

ESP MIGRATION CHECKLIST



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Subscriber Data Migration

Core elements to be pulled across:

- Subscriber profile data such as email address, first/last names, time of subscription, location, and custom fields
- Subscriber order data
- Subscriber event data
- Subscribers' opt-in/opt-out statuses, i.e. suppression lists

Backing Up Data

Data to be backed up before shutting down your old ESP:

- Download your subscriber lists with all profile properties checked
- Pull all the past email creative into a folder
- Export all metrics reports, preferably the CSVs of the raw data by email message
- Screenshot important segmentation criteria
- Keep a record of A/B testing numbers and results

Deliverability and List Health

Items to be aware of during a migration:

- Pick your timing
- Configure your sending infrastructure
- List warm-up and cleaning

Integrations, Configurations, and Customizations

Needed account settings updates, integrations, and templates:

- Global frequency caps
- Attribution setup
- Organizational settings
- Opt-in & opt-out settings
- Global unsubscribes
- Custom preferences & unsubscribe pages
- Single opt-in lists
- Email signup forms
- Shopping cart integration

Email Content Transition

- Email content updates
- Automated email transition
- Transactional emails
- Campaign email transition



NEED HELP WITH ESP MIGRATION?



Essence of Email has built innovative email marketing programs for over 200 eCommerce brands to help them sell repeatedly.

Take your eShop on a journey to positive ROI.