The Growth Marketing Platform Migration Guide

ITERABLE

The growth marketing platform migration. Even the thought of it sends marketers into a whirlwind of stress.

It's time-consuming, resource-heavy, and inevitably comes with a slew of obstacles and blockers. Any projects that came before the migration have to be put on hold until it's over.

Simply put, it's messy. If you're not adequately prepared, you can be left scrambling to find value in the process.

For the modern growth marketing platform this process can actually be quite smooth. To keep your migration clean, you have to get started long before the process even begins.

But where to start?

In this guide, you will see exactly what it takes to prepare yourself and your team for what lies ahead in a growth marketing platform migration and how to ensure a successful transition with your business's growth in mind.

From performing a messaging audit to cleaning your data to finding the right technical integration team, we show you how to tidy up your current system now in order to have immediate success on your new platform later.

Part 1:

Organizing Your Team and Your 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 your data.

Are you ready?

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.

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?

Message Type

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

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.

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?

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).

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? 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.

- Are any of my marketing messages not performing well?
- Are there batch messages that would be better off as action-based triggered messages?
    - Making changes like this will save you and your team time as well as make your messaging more timely and relevant to your users
- Are any messages off-brand or just poorly designed?
- Am I sending too many or not enough messages at a particular lifecycle stage? Is my call-to-action still relevant?
- 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.

Part 2:

Cleaning Up Your Data

Cleaning up your data is an essential part of any platform migration process. Much like a deep clean of your house, a full dive into organizing and cleaning up your data may not be the most glamorous of tasks, but it is necessary.

Now that you've completed the message and use case audit, the worst thing you can do is stop there.

With your messaging strategy sorted out, there is still much to do. Keeping your data clean prior to the migration ensures you will be in a better situation post-migration than when you started.

So, here in Part 2, we have outlined a quick and easy way to protect yourself from falling into the same trap once your platform migration project ends.

Prepping for the Data Deep Clean

Before diving into discussing any data migration, it's important to note a couple things.

Firstly, if your data is a mess in your current system and you do nothing to clean it up when you migrate to the new platform, you're going to find yourself in the exact same situation very quickly.

To put it bluntly, if you have a pile of junk and you move that pile of junk, you still have a pile of junk... but in a new location. Don't come into your new platform and make it messy from the moment you sign in. That won't work.

Cleaning up your data is the single most important piece of any migration. Your team might complain about doing this, but it's much better to spend the time making the right changes upfront than it is to waste months on a migration only to find yourself with similar issues as before.

Secondly, even if your data schema works great in your current system, it doesn't necessarily mean it's going to work perfectly in the new platform.

Be aware of the differences between the two platforms and, again, spend the time making the necessary changes upfront. Be sure to ask questions about data schema when you're evaluating different platforms so you can be aware of larger changes you might have to make.

We will dig deeper into evaluating which platform is right for you in Part 3.

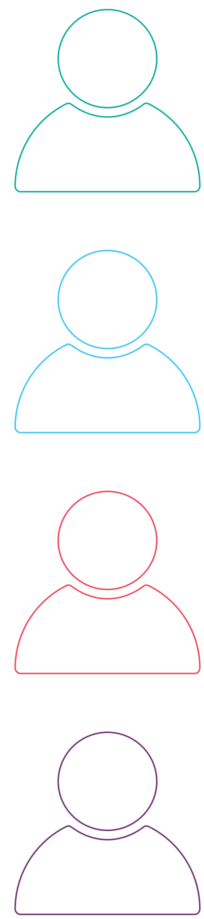
Categorizing Your Data Schema

Similar to how you listed out your messaging in the [message audit exercise](), you're going to also lay out your data schema. You should be able to break down your data into three main categories: User Data, Event Data, and General Data.

User Data

As the name suggests, user data is the information you'll want to store in the new platform about each individual user.

At the simplest level, this could be information like first name and last name. In a modern growth marketing platform, your options are much more specific and numerous. Maybe you'll have an array of product IDs that are currently being recommended to the user or product IDs attached to a user's transaction history.



Regardless, the best place to start organizing this data is in your current platform.

Start by getting an export of the user data you currently have and make a list of each of the user fields. Again, going through an audit process, identify which fields you want to keep and if there are any that need to be updated.

Once you've done that, it's time to identify if there are new data points you'll want to start tracking in the new platform.

The easiest way to identify these new data points is by using the message audit you already created. Are there new or updated messages you'll be sending that require new data? If so, add it to the schema.

Aside from referencing the message audit, you should also identify new data points for users by considering new audiences that you might want to build. If there are user queries you can't achieve in your current system, ask yourself: what user data is needed to make them possible in the new platform?

Once you have a comprehensive list of all of the data points you want to store about your users, it's helpful to provide some further information to keep the whole team on the same page throughout the data migration.

For each of the user fields you've listed, add in the data type of that field (string, integer, boolean, etc.), an example field value, and a quick description of the field's purpose if it isn't obvious.

In completing this process, you set yourself up for simpler tracking as you look to scale on your new platform.

Event Data

Event data are the actions your users take that you want to track.

As an example, let's say your company is a fitness app. Some events you would want to track include a "Signed Up" event when a new user creates an account, a "Created Goal" event when a user adds a new fitness goal, and a "Workout Completed" event each time the user finishes a workout.

Within these events, you should be able to provide further information about what actually happened (the "event fields"). For the "Workout Completed" event, you would likely have information, such as the specific workout the user completed, the amount of calories they burned, and the length of the workout.

If you're already tracking user actions in your current system, you should again start by listing those out and determining if any should be removed or changed before the data migration process begins.

Utilizing your message audit, determine if there are any new events you'll need to start tracking moving forward. If you're planning on sending new triggered messages, does it make sense for those to be triggered by a new event? If you want to build an audience based on whether the users have or haven't done some action, is that action already something you're tracking?

After listing out each of the events you'll track, expand on this by adding in the event fields for each of them.

Simply knowing that users "Viewed a Page" isn't that helpful. Ask yourself what information would make the event more useful. Is there information that would make messages triggered by this event more personalized? Which data fields do you need to query for based on these actions?

Use this process as an opportunity to get more granular with your event tracking data. In doing so, you open up the possibilities for hyper-personalized messaging down the road.

General Data

Your general data is typically information that is common across all or most of your users.

A great example of this is an e-commerce company's product catalog. That company might need to be able to include certain product information in their email templates, but since this data is the same for every single user, it doesn't make sense to store it as User Data.

This data should be stored separately, either in a table that your new platform provides or perhaps within a data feed that is hosted on your end and referenced by the new platform.

Either way, it's important to identify if you have any general data so you can discuss your options for using it during your platform evaluations.

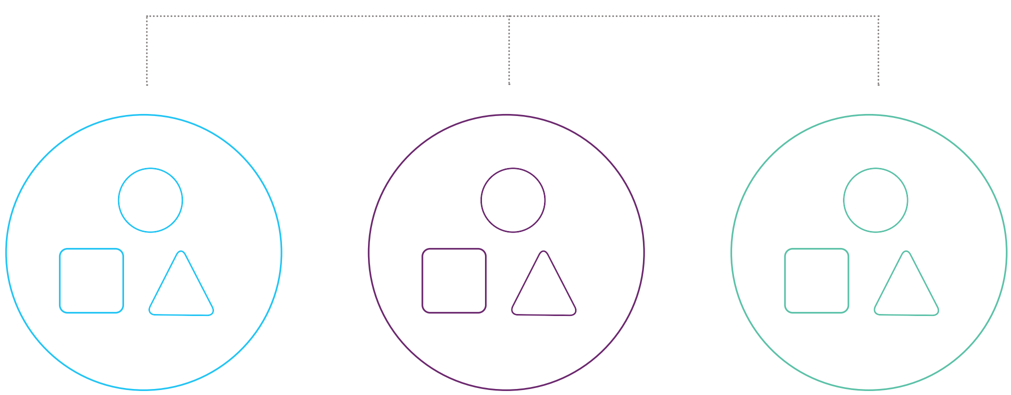
Laying the Groundwork for Now and Later

When you return from a vacation, you don't want to immediately have a series of chores to do to clean up your home.

In essence, you are avoiding this problem—and protecting your future self—by cleaning up your data before the platform migration process begins.

You are also increasing your chances of accelerated growth on your new platform by doing your due diligence and identifying what new data fields you should capture.

It's a win-win, now and in the future.



Part 3:

Owning Your Technical Integration

Your messaging strategy is organized, your team is ready, and your data is clean. Up next: the technical integration.

Undoubtedly, your first question is going to be, “How long will it take me to get integrated with the platform?”

A fair question. A drawn out technical integration process can derail your productivity and disrupt the momentum you gained from your detailed messaging and data preparation.

Let’s take a look at how to own your technical integration by preparing yourself for obstacles and choosing a platform provider that can provide valuable assistance to shorten your timeline.

Scoping Your Technical Integration

The fact of the matter is no two technical integrations are alike. And the answer to your question above will invariably be, "It depends."

There are simply too many factors in play to create a universal process for every integration.

However! There are ways to mitigate risks and keep your technical integration on track. Here are four key factors to keep in mind. If left unmonitored, these could have a significant impact on the length of your integration.

1. Data Clean-Up

We discussed this in Part 2, but it bears repeating. In an ideal world, the data clean-up is completed before you start the integration. That said, the data clean-up should still be included as part of the timeline. This way you can see the impact on the overall length of integration. The more clean-up you have to do, the longer the integration process.

2. Points of Integration

An integration that is simply a few API calls from one back-end system is going to be much quicker than an integration that involves separate systems, such as a web, back-end, and mobile app integration. Your overall tech stack will also play a part here. If you use platforms that can integrate with the growth marketing platform you've decided to move forward with, this will speed up the integration process.

As an example, if you have a customer data platform like Segment that you're already passing data into from a variety of different sources, this could potentially turn weeks of manual integration work into a just a day or two of setup.

3. Currently Existing Code

Your development team likely has code in place for your current system. If this code can be repurposed with slight changes, then this will speed things up. For example, your system might be making API requests to your current marketing platform either to create and/or update users or to track actions they're taking. These could likely be updated to utilize your next platform's API with little effort.

4. Capability of Your Integration Team

It's a bit of an obvious statement, but the savvier your development team is, the quicker the process will be. When drafting your timeline, consider the resources you have in-house—both in quantity and combination of skill sets. Also take into consideration the resources you'll receive from your new growth marketing platform vendor, who will act as an extension of your team.

For implementations at Iterable, you have access to a dedicated implementation consultant, as well as Solution Architects and your Customer Success Manager—all of whom are product experts. When evaluating platforms, be sure to identify whom you'll get to work with on the vendor side and understand how they'll support your team.

It's a near impossible task to lay out the entire scope of your technical integration prior to getting started with your new platform provider. There will always be integration pieces you weren't aware of or that don't work exactly the way you thought they did.

Combat this inevitability by utilizing what you do know to get a general sense of the work your development team has ahead of them.

Your new growth marketing platform provider should have the tools and team in place to help you finalize your technical integration plan.

What to Expect From Your New Provider

The technical integration aspect of the migration shouldn't be something that scares you. If anything, choosing a new platform should be something that excites your development team.

Your new provider should have systems and teams in place to make the process simple, smooth, and painless. For example, new customers are provided with a template they can utilize to lay out their user schema in a way that makes sense within the Iterable platform.

They also get to go through a schema review session with their dedicated implementation consultant to confirm they're moving forward with a schema that will work well.

As corny as it sounds, there are likely technical aspects of your current platform that your developers don't enjoy working with. Maybe they cringe every time you ask them to push a code change just to update the HTML of a triggered email.

Ideally, your new platform should be one that simplifies life for both marketers developers.

The technical integration process doesn't have to be a burden. And it shouldn't impede your progress. Take the time to find the right growth marketing platform with the right team to address your business needs.

Owning the Technical Integration

Typical technical integrations are rife with obstacles to overcome. There's no denying it and, truthfully speaking, there is no way to completely eradicate all obstacles.

But you can help yourself by doing your due diligence. Focus on the key factors that could derail your integration, stay organized with your data and messaging, and vet your new provider's process before starting the integration.

With the right preparation—and an understanding of potential blockers—you can be running new campaigns in no time.

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, DoorDash, 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.