



Your Ultimate ESP Migration Guide

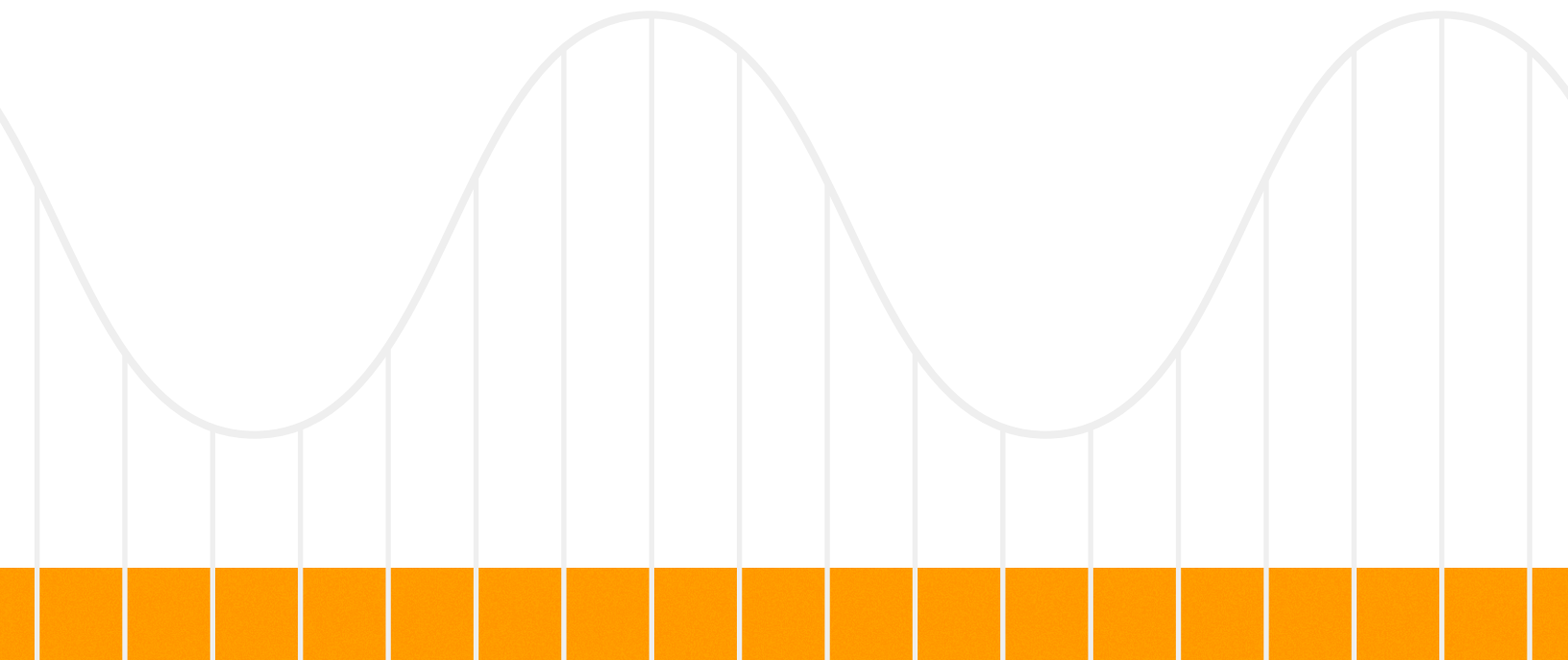
Switching your email marketing tool?
Get ready with this handy guide.

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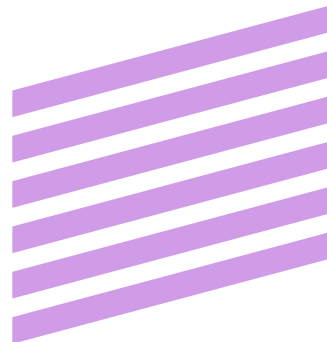
Introduction

Like the world of dating, finding the right vendor from a long list of Email Service Providers (ESP) can feel overwhelming. If your relationship with your existing ESP is 'complicated' you might be on the lookout for a platform that can better serve the needs of the business – whether that be better integrations, increased personalization or just a better overall level of service.

Divorcing your existing email marketing tool is not something that anyone ideally wants to do. Your email software users may take sides with the outgoing technology or be resistant to change, there could be customizations and integrations that you rely upon to be unravelled and rethought, and with email marketing still being one of the highest revenue channels for many businesses, any interruption in sending of campaigns and communications could have severe effects on your immediate bottom line.

If you think your current email solution is holding you back, it's important to be clear about your requirements for a new solution so you can match those requirements to software capabilities, fill the gaps that are there from the existing solution, and therefore ask the right questions when evaluating new technologies.

This guide is your helping hand for migrating to, and from, an ESP or Marketing Cloud. We will help you identify the warning signs that your current solution isn't working for you, including the common reasons brands move in the first place, and we'll outline the common pitfalls to avoid when swapping your ESP to ensure your migration runs smoothly.





01



15 Signs your ESP isn't working for you

In any relationship, there comes a point when you will hit a bump in the road, and a decision must be made whether the problems can be worked through, or perhaps it might be time to part ways. Our instinct is to try and make the relationship work, and this is precisely where many marketers find themselves with their email marketing tool, continuously investing time and money to paper over any cracks. Particularly when a business has made a significant investment in an email marketing solution, it can be difficult to admit that the marriage is just not working out.

The following are some red flags that we commonly hear about from prospects and customers, and which can become the drivers for change.

15 signs your ESP isn't working for you



1. Deliverability Issues

Unless you've got your eye on the metrics related to your email deliverability this can sometimes be a hidden red flag that only presents itself when you start to look into the data for the first time. There are of course many variables related to deliverability, but if deliverability is going the wrong way, and your emails aren't hitting inboxes on a regular basis like they used to, a good email software vendor will have the team in place to help you turn poor results around, so be aware of your deliverability trends and the support you receive.

But beware, just moving to a new email product doesn't guarantee better deliverability, making improvements is an ongoing process that involves effort from you and your software provider, so first reach out to your current vendor who should

be able to work with you to evaluate any issues and help to rectify them. However, if your ESP is not willing to engage with you to resolve the issues then perhaps it is time to seek out one that will so that email deliverability is no longer an issue.

2. Personalization strategies are inhibited

With 74% of marketers saying that personalization increases their customer engagement rates ([eConsultancy](#)), not having the functionality to create good levels of personalization could be negatively impacting the success of your email campaigns. If your audience expects a personalized experience, it's vital that you deliver it, which includes basic personalization tokens, more advanced

abilities to dynamically personalize entire content blocks, personalized triggered messaging, and optimized send times. Each of these capabilities can help to deliver the right message/offer, at the right time to increase engagement and conversions, so if you're not able to create these personalized communications, it might be time to consider a change.

3. Limited reporting

To take the guesswork out of your email marketing strategy, you need access to fundamental metrics such as open, unsubscribe, and click through rates, which almost every email product will provide. However, being able to visualize trends over time, segment results for specific types of emails (e.g. newsletters versus offers), run attribution models alongside other channels, or analyze heatmaps to inform your design principles; these are all features that you may not have, but which can further help to finetune results. Without detailed insights into your email campaign performance, it's impossible to act and make improvements on future campaigns. So, if your current email tool isn't giving you the reporting and analytics you need, it could be time to find another provider. Alternatively, you may be able to use 3rd party BI tools, such as Qlik, to use for email and campaign reporting instead, so consider that there are several reporting options if inadequate reporting is your main gripe.

4. Support/service discontinued

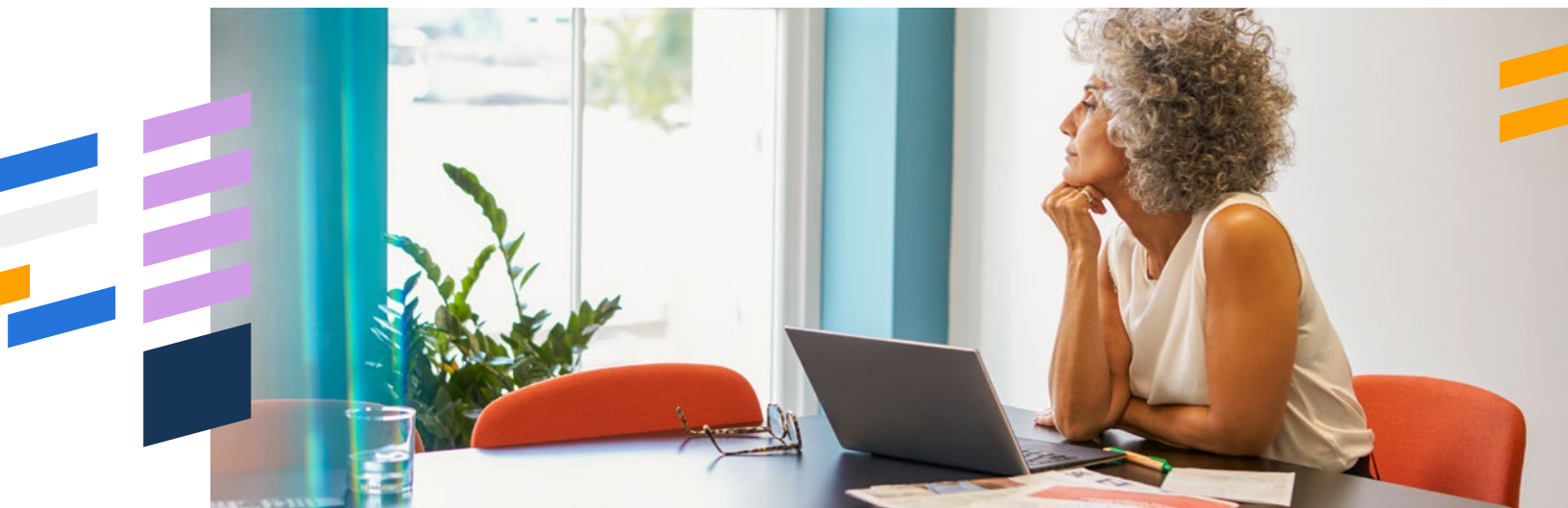
Now and then a software vendor will announce to its customers that a product is being 'sunsetting' or discontinued. This happened in 2021 when Oracle announced the end of life of its Bronto ESP, creating concern for thousands of customers. This led to many needing to shop around, but all that came to Adestra had said there were warning signs and red flags along

the way – namely that there had already been a period of years where support levels, platform stability and development had been in decline. Two-way communication is paramount. Whether you have a query about functionality or an urgent question when launching your latest campaign, the last thing you need is radio silence. If your messages or support emails remain unread, and it's impacting the timeliness and success of your campaigns, find an ESP with a support team that have the resources to answer your questions quickly.

5. A poor product roadmap

There is always a place for spontaneity, but when it comes to your marketing strategy, you want to take as much guesswork away as you can. Afterall, you want to know you're investing your time and resources into something that is going to grow with you and provide new capabilities to take advantage of. It's likely your email marketing will scale and with that you need an email platform that can empower you to scale. Ask yourself, is your ESP ambitious? Are there plans to introduce new tools and services? Is





your provider communicating updates and changes with you, and releasing features that you can take advantage of. If you feel you've hit a wall, and your ESP can't meet your future requirements, in terms of functionality and service, to make your email campaigns successful, you might want to consider swapping to a tool that does.

6. Regular service disruptions

Your holiday campaign has been 3 months in the making, your customer journeys are mapped, workflows agreed, A/B testing in place, and your team is primed to launch to an audience who are ready and waiting for your content. Then you're hit with a service disruption, the fourth time this month! Outages are sadly inevitable, and sometimes can't be predicted. But if your ESP is consistently unavailable, causing constant interruptions in your campaigns, and scheduled downtime isn't communicated to you effectively, then wave them goodbye and find a platform that will keep you more informed.

7. Poor integrations

Does your ESP allow you to integrate with other tech solutions? Every integration or connector comes with its own limitations. Some are limited and locked down, others are temperamental and prone to break, whilst some can't handle the throughput when the volume or scale of emails you're

sending increases. Integrations should work to break down silos and help to get the relevant data passing between two systems in the way you need to be more successful. To work efficiently, integrations with your ESP, such as your Customer Data Platform (CDP), can be extremely useful. If you can't connect your marketing tech stack seamlessly, or at all, your goals of scaling your email marketing could hang in the balance.

8. Lack of omnichannel capabilities

The global email software market was valued at \$7.5 billion in 2020 and is projected to increase to \$17.9 billion by 2027 ([Statista](#), 2021). Email is a channel that will continue to grow, and on its own is incredibly powerful. However, consumers no longer operate on one channel. In fact companies with extremely strong omnichannel customer engagement are reported to retain, on average, 89% of their customers, compared to 33% for companies with weak omnichannel customer engagement (Aberdeen Group).

However, omnichannel is not the easiest move for many brands, and requires a lot of strategic thinking. Multichannel Marketing Hubs, defined by Gartner as "a technology that can orchestrate company communications and offers various customer segments via multiple channels, including websites, mobile, social, direct

mail, call centers, paid media and email", are enabling organizations to combine email with mobile, SMS, web personalization and offline communications. Although these platforms provide many channels out of the box, there are warnings to be had, with many starting life as an ESP and then adding 3rd party products over time to build out other channels. These may not be as feature-rich as investing in a dedicated SMS, mobile or web channel, so that needs to be considered, alongside the readiness of your business to move to a multichannel or omnichannel solution.

With an omnichannel approach you increase your chances of meeting your audience on the channels in which they are most active, whether that's on social media, via text, or in their email inbox, however, consider adding channels one at a time to not bend the business out of shape. Find an ESP that can work with you strategically to integrate or work alongside your other channels, to deliver the seamless experience your customers expect, but our advice is to not to jump into omnichannel in one big leap!

9. You've outgrown your current ESP / lack of functionality

As your email marketing strategy develops, so too will your email marketing requirements and ambitions. You may have managed the manual launch of a newsletter and small campaigns once a month, but now you need something that can support your new email strategy – whether that be to start a journey towards omnichannel, improve personalization or get better at segmentation and targeting. At a minimum, a good ESP should let you create fully automated welcome workflows, nurture campaigns, and triggered emails that free up time and resources for your team, but when strategizing, if your ESP is not likely to support your goals then of course it's a sign that you may need to plan for a swap when your renewal date lands.



10. Cost

You could spend all your budget on the most sophisticated ESP on the market and only use a third of the functionality. Or spend as little as possible and be restricted every time you try to carry out a basic task or contact the support team (if there is a support team of course!). A higher cost doesn't always equate to a more mature platform, and using the cheapest to save budget is likely to bring up capability and service issues.

Pricing can vary widely depending on a variety of factors, so it's important to understand your requirements from an ESP and whether it can deliver on them. Unfortunately, cost models are not always the same and so comparing one vendor with another is not as easy as it should be. Some will offer CPM rates, whilst others will provide pricing based on the volume of contacts in the database, and others may price differently too. If you're not getting bang for your buck with your current provider, you could be making cost savings while achieving better automated campaigns elsewhere. Or with a higher investment you could access the improved functionality your team needs.



11. Data quality

Well-maintained data sits at the foundation of any successful email program. Segmenting your audience, targeting them based on particular attributes, and personalizing your campaigns requires superior data hygiene. Staying on top of your data is essential, but can be resource intensive and often overlooked. Ensure your ESP makes light work of keeping data up to date. Without it, you'll be faced with a poor sender reputation resulting in deliverability issues in the future, or worse still, fall foul of regulations.

12. Data restrictions

Your ESP may keep your data well-maintained, but are you able to access it and utilize it in a way that fully supports your campaigns? Your audience expects a personalized experience, and therefore if there are restrictions on the data that you need to put into your ESP to enable that personalized experience, then you'll be inhibited. Most email products, including Marketing Clouds, have a data architecture that could be limiting if you're looking to move to more advanced segmentation or personalization, which are common issues for enterprise brands that usually are solved outside of the ESP with technologies such as Customer Data Platforms, or through bespoke integrations. With restrictions on

the data you can use in your ESP you could miss opportunities to create personalized campaigns that show your audience you truly understand them, whether that be through demographic, behavioral, or transactional segmentation, and so might be the time to consider either swapping your ESP or finding a complimentary technology that can enable your strategy.

13. Hosting restrictions

Part of living a happy life with your ESP is keeping your IT team happy. Some sectors won't allow for customer data to be cloud-hosted and will want on-premise deployments, or you may have rules in place based on company policies as to where your ESP is hosted (AWS, Microsoft Azure, or Google Cloud). Similarly, you may have local regulations that dictate where the location of your hosting needs to be, and even so far as where that data can be viewed from. In 2020, the Court of Justice for the European Union ruled that for an EU business, any data that is hosted or accessed in the United States, is potentially illegal, and throughout the EU-US Privacy Shield that was formerly in place to enable data transfers in this way. Hosting is therefore incredibly important, and rules will impact what you can and can't buy. Similarly, any changes from the IT team, or a new company-wide hosting policy, could dictate a need to switch.



14. Poor collaboration

Email campaign development is built on a number of components, and multiple team members, ranging from copywriting and design to testing and reporting. The numerous employees, combined with the possibility of running multiple email campaigns, mean that the ability to collaborate effectively is crucial to ensuring successful end-to-end campaigns. If failing to add notes/suggestions and keep your team up-to-date on recent progress is resulting in frequent errors, you need an ESP that knocks down departmental walls, not creates them.

15. Unique Multi-brand issues

This is an issue that is only really apparent in multi-brand organizations, or indeed agencies that provide email marketing services to many clients. The need to manage, report on, separate and combine email marketing campaigns across multiple entities can be tiresome and problematic. Different brands could be using different email technologies as a result, and a lot of manual reporting and administration can be crippling, or at least un-needed. For multi-brand companies (commonly retail, travel/leisure and publishing), or agencies running email services for clients, you should look for an email marketing tool that can provide multi-tenant functionality to enable easier reporting and management of multiple instances of the product.

02

What are the Common Pitfalls When Migrating?

Any mature email marketing program will require you to be working with an ESP daily. Regular use will have you identifying issues in no time. Certain problems with functionality can be worked around, and you might be able to launch your campaigns with relative ease. However, if any of the aforementioned red flags are surfacing on a regular basis, the user experience has you internally screaming, and your cries for help aren't met with support, then a move might be the answer to your woes.

Migrating your ESP isn't always plain sailing, which is why you need to be clear on what you want from a relationship with your new provider. In the following section, we'll take you through the pitfalls of migrating and show you the common mistakes, so you can avoid making them.

What are the Common Pitfalls When Migrating?



Rushing into a relationship with your new ESP provider is likely to lead to mistakes.

Moving too fast

Rushing into a relationship with your new ESP provider is likely to lead to mistakes. A methodical plan for setup and implementation is essential to ensure you have time to make the switchover and that proper training is carried out. You should familiarize yourself with the new system, ensure customizations are setup and that mistakes with data are avoided. Unrealistic deadlines will put unnecessary pressure on your internal teams, and potentially make adoption of the new solution more difficult. Any good email vendor that you're switching to should be able to help you through the process, provide project timelines and help you to migrate smoothly. Chances are, they'll have done it before and therefore will know some of the pitfalls too. When speaking to new vendors, ask them if they can provide a migration plan.

Unrealistic start date of new ESP vs. end date of old ESP

Your migration process needs to be set at a manageable pace with achievable deadlines. Having a realistic launch date for your new ESP, and a date to say a formal goodbye to your current provider, gives you something to aim towards. But think about this carefully, as you don't want to be stranded without an ESP, or paying two bills over an extended period! Remember, you may need to give as much as 3 months of notice to your current ESP to be able to stop your contract with them, and they are unlikely to want to help you if you miss the deadline. Similarly, getting data out of some ESP's is not as straightforward as it could be, and finding out these issues too late is going to put un-needed stress on you and the business. Agree with your current provider to keep it running until you are fully satisfied that all boxes have been ticked.



Insufficient training

Your marketing and tech teams will need to get up to scratch with both the basic and more advanced functionality of your new platform, including where your data lives, how to design your templates, and launch your campaigns. In the early days of using new automation software, it's inevitable that there will be a period of finding your feet, and email marketers can often be wedded to the old solution despite its shortcomings. Training should be thorough, and onboarding should have a clear, two-way channel of communication for any support that is required.

Deliverability issues and improper IP warming

Moving to a new ESP doesn't get rid of your deliverability issues overnight, but it can be a step in the right direction. Moving to a new provider will mean moving to new IP addresses and domains which will require a gradual warming process. The better your sender reputation was with your old provider, the smoother it should be building up with the new.

A lot of email platforms these days have warmed up IP's ready to go, but depending on the scale and volume you're planning to send, it is something worth checking off with the new provider. You will need to create a plan that consists of identifying engaged audiences, slowly building your send volume, and identifying your best performing emails. The rules for good deliverability remain the same; if you target your audience effectively with content they enjoy and are likely to interact with, you increase your chances of opens and clicks and reduce the risks of them hitting the spam button. In reverse, other customers of an ESP can potentially damage your reputation if they are consistently delivering spam to their audiences. Do your due diligence therefore if you're looking at an ESP that is less well known and therefore may not have the same infrastructure.

Custom integrations not supported

Your ESP is one cog in your organization's marketing machine, and to lose integrations such as with your CRM, Customer Data Platform (CDP), Survey software, or eCommerce could see you restricted post-

migration. Your integrations play an integral part in making not only your marketing activity, but your customer experience feel seamless. It is therefore vital to ensure your integrations are considered in the migration process, and run use cases that consider all the variables to ensure that the connector or integration is truly going to give you what you need. An out of the box integration to Salesforce CRM can come in many flavours, so if you're looking for integrations to trigger an action in a 3rd party system, make sure it's up to scratch for your needs!

Transferring creative / templates

Migrating can be a good opportunity to do some spring cleaning, start afresh, and get organized. Your early efforts at templates that are now unused and collecting dust in your folders may not need to be carried over. However, there will be templates that you use on a regular basis that feature in your active campaigns. It's important that they are transferred correctly, to keep interruptions to a minimum, or that you understand the new capabilities available and potentially rebuild them as part of the switchover.

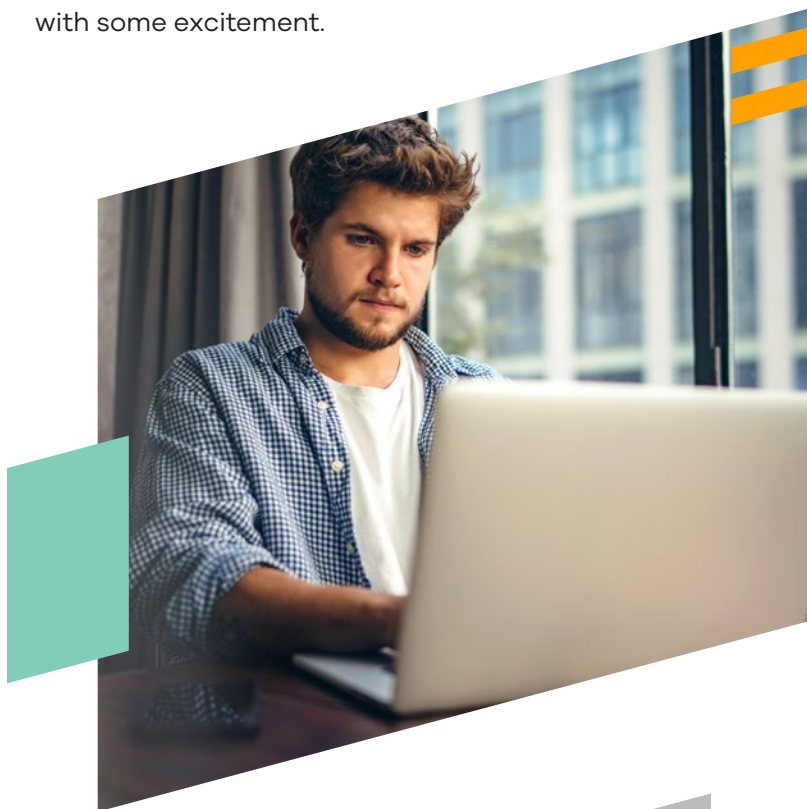
Migration of journeys and always-on campaigns

If you have welcome workflows, reminder emails, and cart abandonment triggers in place, make sure they are carried over or rebuilt and tested, or you could face the timely process of starting from scratch and losing out on customer engagement. Remember, no two workflows or campaign canvases are the same so your campaigns will likely need to be rebuilt, which you will want to work with the customer success team from your new provider to ensure there are no hidden corners that could disrupt campaigns being sent once you switchover.

Poor user adoption

There may only be a handful of your internal team involved in the decision-making process of investing in a new email marketing solution. However, you need to recognize that the platform will be used by your employees, and there will usually be knock-on impacts to processes that some non-Marketing teams rely upon. Therefore, internal buy-in becomes a high priority. It's essential that communication around the change is clear to avoid any concerns, and something that usually helps is to have a champion user to join that process and understand why the changes are happening so that the whole team feels bought-in to the decision.

Your internal promotion about using the new platform needs to breed excitement amongst your team – what benefit is it to them? How is it going to help them do their jobs better and with fewer restrictions? And, what are the exciting new features they can get their hands on? Change can make internal teams uneasy, so settle the nerves with some excitement.






Just like your automated marketing campaigns, the roll out of your new ESP isn't a set it and forget it process. Keep the adoption rate of your ESP high by providing ongoing training, upskilling employees, sharing tips and tricks, and communicating software updates to get the most from your new provider.

Losing historical information / data

Transferring your active data is important, but you need to ensure that your unsubscribes and opt-outs, suppression lists, and spam complaint addresses are accounted for in the migration. If your audience has made it clear they don't want to be contacted, but your new ESP no longer

recognizes their choice, you could end up with subscribers receiving content they didn't want. This will drive them once again to either the spam button – impacting your deliverability – or to have to go through the process of unsubscribing again. Not the customer experience they had hoped for.

These pitfalls can be easily avoided in your early conversations with a potential new provider by communicating and being transparent. If you know what you need in terms of functionality, capabilities, and integrations, you can ensure you are asking the right questions.



03

Migrating your ESP

The pitfalls and red flags we've highlighted might seem daunting, and the process of migrating overwhelming, but we're here to help. The following are some of the key areas to consider for a smooth transition to a new ESP.

Migrating your ESP

Key contact introduction

Once your ESP is up and running, the bulk of activity in the software will be carried out by your Marketing Team. However, for successful migration you need to ensure your IT Department is introduced and involved as soon as possible. Instead of chasing your tails and working to deadlines set by your new provider, both teams should agree on a timeline and ensure migration is smooth with minimal delays.

Email audit

Regardless of the scale of your email marketing program, you'll likely have several assets, folders, templates, and emails to account for and take with you. To make your migration process easier, you'll need to document everything from your image assets, landing pages, and sign-up forms, to your email templates, and lists. Different departments will use your

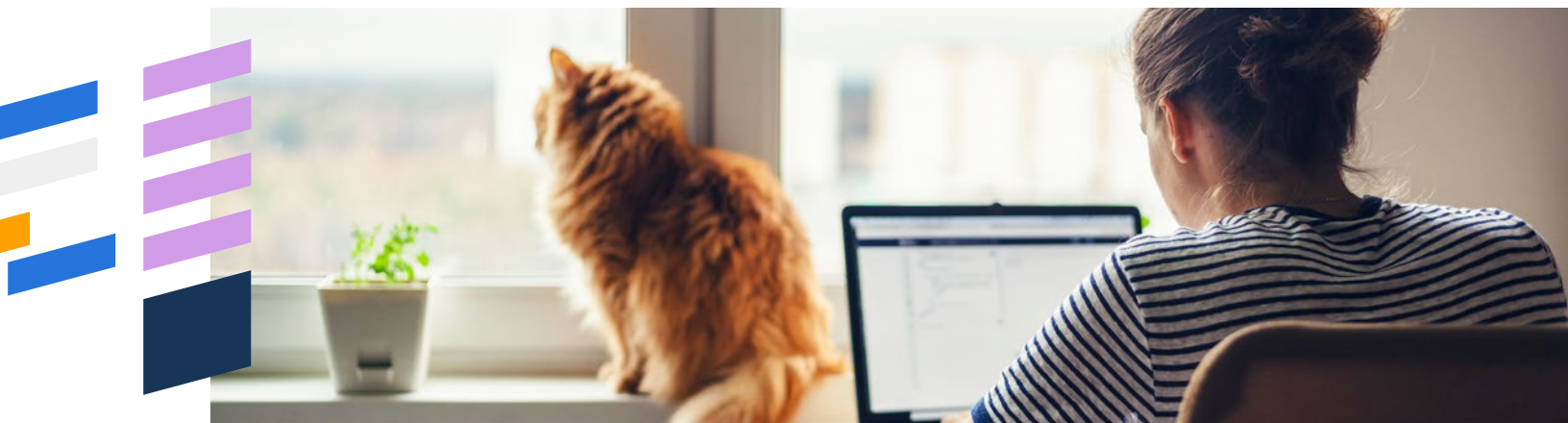
current ESP differently and you need to be clear on where items are saved, what should be migrated, agree on naming conventions and a folder structure that will work with your new provider.

Migrating your email lists

We're realists, and we know staying on top of your lists and maintaining good data hygiene can be time-consuming and may not always be prioritized. Use your migration as an opportunity to review your lists and clear up any inactive or unwanted data. For your active data, check the association with dynamic lists to minimize disruption when moving it. Who in your audience is part of automated campaigns that are already 'in-flight', and can you ensure sure they aren't pulled out midway through their customer journey?

The data you hold likely goes beyond first name, last name, and email address. Ensure you're carrying over the behavioural, demographic, and transactional data you have carefully gathered so you can keep delivering powerful and personalized campaigns.





Content & templates

If you want to carry over your current templates and designs, be sure the templates work within the new editing tool, and that your assets are saved into your new content folders. You'll need to highlight what data dependencies your templates have, for example where personalization features, and then translate this to your new database. Otherwise, you could be sending out emails with your audience addressed as "Hello <first name>" or sending a birthday email weeks before someone's big day.

Reports and analytics

You need your previous campaign reports to help you shape better campaigns in the future. If you are using third-party Business Intelligence (BI) tools, make sure that the link between your new ESP and BI is maintained, otherwise your access to historical data, trends, and ability to predict future campaign success could be lost. The same rule applies for any metrics or information that is fed back to your CRM that assist your sales activity, dashboard creation, or live board reports that are generated from your current ESP.

Sign-up forms & landing pages

Are your sign-up forms and landing pages connected with lists in your current ESP? The way you migrate your sign-up forms will impact the data in those lists if done incorrectly, and vice versa. Be sure to check that your new database matches the fields in your forms, or you could be asking for information that your database isn't set up to store. Whether it's your subscription sign-up form, cart landing page, or your resources page, it's likely that interacting with these pages results in a trigger. Make sure you identify the pages and sign-up forms that trigger an email or start a journey to avoid interruption.

Personalization tokens

You'll need to create a list of all the personalization tokens that you currently rely on in the old ESP so that you can then ensure that they can be recreated in the new email tool. The format, name and customizations that can be used with personalization tokens changes from software to software. By creating a list, and then mapping them to the personalization fields in the new tool, you'll be in a much better place when you migrate the data and email templates further down the line.

Integrations and connectors

Whether you have multiple integrations or a handful, you need to understand whether your new ESP can integrate in the same way as your current connections and if integration can happen more efficiently. You'll need to include your tech teams in these conversations to help map how your data and content flow, agree on the timescales and cost associated with changing these connections, and the potential development resource required.

IP warming

You want to make your sender reputation from your new ESP a great one from the get-go. To do that, you need to create a plan that involves identifying your most engaged audiences. If your early emails can create clicks, opens, and conversions, instead of driving your audience to the spam button, you'll minimize deliverability issues. Once you have established who your most engaged audience is, slowly build the volume at which you're sending your campaigns and identify your best-performing emails.

Automations and workflows

From your welcome workflows to your anniversary triggers and cart abandonment emails, there is a lot to consider when it comes to moving your automation and customer journeys across to your new provider. Bear in mind your automations and workflows will also be associated with active lists, sign-up forms, and landing pages. Take the time to map out where your triggers are placed, and what data is going to be impacted. This is also a good opportunity to spot gaps in your workflows and identify opportunities where you could be interacting with your audiences more effectively.

Suppressions, hard bounces, and unsubscribes

It's natural to want to prioritize your active opted-in data, but don't make your suppressions and hard bounces an afterthought. Make sure all your suppression lists are exported and your known bounces are included in the suppression lists of your new ESP. Be clear on how your unsubscribe lists connect to your current preference centre, and whether your audience have opt-out opportunities via a third party that need to be accounted for (e.g. during a commerce purchase). For future unsubscribes, make sure your ESP recognizes each opt-out, and they are being removed.

Project management

Carrying out a successful migration is no mean feat and with input from your new provider and various internal departments, it's essential to have not only key contacts throughout the process but agreed project managers who will oversee the migration from start to finish. Any good ESP vendor will be more than happy to help make the transition as seamless and frictionless as possible!

Migrating to a new ESP is a marathon not a sprint, and good preparation is key. By setting your expectations early in the process, both you and your new provider will be clear on the deadlines you've set. The individuals and teams involved will also be up-to-date and excited about the project with clear direction on who is responsible for hitting each milestone. While ESP migration can be difficult, matching up with an ESP that better suits your program can ensure the process is worth it.

Considering a new email marketing solution?

Get in touch with our expert team who will help to manage your ESP migration project from day 1 to go live.

Our powerful, easy-to-use software can be customized and uniquely configured to the structure of your business, whilst in-depth email reporting gives actionable insights to drive your marketing success.

Contact us.



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