

How to Migrate to a New ESP

★ (while keeping your data and your mind intact)

★ !important

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#GURUConference2024

What we'll cover:

- Planning for the migration
- Take inventory
- Do the actual migration

Bonus: The Secret Sauce

Parental:
"Clean your room!"



3 Hours Later...



Why do we want to migrate?

1. Somebody “important” said they like a different tool
2. We’re not using our current tool to its full potential & we blame the tool
- ★ 3. We have truly outgrown our current tool or it is just not right for us

What do we need in this new tool?

Include features and capabilities that are *not* in the current tool

&

★ in the current tool

Be as thorough as possible



Create your list of possible platforms

- List all possible platforms – I suggest a spreadsheet so you can take notes as you research
- Crowd-source information – ask your colleagues and peers in the industry what tools they like
- Create a shortlist

ESP	Infrastructure	Cost	Personalization Language	Integrations	Analytics & Reporting	List Management	Testing & Experiments	Email Building	Customer Support	Compliance

Factors that affect timing

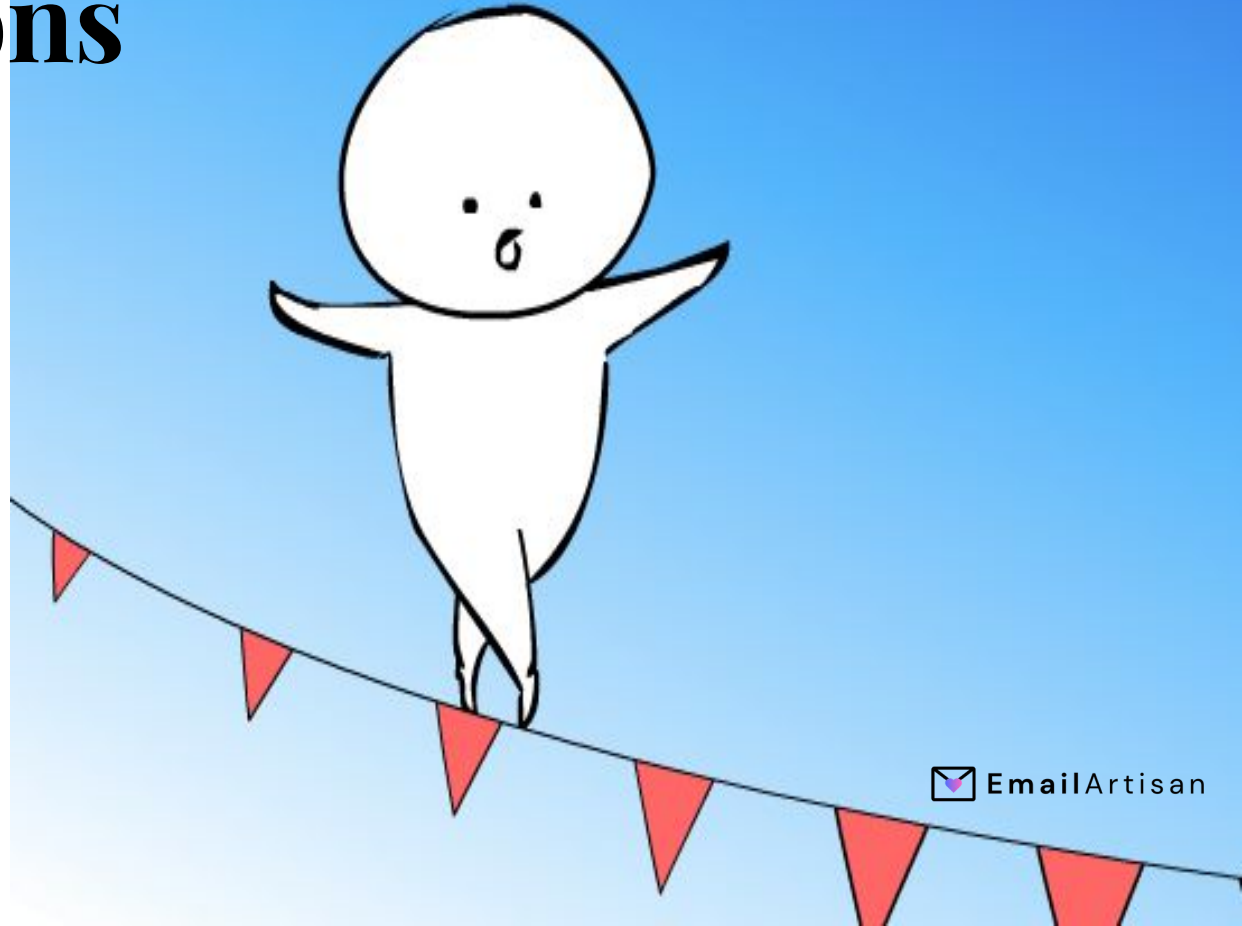


- Business as usual
- Hire contractors?
- Hire an agency to complete the migration or parts of it?
- Optimizations

Optimizations



Take
it
easy



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How long will it take?

Based on all the factors we've discussed then...

 **DOUBLE IT!**


Which campaigns will we migrate?

- Migrate low performing campaigns?
- Low volume campaigns?
- Inactive campaigns?

Campaign	Migrate	Deprecate
Onboarding	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Random_Send	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Loyalty	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Winback	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Irrelevant_Info	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Referral	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Annual Notice	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Document Everything!

- For each campaign, document every detail
- Varies by organization

Campaign	Trigger	Audience	Messaging	Exclusions	Data Points



"If you would have been keeping up with your stuff all along, ***you wouldn't have so much to do now!***"

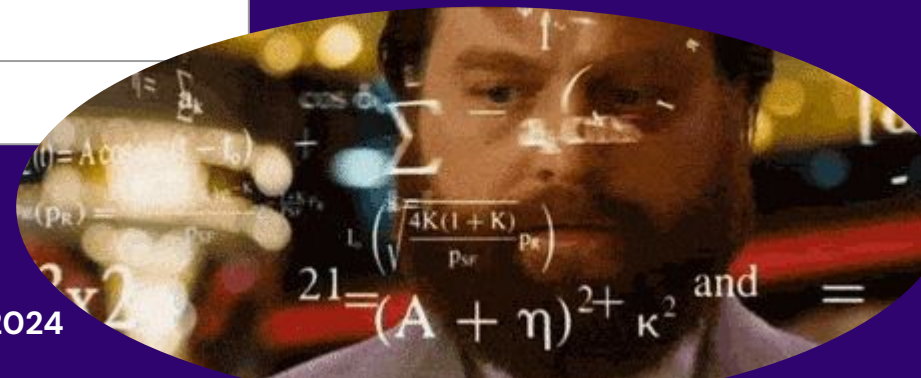
- Mom

Don't forget your data



Event	Properties	Values	Data Type

Customer Attribute	Value	Data Type



How will you migrate?

- Third party
- By Hand
- By API

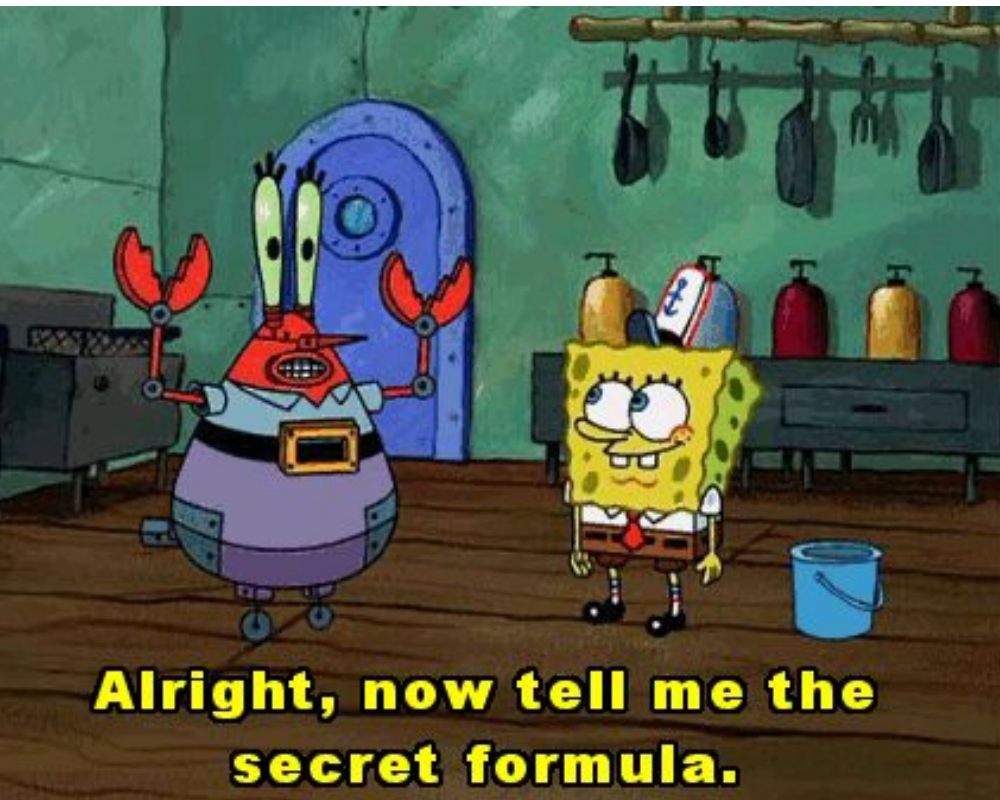
200%

Of migrations take place with too few people

Delegate. Clearly.

- Give each team member a job in the migration
- Be very clear





Secret Sauce!



Collaboration



Communication



Comprehensive documentation

Thank You!

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