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Keeping Marketing Cloud healthy after go-live

A guide to managed services for Marketing Cloud and Account Engagement

Setlerz IT Solutions
Certified Salesforce Consulting Partner | www.setlerz.com

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About Setlerz

Setlerz IT Solutions is a certified Salesforce Consulting Partner headquartered in Pune, India, with a US presence in Sheridan, Wyoming. Founded in 2023, the team holds 13+ Salesforce certifications and carries a 4.95 rating on Salesforce AppExchange. Setlerz supports businesses that need Salesforce to work and consulting firms that need delivery capacity.

01 Executive summary

A Marketing Cloud implementation does not end at go-live. The journeys, data extensions, automations and sender reputation that make campaigns work need steady attention, or they quietly degrade. This paper explains what that attention involves and how marketing and CRM leaders can secure it without building a full in-house team.

It is written for heads of marketing, CRM and marketing operations, particularly in retail, financial services and consumer goods, where campaign volume is high and data quality and compliance matter. It draws on how Setlerz structures managed support for Salesforce Marketing Cloud and Marketing Cloud Account Engagement (formerly Pardot).

In this paper

- The five layers of a healthy Marketing Cloud instance and how each one fails.
- A clear scope for managed support, for Marketing Cloud and for Account Engagement.
- Industry considerations for retail, financial services and consumer goods.
- How service levels and scope limits work, and how to size a retainer.
- A 90-day onboarding plan and a provider evaluation checklist.

5
layers of a healthy instance

3
service levels: Basic, Standard, Premium

90
day onboarding plan

02 Why Marketing Cloud degrades after go-live

Marketing Cloud is built from many moving parts that depend on each other: contact data, audiences, journeys, automations, content, sending infrastructure and the connection back to Salesforce. Each part is configured once and then changed, often by different people, for months or years.

Without an owner, the same things tend to happen:

Journeys multiply and age

New campaigns add journeys; old ones are never retired. Nobody is sure which are still live, which still reference current data and which are quietly erroring.

Data extensions sprawl

Extensions are created for one campaign and reused for another. Naming drifts, relationships break and suppression logic becomes uncertain.

Automations fail silently

A scheduled automation stops running after a source file changes. The first sign is a campaign that does not send, or one that sends to stale data.

Deliverability erodes

List hygiene, authentication and engagement slip. Inbox placement falls gradually, so the decline is noticed late.

The hidden cost

The cost of poor upkeep is rarely a dramatic failure. It is a steady loss of confidence: marketers do not trust the audiences, the numbers or the sends. Managed support restores that confidence by making someone accountable for the health of the whole system.

03 The five layers of a healthy instance

It helps to think of Marketing Cloud health in five layers. Problems at a lower layer show up as symptoms in the layers above.

1. **Data and contacts**
   Contact Builder structure, data extensions, relationships, and the hygiene of source data. This is the foundation. Errors here travel into every journey.

2. **Audiences and automations**
   Segmentation, queries and Automation Studio activities that prepare and move data on schedule.

3. **Journeys and campaigns**
   Journey Builder logic, entry sources, wait times, decision splits and the build and quality assurance of each campaign.

4. **Deliverability and compliance**
   Sender authentication, reputation, suppression, consent and the monitoring that protects inbox placement.

5. **Salesforce sync and reporting**
   The connection to Sales and Service Cloud, and the reporting that tells the business what is working.

Layer	What it looks like when healthy	Early warning sign
Data and contacts	Documented structure, clean source, consistent naming	Duplicate or orphaned data extensions
Audiences and automations	Scheduled runs complete and are monitored	Automations that run but return zero records
Journeys and campaigns	Every live journey has an owner and a purpose	Journeys no one can explain
Deliverability	Authentication in place, engagement monitored	Gradual fall in opens or inbox placement
Sync and reporting	Sales and marketing see the same data	Marketing and sales disagree on lead numbers

04 What managed support covers

Setlerz Marketing Cloud managed support gives you a named specialist and SLA-based ticket support, not a shared queue and not a black box. The scope covers the layers described above:

Support area	What it includes
Journey monitoring and maintenance	Reviewing live journeys, fixing errors, retiring what is no longer needed
Email deliverability and sender reputation	Monitoring, authentication checks, list hygiene guidance
Data extension and Contact Builder hygiene	Structure, relationships, naming and clean-up
Campaign build and QA support	Building and testing campaigns before they send
Automation Studio troubleshooting	Diagnosing and fixing failed or silent automations
Salesforce sync monitoring	Checking that data flows correctly between Marketing Cloud and Salesforce
Monthly performance reporting	A regular view of what is working, and what to change

Ticket support versus project work

Managed support handles the ongoing running of the platform and small enhancements. Larger pieces of work, such as a new programme, a migration or a major redesign, are scoped as projects. Keeping the two separate keeps the retainer predictable and prevents large initiatives from consuming the support hours that keep the platform healthy.

05 Account Engagement: the same discipline

Many organizations run Marketing Cloud Account Engagement, formerly known as Pardot, alongside or instead of Marketing Cloud. The discipline is the same, but the failure points are different, because Account Engagement sits closer to sales.

Support area	What it includes
Lead scoring and grading upkeep	Keeping models aligned with how sales actually qualifies
Nurture programme build and optimisation	Building and improving programmes that move leads forward
Landing page and form troubleshooting	Fixing broken forms, tracking and page issues
Salesforce connector health checks	Confirming that prospects and activity sync correctly
Deliverability and compliance monitoring	Protecting sender reputation and consent
Engagement Studio maintenance	Reviewing and tuning engagement programmes
Monthly ROI and funnel reporting	Showing how marketing activity connects to pipeline

Related reading

Setlerz has published a guide to migrating from Pardot to Marketing Cloud Account Engagement and what tends to break along the way, available in the Resources section of setlerz.com.

06 An industry lens: retail, financial services, consumer goods

The platform is the same across industries, but the priorities of the people running it differ. The points below are considerations to raise in scoping, not performance claims.

Retail

Frequent, time-sensitive campaigns, large and changing audiences and a need for fast turnaround on promotions. Priorities: automation reliability, audience accuracy, quick campaign build and QA, and consistent customer data across channels.

Financial services

Strict consent, privacy and approval requirements, and a high cost for errors in customer communication. Priorities: suppression and consent logic, controlled changes, documented journeys and careful deliverability monitoring.

Consumer goods

Complex routes to market and often a mix of direct and partner relationships. Priorities: connecting marketing data to sales and service, reporting that shows contribution to demand, and scalable programmes across brands and markets.

In each case the decision-makers are usually in marketing, CRM or marketing operations. They typically care about reliability of sends, trust in the data and the speed of getting campaigns out. These are the outcomes managed support is designed to protect.

07 Service levels, scope and governance

Setlerz offers managed support at three levels. Each level adds monthly hours and faster response.

Level	Response time	Hours of cover	Review cadence
Basic	2 business days	Monday to Friday, India hours	Quarterly review
Standard	1 business day	4 hours overlap with US time	Monthly review
Premium	4 business hours	Extended US overlap	Named delivery lead, bi-weekly check-in

Defining scope so there are no surprises

A retainer works best when it is clear what is covered. For Marketing Cloud, that means agreeing indicative inclusions, such as the approximate number of live journeys, data extensions and automations in scope, and how many new builds are expected each month. The exact figures are confirmed during scoping against your actual instance.

- Work within the agreed scope is covered by the retainer hours.
- Work beyond the scope is quoted or billed at the agreed hourly rate, and approved before it starts.
- Unused hours do not carry forward unless agreed in the order form.
- Larger initiatives are scoped as separate projects.

Commercial basics

Setlerz managed packages are priced as flat monthly retainers, with a three-month minimum term. Invoicing, payment, notice and termination terms are set out in the order form. Custom scope is priced after a discovery call.

08 Your first 90 days with a managed partner

1. **Days 1 to 15: Discover and document**
   Access and security set-up, an inventory of live journeys, data extensions and automations, and a review of deliverability. You receive a short findings note.

2. **Days 16 to 30: Stabilise**
   Fix the errors that matter, retire clearly obsolete assets, put monitoring in place and agree the scope limits for the retainer.

3. **Days 31 to 60: Operate and improve**
   Run the support cadence. Resolve tickets within the agreed response times. Begin tackling the improvements identified in the first review.

4. **Days 61 to 90: Review and plan**
   Review the first quarter with the numbers. Agree priorities for the next quarter and adjust the service level if needed.

What you should notice

Fewer surprises, faster fixes and a marketing team that spends its time on campaigns, not on chasing why something did not send.

09 Choosing a provider: a checklist

Question to ask	Why it matters
Will we have a named specialist?	Continuity and context beat a rotating queue
Are the consultants certified in the cloud they will support?	Credentials should be in place before the engagement, not during it
How is scope defined and what happens beyond it?	Avoids disputes about what the retainer covers
What are the response times, and for which hours?	Overlap with your time zone affects real responsiveness
How is deliverability monitored and reported?	Sender reputation is easy to lose and slow to rebuild
Is there a regular review with reporting?	You should see the value, not assume it
How do larger projects get scoped?	Keeps support hours protected
Can the arrangement scale up or down?	Campaign volume and needs change

Talk to a Setlerz Marketing Cloud specialist

Share a short description of your instance and we will outline a sensible scope and service level. Book a call at **calendly.com/setlerz** or write to info@setlerz.com. Setlerz is a certified Salesforce Consulting Partner with an Agentforce Marketing accreditation.

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Make your campaigns dependable.

Talk to a Setlerz Marketing Cloud specialist about scope, service levels and a 90-day plan.

Free Agentforce readiness assessment

Book a call

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