



# Salesforce Marketing Cloud Account Engagement

A Salesforce feature offered by KPMG





# Marketing Cloud Account Engagement

- Lead qualification
- Forms, form handlers and landing pages
- E-mail marketing
- Engagement studio

# Intro

## What is MCAE

Marketing Cloud Account Engagement comes with a connector to synchronise and embed the marketing tool directly in Salesforce Sales Cloud to ensure that data is unified and up to date across both systems.



### Target to lead: Marketing

Customer strategy and experience vision	Strategic plan	Campaign management	Marketing operations	Reporting and analytics	Manage process	System governance
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Salesforce Marketing Cloud Account Engagement (formerly known as Pardot) is a marketing automation tool by Salesforce optimised for B2B marketing. Account Engagement helps accelerate the sales process by providing sales teams with the information and tools they need to close deals faster. The tool helps businesses identify and engage with the most qualified

leads and current customers. Some of the most popular features include intelligent campaigns, landing pages, automatic lead scoring, personalised content, cross-team collaboration tools and e-mail template builder.

In short, Account Engagement provides an efficient and powerful process of turning

leads into customers and customers into long-term customers by enabling collaboration between marketing and sales teams. Account Engagement customers have seen sales revenue increase by 34% and marketing effectiveness increase by 37%, on average.

Benefits	High
Data quality and compliance	● ● ●
Time reduction and efficiency	● ● ●
Improved customer service	● ● ●
Scalability	● ● ●

Estimated effort	Low
Data quality and compliance	● ● ●
Time reduction and efficiency	● ● ●
Improved customer service	● ● ●
Scalability	● ● ●

# Lead qualification

Identify the best leads  
and improve efficiency

Marketing Cloud Account Engagement's lead qualification feature helps identify the best leads for sales teams to pursue by scoring and grading each individual lead. The measures and thresholds for scoring and grading are set up in a joint effort by marketing and sales teams based on the organisations' practices, goals and needs. Once leads have been qualified, they are automatically routed to the right sales rep for follow-up.

Scoring and grading are the two dimensions of lead qualification. Marketing Cloud Account Engagement evaluates a score based on how interested a prospect is in a product/service based on how the lead interacts with your marketing assets (for example clicks on website and e-mails opened).

The grade of a lead reflects how good of a fit the lead is for your business by comparing the lead with your ideal customer profile. With Marketing Cloud Account Engagement leads are automatically assigned a score and grade – based on the rules you define – and are routed to the right sales rep once qualified.

- Increase data quality by automatically scoring leads based on interest in your products or services
- Improve customer experience and identify ideal buyers by automatically assigning grades to the leads
- Decrease time and effort spend by the Sales team on identifying and qualifying ideal leads



Identify the  
best leads



Grade and  
score leads



Sales reps work  
more efficiently

## Grade

*Threshold: B*  
**Criteria:**

### Job title

- Executive or staff?

### Job function

- Marketing or HR?

### Location

- Country or state?

### Company size

- SB, MM, enterprise?

### Custom data

## Score

*Threshold: 200 points*  
**Criteria:**

### Form completed

- Demo request or white paper?

### Page visits

- Pricing or careers?

### Webinar/event

- Registered or attended?

### E-mail

- Open or click?

### Custom data

## Benefits

High

Data quality  
and compliance



Time reduction  
and efficiency



Improved customer  
service



Scalability



## Estimated effort

Low

Data quality  
and compliance



Time reduction  
and efficiency



Improved customer  
service



Scalability





# Forms, form handlers and landing pages

Integrate forms and capture lead information easily on your landing pages

Convert visitors into known prospects.

Forms and form handlers are a way to collect visitor information and create identified prospects. Account Engagement comes with an intuitive form builder to create and embed forms on websites. With form handlers you can easily connect your Marketing Cloud Account Engagement with 3rd party forms.

Salesforce Marketing Cloud Account Engagement offers efficiency tools like bot protection and kiosk/data entry mode (to submit forms multiple times by disabling cookies) and progressive profiling to continually learn more about your prospect with every interaction. With automation tools you can notify specific users when a prospect has filled out a form or assign the

prospect to different marketing campaigns to get the most out of every form submission. Use pre-built forms and landing page reports to view form statistics of how your forms are performing to increase submission rate, amount of page views and run tests and test reports to view which version of a form or landing page performs the best.

- Customise forms to ensure a more efficient prospect conversion
- Improve customer experience by directing prospects to a form on a custom landing page
- Use progressive profiling to collect more information without increasing the time spent on form submission



Easy form-building tool



Integrate forms to landing pages



Capture lead information

## Benefits

Data quality and compliance  
Time reduction and efficiency  
Improved customer service  
Scalability

Med

## Estimated effort

Data quality and compliance  
Time reduction and efficiency  
Improved customer service  
Scalability

Low

# E-mail marketing

Send out customised e-mails to all your prospects

Marketing Cloud Account Engagement's mass e-mail and e-mail automation is a powerful marketing tool to effectively send out personalised e-mails to prospects based on e-mail templates created in Marketing Cloud Account Engagement e-mail template builder, an easy and intuitive drag-and-drop tool to create striking e-mails.

Marketing Cloud Account Engagement allows you to send e-mails to thousands of prospects with a single click. It comes with numerous advanced e-mail marketing features yet is easy to use. A specifically praised tool is the e-mail template builder, which allows users to drag and drop components onto a canvas to build unique e-mail templates for different purposes. With dynamic content, each element of a

template can be set to show personalised content based on receiver segmentation rules. e-mails can be previewed to see what they look like on different devices by different e-mail providers, and before an e-mail is sent, it is analysed to determine the risk of it being marked as 'spam' or 'junk'. Options to avoid the spam folder are automatically provided.

- Improve effectiveness of your e-mail marketing by sending highly personalised mass e-mail
- Improve your marketing content by tracking engagement and interactions through reports



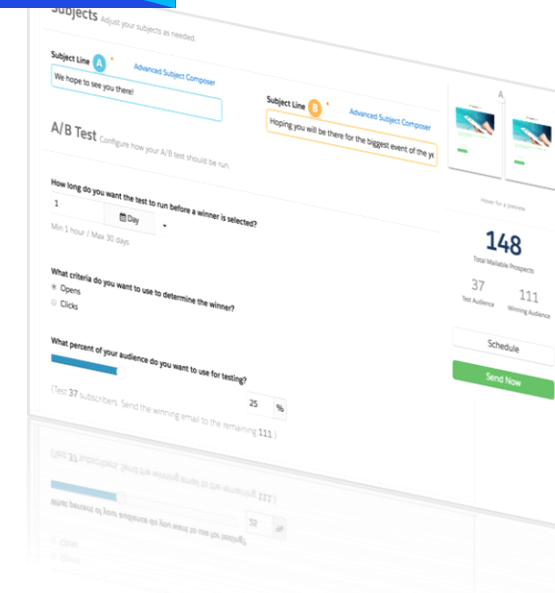
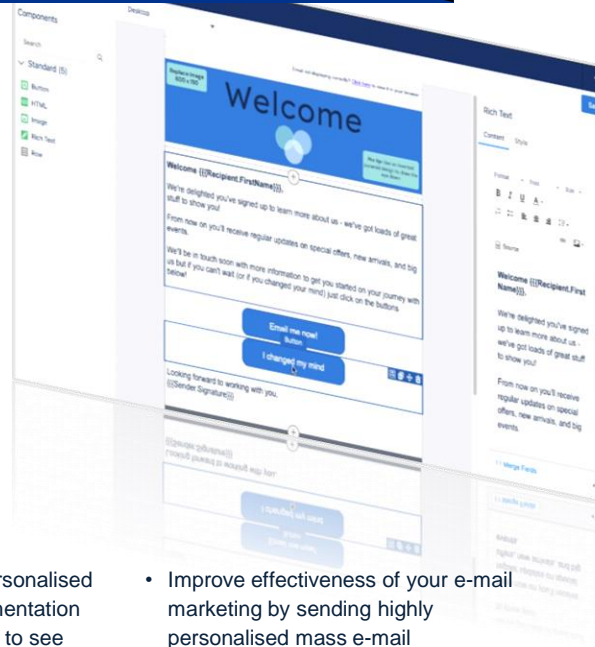
Mass e-mail automation



Personalised content



Improved e-mail effectiveness



## Benefits

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Data quality and compliance	●	●	●
Time reduction and efficiency	●	●	●
Improved customer service	●	●	●
Scalability	●	●	●

## Estimated effort

Low

Data quality and compliance	●	●	●
Time reduction and efficiency	●	●	●
Improved customer service	●	●	●
Scalability	●	●	●

# Engagement studio

Personalise your prospects experience

Engagement studio is an advanced yet easy-to-use tool to create personalised drip campaigns. Each prospect's interaction with your marketing content determines the next step of the campaign. The customisable campaign path combined with e-mail templates with dynamic content ensures a fully personalised experience for all your prospects.

Engagement studio combines several features in a single powerful and intuitive tool. It has dynamic campaign member lists to automatically add or remove prospects from a campaign. Form submissions, page actions, landing page visits and e-mail clicks and opens can all be used to define the campaign path an individual prospect will follow. With the A/B test function, the tool will test different

versions of e-mails and submission forms to determine which version to use in the future. Engagement studio uses e-mail templates to send one-to-one or mass e-mails as part of your campaign, and prospects in the campaign can automatically be converted and assigned to specific sales reps or teams when the time is right.

- Customise and personalise campaigns and marketing content
- Automate activities to save time, eliminate errors and align processes
- Collect valuable data on your prospects to use in future marketing activities



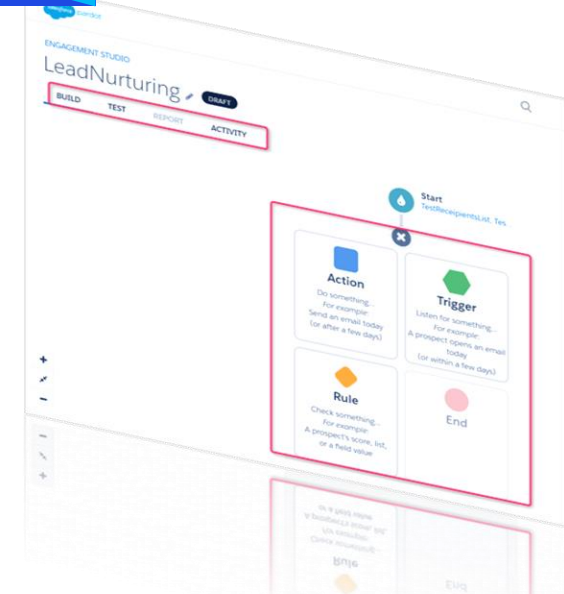
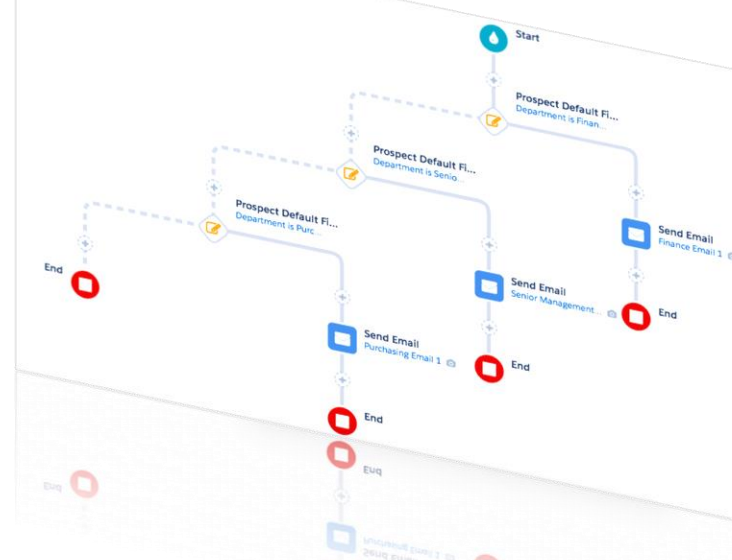
Campaign engagement



Drip campaigns



Personalised experience



## Benefits

Data quality and compliance  
Time reduction and efficiency  
Improved customer service  
Scalability

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## Estimated effort

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# Want to hear more?

Our experts are ready to help if you are interested in hearing more about how these features could benefit your business.

## Contact KPMG Customer & Growth



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