



DO'S AND DON'TS OF A MARKETING AUTOMATION PLATFORM MIGRATION

MG **MARKETING GUYS**

INTRODUCTION

Most current B2B marketers use marketing automation. If you have a few years of experience with it, you likely know the pros and cons of the platform you initially chose. You may now be considering switching to a different platform.

Why would you switch marketing automation platforms?

There are several reasons why you might want to switch marketing automation platforms:

- **Better functionality and usability:** A different marketing automation platform might better align with a company's specific needs and requirements. You may have previously chosen a platform that turns out to be not very user-friendly. This could include challenges with the email editor (some platforms are very cumbersome, while others offer easy drag-and-drop options), simple form building on your site, easy audience segmentation, and straightforward access to and creation of reporting.
- **Greater scalability:** If the current platform cannot grow with the company, it might be time to switch to one with more scalable options.
- **Better integration with other systems:** If the current marketing automation platform poorly integrates with other systems used by the company, switching to a platform with better integration capabilities could be beneficial.
- **Improved customer service and support:** If the current marketing automation platform offers limited support, switching to one with better customer service and support can enhance productivity and efficiency.
- **Cost savings:** A different marketing automation platform might be less expensive or provide more value for the money. This can make switching to that platform financially appealing.

3

YOU NEED TO MIGRATE FROM ONE MARKETING AUTOMATION PLATFORM TO ANOTHER. HERE'S WHAT YOU SHOULD AND SHOULDN'T DO.

1. Start with what truly matters. Gather what is critical to the business. These elements must, at all costs, be transferred to the new platform.

Consider:

- Templates
- Nurturing programs
- Content such as images and PDFs
- Branding/style guidelines
- Integrations (e.g., with your CRM)

2. Pay attention to processes

- How easy is it to replicate the existing processes, and will you achieve the same results?
- How do you organize your files and data? Leave no (crucial) data behind!
- Consider naming conventions, so files can be easily located after migration. This is helpful if employees leave and newcomers need to take over the work.
- This is also a good time to review CRM data. Is it still logically organized for data exchange with your marketing automation? Many CRMs are not initially set up this way.

3. Identify contacts and lists to be migrated

- Don't use the segmented list from your CRM; instead, perform a bulk export from the old marketing automation tool to the new platform. Segment within your new marketing automation platform.
- Deduplicate your contacts. During migration, you'll often find many duplicate contacts in your CRM. This is a great time to clean them up!
- Import an opt-out list from the old marketing automation platform into the new one.

4. Collaborate with the right people in your organization to prevent future issues

- IT colleagues should help you avoid technical and infrastructure issues during the migration (also consider CRM administrators!).
- Sales colleagues should share what improvements they would like to see, so the migration can provide them with greater benefits.
- Who manages the technical aspects of the website? This person will need to place tracking beacons. Announcing this early prevents delays if an IT colleague has limited time to place the beacon on short notice.

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5. Avoid the pitfalls

- Engaging the CRM partner too late.
- Doing too much too quickly. It's better to proceed in phases.
- Lacking the proper support.
- Failing to measure along the way. You need measurement results to make timely adjustments.
- Skipping testing. Test if tracking codes work, verify that email templates are correct, and check their consistency across different email clients. To avoid missing anything, it's helpful to create a test plan.

6. Assemble the right team for a flawless migration

- Ensure you have an experienced partner to assist with the migration.
 - Get trained by professional instructors (this could be your migration partner).

7. Optimize!

- Evaluate what works and what doesn't.
- Select the best-performing programs.
- Clean up existing data and lists.
- Remove contacts that have been inactive or unengaged for a long time ("zombies"). They often pose more (GDPR) risks than benefits.
- Check if they are still valid.
- Ensure data security. Minimize the risk of data leaks as much as possible.
- Is the lead scoring still accurate?
- Strengthen collaboration with sales and even customer service to gain an even better understanding of your (potential) customer.
- Your website is closely connected to your marketing automation, so include it in your optimization process. Think of landing pages, form placements, and call-to-action buttons.

8. Boost your results!

Migration is an excellent opportunity to review all your processes and invest in collaboration with sales (sales & marketing alignment). The positive outcome is that sales will engage with leads at much more opportune moments when they are ready to buy. And that makes everyone happy!

IN CONCLUSION, THE QUESTION YOU SHOULD ALWAYS ASK YOURSELF: IS IT REALLY NECESSARY TO MIGRATE TO A DIFFERENT MARKETING AUTOMATION PLATFORM?

MIGRATION IS NOT ALWAYS MEANINGFUL IF:

1. Marketing automation is often sold as a bundle with a CRM, which IT or finance may see as an advantage. However, IT and finance don't need to work with the tool daily—you, as the marketer, do. Marketing automation and CRM are tools that should work together to generate sustainable revenue. Achieving that goal doesn't require both tools to come from the same provider.
2. If marketing results are disappointing, it may not necessarily be due to the tool. It could simply be that effective marketing hasn't taken place. This is a critical question to ask yourself, as migrating to a different tool won't help if your marketing activities aren't effective. It might be better to focus on improving those efforts first rather than going through the trouble of migrating, only to end up with the same unwanted, disappointing outcome later.

In short, there are plenty of points to consider and reflect on. In such a migration process, it's helpful to have an experienced partner.

And that's where we come in.

Marketing Guys has carried out various marketing automation implementations and migrations. Schedule an appointment with us to discuss your migration plans.

We bet you'll find those 30 minutes both liberating and valuable.

[Schedule an appointment here with Claudia Pas](#)

**CLAUDIA
PAS**



MARKETING AUTOMATION DOESN'T ALWAYS DELIVER WHAT YOU EXPECT.

- The results are not what you expected.
- Your workload has increased rather than marketing automation making things easier for you.
- Or, regulations are such that you spend more time on compliance than on creating a smooth customer journey.
- What do you need to improve this situation?
- Is optimizing your current tool and processes enough?
- Is a different tool more suitable?

If this feels overwhelming, we're here to help you through the process.

As your marketing technology partner, our goal is to support you every step of the way.

Optimize or switch?

If you're unable to achieve your marketing ambitions with your marketing automation tool, you have three options:

1. Struggle along
2. Optimize
3. or switch

If you choose to optimize or switch, you could use some help. How do other companies handle this? What common mistakes should we avoid at all costs? Or, more practically, what exactly do I need to do?

Our motto, "**helping companies succeed**," also applies to businesses where the first "marketing automation attempt" wasn't successful. So feel free to ask us any questions.

Do you want to switch to a different marketing automation tool?

There's a lot involved.

How do you maintain data integrity?

How do we keep the existing customer journey intact?

Are there integrations that need to be re-established?

Do you want to be sure you've thought of everything? And could you use some help with this process? We're here to make your migration a success so you can get back to building your business.

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