ITERABLE

The Cross-Channel Marketing Platform Migration Guide

The thought of migrating to a new CRM or marketing messaging platform can send marketers into a whirlwind of stress.

Migration can be perceived as time-consuming and resource-heavy, and it inevitably comes with a slew of obstacles and blockers. If you're not adequately prepared, you can be left scrambling to find value in the process.

However, with a **modern cross-channel 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 learn what it takes to prepare yourself and your team for what lies ahead in a cross-channel platform migration and how to ensure a quick, successful transition with your business's growth in mind.

Part 1

Defining Your Goals and Quick Wins

An overlooked but critical step in migrating to a new platform is to review the goals of the migration and identify the first tangible wins you want.

To do this, think short term and long term.

Quick wins are all about the goals you can achieve as you move to a new platform. These can be how long it takes to launch your first message, or how much quicker it is to create a campaign compared to your old system.

In the long term, consider what business outcomes you can tie to a successful use of the new platform.

These could be faster campaign production time, improved engagement metrics, or an increased influence on messaging ROI. Baseline these before you migrate so you can compare your results on a new platform as you go.

A bit more formally, an effective goal-setting system for migration is the **People, Process, Technology framework**. This frames your goals in ways that ensure project stakeholders, your current and future processes, and the tech stack you are working with are all considered and working together.

PEOPLE

Think through who has the skills and knowledge to make the migration successful. This includes marketing and CRM team members who know the ins and outs of your current marketing platform or point solutions. That team, in turn, partners with the product and engineering team members who know how to pass data to and from your customer systems.

And don't underestimate the importance of an executive sponsor. This is a high-level partner who can help clear internal roadblocks you may encounter and give visibility to your successes.

Key Questions to Ask Yourself:

- Who would do what during the migration?
- Who would you not need after the migration is complete?
- Which team members have bandwidth?
- Which teammates are change agents excited about making a difference?

PROCESS

Think through the processes you go through today to conceive and launch your email, SMS, and mobile app campaigns. A quick audit can tell you which processes you'd like to carry over to the new platform and which ones need to be reconsidered.

Consider, too, the timeframe in which you need to migrate. Often the expiration date of a previous platform drives the timeframe of a migration. The more time you give yourself to migrate, the less stress you will add to the project.

For the migration itself, clearly define roles and responsibilities to ensure updates are visible across the team and the project stays on track.

Key Questions to Ask Yourself:

- What date do you want to start with the new platform?
- Which processes work well and are efficient?
- Which processes have bottlenecks due to reliance on other teams or other tools?

TECHNOLOGY

Consider what challenges you and your team face in using your legacy platform today, or how you're limited with your legacy platform or your set of point solutions.

It's also important to fully audit your technology stack to determine how this migration will impact the other pieces in your stack. A deep understanding of where this migration solves pain points—and also where new ones *could* arise—will help prepare you for a smooth transition.

Lastly, bring all of these together by committing to and driving towards a quick win that shows you're getting early value out of a cross-channel platform.

Teams who drive towards one quick win after another achieve quicker success and generate momentum, which leads to results.

Key Questions to Ask Yourself:

- What are the pain points you'd like to improve by using a new cross-channel platform?
- What is the first campaign your team wants to launch?
- Does your new platform have different integrations from your existing platform?

Part 2

Organizing Your Team and Your Campaigns

Once you've started with goals and considered how your people, processes, and technology are interrelated, it's time to plan the migration.

GATHER YOUR TEAM

The first step before you move forward with any migration planning is identifying the specific stakeholders who will be involved—a **tiger team** of sorts. 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 could very well have a team of 10-15 people who are all assigned specialized roles. If you're a startup in growth mode or part of a smaller business unit in a larger company, you'll likely only have a team of two to five people who are all wearing multiple hats—or even just one, in which case, kudos for taking the time to read this.

Regardless of the size of your organization, what's important is that you designate people who can own the following roles and responsibilities.

Executive Sponsor

This role champions the project, including advocating and gaining support from cross-functional departments. They provide necessary business context, secure budget, assign resources, and communicate project priority within the organization. They also manage the relationship between your company and your new provider.

Marketing Champion

Your platform expert. This person will "own" the platform and use it on a regular basis. They'll ensure the correct campaigns and use cases are migrated to align with both the business's goals and the goals of the migration itself.

Technical Champion

This will be a developer, or squad of developers, who oversee the technical integration. They should have a good understanding of your marketing tech stack and data structure. They will need to become familiar with the new platform's APIs, SDKs, and overall technical abilities. Larger teams tend to have technical roles specializing in front-end, back-end, and mobile parts of your tech stack.

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. They will also regularly communicate tasks completed and identify blockers to task completion.

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 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.

DOCUMENT YOUR CAMPAIGNS & USE CASES

Once you have identified your team, it is time to plan for which campaigns and associated data should be part of the migration. If migrating to a new system is like moving to a new house, think of this like your packing list.

Listing out all the campaigns you're currently sending to your users might seem like a pretty obvious step in the process, but you'd be surprised by how many teams skip this important step. Documenting your campaigns and use cases is the first real step in determining the overall scope of your migration.

It also acts as a mini-messaging audit, giving you a great visualization of all of the types of messages that you're currently sending. Whether you are categorizing your campaigns by lifecycle state (onboarding or nurture), message category (transactional or promotional), or sending channel (email, **push**, **SMS**, **direct mail**, etc.), it is crucial to have a holistic view of your campaigns.

Since it may have been a while since an exercise like this was completed, this is also an opportunity to reconsider your communication strategy and look for areas of improvement.

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

Create a Campaign Master List

Set aside a few hours to put your current campaigns into a master list. You may need to go into more than one system to document all of your campaigns, and may even discover campaigns that are still running that you weren't aware of.

This typically occurs when companies have triggered campaigns 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 the campaign audit process, it's important to partner with your engineering team so you can gain the full picture of your current platform setup.

As you begin to list out all the campaigns you're currently sending to your customers, it's helpful (and important) to tag these campaigns 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
- Journey: multiple messages that are sent to a user over a period of time. Journeys 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 journey, what would cause the user to begin or complete that series?

Personalization Data

- Which messages include certain user or event data to make the message more relevant? What data is needed to trigger your messages? For 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. Also, be sure to include the data required to personalize a message with a catalog of products, store locations, or any data beyond user and event data.

AI-Readiness

- AI is changing how marketers leverage their data and engage with their customers. That's why it's important to think about your campaigns with an AI lens. Consider what campaigns you have that could use a boost from new subject lines or calls to action generated by AI. Or what user and event data can be used to predict the likelihood of a purchase, churn, or key conversion point. Thinking through AI upfront will speed along your use of AI tools that learn from the data you store in a modern platform.

Evolve Your Messaging Strategy

Once you have all of your campaigns 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.

- Which marketing messages could have more engagement or help influence key business metrics?
- Which batch-and-blast campaigns would be more effective as real-time 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.
- Which messages feel off-brand or are poorly designed?
- Am I sending the right amount of communications to the right audience at a specific lifecycle stage?
- Is my call-to-action still relevant?
- Does a journey flow in the way that it should?
- Do steps in the journey need to be redesigned for a cross-channel audience or to better align with today's customer behavior?

By looking at your messaging with fresh eyes, 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 campaign 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 cross-channel 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 3

Standardizing Your Data

Defining the data in your new platform is an essential part of any platform migration process. Collecting and documenting data needed to support your campaigns and use cases may not be the most glamorous task, but it is necessary to have a clean foundation to leverage the data that powers your personalization and segmentation needs.

After you've audited your campaigns and use cases, keep up the momentum and move on to evaluating your data.

In this section, we outline a way to have a source of truth that allows all your stakeholders to determine which data is needed to power your cross-channel marketing initiatives.

PREPPING FOR THE DATA DEEP CLEAN

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

You've heard of the phrase "garbage in, garbage out?" If your data is disorganized in your current system and you let that stay as is when you migrate to a new platform, you're missing an opportunity to make processes easier and more efficient for everyone who will use the new platform.

Standardizing your data is one of the most important parts of a migration. This step is about seeing your data in a source of truth schema document, understanding how it will be used in the system, and looking for data points that would make it confusing for the team members using your new system.

For example, look for fields that store the same data with similar names (e.g. firstName and FirstName) or event fields that track the same user action but are similar in nature (e.g. PurchaseCreditCard and PurchaseApple).

This may feel tedious, but taking the time to document, review, and update your data saves time in the long run versus relying on confusing data that can cause issues for months and years.

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, so this step is crucial no matter the situation.

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. (Spoiler: we help with this in Part 4!)

CATEGORIZING YOUR DATA SCHEMA

Similar to how you listed out your messaging in the message audit exercise, you're going to lay out your data in a data schema (also called a tracking plan). 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. This data identifies "who" the person is—usually, data captured upon acquisition that the user gives permission to share (name, email, phone number, product preferences) or that your back-end system adds (e.g. user ID).

At the simplest level, this could be information like first name and last name. In a modern cross-channel 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 renamed or recast.

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 target. If there are users you haven't been able to segment 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 points 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. This is data about the “stuff” you need to include in your personalization and segmentation efforts.

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.

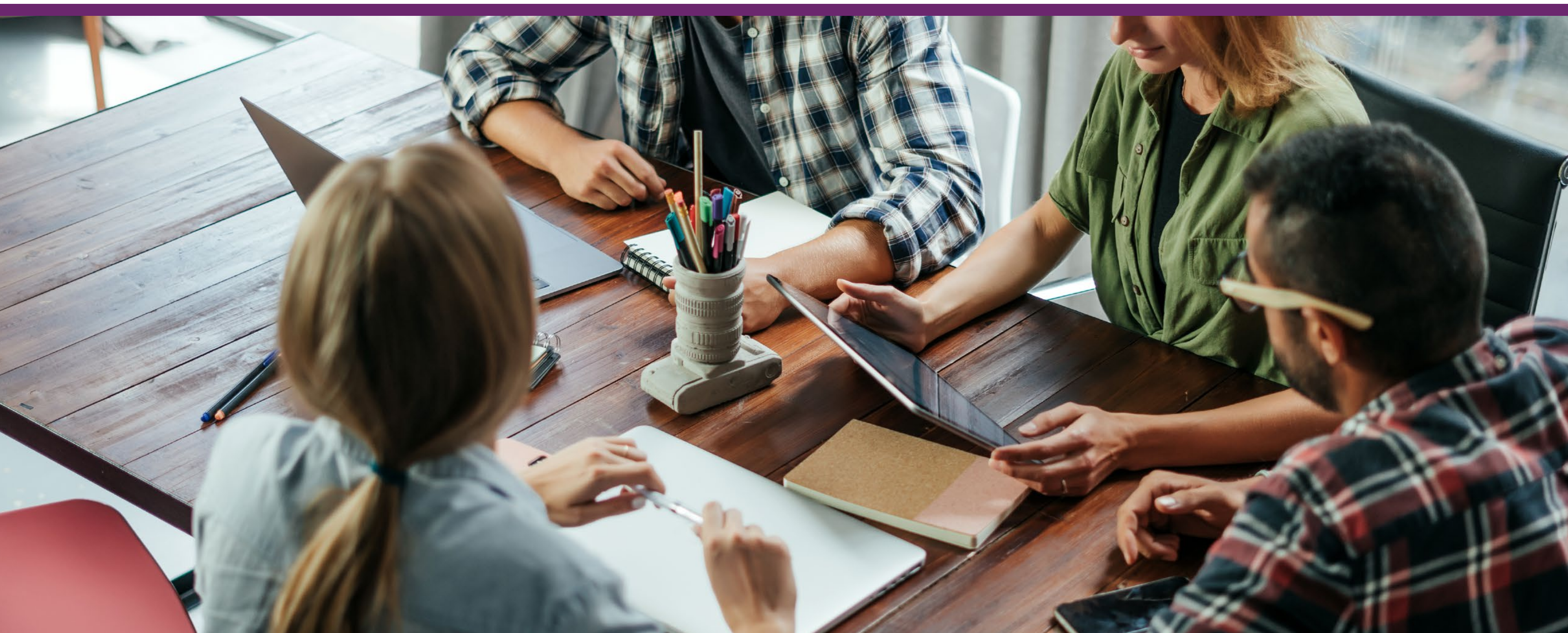
This data should be stored separately, either in an index or table that your new platform provides, or perhaps within a data feed that is hosted on your own end and just referenced by the new platform.

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

LAYING THE FOUNDATION FOR NOW AND LATER

Overall, the outcome of documenting and standardizing your data is to increase your chances of accelerated growth on your new platform by knowing what data you need in the new system, where it’s coming from, and why you’re using it.

Well-organized data lets you launch your campaigns quicker, makes reporting more insightful, and lets other teams and tools leverage your data in new and meaningful ways.



Part 4

Owning Your Technical Integration

Your messaging strategy is organized, your team is ready, and your data is ready to go. 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 each and 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 Standardization

We discussed this in Part 3, but it bears repeating. In an ideal world, the data is well-organized and well-understood before you start an integration. Be sure to include data documentation and prep as part of the project 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 cross-channel 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 or a reverse ETL that you're already passing data into from a variety of different sources, this could potentially turn weeks of manual integration work into a few days of setup and validation.

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 cross-channel vendor, who will act as an extension of your team.

For implementations at Iterable, you have access to a team of people to support you as you migrate during your onboarding phase all the way through expanded platform growth. Whether it's your Implementation or Technical Consultant, a Solution Architect, a support agent, or your Customer Success Manager—all of whom are product experts—you'll be able to leverage years of experience and platform knowledge to get the most value of your investment.

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. Keep in mind that there will always be data points or parts of your tech stack or data that you weren't aware were essential to a migration or that don't work exactly the way you thought they did.

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

Your new cross-channel 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 to Iterable are provided with a workbook they can use to document their campaigns and lay out their data schema in a way that makes sense within the Iterable platform.

They also get to go through data schema review sessions with their onboarding team to confirm they're moving forward with a schema that will work well now and in the future.

There are likely technical aspects of your current platform that your marketers and developers don't enjoy working with, which leads to wasted time. Maybe a marketer has to go to a developer to pull a segmented list. Or developers have to use their valuable time to make minor updates to a triggered email. Ideally, your new platform should be one that simplifies life for both the marketers and the 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.