

LEADOUS

THE ULTIMATE GUIDE TO DIGITAL PLATFORM MIGRATION

**A STRATEGIC APPROACH TO
OPTIMIZING, STREAMLINING, AND
UNLOCKING NEW CAPABILITIES
WITH LEADOUS**



Marketo Engage



pardot



marketing cloud

HubSpot

ORACLE
eloqua

ABOUT LEADOUS

The journey between “Hello Prospect” to “Welcome Valued Client” can be difficult to navigate. From concept to conversion, we utilize technology, methodology, and certified Marketo Engage and Bizible resources to deliver consulting services that increase demand, lead conversion and deliver pipeline growth. Our near-decade-long world-class partnership with Adobe has serviced hundreds of clients, across industries, to obtain measurable value from their investments in customer journey solutions. **Let us lead you.**

Migration Made Simple: Prepare, Optimize, and Transform

Switching to a new platform is an opportunity to streamline your processes, eliminate redundancies, and unlock advanced features tailored to your evolving needs.

At Leadous, our migration process isn't a simple one-to-one data transfer—it's a comprehensive, efficiency-driven transformation designed to optimize your systems for long-term success.

WHY MIGRATE?

Migrating to a new platform enables you to:

- **Streamline Operations:** Optimize workflows by eliminating outdated or redundant processes.
- **Unlock New Capabilities:** Leverage advanced features and new functionalities that your current system may not support.
- **Enhance Data Quality:** Establish naming conventions and clean records, ensuring your new platform is organized and ready for growth.
- **Achieve Long-Term Efficiency:** Transitioning isn't about replicating the old system—it's about building a smarter, more agile infrastructure that delivers measurable results.
- **Drive ROI:** Optimize your systems and processes to achieve measurable improvements in efficiency and revenue generation.



HOW LEADOUS SUPPORTS YOUR MIGRATION

Our expert team will partner with you every step of the way to ensure a smooth and successful migration:

- **Assess & Plan:** We begin by evaluating your current system, identifying optimization opportunities, and defining a tailored migration strategy.
- **Prepare & Organize:** We help you compile a comprehensive asset inventory and establish best practices, including naming conventions and data cleanup, to set your new platform up for success.
- **Optimize & Implement:** Our team manages the migration process, ensuring that your data is transferred efficiently while enabling new features and integrating optimized workflows.
- **Ongoing Support:** Post-migration, we provide training and continuous improvement support to ensure you fully capitalize on your new system's capabilities.

MIGRATION PREPARATION STEPS

To help prepare for a successful migration, please consider gathering the following information. While taking these preparatory steps in advance can be helpful, they are not mandatory—we are here to assist you throughout the process.

1. Access Credentials & Environment Details:

- Provide access to both your current (old) and new platform instances, including login credentials, API keys, and administrative rights.

2. CRM & Integrated Applications:

- Share access details for your current CRM and any other applications that integrate with your platform.

3. Asset Inventory:

- Compile a detailed inventory of all assets, including:
 - Programs
 - Campaigns
 - Media files
 - Lists
 - Operational campaigns

4. Custom Fields & Configurations:

- Document any custom fields or specific configurations that are integral to your operations.

5. New Features & Functionalities:

- Identify any new features or capabilities you plan to enable that are not currently in use.

6. Data Quality & Record Management:

- Work with us to identify records that need to be cleaned.
- Establish naming conventions to ensure your new platform is organized from the start.

7. Stakeholder Contact Information:

- Provide contact details for all key stakeholders involved in the migration process.

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WHAT TO PROVIDE TO YOUR LEADOUS CONSULTANT

Before we kick off the migration, please prepare and deliver the following:

- Access to both the old and new platform instances (credentials, API keys, etc.)
- Access to your CRM and other integrated applications
- A comprehensive asset inventory (programs, campaigns, media files, lists, operational campaigns)
- Documentation on custom fields and configurations
- A list of new features to be enabled
- Information on records to be cleaned and established naming conventions
- Contact details for relevant stakeholders

READY TO TRANSFORM YOUR OPERATIONS AND UNLOCK THE FULL POTENTIAL OF YOUR NEW PLATFORM?

Contact your Leadous representative today to schedule a comprehensive migration assessment.

Let's work together to streamline your processes, optimize your data, and set your organization up for long-term success.

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