



Guide

How to Master Your Campaign Management Migration

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Migration Made Easier

Legacy campaign management tools can't keep up with today's consumers — not their complex customer journeys, not the number of interactions they have with brands and not the volume of data necessary to provide them with superior customer experiences.

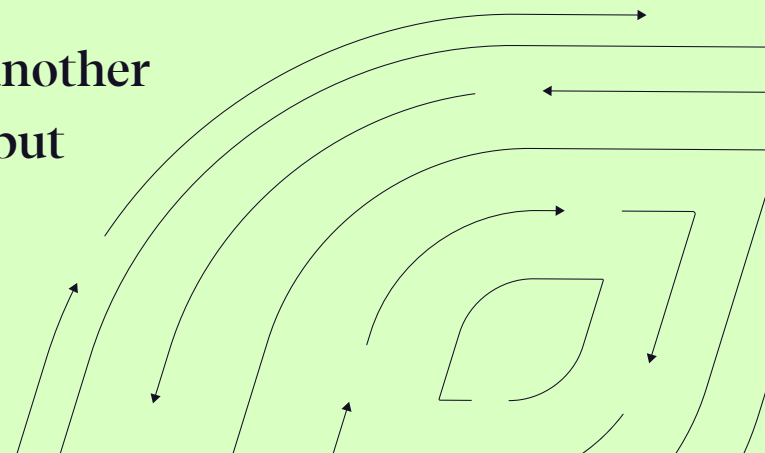
That's why brands are replacing outdated campaign management tools with customer journey management solutions designed to scale customer intelligence, improve customer segmentation and empower everyday business users to build and optimize sophisticated customer journeys.

But migrating from one solution to another is much like moving — exciting but potentially frustrating. It can feel challenging to prepare, control costs, determine timelines and make final decisions. And just like hiring professional movers, working with a partner that can help streamline the process is much more preferable than going it alone.

ActionIQ has partnered with many enterprise companies that have successfully migrated from legacy campaign management tools, including Unica, Teradata CIM, SAS Marketing Automation and more. The recommendations in this guide are based on what worked best for those enterprise brands.

Your new home is waiting for you — now it's time to make the move as painless as possible. Use this guide to understand the four phases of campaign management migration and master your move to customer journey management.

“Migrating from one solution to another is much like moving — exciting but potentially frustrating.”



PHASE 1

Preparing for Migration

The first phase of migration is all about preparation. Brands must finalize their timelines and establish the scope of the migration. Remember that the latter will influence the former — the more you're moving over, the longer it will likely take. Just as important is preparing your organization to adapt to new technologies and processes and working to guide the transition.

Timeline

WHAT TO DO

Determine two dates:

1. When the new solution should be in production and used by the team
2. When the old campaign management tool should be turned off

HOW TO DO IT

Figure out how much flexibility you have in terms of timeline.

If the contract you have with your current vendor has a specific end date and there's no plan to renew, inform your new vendor immediately and use this date to guide your planning.

Scope

WHAT TO DO

Create an inventory of what you'll be moving over by identifying the audiences and campaigns in your current tool. Pinpoint the sources and data points for each of these.

Score the importance of each audience and campaign to understand which ones should be prioritized during migration. Scoring can be facilitated by your new vendor or a consulting firm to help simplify the process.

HOW TO DO IT

Use this as an opportunity to identify less valuable audiences and campaigns in your current tool (i.e., not being used despite being ingested).

When prioritizing which campaigns to migrate, consider their complexity, their frequency and the necessity of having them running without disruption.

PHASE 1

Organizational Readiness

WHAT TO DO

Allocate time and resources to help internal teams adopt the new solution.

Successfully migrating to a new solution is about more than moving data. It should be defined by a strategy that aligns people, technology and processes.

HOW TO DO IT

Follow [change management best practices](#) — including getting consensus on goals and outcomes and mapping out critical tasks — to prevent complications. Prioritize collaboration between business, IT and analytics teams to ensure everyone understands roles and responsibilities.

Plan on taking more time to help people adapt to the new solution at the beginning of the migration.

Transition Strategy

WHAT TO DO

There are two types of transition strategies:

1. Ramping up, which involves using your old tool and your new solution in parallel while you steadily increase usage of the new solution and reduce usage of the old tool until it can be completely retired
2. Switching off and on, which involves retiring your old campaign management tool the day your new solution is deployed

The first option is recommended, and is the one most organizations choose.

HOW TO DO IT

Weigh the pros and cons of each approach.

While ramping up results in two technologies being used for a limited time, it's far less disruptive to business operations and safeguards against potential complications arising during migration.

Switching off and on forces internal teams to adopt the new tool immediately, but the abruptness increases the likelihood of complications. It may also impact the customer experience as teams calibrate the new solution to match the usage of the old tool.

Migration in Action

When organizations work with the right partners and prepare in advance, results can be even better than expected. One ActionIQ customer that migrated from a legacy campaign management tool was able to complete its full migration **a year sooner** than originally forecasted, saving it over **\$400K**.

PHASE 2

Migrating the Most Strategic Campaigns

The second phase of migration is all about prioritization. Once the foundational work is complete and data can be piped in and out of a new solution, brands should begin moving over their most important campaigns. These campaigns — generally ones that are always on and generate the highest return on investment — should have already been identified in phase 1.

WHAT TO DO

Migrate your most strategic campaigns to your new solution. These typically include:

- Nurture and welcome campaigns that help you educate and demonstrate value to prospects
- Trial conversion and renewal campaigns that help you convert trial users into paid customers and encourage paid customers to renew their subscriptions
- Customer churn campaigns that help you prevent customer attrition
- Winback campaigns that help you reengage churned customers

HOW TO DO IT

Aim to have your most critical campaigns deployed in your new solution by the end of this phase.

This requires understanding all the customer data required to run these campaigns, then ingesting it into the new solution and setting up the correct data models.

Configure and test the campaigns in your new solution. They will likely be very similar to what was in place in your old tool, but you will quickly notice increases in operational efficiency. For example, business teams should be able to self-serve customer insights and automate customer journeys without having to create complex SQL queries or rely on technical assistance.

Migration in Action

By focusing on the highest-value campaigns first, organizations can quickly start to drive results. One ActionIQ customer not only quickly migrated its most important use cases, but enhanced them, reducing campaign time to market from **35 days to 10** while driving a **4x** increase in subscribers.



Enhancing and Expanding Campaigns

The third phase of migration is all about taking advantage of the new solution's capabilities. If brands aren't facing pressure to retire their old campaign management tool immediately, they should build on the launch of their new solution by innovating strategies and uncovering valuable opportunities.

WHAT TO DO

How you approach innovation will depend on what you were doing before, but common examples include:

- Expanding to new channels to increase customer engagement
- Conducting A/B tests and optimizing send times to improve conversions
- Leveraging predictive analytics to identify likelihood of customer churn
- Automating customer engagement based on behavior and purchase history

HOW TO DO IT

Explore tactics and channels you weren't able to utilize before.

By unlocking capabilities and use cases that weren't supported by your old tool, you'll not only drive new revenue and improve customer experience, but also generate excitement for continued innovation.

Migration in Action

After one ActionIQ customer migrated from its legacy campaign management tool, it prioritized leveraging newly available capabilities to speed up time to market. It increased campaign to market velocity by **4x** and reduced the time it takes to create and run campaigns by **60%**.

Migrating Remaining Campaigns

The fourth and final phase of migration is all about completion. Brands must migrate all their remaining campaigns to their new solution and retire their old campaign management tool. Once this is done you can focus on continuing to maximize the value of your new solution and creating customer journeys that drive positive business outcomes.

WHAT TO DO

Migrate your remaining campaigns from your old tool to your new solution.

Don't bother migrating any campaigns you identified that aren't being used anymore or driving ROI.

HOW TO DO IT

Finish migrating campaigns one by one until none are left.

Remember that the length of this phase will vary depending on the number of remaining campaigns you have. Keep your timeline in mind when beginning to execute.

After the foundational work is complete and your organization is familiar with the process, migrating your remaining campaigns can generally be done much faster than your initial ones.

Migration in Action

One ActionIQ customer migrated its remaining campaigns and optimized them as it went. It completely retired its legacy campaign management solution within six months while increasing efficiency in marketing operations by **20%**.

Minimize Migration Risks

Migrating from one solution to another comes with challenges both known and unknown at the start of the project. In order to minimize risks and support a seamless transition, brands should keep the following tips in mind.

OBTAIN ORGANIZATIONAL BUY-IN

Make sure your plans are clear and shared with stakeholders across your organization. Everyone should agree on the process to ensure decision-making is aligned and each phase flows smoothly from one to the next.

MAKE DATA-DRIVEN DECISIONS

It can be tempting to prioritize different elements of a migration based on intuition or assumptions. Whenever possible, base your decisions on data. Ensuring ROI guides which campaigns you migrate and when will help your organization see the value of your new solution sooner.

TAKE CHANGE MANAGEMENT SERIOUSLY

Don't underestimate the human component of successful migrations. Acknowledge that making changes to day-to-day processes can be difficult and plan ahead for how to help teams adapt to new tools and processes.

PRIORITIZE DATA PREPARATION

Make sure your customer data is in the shape and form necessary to support a successful migration. For example, transactional data can be valuable, but without insights into how a customer came to make a purchase, your ability to personalize customer journeys will be limited. Focus on creating comprehensive and connected profiles for your customer base.

Master the Move to Customer Journey Management

Modern consumers demand consistent, personalized experiences when engaging with brands no matter what channel or device they're using.

And as the data shows, outdated campaign management tools can't keep up. Forty-three percent of organizations say not having the right technology is the biggest barrier to orchestrating omnichannel customer experiences.

With consumers interacting with brands across so many different channels, it's easy to see why.

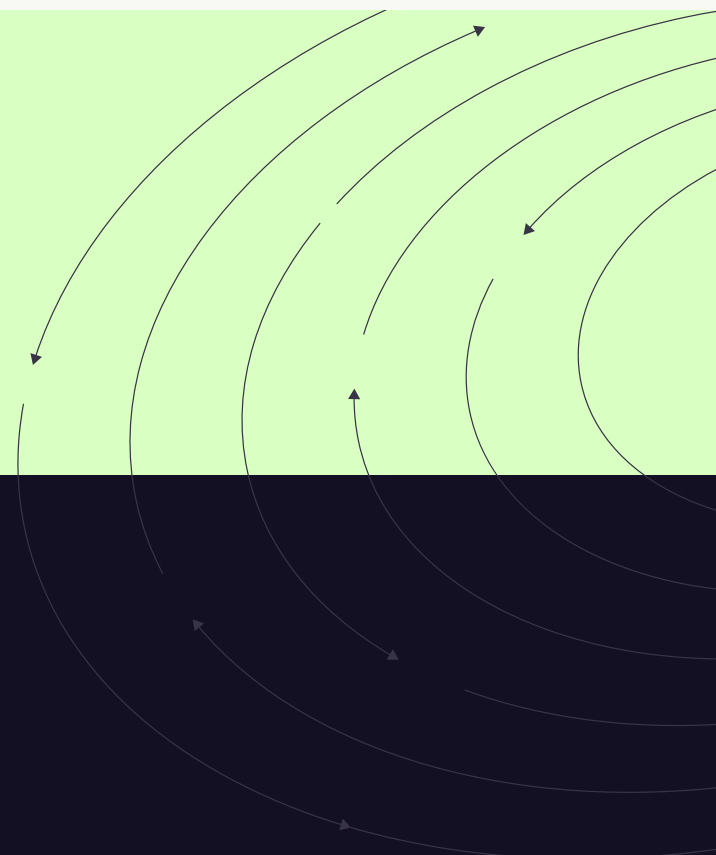
Moving to a new solution may seem daunting, but it's essential to meeting customer expectations. And much like moving house, once all the boxes are unpacked and you're settling into a bigger, better environment, you'll see that your decision was well worth the investment.

When replacing your old campaign management tool with a new solution, make sure it not only has the capabilities you need, but that you select a vendor that can help you migrate as efficiently and effectively as possible.

Even the most formidable moves are made easier with the right helping hands.

“Much like moving house, once all the boxes are unpacked and you're settling into a bigger, better environment, you'll see that your decision was well worth the investment.”

[Contact ActionIQ](#) for a consultation with one of our experts to learn more about migrating from legacy campaign management tools to a customer journey management solution.





AIQ brings order to CX chaos. Our Customer Experience Hub empowers everyone to be a CX champion by giving business teams the freedom to explore and action on customer data while helping technical teams regain control of where data lives and how it's used.

[Get in touch](#) with our experts to learn more.

