

The Perils and Pitfalls of Email Marketing Migration

This article is aimed at UK organisations sending higher volumes of emails (>10,000 a week)

Are you thinking of changing your Email Service Provider?

Read this first!

Changing your email marketing provider is a little like moving house, except the house is a busy shop you have to keep open during the move, your existing staff have to cover both shops at the same time, and the premises you are moving into might fall into the sea without warning and need completely rebuilding...

OK perhaps that's a little over dramatic, but changing your email marketing provider is no small task. Before you move to a new ESP, you need to be sure the benefit is worth the cost. What are the compelling reasons to change your platform? Have you got sufficient in-house expertise? Have you reviewed the market and do you know what you're looking for? Will you need – or even use - all of the shiny new functionality that you're paying for?

Here's a few areas that you're going to need to consider when considering a new ESP.

Functionality

Your new ESP should be an upgrade that allows you to do things you currently cannot. What are you looking for? It might be subject line optimisation, dynamic content, send time optimisation, integration with your SCV etc. Make sure that you identify what you need from your ESP before beginning your search.

Ease of use

The main cost involved in email is staff time, so the less of it you spend fighting with software trying to get it to do what you want, the better. Your ESP should be intuitive enough that non-specialist staff can use it without extensive training, and not cause headaches for the staff that have to use it.

Customer Support

There's nothing worse than getting stuck while facing a tight deadline and not getting the support you need. Your ESP should have dedicated account management and support staff available during your business hours and who respond fast enough to help you.

Most ESPs are designed to be self-use platforms that you get trained on then are left to your own devices-depending on your expectations that might be perceived as poor support. Make sure you have included sufficient training and hand-holding in your agreement, and that staff are going to be available to answer your calls. The first three months are likely to be the busiest time-after that you will probably feel confident enough to drop to occasional levels of support e.g. if something goes wrong.



Time to migrate

The time needed to migrate is often under-estimated. It will almost certainly take longer than you think to switch from one system to another, whether that is caused by delays in training, unexpected tasks, IT shortfalls, slow data extracts from your old system, staff changes or holiday. Every project is subject to slippage and ESP migration is no different. Three months of concerted effort is a realistic minimum estimate and the time used in migrating can massively increase the real cost to your business in terms of resource and opportunity cost.

Changing your sending identity

Beware, if you are on a dedicated sending IP, Microsoft will punish you for migrating! Microsoft have tightened up their inbox filtering recently so it is more difficult to evade their junk folder, especially for new senders who have yet to build up their sending reputation. Migrating to a new sending identity is going to affect your delivery into @hotmail, @outlook, @msn and @live email addresses. Unless you are extremely careful, you're very likely to see a sharp drop in open rates as lots of your emails start going into their junk folders.

Cost

Email is cheap and the cost of migrating platforms is significant. If the main reason you are changing is to save money then you should carefully consider the initial setup costs of the new system, the hidden costs to you in terms of staff time and efficiency, and how long it will take before you see a real saving.

It's likely to be several years before you experience the benefit of a lower cost system and the savings are unlikely to be substantial. If cost savings need to be found, consider reducing your sending volume instead by segmenting your frequency by engagement which will deliver a comparable reduction of cost, without the headache of migrating platforms.

So what will you need to do?

Have a clear plan

Make sure you have a detailed project plan and have made your preparations before signing a contract. Effective use of your time and a clear road map can help you ensure you have a smooth and successful migration rather than a painful headache.

Protect your deliverability

Makes sure that your deliverability remains intact by being cautious about Hotmail accounts and Microsoft filters. Build up your sending reputation and take things slowly.

Maintain your campaign history

If you have a historical record of consumer activity (opens, clicks etc.) you will want your new ESP to continue it with compatible data so you have an unbroken history that you can access using your existing software.

Ensure accurate permissions

Be very careful that you correctly suppress anyone who has opted out or complained, or whose email address has been blocked. You risk expensive fines if you start emailing someone without an appropriate legal basis. Changing from one data system to another is a likely time for accidents to happen.

Export suppressions and reporting

You'll need to extract all useful data from your old system before you shut it down. Principally that will be the suppression list of people who have opted out or bounced, and reporting data on consumer activity.

Update signup forms and integrations

Your newsletter signup form probably feeds directly into your ESP, so you will need to update it to point to the new system. That will probably need some work from your IT or website team, who will also need to amend any software integration you have set up with e.g. CRM systems.

Create a new sending domain

This will also require some action from your website or IT team as you'll need to create a new sending subdomain (something like email.yourwebsite.com) and change the settings form authentication purposes.

Training

You'll need to get your staff trained on the new platform. This may take several sessions, and will almost certainly need some follow up practice time getting used to it, so don't underestimate the time this may take.

Templates & messages

You'll need new html messages creating, and very likely also some new templates made that are compatible with the new ESP. You might also want to take this opportunity to change or improve your template design at this point, whether it's just improving the responsive coding or revamping your whole look.

Parallel run

There will be a period when you are operating two overlapping email systems and will need to make sure people don't receive multiple emails in error. Start with your triggered and customer journey campaigns and use exclusions to move people over to the new system in a trickle, then use your most engaged recipients for your warm up bulk campaigns. Finally, move any re-engagement campaigns over last.

Need some help?

If you're still looking for some expert guidance, then why not talk to us?

We've reviewed over 400 providers and can help you find the best fit for you. And with long experience of managing migrations for our clients, we can guide you through the process and ensure that everything goes smoothly.

You can get in touch with us [here](#).

Top Tips

- ▶ **Don't chase volume**
Sending too much too fast will damage your deliverability.
- ▶ **Use a shared IP**
If you can avoid a dedicated IP it will save you a lot of potential problems.
- ▶ **Whitelisting is a good excuse to re-engage**
Consider sending an email about a changed sending address to re-engage your customers or prospects.
- ▶ **Overlap your existing ESP and new ESP**
Use both systems together for at least three months, until you are sure that everything is working as it should.
- ▶ **Data protection**
Ensure that all your marketing permissions are correctly carried over. GDPR has made the cost of mistakes greater than ever before.