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FREE PLAYBOOK · 2026 EDITION

THE BACKOUCHE GROUP

From Pardot to Marketing Cloud Next..

A field-tested migration playbook for Australian SMBs running Account Engagement (Pardot) on Salesforce. Built from real engagements. Specific numbers, concrete steps, honest decisions.

SPECIFIC

Object names, click paths, time-per-asset numbers — not generic advice.

CONCRETE

Every chapter ends with something you can do this week.

HONEST

When DIY beats hiring a partner — and when it doesn't.

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Why this playbook exists

Salesforce is winding Account Engagement (formerly Pardot) toward end-of-life. Marketing Cloud Next — the Data Cloud-native successor — is now the default recommendation for every new marketing automation project on the platform.

If you run journeys, scoring, automation rules, lists, or forms on Pardot today, you need a migration plan. Not a slide deck. A plan.

This document is what we actually do on engagements — distilled from real Australian SMB migrations (Cartology, Rawson, Dovetail) — without the consultancy padding.

Three rules for the rest of these pages:

- **Specific.** No "modernise your stack." Object names, click paths, time-per-asset numbers.
- **Concrete.** Every chapter ends with something you can do this week.
- **Honest.** Some migrations are doable in-house. We say which ones and why.

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01 The migration sequence

What "migration" actually means in 2026

Marketing Cloud Next is not a new version of Pardot. It's a different architecture sitting on top of Data Cloud (Salesforce's CDP). Your prospects, lists, scoring, journeys, and templates do not lift-and-shift. You rebuild them inside a new model — the **Unified Individual** — fed by Data Cloud Data Streams.

Practically, this means a Pardot → Marketing Cloud Next migration has three parallel workstreams:

1. **Foundation.** Stand up Data 360 (Data Cloud), install the Marketing Cloud Next data kits, configure identity resolution.
2. **Engagement data.** Pipe historical email/form/page engagement out of Account Engagement into Data Cloud so you keep insight continuity.
3. **Asset rebuild.** Recreate templates, landing pages, forms, scoring, and journeys inside Marketing Cloud Next using the new builders.

If you try to do all three at once you will burn the timeline. The order below is what works.

Week-by-week sequence

Week 1 — Foundation

Goal: A Marketing Cloud Next instance that can technically send an email. Nothing more.

- Enable **Data 360 (Data Cloud)** in Setup → Data Cloud Setup → "Set Up Your Data Cloud Instance".
- Assign the **Data Cloud Architect** (formerly Data Cloud Admin) permission set to your build user. Without it, the Data Space dropdown stays greyed out and you will lose half a day chasing it.
- In **Setup → Assistant Home → Basic Settings**, complete the six-step kickoff: 1. Enable Data Cloud 2. Create a Salesforce CRM Connector 3. Add a Default Email Channel 4. Add Data Protection Details to Records 5. Select a Data Space (use **Default** unless you have a multi-brand justification) 6. Enable Marketing Cloud
- **Install the Marketing Cloud Next Data Kits** (auto-installs DMOs, field mappings, schema). Allow up to 30 minutes:
- Sales Data Kit
- Marketing Setup Objects Data Kit
- Consent Objects Data Kit
- Flows Integration Data Kit
- Email Channel Data Kit
- SMS Channel Data Kit
- WhatsApp Channel Data Kit
- Generate the default **Identity Resolution Ruleset** (email-match only is enough at this stage — refine later).
- Create the first Data Stream: Salesforce CRM bundle → Sales Bundle → deploy. This pulls Account, Contact, Lead, Opportunity, OpportunityContactRole, User, CurrencyType into Data Cloud as `*_Home` Data Lake Objects.

Week 2 — Engagement data + email channel

Goal: Two years of Account Engagement engagement history living inside Data Cloud, and a verified email sending domain.

Engagement data migration (Account Engagement → Data Cloud):

1. Data Cloud Setup → Salesforce CRM tab → install the **"Marketing - Account Engagement CRM Data"** bundle (admin-only).
2. Data Cloud → Data Streams → New → Salesforce CRM connector → choose **Marketing - Account Engagement CRM** bundle. Deploy.
3. Salesforce Setup → **Data Cloud Integration** → select your Account Engagement Business Unit.
4. Create an **Account Engagement Data Stream** (type: Email Engagement Data — also available: Form Engagement, Web Page Engagement, Custom URL Engagement).
5. In Account Engagement → Settings → Connectors → edit the Data Cloud Connector → set **Lookback Date = 2 years** → activate.

You now have ~24 months of email engagement history inside Data Cloud, attached to the Unified Individual model.

Email channel:

- Assistant Home → Set Up Email → "Go to Authenticated Domains" → Add Domain.

- **Use a subdomain** (e.g. `email.yourcompany.com.au`). Never authenticate the apex domain — you'll wreck your transactional mail.
- Add the CNAMEs (`s1._domainkey.email`, `s2._domainkey.email`) to your DNS registrar. Wait 24–48h for propagation, then validate.
- Add your physical address (compliance footer).
- Keep consent management on the default (commercial only — transactional is optional and not required for Day 1).

Week 3 — Asset rebuild + Einstein + cutover prep

Goal: Production-ready Marketing Cloud Next, scoped to one campaign you can actually run.

- Build a **Data Graph** (Customer Engagement → Configure Basic Personalization → Go to Data Graphs → New from Scratch). Primary DMO = **Unified Individual**. Add: Individual (via **Unified Link Individual**), Contact Point Email, Contact Point Phone, Contact Point Address, Email Engagement, Website Engagement. This is what powers merge fields in email templates. Refresh schedule = daily unless you have a real-time need (it costs Data Cloud credits — track via the Salesforce Digital Wallet).
- **Migrate consent** from Account Engagement (see chapter 2 — full SQL + SFTP procedure).
- Recreate the priority assets. The order that survives time pressure: Templates → Forms → Landing Pages → Lists/Segments → Scoring → Journeys/Flows.
- Enable Einstein:
- **Send Time Optimization** (opt in to the Global Data Model — needs ~30 days of history before predictions stabilise).
- **Metrics Guard** (filters bot opens/clicks; turn it on Day 1 so your reporting is clean from the start).
- **Engagement Scoring** (Advanced edition only).
- **Engagement Frequency** (Advanced edition only).
- Install the analytics packages from AppExchange:
- Marketing Engagement Analytics Package
- Landing Pages and Forms Analytics Package
- Flow Reports Analytics Package
- Brand: upload logo, configure the branded landing-page domain.
- Page Customization: add the Marketing Cloud Next Lightning Web Components to Contact and Lead page layouts (Privacy Consent Status, Data 360 Profile Engagement, Data 360 Profile Insights). This replaces the Account Engagement History widget Pardot users are used to.
- Permission sets: assign **Marketing Cloud Admin** (full) or **Marketing Cloud Manager** (build-only — no Setup access) to each marketer.

What to leave for last

- **Don't run the Pardot disconnect until the new platform has sent and reported on at least one production campaign.** A common mistake: cutover decided by calendar, not by a successful end-to-end test.
- **Don't migrate every Engagement Studio program before you migrate the segments that feed them.** Build segments first; flows second.
- **Don't decommission the Pardot tracker domain (`go.example.com.au`) until web traffic to it has dropped to zero for 30 days.** It's serving cookies and redirects you forgot existed.

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02 The complete inventory checklist

Before you touch Marketing Cloud Next, inventory what's actually in your Pardot org. The single biggest source of overrun on these projects is finding "ten more lists" in Week 4.

Pardot asset inventory — what to count, and how long each takes

The numbers below are real per-asset rebuild times from a 2025 Cartology engagement (Woolworths). Use them to size your project.

PARDOT ASSET	MANUAL REBUILD TIME	WHAT YOU MEASURE	NOTES
Landing Pages	**30 min each**	Count + complexity (forms embedded? custom CSS?)	Layout + content + form linking
Classic Email Templates	**15 min each**	Count of templates actively used in last 12 months	Drop unused first
Lightning Email Templates	**15 min each**	Count	Already on the new builder — fastest to migrate
Engagement Studio Programs	**30 min each**	Active programs only (skip drafts, skip "test" copies)	Each maps to a Marketing Cloud Next Flow
Lists (Dynamic + Static)	**10 min each**	Count + segmentation logic complexity	Re-express as Data Cloud Segments
Forms + Form Handlers	**30 min each**	Count + which website pages embed them	Form Handlers usually break — re-test every one
Custom Redirects	**10 min each**	Count of redirects with traffic in last 90d	Drop the rest
Automation Rules	**10 min each**	Active rules only	IF/ELSE → Salesforce Flow or Marketing Cloud Flow
Completion Actions	(fold into form/page count)	List per asset	Often forgotten until the form doesn't work
Custom Fields synced to Salesforce	5 min per field	Count + identify which feed segmentation	These map to Data Cloud DMOs

A worked example

Cartology's actual count (2025):

- 26 landing pages → 13 hours

- 51 classic email templates → 12.75 hours
- 15 lightning email templates → 3.75 hours
- 6 engagement studio programs → 3 hours
- 444 lists → 74 hours (the killer line item — see below)
- 17 forms / form handlers → 8.5 hours
- 7 custom redirects → 1.17 hours
- 6 automation rules → 1 hour

Total manual rebuild: ~117 hours / 15 working days.

This is a Pardot-to-Pardot migration baseline. **Pardot to Marketing Cloud Next is 1.5–2× longer** because lists become Data Cloud Segments (which require field mapping work that lists don't), and Engagement Studio programs become Marketing Cloud Next Flows (which use a different builder entirely).

The list problem (and how to avoid 74 hours of rebuild)

Most Pardot orgs accumulate lists for years. The 444-list count above is normal for a 5-year-old org.

Don't migrate them all. Run this triage in week 0:

1. **Pull the Pardot list export.** Filter to lists with members > 0 AND used in a campaign / automation / Engagement Studio program in the last 12 months.
2. Most orgs reduce by 60–80%. Cartology's 444 lists likely have ~80–100 that are actually load-bearing.
3. Of the survivors, group them by what defines membership (job title, region, lifecycle stage, behaviour). You'll find duplicates and near-duplicates — collapse them.
4. The lists that survive triage become **Data Cloud Segments** built on the Unified Individual DMO.

Pardot → Marketing Cloud Next mapping (the cheat sheet)

PARDOT CONCEPT	MARKETING CLOUD NEXT EQUIVALENT	WHERE IT LIVES
Prospect	Unified Individual	Data Cloud (DMO)
Prospect ID	Unified Link Individual + Identity Resolution Ruleset	Data Cloud
List (Static)	Segment (manual / list-based)	Marketing Cloud Next, fed by Data Cloud
List (Dynamic)	Segment (rule-based on Unified Individual fields)	Marketing Cloud Next
Engagement Studio Program	**Flow** (built in Flow Builder inside Marketing Cloud Next)	Marketing Cloud Next
Automation Rule	Marketing Cloud Flow OR Salesforce Flow	Salesforce
Completion Action	Flow trigger / Form action	Marketing Cloud Next
Email Template (Lightning)	Email Content (CMS Workspace)	Content → Content Workspace for Marketing Cloud
Email Template (Classic)	**Rebuild from scratch** in the new email builder	Marketing Cloud Next
Landing Page	Site / Form (in Marketing Cloud Next Sites & Forms)	Marketing Cloud Next
Form	Form (Marketing Cloud Next) — Form Handlers do not have a like-for-like; rebuild via Web Tracking + Data Cloud	Marketing Cloud Next
Tracker Domain (`go.example.com`)	Branded Landing Page Domain (configured in Brand)	Marketing Cloud Next
Scoring Rule	Scoring (Customer Engagement → Scoring Setup)	Marketing Cloud Next
Grading	No direct equivalent — replace with Einstein Engagement Scoring	Marketing Cloud Next (Advanced)
Custom Redirects	Standard Salesforce URL redirects or branded short-link tooling	Outside Marketing Cloud Next
Pardot Email Engagement (opens/clicks)	Email Engagement DMO + Data Graph	Data Cloud
Pardot Form Engagement	Form Engagement DMO	Data Cloud (via the Account Engagement Data Stream)
Web Pages tracked by Pardot cookie	Web Page Engagement DMO + Web Tracking connector	Data Cloud
Connected Campaigns	Campaigns (with Brief + Flow attached)	Salesforce / Marketing Cloud Next

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03 The 7 pitfalls we've seen in the wild

Each of these has cost a real client a real week. They are listed in order of how often we see them.

Pitfall 1 — Authenticating the apex domain

What it looks like: Someone enters `yourcompany.com.au` in the Authenticated Domains step and adds the DKIM CNAMEs to the apex zone. Two days later, transactional email from Sales Cloud, Service Cloud, and your CRM workflows starts going to spam.

Why it happens: The Add Domain dialog doesn't warn you. Apex authentication overrides the SPF/DKIM you already had set up for Google Workspace / Microsoft 365.

The fix: Always use a subdomain (`email.yourcompany.com.au` , `e.yourcompany.com.au` , `mkt.yourcompany.com.au`). If you've already authenticated the apex, remove the records, wait 48h, and re-add against a subdomain.

Pitfall 2 — Migrating before you triage lists

See Chapter 2. Teams budget 15 days, find 444 lists in week 1, panic, blow the timeline. **Triage first. Migrate second.**

Pitfall 3 — Not setting the Data Cloud Connector lookback to 2 years

What it looks like: You activate the Account Engagement → Data Cloud connector with the default lookback. Three weeks later marketing asks for a list of "everyone who opened anything in the last 18 months." The data isn't there.

The fix: In Account Engagement → Connectors → Data Cloud Connector → set **Lookback Date = 2 years** *before* activation. You can't backfill silently after the fact without re-establishing the connection.

Pitfall 4 — Forgetting the `Unified Link Individual` DMO when building a Data Graph

What it looks like: You build a Data Graph with Unified Individual as primary, try to add the Individual DMO directly, and the email merge fields render as `null` for everyone.

Why it happens: Data Graphs join through the Identity Resolution layer. The bridge object is `Unified Link Individual` — without it, Unified Individual and Individual aren't connected.

The fix: When adding DMOs to a Data Graph, always add `Unified Link Individual` first, then `Individual` , then the Contact Point and Engagement DMOs.

Pitfall 5 — Cutting over Pardot before consent is migrated

What it looks like: Marketing Cloud Next sends its first campaign and the unsubscribe rate is 8× the historical average — because everyone you've ever emailed is now treated as un-consented and gets the full opt-in flow.

The fix: Before first send, run the consent migration in Chapter 4 (Step 4: SQL → SFTP CSV → import). All active subscribers from the last 12 months get opted into Marketing Cloud Growth's commercial subscription. Without this step, your sender reputation craters in week one.

Pitfall 6 — Form Handlers that no longer match anything

What it looks like: A web form on the corporate site has been silently failing for 4 months because the Form Handler endpoint changed during migration and no one tested the marketing pages.

The fix: Inventory every web page that posts to a Pardot Form Handler URL. There's usually 3–5× more than marketing remembers. Replace each with a Marketing Cloud Next Form embed (or a custom JS post to the Web Tracking endpoint). Test every one before disconnect day.

Pitfall 7 — Underestimating Data Cloud credit consumption

What it looks like: A Data Graph refreshing every 15 minutes. Three months in, finance asks why the Data Cloud bill is 4× the quote.

The fix: Default Data Graph refresh = **daily**. Move to hourly only for graphs powering real-time use cases (transactional email personalisation, abandoned cart, etc.). Track consumption in the **Salesforce Digital Wallet**. Set a credit alert at 80% of monthly budget.

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04 Pre & post-migration audit templates

Pre-migration data audit (run this today — 1 day of effort)

Open a spreadsheet with these tabs and fill them in. This is the single most useful artefact on the project — it sizes the work, exposes orphans, and gives you a rollback baseline.

Tab 1 — Asset inventory. Use the asset table from Chapter 2. One row per asset.

Tab 2 — Field mapping. Every custom field on Contact, Lead, and Prospect. For each field, three columns: - Used in segmentation? (Y/N) - Used in email merge? (Y/N) - Mapped to a Data Cloud DMO field? (Y/N — fill this in during migration)

Tab 3 — Domain & DNS. - Current Pardot tracker domain(s) - Current SPF, DKIM, DMARC records - Planned Marketing Cloud Next subdomain - DNS registrar + admin contact - Planned cutover date for DNS changes

Tab 4 — Active integrations. - Every system that posts to / pulls from Pardot (CRM sync, webform endpoints, Zapier, custom integrations) - Owner of each integration - Whether it survives migration as-is or needs rework

Tab 5 — Compliance. - Where consent is currently stored (which field, which object) - Date of last database opt-in refresh - DPO sign-off on the migration approach

Tab 6 — Stakeholder list. - Every person who logs into Pardot today - Their planned role in Marketing Cloud Next (Admin / Manager / no access) - Whether they need training before cutover

Post-migration validation checklist

Use this on the day of cutover and again 7 days later.

Foundation

- [ ] Data Cloud is enabled and the Default Data Space is selected for Marketing Cloud
- [ ] Marketing Cloud Next Data Kits all show "Deployed" status
- [ ] Identity Resolution Ruleset is generated and runs on schedule
- [ ] Salesforce CRM Data Stream shows last refresh < 24h ago
- [ ] Account Engagement Data Stream shows last refresh < 24h ago and lookback = 2 years

Email channel

- [ ] Authenticated subdomain shows "Validated" status
- [ ] Test send from Marketing Cloud Next reaches `gmail.com`, `outlook.com`, and a corporate Microsoft 365 inbox
- [ ] All three test sends pass DKIM and DMARC alignment (check headers)
- [ ] Physical address renders in the email footer
- [ ] Unsubscribe link works and writes a record back to consent storage

Data

- [ ] Total Unified Individual count ≈ Pardot Prospect count (within 5% — small variance expected from identity resolution merging)
- [ ] At least one Data Graph is Active and refreshed in the last 24h
- [ ] Sample 10 Unified Individuals — every one has the merge fields needed for the welcome email
- [ ] Sample 10 — Email Engagement DMO has at least one historical email event from the Account Engagement period

Consent

- [ ] Active subscriber count in Marketing Cloud Growth ≈ count of opted-in subscribers in Pardot (within 2%)
- [ ] At least 10 sample subscribers spot-checked for correct subscription status
- [ ] Unsubscribe from a test email immediately reflects in Marketing Cloud Growth consent record

Assets

- [ ] Every priority email template renders correctly on desktop Gmail, Outlook 365, iOS Mail, Android Gmail
- [ ] Every priority landing page loads on desktop + mobile under 2 seconds
- [ ] Every form submits successfully and creates the expected Lead/Contact + writes to Data Cloud
- [ ] Every active flow has been triggered with a test record and the test record reached the expected end state

Reporting

- [ ] Marketing Engagement Analytics dashboard renders for at least one campaign
- [ ] Landing Pages and Forms Analytics shows form submission counts matching Salesforce Lead creation
- [ ] Flow Reports Analytics shows flow entry/exit counts

Cutover decision

- [ ] All of the above pass on cutover day
- [ ] All of the above still pass 7 days post-cutover
- [ ] [ ] **Only then** initiate Pardot Business Unit pause / disconnect. Not before.

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05 When to migrate yourself vs. when to bring in a partner

This is the chapter most playbooks turn into a sales pitch. We'll keep it honest.

You can probably do this in-house if:

- You have a Salesforce admin who has shipped at least one Flow Builder automation in production and is comfortable in Setup.
- Your Pardot org has **fewer than 50 active assets total** (templates + landing pages + forms + active engagement programs combined).
- You don't currently rely on Pardot scoring, grading, or Engagement Studio for lead routing decisions that affect revenue.
- Your CRM data is clean — minimal duplicate Contacts, consistent custom field usage, no shadow data flows you don't understand.
- You can spare 4–6 weeks of one person's calendar (not 4–6 weeks of elapsed time — actual focused work time).
- Email deliverability is not currently a known issue in your org.

If five of those six are true, do it yourself. Use this playbook, stand up Marketing Cloud Next in week 1, do a parallel run for 4 weeks, cut over.

You probably want a partner if:

- You have **>200 active Pardot assets**, multiple Business Units, or a multi-org Salesforce structure.
- Pardot scoring or Engagement Studio decisions are wired into Sales Cloud lead assignment, opportunity workflows, or revenue attribution.
- You have custom Form Handlers, custom CSS-heavy landing pages, or third-party JS posting to Pardot endpoints (Marketo migration veterans, this is you).
- You have compliance requirements (HIPAA, GDPR enforcement, Australian Privacy Act amendments coming in 2026) that demand an audit trail on the migration itself.
- Your team has never touched Data Cloud and your timeline is < 8 weeks.
- Email deliverability is *already* a problem you haven't solved — migration will not fix it; it amplifies it.

The middle ground

Most Australian SMBs are in the middle: too complex for a pure DIY (because of Data Cloud), too small to need a Big-4 implementation team.

The pattern that works for this segment:

1. **Foundation as fixed-scope.** Have a partner stand up Data Cloud + Marketing Cloud Next + email channel + Identity Resolution + Data Graph in a fixed 5-day engagement. This is the part where mistakes cost the most.

2. **Asset rebuild as time-and-materials.** Once foundation is in, your team can rebuild templates and lists efficiently because the hard architecture decisions are already made. Partner stays available as flex capacity at an hourly rate.
3. **Cutover as a fixed-scope checkpoint.** Bring the partner back for the cutover validation in Chapter 4 — independent eyes catch the things you stopped seeing three weeks ago.

That's the model The Backouche Group runs:

- **MC Next Activation:** AUD $5,000 fixed · 5 days · Data Cloud + AI + Agentforce campaign
- **Flex-up days:** AUD $1,000/day · scope tuned per engagement
- **Post go-live support:** AUD $200/hr · 10-hour blocks

All prices ex. GST. Fixed-scope. Fixed-price. Zero friction for your team's velocity.

It's not the only model that works, but it's the one we've seen survive the most timelines.

How to choose a partner (regardless of who it is)

Three questions to ask any vendor before you sign:

1. **"Show me a Marketing Cloud Next instance you've stood up in the last 90 days."** Not Marketing Cloud Engagement. Not Pardot. **Next.** Many partners are still selling Engagement migrations because Next is new. If they can't show you a recent Next build, they're learning on your dollar.
2. **"What's your rollback plan if the cutover fails?"** A good answer mentions parallel running, the validation checklist above, and a defined "go/no-go" gate. A bad answer is "we have lots of experience."
3. **"Will the Solution Architect on the engagement be the same person doing the build?"** In SMB engagements the answer should be yes. If you're being sold a senior architect for design and an offshore team for build, walk.

What to do this week

Whatever you decide on partner vs. DIY, do these three things in the next seven days:

1. **Run the Pardot asset inventory** (Chapter 2 spreadsheet). One day of work. Every other decision depends on it.
2. **Triage your lists** down from "all of them" to "load-bearing only." Half a day. Saves a week later.
3. **Pick the email subdomain** you'll authenticate (`email.yourcompany.com.au`) and confirm your registrar admin can edit DNS. One conversation.

That's the foundation. Everything in chapters 1–4 builds on it.

About the author

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