

# Migration Checklist



WE KNOW MIGRATION  
CAN BE INTIMIDATING.

*Marigold* has  
the resources  
and expertise to  
make it simpler.

Following is an overview of the steps you should expect for migration. Feel free to **connect with us directly** to get insight into how the exact process will work for you.

## □ FIND THE ESP THAT'S RIGHT FOR YOU.

Before you migrate, you'll of course need to know where you're migrating to. Make a list of the functionalities and capabilities you need. Not sure where to start?

Check out our RFP Guide "**5 Steps for Selecting the Right Email Marketing Solution**" for all industries – or dive into our industry-specific recommendations for **retail, travel and hospitality, media and publishing, agencies** and **financial services**.

We have also included a **vendor evaluation scorecard** that includes 100+ operational, functional and technical requirements you need to consider, along with the ability to score and weigh the capabilities of each vendor so you can do an honest and fair evaluation.

## □ SORT AND AUDIT YOUR CURRENT CAMPAIGNS.

Make note of the data and materials you'll need when migrating to a new provider. Create a list of both your automated and promotional campaigns, as these campaign types will require different implementations.

### THINGS TO ACCOUNT FOR INCLUDE:

- Audience lists and suppressions
- Segments
- Campaign templates, images and code
- Data sources, formats and schemas
- Delivery cadence
- Campaign prioritization and audience contingencies

## □ DECLUTTER!

Think about the last time you moved to a new house or apartment. Prior to the move, you probably cleaned, decluttered and parted ways with things you no longer needed. This process is beneficial for ESP migration, too. The more data you have, the longer the process will take. To streamline the migration, clean your email lists and remove any unneeded data. For additional guidance on this front, check out our [2024 Guide to Email Deliverability](#).

*Note:* Now is a good time to isolate your most engaged subscribers.

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When you begin sending from a new provider, you'll want to strategically target this segment to optimize your IP warm-up efforts.

This step also serves as a prime opportunity to get in sync with IT and your marketing operations team. Review your audit together and determine the level of effort required to migrate your various campaigns. Doing this early will prepare you for the implementation process and enable you to prioritize campaign migrations accordingly.



## □ IMPORT YOUR DATA.

At this point, you will have an inventory of clean, decluttered data. Now, it's time to begin migrating it to Marigold. The process includes creating lists, uploading existing user data, and setting up new data syncs to ensure you have the ability to manage subscribers and their opt-ins and -outs.

## □ ENSURE ALL EXISTING FORMS ARE SENDING DATA TO MARIGOLD.

You'll need to swap your old ESP forms for Marigold forms. If you notice new subscribers are still making their way into your old ESP lists, that's an indicator there are still forms that need to be swapped.

## □ TEST, TEST, TEST.

Prior to go-live, test your emails and new integrations to ensure data synchronization and automation workflows are working correctly.

## □ BEGIN SENDING EMAILS... GRADUALLY.

By this point, we know you're ready to flex your new ESP's muscles. But be strategic and **refrain from blasting emails to your entire list on your first few sends**. Instead, work with your ESP to selectively deploy campaigns to your most engaged subscribers. Often referred to as "warming up the IP," this will help to improve your new account's reputation and deliverability.



*Connect with our team* to see how the migration process will work for you.