The Growth Marketing Platform Migration Guide

Part 1: Organizing Your Team & Messaging

Migrating to a new growth marketing platform can seem like a daunting process. You've no doubt amassed a substantial data repository with a (now comfortable) schema.

But, as so often happens, you reach the point where you need more. More flexibility. More scalability. More features. More of what can optimize your marketing efforts.

And rather than jumping in blind, you have researched your options for a modern, innovative growth marketing platform. Soon, it will be time to migrate to a new marketing production center.

Are you ready?

Below, we will show you exactly how to prepare yourself (and your data) for a clean migration process.

You can't dive in head first without understanding what you're getting yourself into. Making that mistake will find you back where you started.

This platform migration guide lays out the steps you should take for a successful migration. From organizing your messages to cleaning up your data to understanding what to expect from a technical integration, it is possible to have a smooth migration that transfers your pertinent information and sets you up for immediate success on your new platform.

In part one, we walk through how you and your team can prepare for the migration process by organizing your team and messaging.

1. Gather Your Team

The first step before you move forward with any migration planning is identifying the people who will be involved. The team you put together is contingent upon the type, size, and organizational structure of your business.

For example, if you're a large enterprise, you very well could have a team of 15 people who are all assigned specialized roles. If you're a small business, you'll likely only have a team of 2-5 people who are all wearing multiple hats.

Both of those situations can work, but what's important is that you designate a person (or people) who can own the following responsibilities:

Business Champion
This person will own the overall vision of how the new platform will be leveraged and will set the goals and KPIs for the entire team. They will also manage the relationship between your company and your new provider.

Marketing Champion
Your platform expert. This person will be in the platform on a regular basis. They'll ensure the correct messaging and use cases are being implemented to align with both the business's goals and the goals of the migration itself.

Technical Champion
This will be the developer who oversees the technical integration. They should have a good understanding of your technical landscape and data structure and they will need to become familiar with the new platform's APIs and overall technical abilities.

Project Manager
This person will define the scope of the migration project and lay it out into a project plan for the aforementioned champions and stakeholders. They will keep all team members on the same page and ensure tasks are being completed by the desired timeline.

If you do end up having multiple people filling these roles, it's recommended that you pick one champion who can oversee, delegate, and provide updates to the project manager on the tasks at hand.

Each of the main champions should be as involved as possible in the evaluation of different growth marketing platforms. This will not only help you cover all the bases in identifying the right platform for your business, but will also ensure that the final decision is best for everyone involved, making for a much smoother migration.

2. Audit Your Messages & Use Cases

Once you have identified your team, it is time to determine your data foundation that will be migrated.

Listing out each of the messages you're currently sending to your users might seem like a pretty obvious thing to do, but you would be surprised by how many teams don't do this. The message audit is the first real step in determining the overall scope of your migration.

It also gives you a great visualization of all of the types of messages that you're currently sending. Whether you are categorizing your messages by type (transactional or promotional) or by channel (email, push, SMS, direct mail, etc.), it is crucial to have a holistic view of your messaging.

It's best to utilize this exercise as an opportunity to clean up your communication strategy.

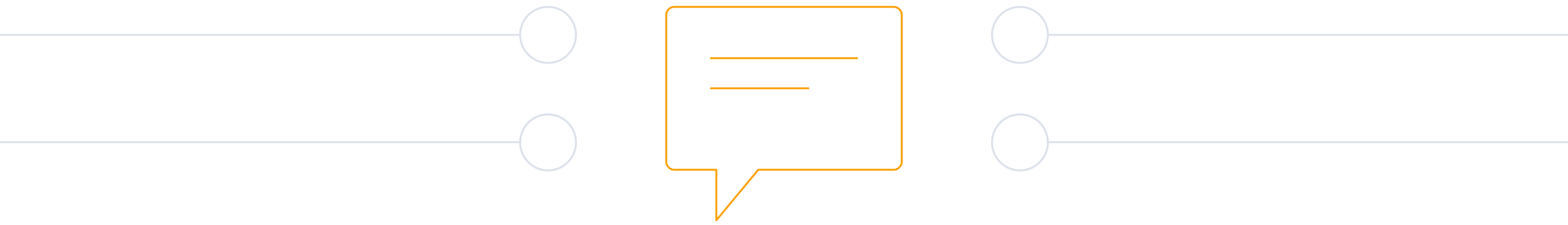
First, let's look at what you should include in your list.

Create a Messaging Master List

Putting your current messaging into a master list likely isn't as easy as you're expecting it to be. Some teams end up realizing they have messages being sent that they didn't even know about.

This typically occurs when companies have triggered messages built into their own systems, which require engineering work to update or disable. It's easy for marketing teams to lose sight of these.

When diving into this process, it's important to note that auditing your messaging might not be as simple as looking at the campaigns in your current platform; it could involve meeting with your engineering team depending on the complexity of your current platform setup.



As you begin to list out all of the messages you're currently sending to users, it's helpful (and important) to tag these messages with the following information:

Channel Type

- Is this an email? Push notification? In-app? SMS?

Campaign Type

- Batch Message: one-off or recurring campaigns that you send all at once to an audience
- Triggered Message: messages that are sent to individual users, typically action or time-based
- Series: multiple messages that are sent to a user over a period of time. Series are typically a handful of triggered messages combined together, such as a Welcome Series.

Message Type

- Is the message a marketing/promotional message or a transactional one?

Lifecycle Stage

- At which stage of the customer lifecycle is the message being sent? As an example, your customer lifecycle stages might be Activation (building interest), Nurture (engaging with customers), and Reactivation (driving retention).

Audience / Trigger

- If this is a batch campaign, which audience is receiving the message?
- If it's a triggered campaign, what is the trigger that would cause a user to receive this message?
- If it's a series, what would cause the user to begin or complete that series?

Required Data

- Do any of your messages include certain user data in them or perhaps need specific information in order for the messages to be triggered at all? As an example, if you're sending a transactional purchase confirmation email it's likely you would need to include the product information of what the person purchased within the message.

3. Clean Up Your Messaging Strategy

Once you have all of your messaging laid out and tagged appropriately, it's time to audit the overall messaging strategy.

Here are some questions you should be asking yourself to determine which messages should stay, which should go, and which need to be updated.

- [x] Are any of my marketing messages not performing well?
- [x] Are there batch messages that would be better off as action-based triggered messages?
- [x] Are any messages off-brand or just poorly designed?
- [x] Am I sending too many or not enough messages at a particular lifecycle stage?
- [x] Is my call-to-action still relevant?
- [x] Does the series flow in the way that it should?

In doing the message clean-up, you prepare yourself for a more refined strategy as you migrate into your new system. It's the perfect opportunity to refresh your efforts and start off with a clean slate.

At the end of your message and use case audit, you should have a list of what you have, where you have it, and which areas need improvement. Building a list with detailed message information gives you a sense of the overall work required as you migrate to a new platform.

Keep Your Migration Tidy From the Beginning

Migrating to a new growth marketing platform is about more than taking your data and moving it from one system to another. It's an opportunity to assess and improve, to tidy up.

By designating a team of champions and cleaning up your messages, you will set your brand up for success, from migration to implementation and beyond.

About Iterable

Iterable is the growth marketing platform that enables brands to create, execute and optimize cross-channel campaigns with unparalleled data flexibility.

Leading brands, like Zillow, SeatGeek and Box, choose Iterable to power world-class customer engagement throughout the entire lifecycle.

Data Flexibility at Your Fingertips
Access real-time user, behavioral and event data to trigger personalized messaging at virtually unlimited scale. Support an audience of millions while appealing to each subscriber's unique preferences.

Unified Brand Experience
Orchestrate seamless customer engagement across email, mobile push, SMS, in-app, web push, direct mail and more throughout every lifecycle stage, from activation to re-engagement.

Agile Iteration & Optimization
Launch, measure and fine-tune campaigns with ease to deliver more relevant messaging faster than the competition. Experiment and iterate on-demand to determine the right content, channel and cadence for each user.

Customer Journey Mapping
Visualize the entire customer journey and build sophisticated, cross-channel segments and campaigns with Iterable's intuitive, drag-and-drop Workflow Studio.

If you want to learn more about Iterable, please request a demo:

REQUEST DEMO