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A MARKETING GEEK'S GUIDE TO:

MARKETING AUTOMATION PLATFORM (MAP) MIGRATIONS

A MARKETING GEEK'S GUIDE

ABOUT THIS SERIES

There is a lot that goes into your marketing strategy, and it's not something you should go at alone. Lucky for you, our experts have you covered. At Relationship One, our mission is to "Inspire Success." We hope that reading through this eBook will inspire you to try something new, solve a problem you've been dealing with, or invent something that will take your marketing efforts to the next level.

Let our experts help you dive into an area of modern marketing that you're curious about and let the inspiration flood in.

A MARKETING GEEK'S GUIDE:

MARKETING AUTOMATION PLATFORM (MAP) MIGRATIONS

Migrating your Marketing Automation Platform (MAP) is not merely a tool swap—it's a transformative project that demands strategic planning, a clear roadmap, and thoughtful change management.

By the end of this guide, you'll gain insights into less-visible expenses, overlooked pitfalls, commonly repeated myths, and practical preparation steps. Whether you're evaluating platforms or in the midst of transition, this collection arms you with a holistic, data-driven roadmap for success.

CHAPTER 1:
THE HIDDEN COSTS OF MIGRATING YOUR MARKETING AUTOMATION PLATFORM

Marketing automation platforms (MAPs) and customer engagement platforms are the backbone of efficient and successful marketing operations. With the right MAP, marketers can streamline campaigns, personalize customer journeys, and enhance lead nurturing. Marketing automation has become a staple of modern marketers, and the majority of seasoned marketing teams have been using MAPs for years. However, as the technology landscape advances, many organizations are exploring ways to integrate platforms, pursue new capabilities, and/or save money. Although a shift in tools can be exciting, migrations can quickly transform into a complex process with unforeseen challenges and significant hidden costs. What appears on the surface as a simple software swap (with potential license savings), in reality, can be an invisible iceberg, with the vast majority of its expense lurking beneath the surface.

WHY COMPANIES MIGRATE

Understanding why companies switch marketing automation platforms is important because it offers a powerful lens into the evolving landscape of marketing technology and strategic business needs. For marketers, this insight allows for proactive self-assessment and informed decision-making when evaluating their own tech stack, ensuring they avoid common pitfalls and select solutions that genuinely align with their long-term objectives. For vendors, it provides valuable feedback for product development, competitive positioning, and refining customer retention strategies. Ultimately, this collective knowledge fosters greater efficiency, smarter investments, and more effective marketing outcomes across the industry, enabling all parties to adapt to dynamic market demands and maximize the value derived from marketing automation.

Common drivers include:

- **Scalability Issues:** The existing platform can no longer handle growing contact databases, increasing campaign volume, or complex segmentation needs.
- **Feature Gaps:** The current MAP lacks essential functionalities, such as advanced AI-driven personalization, robust analytics, or specific integration capabilities crucial for evolving marketing strategies.
- **Cost Optimization:** Perceived high licensing fees or inefficient usage of the current platform lead to a search for a more cost-effective alternative.
- **Integration Challenges:** The current MAP struggles to integrate seamlessly with other critical components of the MarTech stack, like CRM, sales enablement tools, or data warehouses.
- **Vendor Relationship & Support:** Dissatisfaction with vendor support, lack of innovation, or restrictive contracts prompt a move.
- **User Experience:** A clunky or outdated user interface hinders team productivity and adoption.

While these motivations are valid, the true cost of achieving these benefits often extends far beyond the new platform's license fees.

HIDDEN FINANCIAL COSTS

The most tangible, yet frequently miscalculated, costs are financial. Beyond the obvious subscription fees for the new platform, many other monetary expenses can quickly accumulate.

OVERLAPPING SOFTWARE LICENSING AND SUBSCRIPTION FEES

A common and often unbudgeted expense is the necessity of running both the old and new MAPs concurrently for a transition period. This ensures business continuity, allows for phased data migration, and provides a safety net should unforeseen issues arise with the new system. Depending on the complexity of your operations and the volume of data, this overlap could last for several months, effectively doubling your software expenditure during the migration phase. Companies might also incur penalties for early termination of their old MAP contract, especially if they are moving before the contract term expires. In some cases, vendors will not allow for short contract renewals, and full year licenses may be required, increasing overall cost.

IMPLEMENTATION AND SETUP FEES

While some MAP vendors include basic onboarding, many charge separate, substantial implementation and setup fees. Often, vendors will bring implementation partners into the conversation, and they will provide separate quotes for implementation and initial managed services. These costs cover the configuration of the new platform, initial data imports, and basic integrations. These fees can vary wildly, from thousands of dollars for simpler setups to tens of thousands for enterprise-level deployments with complex requirements. Always get a clear breakdown of what's included and what's extra.

DATA MIGRATION & CLEANSING COSTS

Most legacy systems accumulate "dirty data" over time: duplicates, incomplete records, inconsistent formatting, and outdated information. Migrating this bad data simply perpetuates the problem in the new system, undermining its effectiveness from day one. Therefore, a crucial pre-migration step is data cleansing and standardization. This process is incredibly time-consuming and often requires specialized software tools (e.g., deduplication software, data validation tools) or the engagement of data quality consultants, all of which come with a price tag. Investing in these services upfront saves exponentially more in troubleshooting and ineffective campaigns down the line.

INTEGRATION DEVELOPMENT AND MAINTENANCE

A MAP rarely operates in isolation. It's typically part of a broader MarTech ecosystem, integrating with CRM (e.g., Salesforce, Microsoft Dynamics), analytics platforms (e.g., Google Analytics, Adobe Analytics), webinar platforms, advertising platforms, content management systems, and more.

- **Connector Costs:** Many modern MAPs offer pre-built connectors to popular third-party tools. However, these connectors might require separate licenses or come with usage-based fees.
- **Custom Development:** If your existing tools or unique business processes demand integrations not covered by native connectors, you'll need to invest in custom API development. This requires skilled developers, potentially external consultants, and can be a significant, ongoing expense. Each custom integration adds complexity and a potential point of failure.
- **Integration Testing:** Thoroughly testing every integration point to ensure data flows correctly and consistently is non-negotiable. This testing requires dedicated human resources and often specialized testing tools, incurring both time and financial costs.

CONTENT MIGRATION

- **Asset Recreation:** Email templates, landing pages, forms, and email assets (images, PDFs) often don't transfer perfectly between platforms due to differences in coding, design frameworks, and proprietary elements. This means a significant portion of your existing assets may need to be rebuilt or heavily reformatted in the new system. This requires design, copywriting, and development resources.
- **Workflow and Program Recreation:** Rebuilding complex marketing automation workflows, nurture sequences, lead scoring models, and segmentation logic in the new platform is not a simple copy-paste operation. It involves careful mapping, meticulous configuration, and extensive testing, demanding significant time from marketing operations specialists.
- **Historical Data Archiving:** While you might migrate current contact data, consider the cost of archiving historical campaign performance data, email sends, click-through rates, and other metrics from your old platform if you need to retain them for compliance or long-term analysis.

TRAINING COSTS

Effective training, while sometimes partially included during implementation, frequently incurs additional costs for specialized or in-depth sessions, particularly for distinct roles like marketing operations or analytics. Beyond this, companies must also account for the substantial internal resources and time required to develop tailored training materials, conduct workshops, and provide ongoing support and governance oversight to their teams. This extensive training period inherently leads to lost productivity, as time dedicated to learning the new platform means less time spent on crucial marketing initiatives, directly impacting campaign execution and lead generation during the transition.

CUSTOMIZATION, REPORTING, AND ONGOING OPTIMIZATION

If your business has unique needs, you might require custom development within the new platform to replicate specific functionalities or build new ones. Furthermore, setting up new custom reports and dashboards to track KPIs in the new environment takes time and expertise. After migration, continuous optimization of workflows, integrations, and campaign performance within the new system is an ongoing effort that requires dedicated resources.

HIDDEN TIME COSTS

While financial costs are quantifiable, the impact on your team's time and productivity can be just as, if not more, challenging. These time costs often go unlogged and unrecognized, yet they impact project timelines, morale, and ultimately, business outcomes.

EXTENSIVE PLANNING AND STRATEGY

- ○ **Platform Evaluation and Selection:** The time spent researching, demoing various platforms, comparing features, negotiating contracts, and making a final decision is substantial. This often involves multiple stakeholders across departments.
- ○ **Internal Audits and Discovery:** Before moving anything, a thorough audit of your existing campaigns, workflows, data, integrations, and assets is crucial. Understanding how everything is currently connected and used identifies critical dependencies and potential roadblocks. This discovery phase alone can take months.

- ○ **Migration Team Assembly and Coordination:** Designating a dedicated internal team to lead the migration – with clear project owners from marketing, sales, IT, and potentially legal/compliance – and coordinating their efforts is a massive organizational undertaking. Regular meetings, communication, and conflict resolution consume significant hours.

DATA PREPARATION

- ○ **Data Cleansing Labor:** As mentioned, identifying and correcting errors, duplicates, and inconsistencies in your existing data is labor-intensive. This involves manual review, running reports, and implementing corrective actions.
- ○ **Data Mapping and Transformation:** Carefully mapping fields and data structures between the old and new systems is a painstaking process. What seems like a simple "contact name" field might have different definitions or associated properties in each platform, requiring careful transformation rules. This demands deep institutional knowledge of both systems.
- ○ **Legacy Data Export Challenges:** Older systems often have limited or complex export capabilities, making it difficult to extract large volumes of data cleanly and efficiently. This can lead to fragmented data, requiring multiple exports and manual reconciliation.

TEAM TRAINING, ADOPTION, AND CHANGE MANAGEMENT

- ○ **Learning Curve and Productivity Dip:** Even with the best training, there will be a natural learning curve as your team adapts to the new interface, terminology, and functionalities. This inevitably leads to a temporary dip in productivity, as tasks that were once second nature now require conscious effort and time to navigate the new system.
- ○ **Addressing Resistance to Change:** People are creatures of habit. Introducing a new system, especially one as central as a MAP, can meet resistance. Marketing leaders must dedicate time to proactive change management, clear communication, addressing concerns, and demonstrating the benefits to foster adoption.

◦ **Developing Internal Expertise:** Beyond initial training, your team will need time to truly master the new platform, becoming proficient in troubleshooting, advanced features, and optimization techniques. This organic development of expertise takes sustained effort.

◦ **Developing a Center of Excellence (CoE):** Establishing a CoE and robust governance is crucial during marketing automation migrations to ensure consistent best practices, maximize platform utilization, and mitigate risks. This framework fosters standardized processes and shared knowledge, ultimately driving a smoother transition and greater long-term ROI from the new tool.

STRATEGIES TO MITIGATE THE HIDDEN COSTS

Migrating marketing automation platforms is a complex undertaking that demands a strategic and meticulous approach. Before selecting a new tool, it's crucial to conduct a comprehensive pre-migration audit. This involves an exhaustive review of your current platform's usage, assessing data quality, scrutinizing existing integrations, and taking a full inventory of all marketing assets. This deep dive helps you identify what's truly essential to carry over, what can be retired, and what requires significant cleanup or re-creation, setting a clear foundation for the transition.

With a clear understanding of your current state, you can then develop realistic budgeting and timelines. . It's vital to account for all the often-hidden costs, not just the obvious subscription fees. Building in a substantial contingency fund, typically 20-30% of the initial estimate, is a wise move to cover unforeseen expenses. Similarly, extend your timelines to allow ample room for critical steps like data cleansing, thorough testing, and comprehensive team training. Speaking of data, prioritizing data cleansing is non-negotiable. Invest in data cleansing tools or services before migration to ensure you're not transferring flawed data, because "garbage in, garbage out" applies to marketing automation. Instead of a risky "all or nothing" switch, consider a phased migration approach, moving essential data and core campaigns first, then gradually transitioning less critical elements. This minimizes disruption, allows your team to adapt incrementally, and can potentially phase your expenses.

Successful migration also hinges on effective team collaboration and robust planning. Assemble a dedicated migration team that is cross-functional, with clearly defined roles and responsibilities. Appoint a strong project manager to oversee the entire process, manage communications, and keep all stakeholders aligned. Following this, develop a thorough testing plan that covers every aspect, from data integrity and integrations to workflow functionality and content rendering, involving key users in User Acceptance Testing (UAT).

While leveraging vendor and partner expertise is important, understand precisely what their professional services include and where you might need to supplement with internal resources or specialized consultants, particularly for custom integrations. Finally, automate where possible using third-party tools for data migration or content transfer to reduce manual effort, and define clear success metrics that go beyond just launching the system, focusing on tangible improvements in team efficiency, campaign performance, and overall ROI post-migration.

THE INVESTMENT FOR FUTURE GROWTH

Migrating from one marketing automation platform to another is a significant investment that extends far beyond licensing fees. From the process of data cleansing and content/workflow migration to the intangible impact on team productivity, these hidden expenses can quickly inflate the true cost of the project.

However, recognizing and proactively planning for these challenges transforms the "invisible iceberg" into a manageable landscape. By embracing planning, data quality, robust testing, and change management, marketers can navigate the complexities of MAP migration with greater confidence. The short-term disruption, when managed effectively, paves the way for long-term gains in efficiency, scalability, and a more powerful and effective marketing engine ready to drive future growth.

What appears to be a cost-saving shift to a new marketing automation platform (MAP) can quickly snowball into unexpected expenses.

The Hidden Costs of Marketing Automation Platform Migrations

Hidden Financial Costs

- Overlapping Software Licensing and Subscription Fees
- Implementation and Setup Fees
- Data Migration & Cleansing Costs
- Integration Development and Maintenance
- Content Migration

Hidden Time Costs

- Extensive Planning & Strategy
- Data Preparation Consultation
- Team Training and Adoption
- Organizational Change Management

Strategies to Mitigate the Hidden Costs

Conduct a Pre-Migration Audit
Review current usage, data, integrations, and assets to plan what to migrate or retire.

Prioritize Data Cleansing
Clean and standardize your data before migrating to avoid carrying over flawed or duplicate information.

Migrate in Phases
Migrate your key use cases and journeys first, then roll out the rest gradually.

Align Teams and Leverage Expertise
Build a cross-functional team, assign a project lead, and use expert help when needed.

CHAPTER 2:
DISPELLING THE MYTHS OF MARKETING AUTOMATION MIGRATIONS

It's easy to think of a marketing automation platform (MAP) migration as a simple tool swap. In reality, it's more like rebuilding your entire marketing engine while continuing to drive at highway speed. If you've been around the marketing "block" for a while, you've probably heard and/or experienced a horror story or two. Change is always hard, and with it comes uncertainty. Unfortunately, that leads to a lot of misinformation about MAP migrations out there.

Let's take a moment to set the record straight. Here are the 5 most common myths we hear, and what marketing leaders need to know.

MYTH 1: "CHANGING OUT OUR MAP WILL SOLVE OUR MARKETING PROBLEMS"

If you've ever struggled with a MAP that is not delivering the results your company expects, it may be a knee-jerk reaction to blame the tool. But technology is just one of the three elements of organizational success, according to the PPT Framework. The other two sides of the triangle are People and Process. Swapping out your MAP isn't going to fix your deliverability, open rates, or net-new names acquisition if your problem actually lies in your data, your marketing practices, or even the members of your team.

Before deciding to go the request for proposal (RFP) route to search for a new MAP, take a good, hard look at your data, its cleanliness, and the data ingestion process.

- Do you have the data you need in your MAP to personalize your communications?
- Do you bring in purchase and opportunity data to tailor your user journeys to their lifecycle stages?
- Are you consistently cleaning your marketing database to eliminate duplicate and flawed data?
- Have you documented all the places where data is coming into your MAP and routinely verified that you are still receiving the right data?
- Are your processes as automated as possible to avoid human error?

We also need to think about the third side of the triangle – the people element.

- Do you have the right people in the right seats in your department?
- Are there inter-department communication issues? If IT makes a data or process change, are they involving Marketing in the decision making process and the change rollout?
- Is there more that your team can and should be doing like cross-training between roles or participating in learning opportunities to upskill in your current MAP?
- If you make a MAP switch, will your team members be able to continue their effectiveness?

Remember that changes in one side of the triangle, like introducing new technology, is not done in a vacuum. It affects the other two sides, people and processes. These impacts need to be factored into the costs of MAP migration and planned for accordingly.

MYTH 2: "IT'S JUST A LIFT AND SHIFT"

No…Just no. This is probably the most common, and most dangerous, misconception we hear from clients. Put simply, migration isn't a copy-paste job. Each platform has its own logic, language, features, and data structures. Trying to replicate everything usually leads to broken workflows and campaigns, and missing data. Your triggers, scoring models, workflows, and even the most basic segmentation rules don't always translate between MAPs. It also leads to underutilized capabilities in the new platform as you try to shoehorn what you're doing today into a new box. Trying to copy and paste your Platform A setup to Platform B will almost guarantee you experience a horror story for your migration experience. And, all you've done is move your problems to a new house.

Instead, treat your migration as an opportunity to optimize your marketing efforts. Evaluate what is working, what's not, and rebuild in a smarter way. The whole reason you're going through this migration experience is likely because you've trapped yourself into a corner with your current MAP. The workflows, programs, and processes put in place today are too difficult to re-engineer in the current structure. So use this time to strategically think about what is going to propel you forward for the next 3-5 years and insist on the MAP that most closely aligns with your business goals.

MYTH 3: "WE'LL LOSE ALL OUR DATA"

This one gives CMO's nightmares. You have years of behavioral history, lead data, and campaign performance metrics. It's a scary thought, but thankfully false. If your migration is done right, your data can be retained and maintained. It means planning ahead and prioritizing data mapping. It is important to understand where your data lives, how it is and will be used, and how it will be structured in your new platform. Test and validate repeatedly during the pre- and post-migration phases. And don't forget to think about your custom fields, scoring models, and form behaviors as you map your data to the new MAP.

MYTH 4: "ALL MARKETING PLATFORMS ARE BASICALLY THE SAME"

Yes, at its most basic level, all MAPs do the same thing – send out your marketing and transactional communications to your audience and have background workflows. But MAPs differ wildly in the way they approach the data, native integrations, reporting dashboards, AI capabilities, CRM sync behavior, privacy tools, and so much more. Some are better at ABM, others excel in AI personalization or compliance. Assuming MAPs are interchangeable most often leads to disappointment and missed opportunities.

The key is to pick the platform based on your current and future marketing goals. Let me repeat that – pick the one that fits your business goals, not just the one that is cheapest or feels most familiar. Take a moment to document what is most important to you today and as far into the future as your crystal ball can foretell. This needs to go beyond a simple features list. It needs to define your must-haves based on business goals. Then, pick the platform that most aligns with your strategic goals.

MYTH 5: "WE CAN JUST FIGURE IT OUT AS WE GO"

Please don't. Would you launch a major product campaign without a plan? Of course not! So don't risk your entire marketing infrastructure with a "winging it" migration. Underestimating the complexity of a migration can create long-term issues. Without a solid plan, and the right partners, your migration is going to be painful. Migrations require cross-functional expertise from IT, legal, operations, and more often than not, compliance. Without them, you risk misconfigurations, broken forms, missed integrations, and regulatory missteps (think GDPR, CASL, CAN-SPAM, CCPA). It pays to bring in an external partner who has done it before, but if that isn't an option, at least take the time to map out a smart strategy, create a migration tiger team and have a dedicated project manager to guide your migration project.

FINAL THOUGHTS

A marketing automation migration can feel like an overwhelming task. If we're honest, it's also not something anyone wants to do in their spare time. But a MAP migration is a golden opportunity, not just to switch tools, but to optimize your strategy, improve processes, and enable smarter marketing. With the right planning, the right partners, and the right perspective, it's a strategic move that can massively improve agility, performance, and ROI. Don't let outdated fears hold you back from transforming your entire marketing engine.

Migration Readiness Checklist

☐ Ensure you have executive buy-in

☐ Set your migration budget (including training & post-migration support)

☐ Document your platform selection rationale including clear use cases and data requirements

☐ Audit your existing MAP and create an inventory of assets, programs, and data

☐ Assign clear owners across Marketing, Operations, Sales, and IT

☐ Create a project plan and timeline with milestones and QA checkpoints

☐ Develop a change management communication plan for internal stakeholders

☐ Ensure you set aside 4-6 weeks for IP warming and deliverability prep

☐ Create a go-live support plan and a 30/60/90 day roadmap

CHAPTER 3:
FALLACIES OF LIFT AND SHIFT MIGRATIONS

We have all heard the term "lift and shift" when it comes to migration in the world of marketing automation platforms. It can fool one into thinking that a complex, time-consuming process can actually be an effortless move. If only we could move our carefully built campaigns, intricate data structures, and seamless integrations from one system to another with a simple copy-paste.

If you've ever navigated the complexities of switching from one Customer Engagement Platform or Marketing Automation Platform (MAP) to another, you know the reality is far more nuanced. That phrase "lift and shift," while convenient, often hides a whole world of challenges that demand planning, strategic re-evaluation, and a deep understanding of both your old and new systems.

While all marketing automation platforms share the fundamental goal of helping you connect effectively with your customers, how they actually work behind the scenes can vary dramatically. This core difference means a true 1:1 replication is practically impossible, even when you're moving between platforms that seem similar or consolidating different instances of the same platform. The journey isn't really about rebuilding what exists. It's more about rebuilding, optimizing, and strategically adapting.

THE "LIFT AND SHIFT" MYTH CHALLENGED

The core misconception of "lift and shift" stems from an oversimplification of what a marketing automation platform actually does. It's not just a message sender; it's a sophisticated ecosystem managing customer data, segmenting audiences,

orchestrating complex journeys, personalizing content, and integrating with a myriad of other business systems. Each has developed its own proprietary way of handling these functions, leading to unique:

- **Data Models:** How customer attributes, activities, and relationships are stored and accessed.
- **Workflow Logic:** The specific methods for building campaigns, programs, and automation flows.
- **Content Management:** How emails, landing pages, and other assets are created, stored, and rendered.
- **Integration Frameworks:** The APIs and connectors available for interacting with external systems.

These inherent differences mean that even if you're moving from one instance of Eloqua to another, or from Eloqua to Braze, elements like image links, form submissions, and tracking mechanisms will inevitably require updates. Furthermore, crucial historical data, such as past campaign performance and individual contact activity, cannot simply be "transferred" into the new system's native reporting environment. This necessitates a strategic approach to data archiving and historical analysis, often involving external data warehouses.

KEY CONSIDERATIONS BEYOND A SIMPLE REPLICATION

A successful marketing automation migration requires a comprehensive analysis that goes far beyond the superficial resemblance of features. Here are the critical areas that demand careful consideration and often significant effort.

1. DATA STRUCTURE AND SCHEMA MAPPING

Your customer data is the lifeblood of your marketing automation efforts. Different platforms handle data structures in distinct ways. Does your existing platform support one-to-many relationships (e.g., one customer with multiple purchases) or even many-to-many relationships (e.g., multiple customers attending multiple events)? Do any of your existing processes rely on complex relational data tables, linking customer profiles to product preferences, order history, or loyalty program tiers?

Migrating this data often requires an entirely new data structure in the target platform. This isn't just about moving fields; it's about understanding how the new platform's data model (e.g., Salesforce Marketing Cloud's Data Extensions, Adobe Marketo Engage's Custom Objects, Oracle Eloqua's Custom Data Objects) can accommodate or improve upon your existing relationships. This phase involves:

- **Schema Analysis:** Deeply understanding the structure of your current data.
- **Mapping:** Identifying how each field and relationship in the old system translates to the new.
- **Normalization and Cleansing:** An opportune moment to clean up inconsistencies, remove redundancies, and standardize data formats.
- **Data Transformation Rules:** Defining how data needs to be manipulated during the transfer process to fit the new schema.

Failure to properly map and transform your data can lead to broken segmentation, inaccurate personalization, and flawed campaign execution.

2. DATA COMPARTMENTALIZATION AND SECURITY

Many organizations, especially larger enterprises or those with multiple brands and business units, require strict data compartmentalization. This raises questions like:

- Do separate business units need their data housed in distinct data objects or even entirely separate instances within the platform?
- Will there be a need for separate profile lists for different brands, as is often required in platforms like Oracle Responsys?
- Is contact-level security a necessity, where specific groups of contacts are only visible to particular lines of business or user groups?

Implementing these security and organizational requirements in a new platform can be complex. It involves configuring user roles, permissions, and data visibility rules to ensure compliance with internal policies and external regulations (like GDPR, CCPA). This isn't a simple data dump; it's about recreating a secure and logically segmented environment that aligns with your organizational structure and compliance needs.

3. DATA TRANSFORMATION AND ETL PROCESSES

Beyond the raw data, many marketing automation platforms perform "hidden" data transformation processes. These might include:

- **Data Enrichment:** Automatically pulling in demographic or firmographic data from third-party sources.
- **Calculated Fields:** Deriving new data points (e.g., "days since last purchase") from existing ones.
- **Aggregation:** Summarizing data (e.g., total purchases over time).
- **Deduplication Logic:** Rules for identifying and merging duplicate contact records.

These crucial processes, which might have been built into your old platform's native capabilities or custom scripts, will need to be meticulously replicated in the new environment. The new platform may have different capabilities or limitations in how it supports these transformations, potentially requiring custom development, middleware solutions, or a re-engineering of the process entirely.

4. THIRD-PARTY INTEGRATIONS

Modern marketing automation platforms rarely operate in isolation. They are part of a broader martech and sales tech ecosystem, integrating with CRMs (e.g., Salesforce, Microsoft Dynamics), Customer Data Platforms (CDPs) (e.g., Twilio Segment, Oracle Unity, Salesforce DataCloud, Adobe Real-Time CDP), analytics tools (e.g., Google Analytics, Adobe Analytics), e-commerce platforms, and more.

Each of these integrations represents a potential point of failure during migration. You'll need to:

- **Analyze Compatibility:** Ensure your existing tech stack is compatible with the new platform.
- **Reconfigure and Re-authenticate:** All existing integrations will need to be set up anew in the target platform, requiring new API keys, authentication tokens, and mapping of data fields.
- **Potentially Re-develop:** If native connectors aren't available or sufficient, custom API integrations may need to be rebuilt from scratch, adhering to the new platform's API specifications.
- **Verify Data Flow:** Rigorously test that data is flowing correctly and synchronously between all connected systems.

This can be one of the most time-consuming and technically challenging aspects of a migration, as it involves coordinating across multiple systems and often multiple vendors.

5. CONTENT AND ASSET MIGRATION

Emails, content cards, landing pages, forms, templates, images, and dynamic content blocks are the visible face of your marketing efforts. While they appear to be simple assets, migrating them is far from a drag-and-drop exercise:

- **Image Hosting:** All images linked within your existing assets will need to be hosted in the new platform's asset library, and every single reference to those images within emails and landing pages will need to be updated. This is a manual and error-prone process if not automated.
- **Form Rebuilding:** Forms are often deeply integrated with data capture and lead routing logic. They will need to be rebuilt in the new instance, and any external web pages hosting these forms will require updates to point to the new form URLs.
- **Template and Dynamic Content:** Platform-specific template languages, dynamic content rules, and personalization tokens will likely not translate directly. This often means recreating templates and logic from the ground up, ensuring that personalization functions as intended.

6. CAMPAIGNS, PROGRAMS, AND JOURNEY REBUILDING

This is where the true "automation" lives. Your multi-step nurture programs, trigger-based campaigns, and complex customer journeys are the culmination of your marketing strategy. These cannot simply be "copied."

- **Rebuilding Workflows:** Each campaign and program will need to be rebuilt using the new platform's workflow builder, adapting to its unique logic, decision points, and branching capabilities.
- **Segmentation Logic:** The audience segmentation criteria used in the old platform must be accurately translated and implemented in the new system, ensuring that the right messages reach the right people.
- **Prioritization:** Given the effort involved, it's crucial to prioritize which campaigns and programs are critical for immediate migration and which can be rebuilt over time.

7. DELIVERABILITY AND IP WARMING

One of the most critical, yet often overlooked, aspects of a MAP migration is deliverability. When you move to a new platform, you'll typically be sending from new IP addresses and sub-domains. Internet Service Providers (ISPs) view new sending IPs with suspicion to prevent spam. This necessitates an "IP warming" process:

- ◦ **Gradual Sending:** A controlled, gradual increase in sending volume from the new IPs over several weeks or even months. This builds a positive sender reputation with ISPs.
- ◦ **Timing is Key:** The timing of your migration must account for this warming period, potentially requiring a temporary pause in message cadence or a carefully managed cutover from the old to the new platform.
- ◦ **Risk of Poor Deliverability:** Skipping or rushing IP warming can lead to emails landing in spam folders, being blocked, or even blacklisting, severely impacting your marketing effectiveness.

8. HISTORICAL DATA AND REPORTING

A significant challenge is the inability to transfer historical reporting and activity data (e.g., email opens, clicks, unsubscribes, form submissions, website visits) from the old instance to the new one. This means:

- ◦ **Loss of Native Historical View:** The new platform will only begin accumulating data from the point of migration.
- ◦ **Impact on Trend Analysis:** You won't have a seamless historical view within the new platform for year-over-year comparisons or long-term trend analysis.
- ◦ **Data Archiving Strategy:** A plan must be in place to archive historical data from the old system, often in a data warehouse or business intelligence tool, to maintain a complete record for compliance, analysis, and auditing.

9. CONTACT MANAGEMENT AND DATABASE OPTIMIZATION

A migration is an invaluable opportunity to critically assess your overall contact database. Instead of merely replicating existing issues, consider:

- ◦ **Data Cleansing:** Is there missing data on your contact records that could be filled in more completely?

- ◦ **Deduplication:** Are there duplicate records that need to be merged or removed?
- ◦ **Inactive Contacts:** Should inactive or unengaged contacts be included in the migration, or is this an opportunity to start with a cleaner, more engaged audience?
- ◦ **Strategic Re-evaluation:** Now is the perfect time to re-evaluate your targeting strategies, messaging personalization, trigger-based campaigns, and lead management processes. Can they be improved or streamlined in the new environment?

This process ensures you're not just moving problems but actively optimizing your database for future success.

10. PROCESS IMPROVEMENT AND STRATEGIC RE-EVALUATION

The true value of a migration often lies not just in replicating existing functionality but in leveraging the new platform's capabilities to drive process improvements. This is the antithesis of "lift and shift."

- ◦ **Automation Opportunities:** Data that was traditionally transferred via manual file uploads could potentially be automated and integrated in real-time via APIs or native connectors, reducing manual effort and improving data freshness.
- ◦ **Advanced Features:** Does the new platform offer advanced features like AI-driven personalization, predictive analytics, or more sophisticated journey orchestration that you couldn't achieve in your old system?
- ◦ **Rethinking Legacy:** This is the ideal moment to challenge legacy processes that might be inefficient, outdated, or simply carried over due to inertia. A migration forces a critical look at "why we do things this way."

THE HUMAN ELEMENT: CHANGE MANAGEMENT

Beyond the technical hurdles, the human element is crucial. A new platform means a new user interface, different workflows, and potentially new ways of thinking about marketing automation. This requires:

- **Comprehensive Training:** Ensuring your marketing team is adequately trained on the new platform's features and best practices.
- **Change Management:** Communicating the benefits of the migration, addressing concerns, and managing expectations throughout the process.
- **Stakeholder Alignment:** Ensuring that all relevant stakeholders, from IT to sales to marketing, are aligned on the migration goals and prepared for the transition.

A STRATEGIC INVESTMENT, NOT A SIMPLE SWAP

The seemingly straightforward notion of a "lift and shift" marketing automation migration is a deceptive one. While the end goal is to transition your marketing operations, the journey itself is a complex project demanding meticulous planning, deep technical expertise, and strategic foresight. It's not merely a technical task of copying data and assets; it's an opportunity to re-evaluate, optimize, and modernize your entire marketing automation ecosystem.

By acknowledging the inherent differences between platforms, anticipating the challenges related to data structures, integrations, content, campaigns, deliverability, and historical reporting, and embracing the opportunity for process improvement, organizations can transform a daunting technical exercise into a strategic investment that yields long-term benefits in efficiency, personalization, and customer engagement. Approaching a migration with this comprehensive mindset, ideally with the guidance of experienced partners, is the only way to ensure a smooth transition and unlock the full potential of your new marketing automation platform.

4 ACTIONABLE WAYS TO PREPARE FOR A MAP MIGRATION

Let's face it. Organizations will continually make strategic changes to optimize, enhance, and support their business objectives and goals. When it comes to the marketing automation journey, that change may also include a digital transformation decision to change its marketing automation platform (MAP). Marketing departments may decide to change a MAP within their own department or as part of an organizational shift (e.g., Adobe to Oracle products) to align with business technology stack strategies and/or solve a business problem. Whatever reason it may be for an organization, preparation will be important. Migrating from one MAP to another can be tricky, requiring lots of planning and strategy.

HERE ARE 4 WAYS TO PREPARE FOR A MAP MIGRATION

1. ALIGN YOUR TEAMS

A migration is a very complex and time-consuming process. It's key to involve all your key stakeholders from the beginning. Sales, Marketing, and IT will need to work in tandem to ensure your migration is successful. Assigning a Program Manager to oversee the entire migration process from initiation to post-migration will ensure a smooth transition.

Along with providing a high-level overview of the migration effort and common outcomes, providing each team the Who, What, Where, When, Why, and How, will be helpful in gaining buy-in and clarity for each team's roles and responsibilities. Establishing a strong stakeholder matrix and identifying the decision makers will also be helpful. There will be times of team collaboration and the Program Manager will need to know who gets to say "Yes," so the decision can be logged, along with the pros and cons of the decision, and move the team forward.

Not involving key stakeholders at the start of a migration may create gaps for the project team. This could include uncovering processes or dependencies too far in the project that could cause rewriting requirements and rework. Hitting those discoveries during testing could also delay the launch timeline.

2. DOCUMENTATION AND USE CASES

Documenting your current marketing requirements and creating use cases will help you define your objectives and formulate the right migration strategy. You can then evaluate your business initiatives and practices to understand what's working and what's not.

Remember the stakeholder matrix you created? That will be most helpful when establishing who is part of the requirements gathering process. Which team members to include in the detailed requirements session versus which stakeholders need to review and approve the requirements will help eliminate any meeting confusion and wasted time.

Also, as you prepare for a MAP migration, identifying the similarities and differences between the platforms will also help formulate a framework for requirements gathering. This will also be helpful in preparing for data mapping sessions needed for any system integration(s) work.

3. FULL ASSET AUDIT

Before beginning the actual migration, you need to carefully audit your current platform. Use this audit to clean out the "junk." This helps you prioritize the assets you only want to use at launch and speeds up the timeline.

Then, as part of phase 2, you can then bring in any assets you may want to use in the future. We recommend only bringing over active campaigns, ongoing nurtures, and templates. You really don't need a campaign and its assets for something that ran/completed more than a year ago.

As a part of the audit, you will also need to document system rules and programs that must be replicated in the new MAP. Taking time to document these will also help prepare for regression testing and ensuring existing processes are working as expected.

4. DEVELOP A PLAN

Based on your requirements and objectives, you will then need to create a timeline, allocate a budget, and assign roles to your team. As a part of the planning process, you should account for a cut over plan. This should detail when your current MAP will be turned off and your new one turned on. You may also have a freeze period based on your email campaigns and schedule, where no emails are to be sent from the former MAP.

Finally, building out a strong communication plan will help ensure everyone is on the same page throughout the project. Pieces of this plan could include establishing status meetings (e.g., attendees, cadence/frequency, content, agendas.), status reporting, and determining the best collaboration tool for communications, project tracking and logs (risks, decisions, etc.) and documentation sharing.

WRAPPING THINGS UP

MARKETING AUTOMATION PLATFORM (MAP) MIGRATIONS

You've just unlocked the keys to a smarter, smoother MAP migration—no myths, no shortcuts, no surprises. With a clearer understanding of hidden costs, common pitfalls, and how to prepare effectively, you're better equipped to lead your team through a successful transition. Now it's time to turn insight into action. And if you need a partner to help guide the way, we're here for you. Whether you're planning your move or already deep in the process, Relationship One can help you avoid the headaches and make the most of your new platform. Let's make your migration a win.