) events should we listen for (Exit, Goal Met, or Entry)? • What filters or criteria should we apply (eg: events from last X days)? • What existing MCE data should we reuse for decisioning? What data extensions from the Contact Model?
Communication #2 **(eg: second journey trigger)**	• What content / message(s) do we want to trigger first? • Does this content / data already exist in MCE or do we need to build it? Do we have data and skillset (AMPScript) for it already? • What journey (micro or robust) will that message live in?

Flow Use Case Visualization

Cut and paste these graphics to help visualize your use case



Data

- Create Records
- Update Records
- Get Records
- Delete Records

Interaction

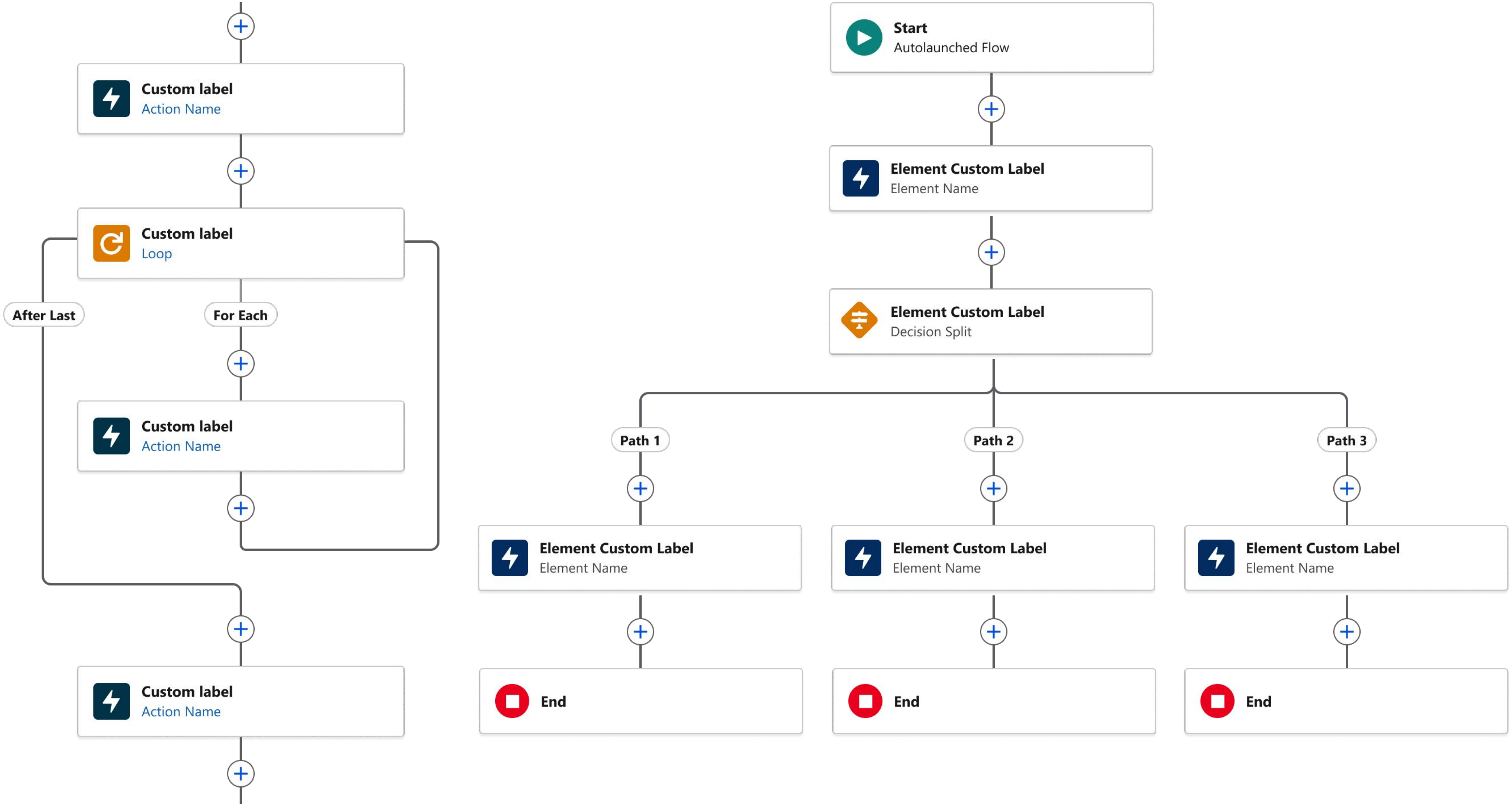
- Send Email Message
- Send SMS Message
- Action
- Subflow
- Send WhatsApp Message
- Forward conversation to Bot or Agent
- Send to Journey

Logic

- Assignment
- Decision
- Loop
- Transform
- Path Experiment
- Collection Sort
- Collection Filter
- Wait for Amount of Time
- Wait Until Date
- Wait Until Event
- Einstein Decision

Flow Use Case Visualization

Cut and paste these graphics to help visualize your use case

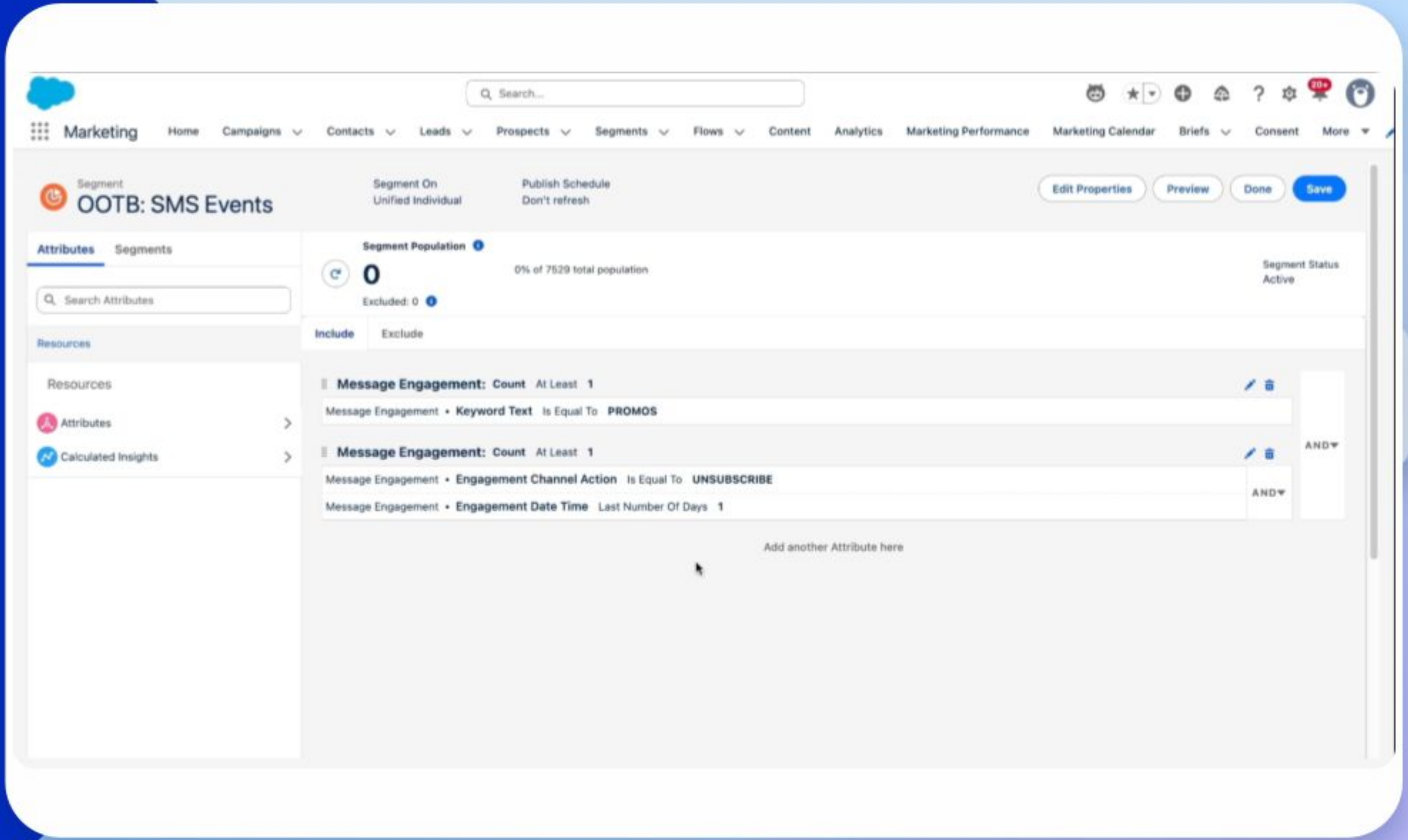


Build segments & event triggers

Access data from Salesforce, Data Extensions, and Public Cloud

Build audiences with Agentforce or through drag-and-drop functionality.

No SQL required.



Getting Started with *Building Segments*

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Build targeted audiences with clicks, no code.

What's different?

Marketing Cloud Engagement relies on SQL to create audiences, which means that you often have to rely on specialized IT expertise to build audiences for your campaigns.

Next-Gen works with your MCE data and provides no-code audience segmentation and event creation with both drag-and-drop and agentic functionality that allows marketers to use natural language to build audiences and ask questions about individuals in a segment.

Example capabilities

- Create inclusion, exclusion, and waterfall audiences with natural language or drag-and drop
- Use OOTB functions and filters such as SUMs, COUNTs, AT LEAST, CONTAINS, LAST X DAYS, etc.
- Enrich segments and create reusable event triggers using CRM & MCE data.
- Check for Segment Membership as part of Flow's Decision Splits and Exit criteria

Initial setup

Step 1: Connect MCE to Data 360 and sync OOTB MCE datasets (Journeys, Send, Asset data)

Step 2 (optional): Sync MCE DEs and CRM Objects to D360 to reuse or enhance audience and events

Step 3: Assign user access

Step 4: Create audiences using Data 360 Segment Builder or Agentforce.

ALT Step 4: Create custom Events using Engagement Signals

Step 5: Use audience in Flow

ALT Step 5: Create an Activation Target to sync audience to Engagement data extension

Key Considerations & Things to Know

- Are you planning to activate the Segment to MCE or Flow?
  - If Flow, then here are considerations:
    - You can trigger MCE Journeys/Sends (recommend audience for use case <1 million/hr)
  - Flow supports both Segments on Individual and Unified Individual.
    - If using Data Graph data to power Flow's Decision Split or Personalize will need to use Unified Individual.
- Do your MCE SubscriberKeys use values from CRM Contacts?
  - If not, do we want to use Identity Resolution to stitch these identities together for unified segments?

Use cases for *Building Segments*

Credit Consumption Guide: Data 360 Credits

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Level 1

Use drag-and-drop UX or Segmentation Agent to create segments or events based on out-of-the-box Engagement data.

Planning Questions

Which marketing audiences are we targeting/retargeting based purely on MCE data?

Which exclusion audiences or criteria (based on MCE data) you want to apply to audiences?

What event triggers can we make based purely on MCE data?

Example Use Cases

Build segments based on:

- Click X email, but not Y email
- Entered / exited X journey
- Opted-in to “X” SMS keyword
- Opened mobile app > 10 times last 30 days
- Exclude subscribers sent to > 10 times in last 7 days
- Exclude subscriber in “X” journey
- Entered Geofence in last 5 days

Level 2

Sync 1-5 well-defined Engagement DEs to Data 360 as custom DMOs. Create segments based on DEs.

Planning Questions

What key data extension(s) in MCE do you commonly use to build audiences?

Which DEs store key profile or event data?

Are there audiences, which ones have scale issues or SQL timeouts?

Example Use Cases

Enhance DEs with MCE data to create net new or modified audiences

- Gold Members who have not opened any emails in “X” time period
- Highly engaged subscribers that did not open mobile app

Level 3

Sync CRM data into Data 360 using standard bundles to enrich audience building and personalization.

Planning Questions

What CRM objects and data can we use to recreate or enhance existing audiences?

What customer data is in CRM that isn’t currently used in messaging campaigns?

Example Use Cases

Build segments enriched with CRM data:

- Exclude Contacts with Red Status
- Purchased in the last 30 days
- >5 web visits in last 7 days
- Attended customer event
- Engaged with social media

Connected Campaign Workspace

Centralize your Salesforce campaign operations and analytics.

Measure the impact of your campaigns with actionable analytics.

Getting Started with *Campaign Workspace*

Create SSOT & organize related campaign activities into one connected workspace.

What's different?

Marketers are spending more time managing campaign logistics and stakeholders than strategic work.

MCE did not have a "workspace" which centralized the wide array of activities that occur when building a marketing campaign.

The next-gen Campaign workspace provides a modern, intuitive homebase for marketers to standardize operational workflows, centralize campaign information, manage a variety of campaign tactics, review campaign analytics, and collaborate with the broader team in Salesforce or Slack.

Example capabilities

- Facilitate a standardized workflow for campaign creation, automation, and documentation.
- Centralize a wide range of activities and items --within Salesforce and outside of it-- related to a specific campaign.
- Create a SSOT for all campaign activities to be used for training, reporting, and broader stakeholder visibility.

Initial setup

Step 1: Connect MCE to Data 360 and sync OOTB MCE datasets (Journeys, Send, Asset data)

Step 2. Install Next-gen Data Kits

Step 3: Install Marketing Performance app & its underlying data model (SDM)

Step 4: Grant user access

Key Considerations & Things to Know

- Though existing CRM users likely have existing expertise already in place, any customer can customize the Campaign workspace, or workflows related to it.
- **CRM Admin Coordination**: Customizations made to objects or their relationships in Salesforce may req. Marketing Admin to coordinate with CRM Admin
- **Potential for Throw Away**: Advanced customizations or process workflows related to Campaign object, such as Slack integration or pre-canned approvals could be productized in the future (TBD).

Use cases for *Campaign Workspace*

*The use cases as outlined below will **NOT** consume credits (Data 360 credits, Salesforce Message credits, or Flex credits).*

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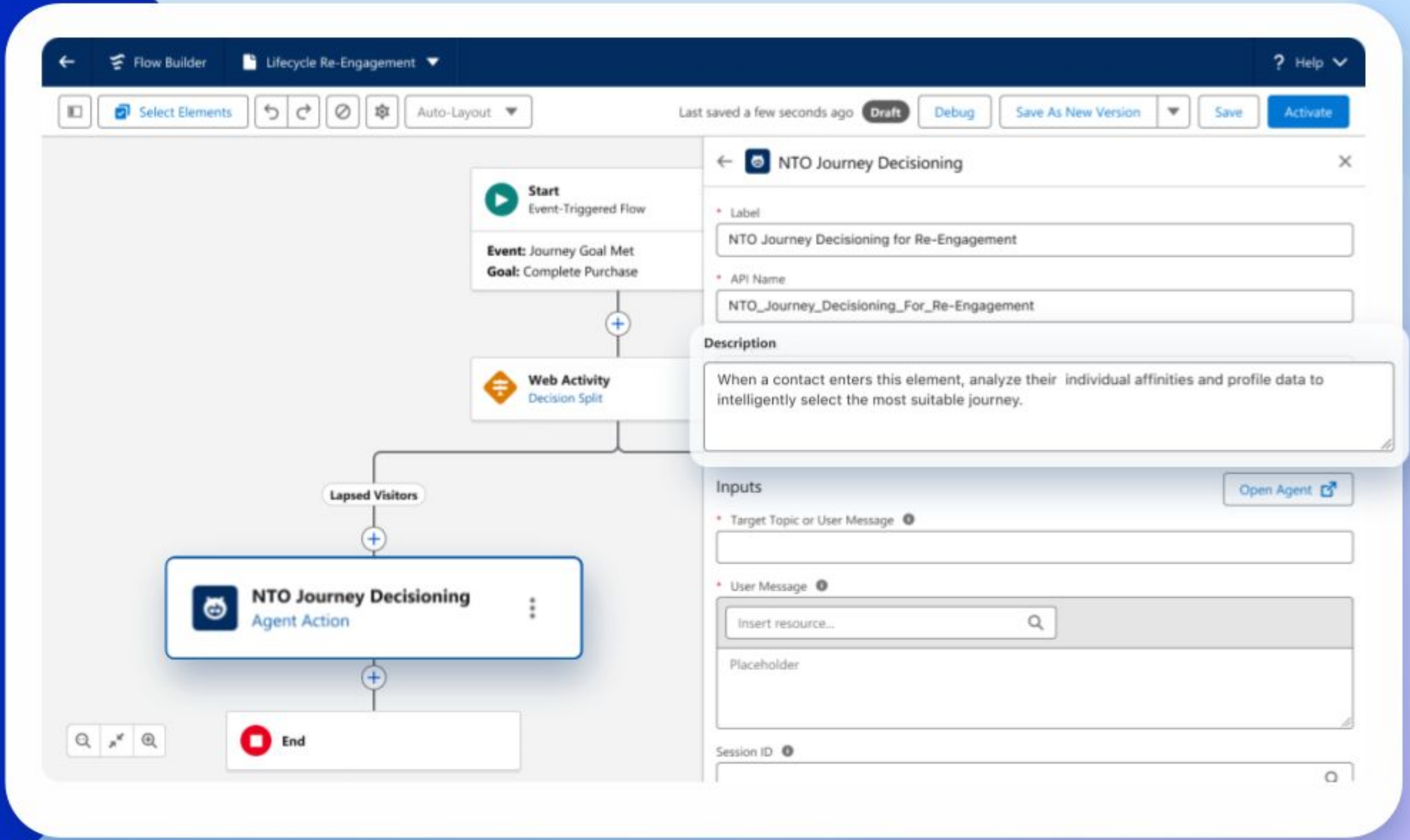
	Level 1	Level 2	Level 3
	Explore and familiarize the team with Campaign workspace and its out-of-the-box features; get inspired on customizations.	**Relate standard Salesforce objects to the Campaign object.** **Create custom Page Layouts & Record Types for Campaign object.**	**Relate custom or external objects to the Campaign object.** **Create custom operations workflows that incorporate Campaign object.**
Planning Questions	Do you have a centralized place to share "what we did for a campaign" or "here is how it performed"? What stakeholders inside Salesforce might want this information? Do you have groupings of related journeys? How do you report on performance across groups of journeys?	What internal information do you want to capture across every campaign? What campaigns capture unique information? What campaign information is most common requested from your stakeholders? Is there info that one business group needs but not others?	Which important assets are most widely used across our campaigns? What internal information do you want to capture or report on across every campaign? What campaigns capture unique information? What standardized workflows would improve quality and velocity?
Use Cases	• Send link to managers or sales team to view what journeys were in the Summer campaign, and how they performed • Centralize campaign brief and related information, such as budget, owners, goals, and journeys used in it	• Relate the Files, Cases, Notes, or Promotions objects to Campaign object. • Create different Record Types or Page Layouts for Events vs Webinars vs Digital campaigns; or AMER vs EMEA teams; BU1 vs BU 2 -- each requiring marketers to input unique information.	• Relate links to Social Media, Blog, or Webinar posts used in a campaign. • Create a dashboard and workflow for intake requests and approvals, which then automatically templatize campaigns and create Slack channels for them.

Agentforce Journey Decisioning

Prioritize the next-best journey
for each individual with Agentforce.



Getting Started with *Agentic Decisioning*

salesforce

Power Agentforce to guide customers to the next-best journey based on real-time context.

What's different?

Automatically select and assign the optimal customer journey in real-time based on behavior and preferences, eliminating manual decision-making and the need for complex custom code.

Delivers personalized experiences that drive higher ROI, engagement, and conversions while freeing marketers to focus on strategic initiatives.

Usage examples

- Marketers identity high-value moments that act as triggers for the agent to then use the available customer data and predefined journey goals to automatically route each individual to the most relevant path (MCE journey).

Initial setup

Step 1: Connect MCE to Data 360 and sync OOTB MCE datasets (Journeys, Send, Asset data)
Step 2. Install Next-gen Data Kits
Step 3: Install Marketing Performance app & its underlying data model (SDM)
Step 4: Grant user access
Step 5 (optional): Sync MCE DEs or CRM objects to D360 for additional customization
Step 6: create Data Graph to ground agent
Step 7: Create Decisioning Agent in Agent Builder (assign topics & actions)
Step 8: Create the use case (select the BU and existing journeys)
Step 9: Build a Flow and add the new Journey Decisioning Agent element

Key Considerations & Things to Know

- Journey Decisioning is not for batch and blast emails, better suited for segments less than 20,000 (important to consider the consumption of Flex credits)
- Must use Unified Individuals (i.e. Identity Resolution) and a Data Graph to help ground the agent and make the best determination for the next-best journey for each individual.
- Each decisioning agent can evaluate up to 5 journeys at a time and create a single output DE (and update it in real-time) in MCE with a recommendation of the next-best journey.

Use cases for *Agentic Decisioning*

Credit Consumption Guide:
- Flex Credits
- Data 360 Credits
- Message Credits

Level 3

Use Agentforce Decisioning to create a more effective and dynamic way to route subscribers to the next-best-journey.

Planning Questions

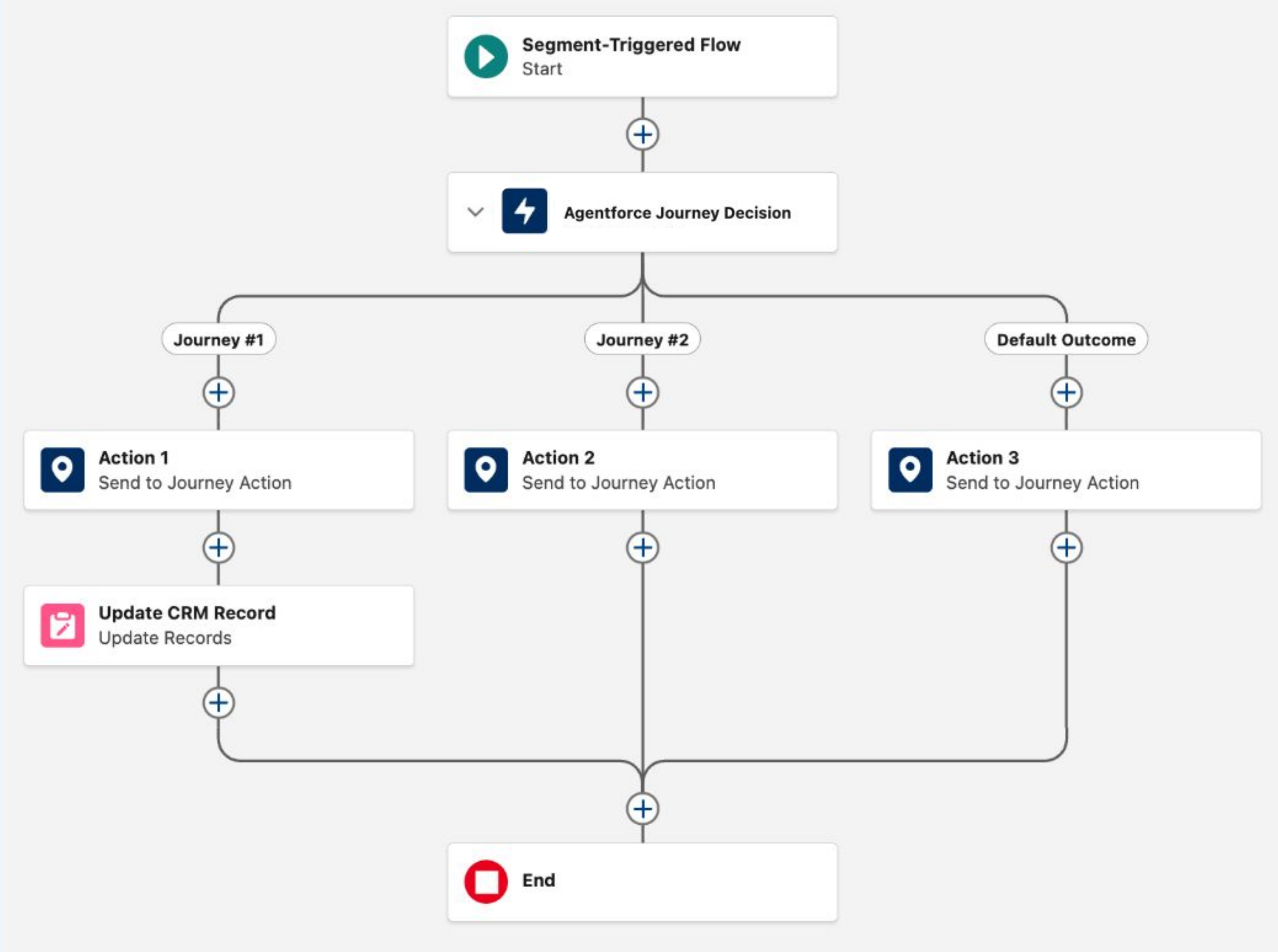
Do you have any large Journeys with very complex Decision Split logic (or data processes to inform them)?

What existing logic do you use to determine which MCE journey to add a customer to? What about where they go after?

Use Cases

- Post-purchase decisioning
- Healthcare post-care decisioning
- Travel re-engagement decisioning
- Non-profit post-donation decisioning

Agentic Journey Decisioning is our most complex use case to begin with. We would consider a “Level 3” as far as effort, setup, familiarity with Data 360, and overall complexity.



Introducing the

MCE+ 60-Day Action Plan

Chapter 0

Educate & prepare

Pre-kickoff

Chapter 1

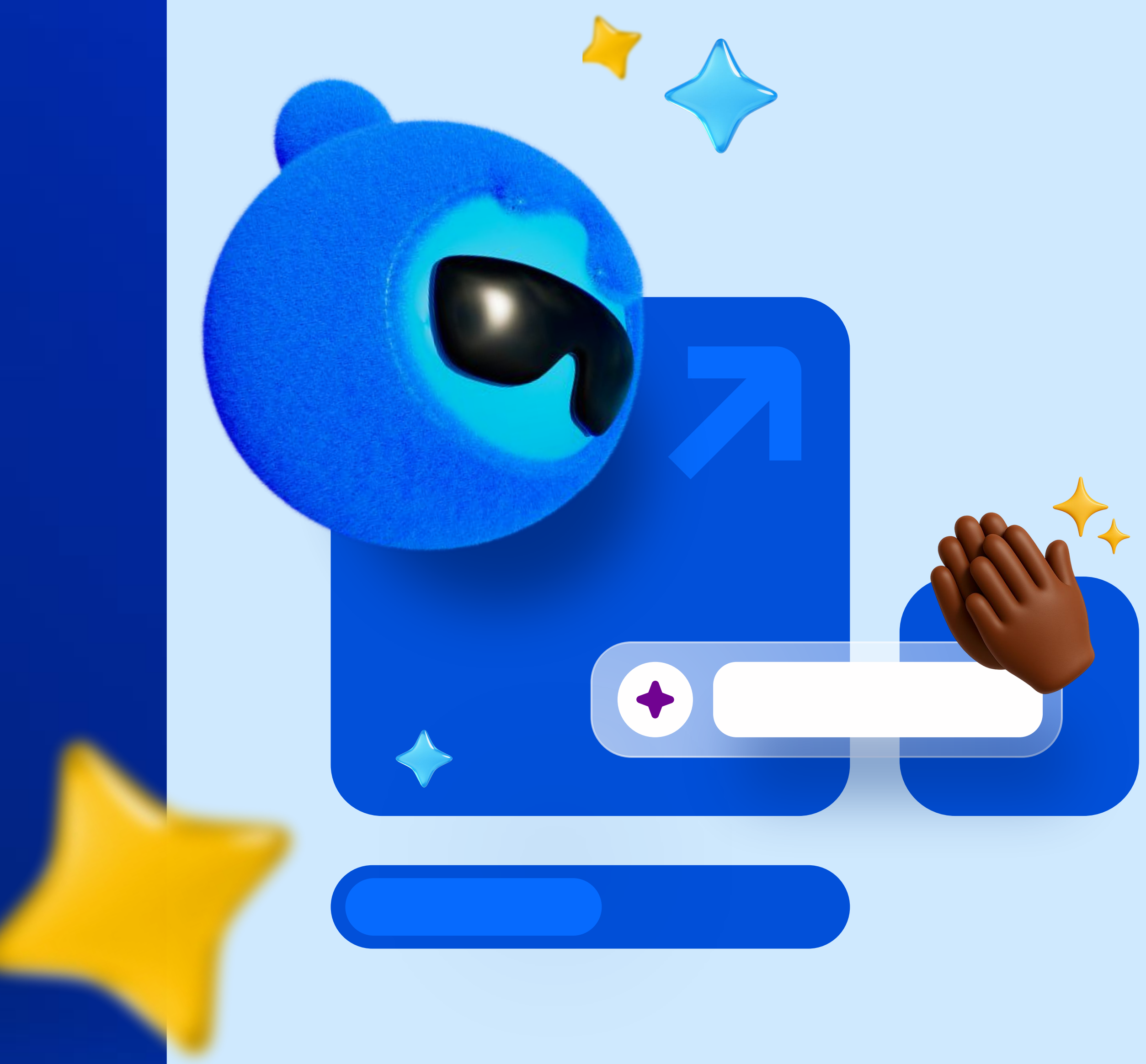
Setup, configure, & execute

Days 0-60

Chapter 2

Review & expand

Beyond 60 days



Chapter 2

- Chapter 2 Checklist
- Measuring success & ROI
- Beyond the first 60 days
- Your roadmap with MCE+

Chapter 2 Checklist

Review & expand upon low-lift use cases

Key Activities	Deliverables	Success Criteria	Responsible Role
☐ **Measure Results**	Review the impact of the use case.	[depends on use case]	Core Team
☐ **Share Lessons Learned**	Core team collects qualitative feedback from the Pilot Team and shares learnings with broader organization.	A formal feedback session is documented and shared with broader team. Core Team also creates plan for their own next steps.	Marketing Champion
☐ **Feature Mapping**	Identify 3-4 specific, MCE+ features supporting broader goals.	Features assigned owners; training resources deployed; Sponsor receives applicability report.	Marketing Champion
☐ **Expand & Enable**	Iterate on low-lift use cases; develop documentation for broader user base.	Execution plan created for next set of goals; enablement assets localized.	Core Team
☐ **Other Teams Ramp Up**	Other teams review materials and form their own initial use case plans.	Other teams understand available resources and execute an initial use case.	Other Business Units
☐ **Reassess & Iterate**	Marketing Champion shares success stories and broader plan for organization adoption.	Goals set for the next cycle of optimization (e.g., H1 2026 roadmap).	Marketing Champion & Executive Sponsor

Success KPIs of the low-lift use cases

Build Unified Reports

Operational Efficiency & Talent Leverage
- Improved Time to Insight / Resolution
- Reduced FTEs Involved (no SQL)
- More Marketers Able to Self-service

Strategic Impact
- Campaign Effectiveness (CTV, CTR, etc)
- Time to Launch

Build Flow Orchestrations

Agility to Market & Talent Leverage
- Incr. Campaign Velocity / Time to Launch
- Efforts Scaled
- CRM Admins Able to Contribute Expertise

Customer Experience & Business Results
- Conversion Rates & AOV
- Customer Satisfaction (CSAT, Reviews)

Build Segments

Agility to Market & Talent Leverage
- Incr. Campaign Velocity / Time to Launch
- Reduced FTEs Involved (no SQL)
- More Marketers Able to Self-service

Customer Experience & Business Results
- Conversion Rates & AOV
- Spend Optimization

Customize Campaign workspace

Operational Velocity & Business Continuity
- Incr. Campaign Velocity / Time to Launch
- Efforts Scaled
- Internal Overhead Streamlined

Quality Control
- Compliance Achieved
- Reduced Cases; Time to Resolution

Agentic Decisioning

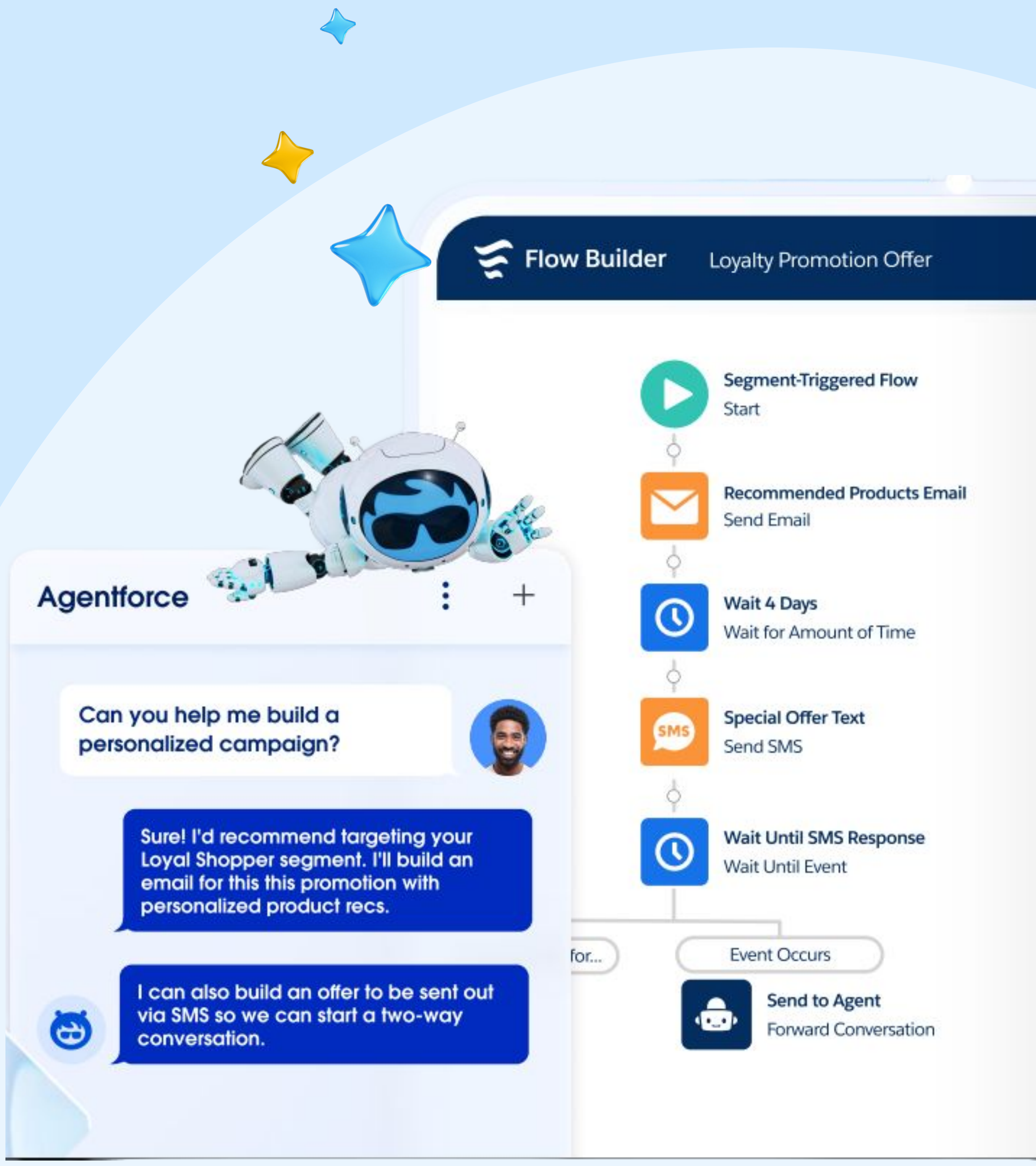
ROI & Business Impact
- Incr. ROI & LTV
- Incr. Conversion & CSAT

Operational Velocity
- Reduced FTEs Involved (no SQL)
- Efforts Scaled

Beyond the first 60 days

Steps to support continued adoption and success of your MCE+ deployment

- **Scale what works**
  Roll your proven use case to full production
- **Build on momentum**
  Apply your learnings to new use cases that drive business value
- **Spread the knowledge**
  Enable other teams with your playbook and success stories



How to get started with Agentforce Marketing

Gradual Adoption

Continue building on MCE while incrementally adopting Agentforce Marketing for select use cases and operational processes.

Why?

Adopt at your own pace while getting immediate benefits that enhance your existing MCE account.

Accelerated Adoption

Build *all new* campaigns & operational processes on Agentforce Marketing while maintaining MCE instance for existing campaigns and operations.

Get all the benefits of Agentforce Marketing without disrupting your operations.

Later in 2026

Accelerated Adoption

Enhancements coming later in 2026 for MCE+ customers

Common Questions

- How do I manage consent?
- What about my channel configurations?
- Do I need to learn new scripting?

Later in 2026

- Synchronize subscriptions & consent between MCE & next-gen sending
- Share Email Domains and SMS codes across MCE and next-gen
- Maximize ROI and continuity by using AMPscript or Handlebars

Your roadmap with MCE+

salesforce

		First 60 Days	Beyond the First 60 Days
Today's Focus	**Basic Setup**	Connect MCE-D360, Install Kits, & Assign Permissions	
	Initial Exploration	View Digital Wallet & OOTB Analytic Dashboards	
	Build Initial Use Cases MCE and Reports, Flows, Segments, Campaign workspace, & Journey decision	Initial Low-lift Use Cases	Scale and Expand Use Cases
	Setup pt 2 Additional Data & Config		Expand D360 Footprint & Config *net new* channels
	Build More Use Cases Additional Setup Required		Agentforce 2-Way Messaging & Campaign Creation for *net new* channels

Unified Agentforce channel sending:

		First 60 Days	Beyond the First 60 Days
Later in 2026	**Setup pt 3** Recommend later in 2026		Reuse *existing* MCE consent, content, & data with Agentforce sending
	Build Use Cases pt 3 Recommend later in 2026		Agentforce 2-Way Messaging & Campaign Creation for *existing* channels

Available Today

In H2 2026, Salesforce making easier for MCE+ users to adopt by enabling reuse of MCE consent, content, & data with Agentforce sending

Thank you