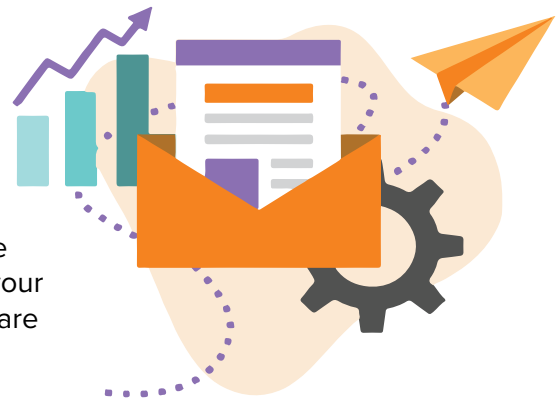




# PLATFORM MIGRATION

Hard Decision. Worth The Effort. Ecstatic With The Results.







Getting it right from the beginning. The cornerstone to any successful marketing automation initiative is to make sure you have a solid foundation. That foundation provides the structure for which data will be collected, shared, and analyzed. Not only is it important to have all of the components of the foundation put in place, but the order in which they are organized.

Your goal is to get campaigns out the door and the one time nuances of a technical set up are best handled by the pros - Leadous Marketo implementations are straightforward, but technical. We leverage our years of experience working with hundreds of clients to accelerate your set up, fast line adoption, help you execute, and get you the results you are looking for..



| Platform Migration  |                  |   |
|---|------------------|---|
|  | <b>DECISION</b>  | Whether it's from one platform to another, a fresh instance of the same, or consolidating instances this is the starting point - deciding whether the cost and time of migrating will drive value. Compare how your requirements map to your plan to be sure the trade-offs are worth it. Some clients get to this very first step and never go further because batch and blast work for them, for most migration is the only option. |
|  | <b>INVENTORY</b> | The first thing after you've decided it's time to migrate is to take inventory of what is in your existing instance. Assets, forms, files, programs, lists, workflows, alerts, and even integration points. These components are the cornerstone to quickly send campaigns on a new platform.   |

## Platform Migration

|   |                       |   |
|---|-----------------------|---|
|    | <b>PLAN</b>           | Create a detailed plan with owners and dates. Share the plan so you have alignment with other resources, such as IT, who may own migration tasks. This is the only way to keep your migration moving forward in a purposeful way that encompasses all of the required steps and can be used to give transparency to stakeholders regarding your strategy and progress.  |
|    | <b>IMPLEMENTATION</b> | Regardless of any migration decision, your instance will have to be implemented and team members will start to be onboarded prior to migration activities. Having a partner through this phase is the difference between a couple weeks or a couple months of technical implementation. Leveraging best practices and experience ensures the implementation goes smoothly (See Leadous Implementation and Onboarding Services). |
|    | <b>MOVE</b>           | Execute the Migration Plan prioritized tasks. The phase ensures programs are imported, campaigns are rebuilt, and other 3rd party systems are integrated into the instance to support marketing efforts. Leadous may scope additional hours for increased support depending upon the number of assets, programs, and campaigns that need to be relaunched as part of the migration.   |
|  | <b>TEST</b>           | Once everything is moved it is important to test the setup and make any modifications so that all existing campaigns will run on the new platform. This is a great time to take note of best practices and leverage all of the features available to you to truly automate your efforts.  |
|  | <b>LAUNCH</b>         | Activate (or deactivate) all of the programs, campaigns, emails, alerts, and operational activities in your instance to start collecting data, identifying levers to pull to make adjustments, and measuring your success. This is an exciting time, however, the importance of best practice here is no different - follow the order to ensure success.  |
|  | <b>OFF</b>            | A very important, but often overlooked step is to provide notice to your previous provider so you are not charged for licensing fees.   |

Migrations are not to be thought of lightly. For simplistic migrations where the decision is made to disregard the data, templates, and flows users can move onto Onboarding and Implementation. However, for most, it's not as simple. Migrating platforms takes thoughtful consideration and planning. Leadous is here to help.

## ABOUT LEADOUS INC.

Leadous is a world-class consultancy that leverages marketing automation to deliver exceptional experiences for the journey makers and the journey takers. The journey between "Hello Prospect" to "Welcome Valued Client" can be difficult to navigate. From concept to conversion, Leadous utilizes technology, methodology, and certified marketing automation experts to deliver consulting services that increase demand, drive conversion, and deliver pipeline growth making the journey a well-traveled one. Our near-decade-long world-class partnerships with Adobe, Hubspot, Oracle, and Salesforce give us the capabilities to serve hundreds of clients, across industries, to obtain measurable value from their investments in customer journey solutions.