Checklist: Set Up Marketing Cloud Growth

You set up Marketing Cloud Growth in a few different places, and it can take some time. Use this checklist to track your progress and stay on the trail. Looking for step-by-step instructions? Check out the [Marketing Setup Implementation Guide](#).

Before You Start

Someone with Data Cloud admin permissions must help a Salesforce admin configure Marketing Cloud Growth. After identifying the right people, make sure that Data Cloud and the other prerequisite tools are enabled. Check your status at **Salesforce Setup > Marketing Cloud > Getting Started**.

1 Data Setup

Data kits and packages contain objects, fields, and relationships that power the marketer's experience in Salesforce. After you install and deploy the data kits and packages, configure identity resolution, and then connect the Analytics packages. [Get Instructions](#).

1a Install the required data kits and deploy each data stream.

Use the package install links in Setup, and then go to the Data Streams tab in Marketing Cloud Growth, and note that some data kits contain two or more data streams.

Data Kits	Installed?	Deployed?						
Sales								
Marketing Setup Objects								
Consent								
Flows								
Email								
SMS *Required when using the SMS add-on*								
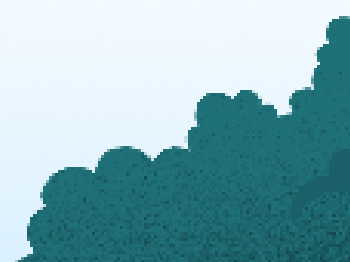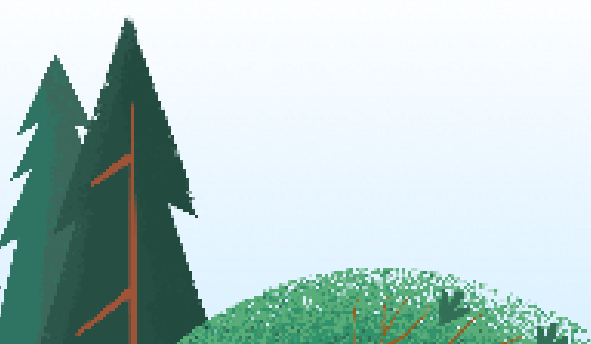
1b **Configure an Identity Resolution ruleset.**

To define the rules for unifying prospect and customer data, go to the Identity Resolution tab in Marketing Cloud Growth.

1c **Install the Analytics packages.**

These packages add preconfigured reports and dashboards to the Analytics tab.

Marketing Analytics

Marketing Analytics - SMS

Marketing Analytics - Landing Pages and Forms

1d **Add the Analytics integration to the landing page site.**

To connect marketing analytics to reports and dashboards, go to Experience Builder settings.

2 User Access

For marketers who manage campaigns and all the related data, we recommend completing these tasks. [Find Out More](#).

Assign permission sets

Add users as Site members

Add users as Site contributors

Add users as Workspace contributors

Add users to Analytics folders

Users

SALESFORCE USER SETTINGS			CMS ACCESS	
USERNAME	PERMISSIONS	PROFILE	SITE	WORKSPACE

3 **Messaging Setup**

Sending promotional content requires compliance with regulatory bodies. Consent tools are provided, and you're responsible for complying with the regulations that apply to your business. Learn More In Help.

3a **Complete these requirements.**

Make sure that you complete every step in the email section. If you have the SMS add-on, those steps are also required.

Email Messaging	SMS Messaging (requires add-on)
Verify your physical address	Register a brand
Set up DKIM authentication	Register a campaign
Add and verify sender email addresses	Create SMS codes and defaults
	Set up an SMS domain

3b **Consider these consent tasks.**

An admin can configure consent validation settings. Other marketing users can also create, import, and customize details at any time.

Review or change your consent validation settings

Create communication subscriptions

Import consent data

Customize your customer's preferences page

Customize the consent-to-track banner for landing pages
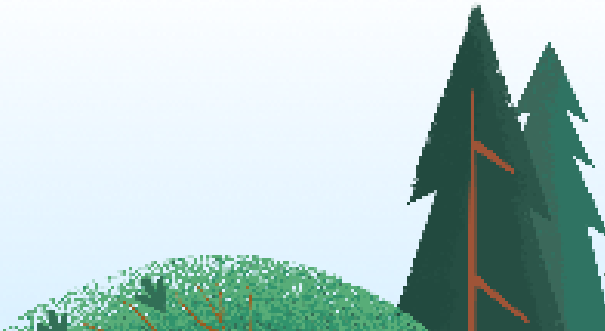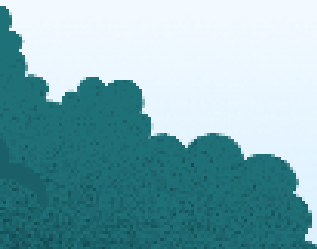
4 Other Setup Tasks

Marketing Cloud Growth offers features that can boost your productivity and optimize your outcomes. Here are some recommended tasks to consider. Find Out More.

4a Define your brand.

Configure a branded domain

My Domain   OR   Custom domain

Apply the domain to your landing pages

Set brand styles

4b Monitor campaign outcomes.

Enable lead scoring

Add scoring components to lead or contact pages

Create Analytics collections

4c Optimize with Einstein AI.

Enable Einstein Metrics Guard

Enable Einstein Send Time Optimization

Enable Einstein Generative AI

Turn on Co-Create for campaigns

Turn on Co-Create for segments