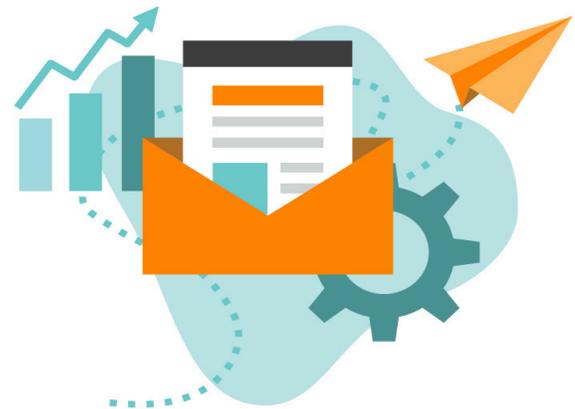


Platform Migration

HARD DECISION. WORTH THE EFFORT. ECSTATIC WITH THE RESULTS.

Marketing has gotten more complicated, mostly due to the expectations of customers wanting to be met where they are in the buyer journey with targeted messaging and content to help them move forward. There is no longer a one size fits all approach that works for most. This shift has put marketing automation providers out front to solve these challenges, but what you see is not always what you get.

Not all marketing automation platforms are the same. Some cater to batch and blast sends to large volumes of recipients and others are feature rich giving you the opportunity to evolve your feature adoption. For the right time, the former will do. But many organizations soon find themselves stretching the boundaries of the more simplistic platforms stuck in a wishing they could mindset. So the challenge of migration is upon them.



But no one is in it alone. It has been estimated that three quarters of marketing automation providers migrate from batch and blast solutions to more robust platforms within twelve to eighteen months. The top reason being value has been proven and they have evolved past the limits of their existing solution.

Migrations are not to be thought of lightly. For simplistic migrations where the decision is made to disregard the data, templates, and flows in an existing platform users can move onto Onboarding and Implementation. However, for most, it's not as simple. Migrating from another platform to Marketo, getting a division setup on a new workspace within your instance, or consolidating instances, takes thoughtful consideration and planning.

CONSIDERATIONS FOR PLATFORM MIGRATION

Decision

The first step is deciding whether the cost and time will drive the value that you are looking to get out of a migration. Look at the feature roadmaps of your existing provider and the ones you are considering, make sure the trade offs are worth it. Some clients get to this very first step and never go further. Why, because batch and blast emailing works for them, but for most migration is the only option.

Inventory

The first thing after you've decided it's time to migrate is to take inventory of what is in your existing instance. Assets, forms, files, programs, lists, workflows, alerts, and even integration points. These components are the cornerstone to quickly send campaigns on a new platform.

Plan

Create a detailed plan with owners and dates. Share the plan so you have alignment with other resources, such as IT, who may own migration tasks. This is the only way to keep your migration moving forward in a purposeful way that encompasses all of the required steps and can be used to give transparency to stakeholders regarding your strategy and progress.

Implementation

Regardless of any migration decision, Marketo will have to be implemented and team members will start to be onboarded prior to migration activities. Having a partner through this phase is the difference between a couple weeks or a couple months of technical implementation. Leveraging best practices and experience ensures the implementation goes smoothly.

Move

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Test

Once everything is moved it is important to test the set up and make any modifications so that all existing campaigns will run on the new platform. Make sure to leverage all of the features Marketo has to offer and truly automate your campaigns.

Off

A very important, but often overlooked step is to provide notice to your previous provider so you are not charged for licensing fees.

ABOUT LEADOUS INC.

We believe that marketing is a human experience.

Behind every email, logo and computer screen are people waiting to engage with the world around them. We connect people to your brand by enhancing your marketing strategy with purposeful automation that drives mindful digital experiences. Building a sound foundation for your team to deliver business results and create happy clients.

HAPPY CLIENTS are how we measure our success.

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