



# Making the Move to a New Marketing Automation Platform

Everything you need to know, consider and remember for a smooth transition.





# Introduction

Not long ago, SugarCRM did what every marketer fears most: We switched marketing automation platforms. After storing years' worth of prospect and customer data in one software solution, the business took the leap and migrated everything over to an entirely different provider. From marketing professionals at the Cupertino, California headquarters to sales representatives stationed across Europe, Latin America and Asia, every frontline employee was committed to transitioning to an all-new system for communicating with contacts and scoring leads.

That's not even the craziest part. It all happened within the span of **three short weeks**.

Yes, you read that right: We switched marketing automation platforms in less than a month.

If you're thinking of transitioning to a new marketing automation platform, you're far from alone. We've seen companies make the move even after spending years with well-known marketing automation platforms and email marketing tools.

The reason is simple: Unless you have the right solution, your company may never fully open the floodgates to more sales and revenue. **Having the right marketing automation platform in place is one of the best ways to cultivate customers for life.** It's your ticket to creating meaningful connections with new customers and strengthening relationships with existing ones.

But first, you need to set the stage for long-term success. Whether you're just getting started with marketing automation or are planning to migrate to new software, it all starts with your setup.

## IN THIS GUIDE, YOU'LL DISCOVER:

- The essentials of a strong marketing automation program
- Best practices to get more from your platform
- Practical insights for a smooth transition



# Get Ready...

First up: Why should marketing automation be a top priority? It's by far the best way to align Marketing and Sales and ensure you're sending the right message at the right time—whether it's to increase a prospect's awareness of your business or let a potential customer know the best time to buy is now.

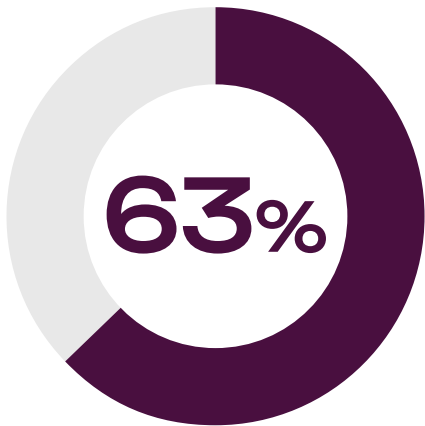
A strong marketing automation program frees you from having to rely solely on mass email blasts and constant follow up, all in hopes that your message will resonate with at least a quarter of the contacts in your database. Instead, you simply set your parameters and then let the platform alert you when a contact has “scored” high enough to be ready to hear from your sales team.

However, this process won't happen overnight. Before you can begin to reap the rewards of marketing automation, you'll need to spend some significant time on setup. Some of the most critical tasks—connecting to your CRM, building lead scoring programs and getting nurtures in place—can also be the most daunting.

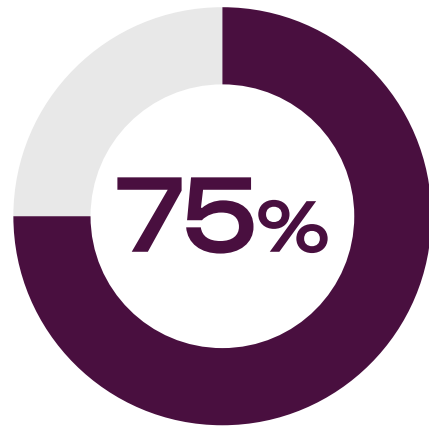
It won't always be easy. But it's worth it. Once you have the right marketing automation platform in place, the rewards you can begin to reap are tremendous.

# Get Set...

**It's a fact:** Companies with strong marketing automation programs outperform those that don't:



of companies that are outgrowing competitors use marketing automation



of companies using marketing automation see ROI within 12 months\*

## How? Because a Strong Marketing Automation Solution:

- Empowers Marketing to generate more leads by helping them target the correct audience for each message
- Frees employees from repetitive tasks so they can focus more time on analyzing and perfecting marketing campaigns
- Allows you to identify high-quality leads so Sales can focus on prospects who have a genuine interest in your products or services



# Start Automating...

Ready to get started? Let's dive right in...

## Checklist: Setting the Stage for Success

When moving to a new marketing automation solution, several key steps will help ensure you get as much ROI as possible—right from the start:

- ❑ **Decide which marketing assets you'll migrate to your new system.** Do you have forms, landing pages, emails or nurture programs that have performed well? You'll want to migrate these to your new marketing automation solution. While you're at it, look for opportunities to make high-converting landing pages and forms even better. Is there a way to improve the data you collect? Can you reduce the number of fields on your forms? Can you streamline your nurture programs?
- ❑ **Plan for any integrations.** This could include advertising tools, chatbots, webinar programs, CRM, e-commerce platforms and more.
- ❑ **Create clean templates.** This will help speed up the building process. Take advantage of any drag-and-drop template builders available in your marketing automation solution.
- ❑ **Make a backup of your files from your old solution.** You never know when you might want to reference them for later.
- ❑ **Plan out your lead scoring program.** This will define who gets passed along to Sales in your customer relationship management software (CRM), and who is held back for further nurturing. If you already have a lead scoring program, you may need to reconfigure the logic for a new system. Or, if your existing lead scoring hasn't been working well, this may be a good time to simplify and rebuild. Either way, Marketing and Sales will need to work together to ensure there is consensus about which leads are passed to Sales.

## STEP-BY-STEP GUIDE:

# 7 Ways to Ensure a Smooth Transition



### Step 1: Involve all important players

Who will be actively using marketing automation? Who will be affected by it? Make sure representatives from each team (Marketing, Sales, Business Intelligence and so on) are constantly communicating and have regular meetings. Consider using project management software to ensure everyone knows what is happening during the migration. And while it's a good idea to appoint project managers to guide the process and keep everyone on task, you'll also need to encourage open communication among the entire team to ensure you're getting the input you need.



### Step 2: Create a plan

Migrating to a new marketing automation solution should resolve issues or fill holes in your marketing, but don't forget what was working well in your previous solution, too. What features were most helpful? How can they be replicated in the new system? What wasn't working? How can you resolve those problems? Make sure your plan has clear action items with set due dates. Involve the technical experts at your marketing automation company to help configure the new solution for your needs.



### Step 3: Connect your CRM

First, clean your database as much as possible and get rid of “dead” leads before you import contacts to your new marketing automation solution. Be sure to upload a list of all of your unsubscribed and opted- out contacts—all you need is their email address—so they don’t start accidentally receiving your emails again. Determine ahead of time if you want to migrate all of your existing leads and contacts or move over only the qualified ones. Next, decide what score or actions will push those qualified leads and contacts to your CRM. Take time to accurately map data from your CRM to your marketing automation platform and, whenever possible, use picklists for your contact field values to keep your data clean.



### Step 4: Prepare your team

Once you’ve determined which fields will need to sync between your marketing automation platform and your CRM, make sure everyone involved in the migration has a copy of your field mappings and is aware of any naming conventions to maintain consistency.





## Step 5: Catalogue your content

Replicate any existing content assets you wish to keep in your new marketing automation system and archive those you no longer expect to use. If you'll be starting from scratch, have a plan in place for creating content you can use when building out campaigns—such as downloadable eBooks and white papers, helpful blog posts and popular tutorials or guides.



## Step 6: Plan for future needs

When determining how you will set up your system, think ahead to what things might look like as your database grows. Create your forms and landing pages first, then email templates, then the actual emails and nurture programs. Build and segment your lists last, once you've had a chance to clean your data so you can better target leads.



## Step 7: Test, test, test

While the “automated” component of marketing automation can make your life easier in the long-term, it may take some time to get the setup just right. All it takes is one overlooked element of program logic to have emails sent to the wrong recipients. For this reason, it's crucial to test each new campaign before you officially go live. Take this time to see how contacts move into your CRM, and how your CRM is affected by the new data, so you can prevent costly and embarrassing mistakes.

## Important Questions to Ask Your New Provider

- Is the software intuitive and easy to use?
- Does it integrate seamlessly with your CRM?
- Will you be paying only for features your team truly needs and will actually use?
- Does it provide the analytics and insights you'll need to measure and improve?
- Can it add additional value like advertising or robust website tracking?
- Will it be adopted across the organization and will I have support after I'm a customer?





# Migrating Successfully to a New Marketing Automation Solution





# How to Future-Proof Your Platform

- **Begin sending emails in small batches to “warm up” your new sending IP addresses**  
You don't want to switch to a new marketing automation solution, send out a large email blast to your entire database and immediately be blacklisted because email servers don't recognize that you have legitimately moved to a new email server.
- **Maintain open communication with all teams involved in the migration**  
If a team notices anything out of the ordinary, it's better to investigate as early as possible.
- **When you're beginning, keep your programs as simple as possible**  
Your nurture programs, lead scoring and lead routing will become more complicated over time, so you should start as clean as possible. Then allow your AI Lead Prediction Scoring take over allowing you to save time on scoring management.
- **Be open to feedback from all members of your organization**  
Not everyone will be actively using the marketing automation solution, but even small changes will affect a large portion of the business.
- **Plan for ongoing training**  
Most marketing automation solutions have knowledge bases and communities that will help you with continued learning. These can be great places to discover newer, better ways to leverage marketing automation—ones that will help you unlock the full potential of your new solution over time.

If your current marketing automation solution isn't working or doesn't provide everything you need, it's time for a new platform. And there's no better time to make the transition than right now. By following the steps in this guide, you can be on your way to more meaningful connections with prospects and customers within a matter of weeks.

# From Attracting to Connecting, Let the Platform Do the Work

Learn what SugarCRM can unlock within your organization.  
A better solution is just a click away.

GET DEMO



## ABOUT SUGAR MARKET

Target accounts based on likeliness to convert, and personalize each outreach with Sugar Market. Highly intuitive campaign builders, AI-based predictions, and superior reporting enable you to understand engagement, improve conversion, and drive more revenue. With Market, you can let the platform do the work.

[www.sugarcrm.com/solutions/sugar-market](http://www.sugarcrm.com/solutions/sugar-market)

## About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit [www.sugarcrm.com](http://www.sugarcrm.com) or follow [@SugarCRM](https://twitter.com/SugarCRM).