Step-by-Step Guide to Switching Marketing Automation Platforms

If your current marketing automation platform (MAP) is too expensive, too complex, lacks support or just doesn't fit your needs any more, you shouldn't be stuck with it simply because the thought of switching is a bit overwhelming. Salesfusion has done hundreds of MAP transitions and has a program in place to assist you every step of the way.

Steps to Transition

We are here to help each step of the way. The chart below provides a general overview of the activities required to transition to a new MAP.

TRANSITION STEP	RESPONSIBILITY	
Step 1: Kickoff & Discovery	**Salesfusion**	**Customer**
Discuss integration goals, timeframe and process	X	X
Determine materials that should be transitioned to new platform		X
Prepare Project Plan for transition	X	
Step 2: Technical Set-up & Integration	**Salesfusion**	**Customer**
Salesfusion to provision and provide login credentials to Customer's Salesfusion instance	X	
Set up SPF and DKIM Records on DNS, CNAME on public and private DNS, and aabuse@ and postmaster@ email address		X
Website tracking created and added	X	X
Complete Yahoo! feedback loop	X	X
Set up of multiple sending Domains (up to 5; additional domains at an additional cost)	X	X

Register customer domain at update@abuse.net	X	
Whitelist IP address range		X
Email validation report: After integration data is run through scrubbing process to identify non-reachable email addresses. ***Will need list from customer if no integration with CRM***	X	
CRM Integration		
Discuss integration goals	X	X
Identify CRM fields utilized		X
Provide Salesfusion bundles for installation by Customer in Customer's CRM environment.	X	X
Establish and review the Salesfusion CRM connector settings to determine which information is pushed and pulled from Customer's CRM	X	X
Establish recurring sync and confirm accuracy	X	
Technical Setup Wrap-up/Post CRM Integration Call to discuss any outstanding questions, receive final approval of integration from Customer, and configure Salesfusion account settings	X	X
Step 3: Transition Materials	**Salesfusion**	**Customer**
FORMS If you have existing forms on your website, there is no need to recreate them. Through the Salesfusion Form Connector, we will work with you to connect them to Salesfusion. During a 1-hour session, our marketing automation consultant will work with your webmaster to create the necessary connectors to capture data coming into your existing forms.	X	X

EMAIL TEMPLATES Do you have email templates that you like and perform well? Identify the email templates you want to copy and we will create up to 4 on your behalf.	X	
LANDING PAGES Do you have landing pages currently in use or former LP templates you love? Identify up to 4 and we will transition them on your behalf.	X	
LEAD SCORING Are you using lead scoring today? We can replicate that for you. Additionally, we offer multiple lead scoring profiles so do you have others you'd like created? We can help with that too!	X	
LIST / SEGMENTATION CREATION Do you have a target list for campaigns that is tried and true? We will get that built for you and ready to go.	X	
NURTURE CAMPAIGN Do you have existing nurture campaigns you'd like to replicate? We will talk you through how to re-create it and offer suggestions to improve it.	X	
Step 4: Ready to Roll!	**Salesfusion**	**Customer**
EXECUTE CAMPAIGNS Now that you have everything set up including integration, templates and campaigns, you are ready to execute. Whether you are a DIY'er or a 'Do it For Me' client, you will have everything in place to start executing campaigns. If you are managing the platform on your own, you will have 30-45 days of training that will begin during the transition phase.	X	X

* During the Transition Step, Client will work with Salesfusion to identify items to transition and provide feedback along the way.

Timeline

We recommend that companies begin the transition process at least 2 months prior to the current MAP contract expiring. 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.