SYKES MARKETING & DESIGN
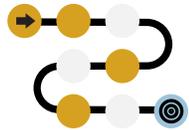
Switching Marketing Automation Systems?

Step by step guide as you move from one marketing automation system to another.

SWITCHING MARKETING AUTOMATION SYSTEMS?

1. KNOW THE TIMELINE

Knowing your timeline of when systems will be turned on and turned off will help know how much time you have for each phase of this switch over. These dates are great to know before any contracts are signed.

2. AUDIT

The first step in moving systems is taking stock of what exists in your marketing automation system. Be nitty gritty about this. See the checklist on the last page to make sure you don't miss a thing.

3. DOCUMENT. DOCUMENT. DOCUMENT.

Knowing what data you have in writing will help you clean up what you don't need, store what you don't need to upload and only upload what is necessary for marketing in the future so your data and reporting is exactly what you need. While minimalist may work in a house....that is not what is best with data. Once this spreadsheet or documented data is complete keep this in your hard drive to store for the future.

Know your timelines and your roadmaps

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4. STRATEGIZE
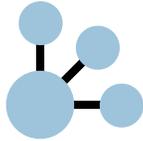
Campaigns. Reporting. Data. Each marketing automation system has its advantages and you chose this system because it can get you where your team needs to go. Work with your marketing team and your marketing automation onboarding team to know your road map. Before turning on your system know what campaigns and reports you want to see. This will help as you create fields, properties or tags.

5. STORE

From your audit you know what you need to store for safe keeping. In a few months you won't be surprised when the sales team asks about that email that was so successful or that image that shows exactly what they need. Data. Images. Files. Documents. Fields and Properties. Knowing your data and important marketing information is safe will be an asset to your team during times of changeover.

6. CREATE. UPLOAD. REPORT.
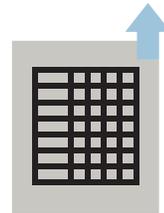
Nows the time! Your data has been audited and stored for safe keeping. You know where those important images and pdfs are when needed that may not be uploaded for your newest marketing campaigns. Turn your new system on! What a BIG day! Create the new fields, properties or tags that will help with your marketing strategy, and campaigns. Upload your images and create your emails. Today is your day.

Do you need someone to help with this big change? Reach out to a team that can help you implement a marketing automation system that reflects your goals. Reach out today.

HubSpot

eloqua

salesforce pardot

Marketo
An Adobe Company

act-on

ActiveCampaign

mailchimp

keap

Before turning on your system, know what campaigns and reports you want to see.

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Have Questions about your Marketing Automation System?

Click Here For Help!

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