

# 30 Key Migration Responsibilities

The key factors for a successful migration are having a solid plan, skilled resources, bandwidth, and cross functional alignment. Only then will you be able to complete the following set of responsibilities successfully and on schedule.

- Prepare and present business case for migrating
- Identify an executive sponsor to align team and overcome hurdles
- Create an RFP or simple internal evaluation checklist to determine the features and capabilities required of the new system
- Evaluate new system(s), negotiate terms, complete license
- Build cross departmental migration plan and high level timeline
- Assign a Project Manager and create project plan, including team leads
- Create an inventory of current assets, programs, forms, images, campaigns, lists, etc. to determine which need to be migrated
- Perform a database field audit to determine which fields are required and actually being used to determine the new system database field configuration
- Setup user configuration and security groups
- Configure email sending domain configuration and IP address warming
- Deploy website tracking scripts and remove old scripts
- Design website forms integration and complete testing
- Establish campaign tracking process
- Design and build new email templates
- Design and build new landing page templates
- Establish database segmentation and persona configuration
- Setup blacklist, whitelist, and existing email opt-outs
- Complete nurture program redesign & porting
- Complete lead scoring program redesign & porting
- Complete lead management program design and configuration
- Perform database de-dupe and cleanup before loading
- Perform CRM integration and testing
- Setup and complete bi-directional CRM/MA database synchronization and testing
- Inventory all integrations with 3rd party MarTech and their integration points
- Plan and complete all the integrations with 3rd party MarTech into new system
- Remove existing and redeploy sales enablement tools (within CRM)
- Setup new email alerts and notifications
- Complete marketing and sales user training
- Configure and complete new reports, dashboards, and analytics
- Perform user acceptance testing (UAT). Consider running two systems to mitigate risk in short term.

You don't have to do this alone.  
Contact DemandGen today  
for a complimentary migration  
consulting session.

☎ 925.678.2511  
✉ [info@demandgen.com](mailto:info@demandgen.com)

## 10 Departments Impacted by a Migration

Migrating marketing automation systems is a shared responsibility, so consider the impact to these other departments and functions.

1. Demand Generation
2. Campaign Operations / Demand Center
3. Marketing Operations
4. Webmaster
5. Field Marketing
6. Sales Operations
7. Sales Team (CRM Users)
8. Marketing Leadership
9. Information Technology (IT)
10. Executive (Legal/Procurement)

