



# Sugar Market Transition Guide





# Switching to Sugar Market

It's time to switch marketing automation platforms (MAPs). Maybe your current solution is too expensive, too complex, lacks support or just doesn't fit your needs anymore, but the transition process seems overwhelming. Good news is, you've taken the first step. Sugar Market has done hundreds of MAP transitions. Here's some information to help you with your transition.

## Determining Your Timeline

We recommend that companies begin the transition process at least 2 months before their existing contract expires. This provides ample time to ensure proper technical setup and the replication of needed templates and campaigns. While MAPs can be transitioned faster if necessary, the 2-month overlap allows customers to ensure no down time.

## Cataloging Your Current Assets

The first thing to do as you begin the process of moving to a new tool is to make a comprehensive catalog of the marketing assets in your current tool. This is a great time to evaluate whether you want to make updates to your content or refresh your look as you make the switch.





## Forms & Landing Pages

These are some of the first assets you want to take a deep dive into, as any active pages and forms will no longer function when your existing platform is turned off. It's important to consider your form field mappings, including hidden fields, and workflows that may be created post-submission. It's a great idea to evaluate which of your forms and pages drive the most conversions, so you can prioritize those when you make the switch.



## Email Templates

Do you have certain email templates that perform well over others? Identify those and collect the assets needed to transition them. We'll work with you during implementation to recreate your templates in Sugar Market. Our Professional Services team is also available to assist if you need a helping hand.



## List/Segmentation Creation

Evaluate the criteria that is used for your email send lists. You can create both static distribution lists and query-based, dynamic lists. If using a querybased list, determine which fields and values you'll be using to filter your data. This transition can be a great time to evaluate your current sending practices and whether you can better target your recipients to increase engagement.



## Nurture Campaigns

Do you have existing nurture campaigns that you would like to replicate? If so, outline the workflow and process so that our team can help you recreate your campaign in Sugar Market. You should consider the workflow, as well as how recipients are added and/or removed from the campaign.



## Lead Scoring

Determine the actions or criteria that indicate interest, such as email opens/clicks, form submissions, web activity, etc. You also have the ability to run multiple scoring profiles simultaneously, so consider whether you would like to implement a single profile or divide by a criteria such as business unit, industry vertical, etc.

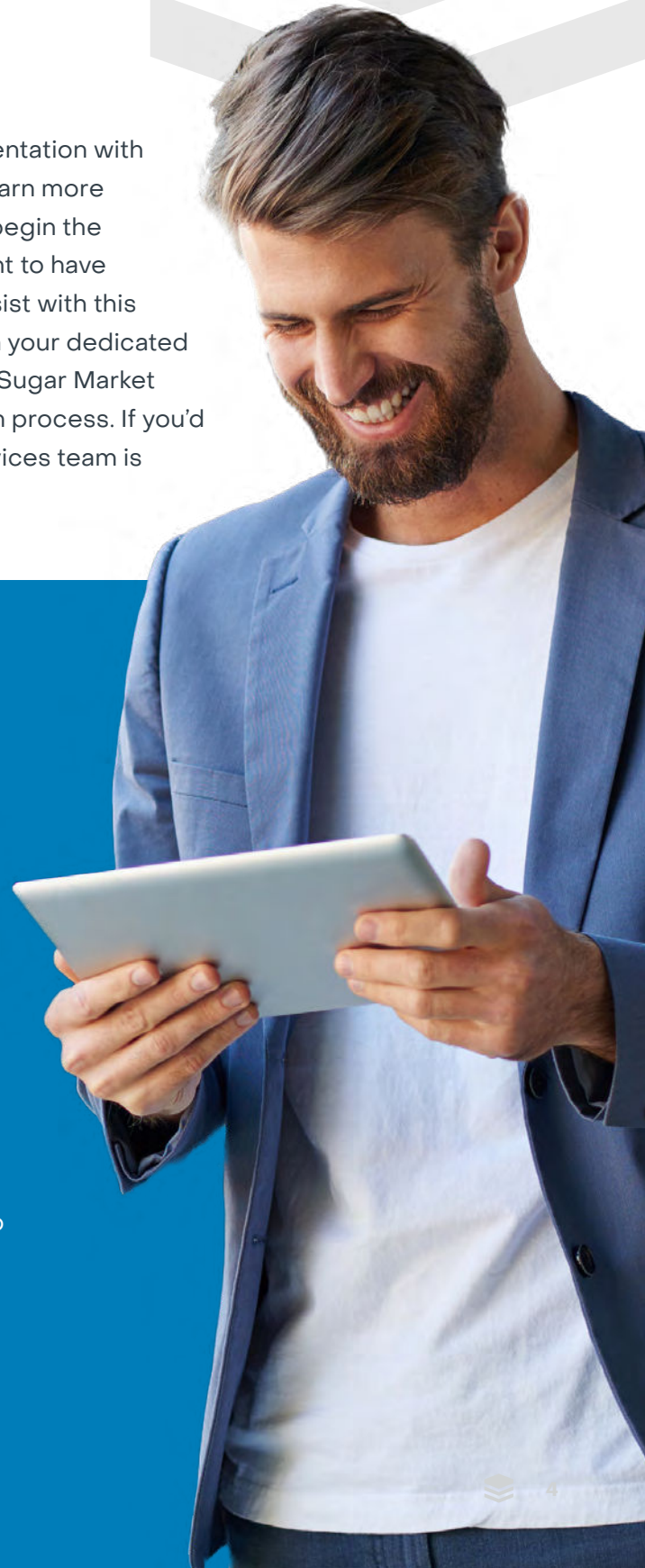
# Getting Started

Once the deal is inked, you'll begin your Sugar Market implementation with our expert team. We'll begin the project with a kickoff call to learn more about your organization and business goals. From there, we'll begin the technical setup and integration phase of the project. You'll want to have your DNS Administrator and CRM Administrator on deck to assist with this part of the process. After this is done, you'll begin training with your dedicated Marketing Automation Consultant who will instruct you on the Sugar Market platform and guide you through the remainder of the transition process. If you'd like us to take the burden off your hands, our Professional Services team is available to assist in transitioning your assets.

## Continuing Your Education

We handle the transition, but we want to help you achieve success and see value in your investment quickly. Here are a few helpful resources to help you continue your Sugar Market education:

- **Sugar Market University:** a two-day, small-group training led by our marketing automation consultants to help you leverage Sugar Market for greater success.
- **Professional Services:** our team of marketing automation consultants that can augment your marketing team and help you create, execute and optimize your campaigns.
- **Resources:** we produce content on all things marketing automation. Whether it's a Marketing Automation Starter Kit or a Mid-Market Buyer's Guide, we have plenty of information for you to leverage on our website, [www.sugarcrm.com](http://www.sugarcrm.com).



# 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).