



MARTECH

Mastering MarTech Migration: Strategies to Ensure a Smooth Transition

A Xerago Guide

As marketing technologies advance, enterprises are constantly evaluating their tech stacks to determine if there are any gaps in performance and capabilities. Organizations often find themselves needing to upgrade their MarTech stack, making migrations an inevitable part of the MarTech lifecycle.

According to the [2023 MarTech Replacement Survey](#), marketing automation was the most replaced MarTech application for the third consecutive year from 2020. It's not surprising to note that 38% of all replacements were aimed at improving the customer experience. In the survey, the biggest migration challenge encountered by respondents was aligning data fields and replicating workflows to maintain the continuity of marketing programs.

From potential campaign disruptions to measurement and reporting lapses, MarTech migrations can seem daunting – but they don't have to be. Here, we will outline a step- by-step approach to mastering MarTech migration, ensuring a smooth transition, and minimizing disruptions.

Top Reasons for MarTech Migration



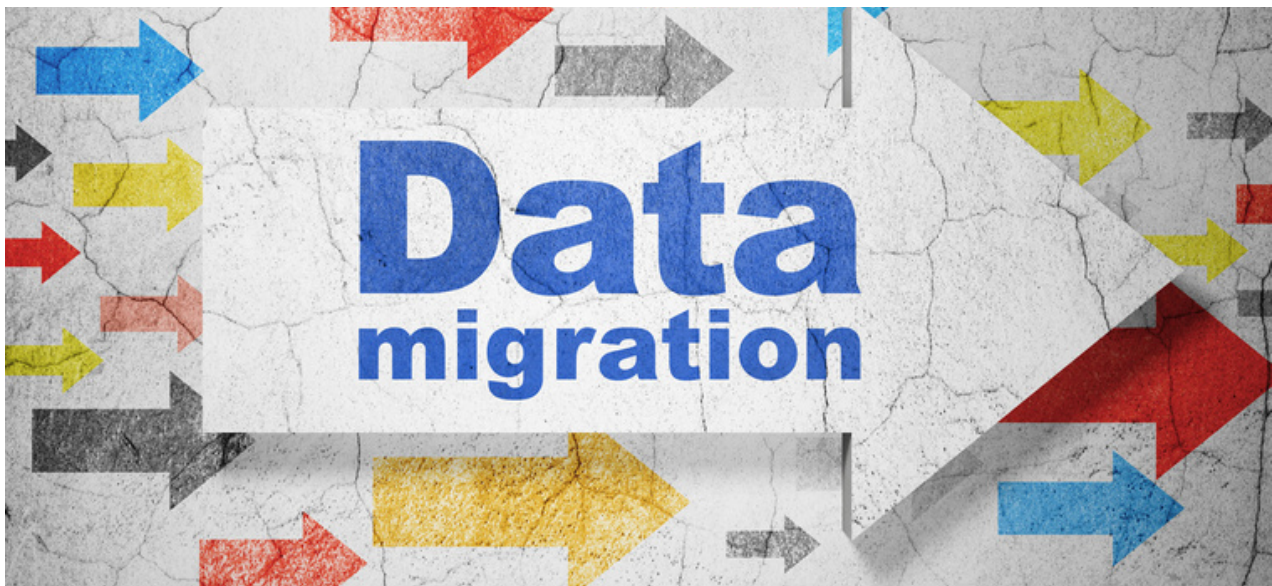
MarTech migration is a strategic move that organizations undertake for various compelling reasons. These reasons highlight the motivations behind transitioning from an existing marketing technology stack to a new one. Understanding these drivers is crucial for making informed decisions and ensuring a successful migration. Here are the top reasons for migrating MarTech:

- Improve customer experience
- Achieve cost-efficiency
- Measure and Maximize ROI
- Augment data centralization capabilities
- Support and vendor reliability
- Innovation and future-proofing
- Regulatory compliance and security
- Organizational changes
- Digital disruptions
- Competitive advantage

Common MarTech Migration Challenges

MarTech migration, while crucial for staying competitive and efficient, is not without its share of challenges. Recognizing these common hurdles and preparing to address them is key to a successful transition. Here are some of the most prevalent challenges you may encounter during a MarTech migration:

- **Data Migration Complexity:** Transferring data accurately and securely from one platform to another can be intricate.
- **Integration Issues:** Ensuring seamless data flow and interoperability with existing systems can be challenging.
- **Training and Skill Gaps:** Team proficiency in using new MarTech tools is crucial to avoid underutilization.
- **Disruptions in Campaigns:** MarTech migration may disrupt ongoing marketing campaigns, affecting customer engagement.
- **Compliance and Data Privacy:** Maintaining data privacy and compliance, especially in regulated industries, is a significant concern.
- **Loss of Historical Data:** Migration may lead to the loss of valuable historical data and insights.
- **Budget Overruns:** Unforeseen challenges can cause migrations to exceed allocated budgets.
- **Resistance to Change:** Employee resistance to adopting new technologies and workflows can hinder success.
- **Vendor Selection:** Choosing the right MarTech vendor is critical, as selecting an unsuitable one can lead to migration difficulties.



A Step-by-Step Guide for Successful MarTech Migration

1. Assessing Current MarTech Stack

Begin by conducting an in-depth audit of your existing MarTech stack. Document the tools and platforms in use, their functionalities, integration points, and performance. This assessment will serve as the foundation for your migration strategy.

2. Assess the Impact on Business

Assess the impact on your business, both from a positive and potential risk perspective. Define the specific goals and desired outcomes of the migration, such as added capabilities, scale, channels, and efficiency. On the other hand, evaluate the risks of cost, expertise, redundancy, and the risks involved in the migration process. This will set the stage for a successful migration and guide your decisions throughout the process.

3. Assembling the Migration Team

Select a cross-functional team responsible for managing the migration. This team should include members with expertise in marketing, IT, data management, and project management. Effective collaboration is key to a successful migration.

4. Budget and Resource Allocation

Determine the budget required for the migration, including software licenses, implementation services, training, and potential post-migration adjustments. Allocate the necessary resources and secure buy-in from stakeholders.

5. Vendor and Platform Selection

Research and evaluate potential MarTech vendors based on factors such as reputation, customer reviews, industry recognition, and the vendor's track record. Consider their commitment to innovation, support, and future-proofing. Moreover, assess how well the new MarTech platform integrates with your existing systems, both internally and externally.

Due diligence requires an agreed process among key stakeholders:

- Use trusted resources
- Have a comparative criteria
- Plot vendors on a handy grid
- Agree on a ranking system
- Showcase standardized ranking during stakeholder demos

6. Preparation for the Migration

Migrating platforms is no small undertaking; systematically approach aspects of your new build. Take note of what you've built over the years within the platform you plan to swap out. By methodically going through the following categories and any others that may be unique to your business, you'll be better prepared to transition these items to a new system and have an idea of how extensive the migration will be:



Data Migration

Data migration is one of the most critical aspects of MarTech migration. It involves moving customer data, historical campaign data, and other information from the old platform to the new one. This includes Data Builds, Lists, Segments, Customer Files, Prospects, Profiles, Relational Data, Connectors, and Places where data flows in and out of your current system. These can also include forms, files, APIs, data exchanges, and the methods by which the data gets in and out of your current system.

- Data Cleanup and Transformation: Before migrating data, conduct a thorough data cleanup. Eliminate duplicate records, outdated information, and irrelevant data. Transform data formats to match the requirements of the new platform.
- Data Mapping and Structuring: Create a data mapping plan that defines how data fields in the old system correspond to fields in the new one. Ensure that data is structured correctly to maintain its integrity and relevance.
- Data Security and Backup: Implement robust data security measures during the migration process. Backup all data before making any changes, and ensure that data is encrypted and protected during the transfer.

Functional Migration

Functional migration involves replicating the features and capabilities of the old MarTech platform in the new one, ensuring that your operations can continue seamlessly.

- **Inventory of Current Functionality:** Document the functionalities of your existing MarTech platform. This includes campaign management, email automation, lead scoring, and any other tools or features that your team relies on.
- **Identifying Gaps and Requirements:** Identify any gaps in functionality between the old and new platforms. Identify what features are missing, and how you can address these gaps. This may involve customization or third-party integrations.
- **Customization and Integration:** If customization is required to replicate specific features, work closely with the vendor or a development team to ensure that these modifications are made without compromising the integrity of the platform.

Strategy Migration

This step entails transitioning key strategies that are enabled from inherent data flows. This could be an entire lifecycle series of communications, trigger-based transactional messages, scheduled newsletters, your entire marketing calendar, or just a few key strategies across all the channels your current solution facilitates. Documenting these will help quantify the types of templates, assets, and materials that will need to be migrated.

Process Migration

The migration to a new platform may often give an opportunity to re-imagine process workflows to enhance performance and team efficiencies. Consider the new capabilities the platform offers to accommodate process-level changes. This can include migration of digital or content assets, templates, forms, flows, and approvals. These components are integral to creating, managing, and delivering content, automating workflows, and ensuring that campaigns meet quality and compliance standards.

Analytics and Reporting Migration

The reporting and analytics function may invariably undergo changes, not only in terms of accessing metrics but also in terms of the insights that can be generated using the analytics features of the new platform. It's essential to establish the correct data connections to ensure a seamless transition and immediately showcase the value of your new platform.

7. Testing and Quality Assurance

Thorough testing is crucial to ensure that the migration is successful and that all functionalities work as expected.

Developing a Testing Strategy

Create a comprehensive testing strategy that includes unit testing, integration testing, system testing, and user acceptance testing. Each stage should address different aspects of the migration.

User Acceptance Testing

Involve end-users in the testing process. Let them verify that the new MarTech platform meets their needs and expectations, and address any issues they identify.

Regression Testing

Perform regression testing to ensure that the migration does not introduce new problems or break existing functionality.

8. Deployment and Transition

The deployment phase involves transitioning from the old MarTech platform to the new one. Ensure to have a handle on major campaign streams and dependencies like IP warming of a new sending domain if any change in ESP. A crucial aspect of a successful migration is ensuring accuracy from the outset, even with small details such as folder structures, naming conventions, and how you organize.

In addition, consider the following aspects:

Phased Deployment vs. Big Bang Approach

Decide whether to migrate all functionality at once (the "big bang" approach) or to phase the migration. The choice depends on factors such as your organization's size, the complexity of the migration, and risk tolerance.

Training and Onboarding

Provide comprehensive training and onboarding to your marketing and IT teams. Ensure they are proficient in using the new MarTech platform, and provide ongoing support.

Post-Migration Support

Have a support plan in place to address any issues that may arise after migration. Monitor the platform's performance and functionality, and address user concerns promptly.

9. Monitoring and Optimization

After successful migration, it's essential to monitor the performance and impact of the new MarTech platform.

Post-Migration Monitoring

Continuously monitor the new platform to identify and address any performance issues, user challenges, or unforeseen complications.

Key Performance Indicators (KPIs)

Establish KPIs to measure the success of the migration. This may include improved campaign performance, reduced operational costs, and increased customer engagement.

Continuous Improvement

Regularly assess the platform's performance and identify areas for improvement. Be ready to make adjustments and optimizations based on real-world usage.

Conclusion



By understanding the core motivations behind migration, acknowledging and addressing the common challenges that lie in its path, and meticulously following a well-structured step-by-step approach, organizations can navigate the process effectively. From the initial assessment to a seamless transition, and beyond, the key lies in thorough planning and execution, with a strong focus on enhancing customer experience and operational efficiency. Remember, MarTech migration is not simply a technical shift; it's a strategic evolution that propels businesses towards digital excellence and maximizes digital impact.

We hope this guide provides a comprehensive roadmap for mastering MarTech migration, ensuring a smooth transition, and minimizing disruptions. In the end, successful MarTech migration is not just about moving data and functionality; it's about enhancing your overall digital capabilities and staying competitive.



Americas

(704) 426 3337
salesusa@xerago.com

Hong Kong

3529 2328
salesapac@xerago.com

Singapore

9066 2077
salesapac@xerago.com

India

4296 0800
salesindia@xerago.com

Xerago is a multi-national Digital Impact Services enterprise. Xerago helps executives and senior managers across digital, technology, and marketing functions in mid-market and large enterprises pinpoint and deliver impact across their customer-facing digital priorities. Xerago interconnects analytics, technology, customer experience, and campaigns to deliver digital impact that is quantitatively measurable and qualitatively visible.