![Acquia — Experience Digital Freedom]

MIGRATING FROM MARKETO TO ACQUIA CAMPAIGN STUDIO: A GUIDE

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FROM CLOSED TO OPEN

Our Marketing Automation Journey

Customers today expect a personalized digital experience. And they expect it not only on your owned digital properties, but across channels. This requires flexibility in terms of the channels you can access, the tools you can use and your ability to leverage customer data.

Unfortunately, many marketers have learned the hard way that closed, proprietary marketing clouds do not provide the flexibility they need.

In 2019, Acquia acquired Mautic, the world's only open marketing cloud. This acquisition was a strategic step toward completing our vision for an open digital experience platform. It also meant migrating from Marketo, which we had been using for nearly a decade, to Acquia Campaign Studio, formerly known as Mautic. Vision aside, there were a lot of practical reasons for us to make the move.

First of all, Acquia Campaign Studio costs less. In our case, it proved to be 65% less expensive than Marketo.

Second, Marketo's automated campaign features are lackluster, cumbersome and dated. Acquia Campaign Studio features a fluid, draggable campaign builder where you can view and edit a range of actions, decisions and filters. Acquia Campaign Studio also provides more possibilities – in terms of creativity, sophistication and pathways – when it comes to multichannel, multitouch campaigns. In a marketing landscape where brands need to be able to show up everywhere, this functionality is essential.

Finally, the learning curve on Marketo is steep. Any strategic digital marketer can quickly learn how to leverage Acquia Campaign Studio's capabilities. Marketo requires external specialists even for basic level builds and executions. Doing anything more sophisticated, such as setting up a marketing engine that listens to customer engagement and syncs with other tools, likewise requires dedicated professional services (and all the ongoing cost that comes with them).

Using Acquia Campaign Studio in conjunction with the advanced personalization and data management capabilities built into Acquia's Marketing Cloud opened a new world of possibility for us. We believe it can do the same for you.
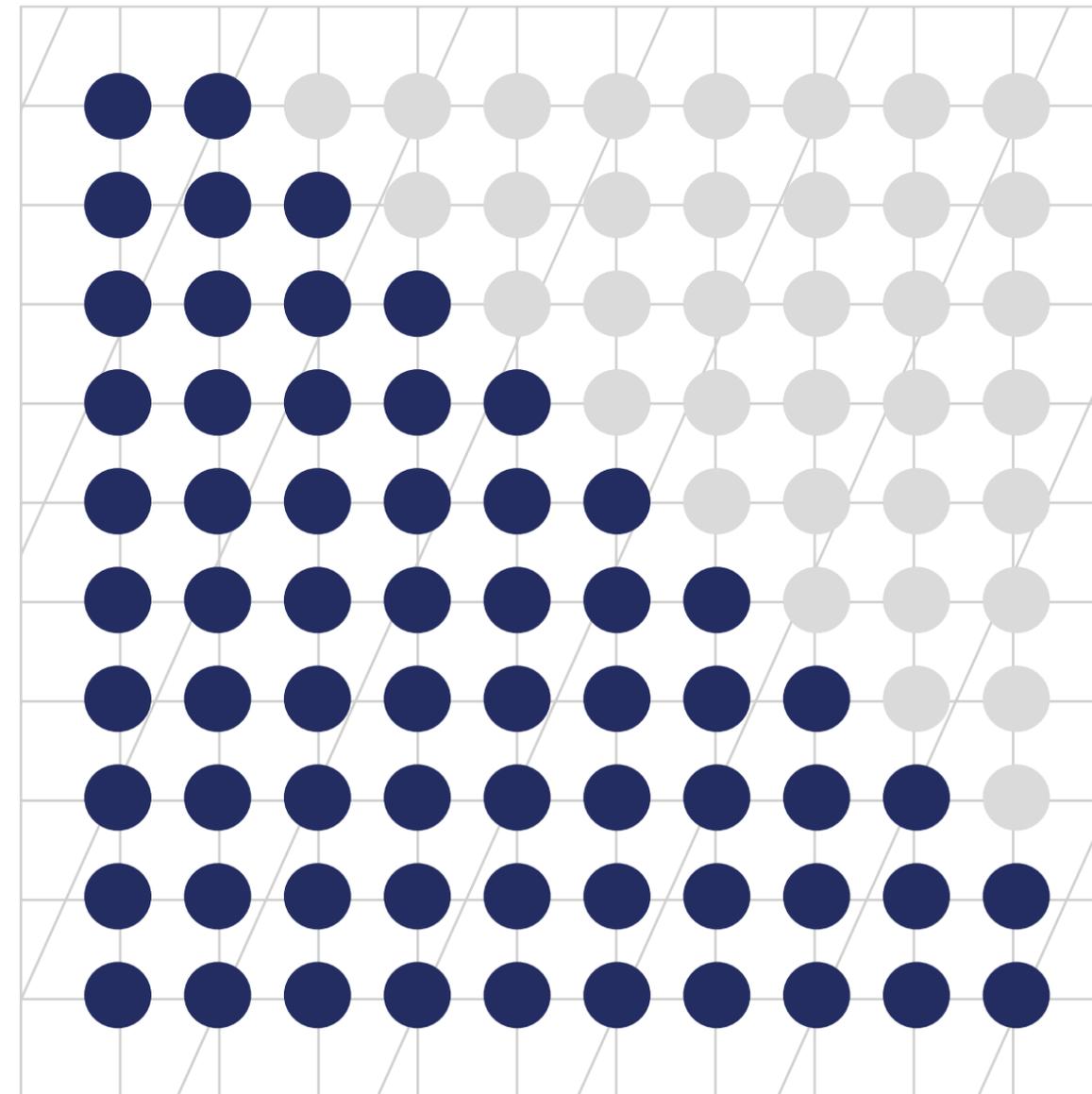
65%

Acquia Campaign Studio proved to be 65% less expensive than Marketo

In this e-book, we share what we learned during our migration from Marketo to Acquia Campaign Studio to make your migration easier. We cover the process from start to finish and answer questions such as:

/ **How do we prepare?**

/ **Who needs to be involved?**

/ **What steps should we follow to complete the migration?**

/ **What kinds of hiccups or challenges can we expect along the way?**

Through the journey of becoming Acquia Campaign Studio users ourselves, we were able to identify opportunities to improve the user experience and enhance Acquia Campaign Studio's capabilities. We also identified ways to optimize Acquia Campaign Studio's integration with common marketing solutions. We describe the new features, capabilities and plugins we added to Acquia Campaign Studio below.

Switching marketing automation systems has its challenges, to be sure. But when the result is agile, customer-centric marketing that engages and converts customers, making the switch is totally worth it.

SECTION 01

PREPARING TO MIGRATE

Laying a new and better foundation for your marketing initiatives

PREPARING TO MIGRATE

Any migration to a new platform must start with an understanding of what you are doing on the current platform. The point of a migration is not to recreate everything in the new system as it existed in the old, however. Migration is an opportunity to lay a new and better foundation for your marketing initiatives. When it's done, you should be able to do everything you want to do in the way you want to do it — not just within the limits of what your marketing automation platform lets you do.

If you're like us, you'll find there is a lot going on in your current system that you weren't really aware of. We had been using Marketo for nine years. The people who had originally implemented Marketo had long since left. As it turned out, many of the automations, emails, forms and content in Marketo were no longer useful.

Preparing to migrate by inventorying everything we had in Marketo gave us the chance to declutter. We were able to tag automations, campaigns, emails, forms and content that were no longer relevant and didn't need to be recreated in Acquia Campaign Studio.

A DATA REFRESH

This process also provided a great opportunity to clean up our fairly large database. Some of our contacts had not interacted with us in years, for example. We kept these records in our CRM but chose not to port them over until we could scrub them and develop a re-engagement campaign.

We also took this opportunity to refresh our data, updating email addresses, phone numbers and company information. Some contacts had new titles and others had moved to new companies entirely. We fixed all that.

Taking stock of our current situation involved auditing our implementation of Marketo. While every implementation will be different, here are the things we focused on and optimized:

- **Campaigns**
- **Automations**
- **Forms**
- **Emails**
- **Content**
- **Tracking**
- **Segments and personas**
- **Scoring**

From a data perspective, we had to consider a few things. First, we had to look at how form fields in Marketo mapped to Acquia Campaign Studio. In this case we discovered that the field lengths in Marketo differed from those in Acquia Campaign Studio, which meant we had to adjust the latter. Second, we had to review all our dynamic filters and lists. Finally, we had to map the data flow between campaigns, automations and forms and our other systems.

Inventorying everything we had in Marketo allowed us to assess what we would need in Acquia Campaign Studio and what we would not. It also forced us to think through what would easily translate into Acquia Campaign Studio, what would require different processes, and what would require changes to Acquia Campaign Studio itself, because the needs of a larger company like Acquia are likely similar to those of many other enterprise companies.

WHEN YOUR MIGRATION IS DONE, YOU SHOULD BE ABLE TO DO EVERYTHING YOU WANT TO DO IN THE WAY YOU WANT TO DO IT – NOT JUST THE WAY YOU'VE ALWAYS DONE IT.

SECTION 02

WHO DOES WHAT?

Getting your team together and on the same page

WHO DOES WHAT?

A lot of different people from across the organization play a role in using and maintaining a robust, enterprise-grade marketing automation system. For this reason, many will also play a role in migrating from one system to another.

Since marketing automation is primarily a marketing tool, our migration called for involvement from teams in marketing operations, events, demand gen and content marketing. Analytics, reporting, development and web operations teams also had a hand in things, as did the admins for Salesforce (the CRM we use) and sales operations. It also made sense for us to tap customer success and professional services teams for their input.

Finally, we had to involve IT and security teams to ensure the new platform integrated properly with the organization's existing infrastructure and adhered to guidelines for security, compliance and governance.

DELEGATING TASKS

To assign roles and responsibilities, we needed to map who owned what tasks in Marketo. For each task, we made a list of relevant stakeholders who saw to it that the task was recreated in Acquia Campaign Studio.

A migration like this involves project management. Like any other Acquia Campaign Studio customer, the project management role was handled by a dedicated customer success manager. The CS manager set deadlines, tracked progress, identified blockers and kept the project moving. The CS manager also provided training on all features and components of the platform. As multifaceted as our migration was, Acquia Campaign Studio and the team behind it made it easy.

MANY DIFFERENT PEOPLE USE YOUR MARKETING AUTOMATION SYSTEM. THEREFORE, MANY WILL ALSO PLAY A ROLE IN MIGRATING FROM ONE SYSTEM TO ANOTHER.

SECTION 03

WHAT WE DID

How Acquia prepared for our
own migration

WHAT WE DID

1. MAPPING MARKETO TO ACQUIA CAMPAIGN STUDIO

We started by mapping what we did in Marketo to what we wanted to do in Acquia Campaign Studio. While the functionality is the same from one platform to the next, we did have to account for the differences in implementations. As mentioned, in some cases this meant learning new Acquia Campaign Studio-specific functionality. Since Acquia Campaign Studio is our platform, it also meant identifying ways to strengthen and enhance Acquia Campaign Studio's capabilities. Since we had nine years of history with Marketo, this mapping process took about a month.

2. DEVELOPING A COMMUNICATION AND TRAINING PLAN

Your marketing automation platform plays a critical role in your business. And a lot of people either depend on it or work with it directly. To prepare them for the migration, we developed a communication plan that:

/ Let everyone know the migration was happening

/ Clearly explained the benefits of moving to Acquia Campaign Studio

/ Detailed the timeline and who would be involved

/ Provided a point of contact if people had questions or concerns

/ Sent weekly updates to leadership and stakeholders

Everyone who works directly with the system needs to be trained on Acquia Campaign Studio's processes and procedures. You don't want to start the training the day after Acquia Campaign Studio goes live, so you need to schedule and run training in a timely fashion, making sure that everyone is ready to go when the new system is. Planning took a few days, but reminders to teams and weekly updates were ongoing.

3. DETERMINING THE ORDER OF OPERATIONS

When migrating from one platform to another, things have to happen in a particular order. For example, before we could create nurture tracks, we knew we had to create forms. But before we could create forms, we had to create the fields in Acquia Campaign Studio. Establishing what needs to happen in what order keeps the project grounded and your team aware of where you are and where you need to go. The process took us about two weeks.

Our order of operations was:

1. Create the fields in Acquia Campaign Studio (via "Custom Fields")

2. Create important scoring automations

3. Create our segments and filters to power decisions and journey paths

4. Create the forms that will replace the Marketo forms

5. Create the email automations

6. Create our nurture tracks

Acquia Campaign Studio Nurture Tracks
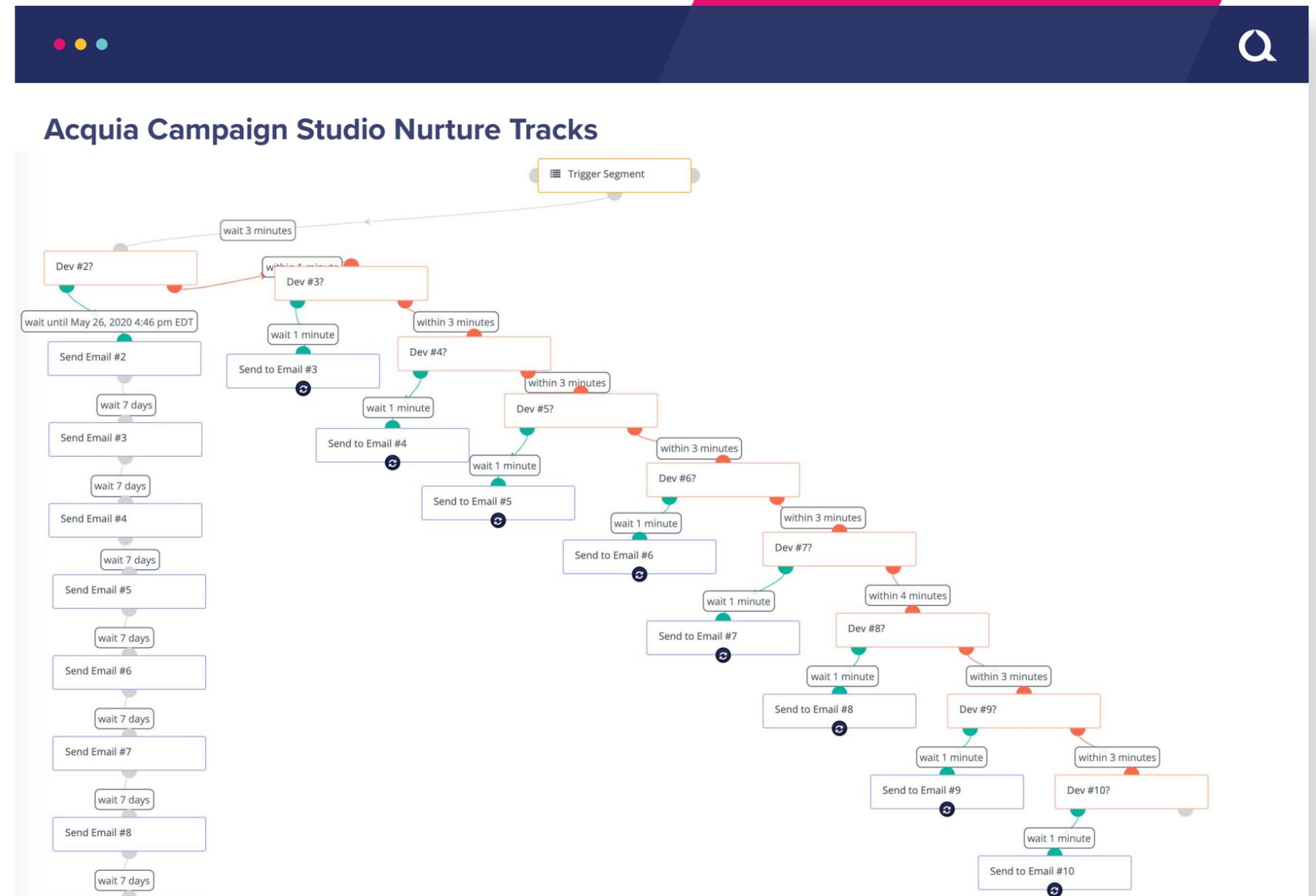
4. FINDING OR CREATING PLUGINS

The beauty of Drupal and open source technology in general is that the community is always creating new plugins, either as a way of solving problems they have encountered or because a customer has requested them. Sometimes, of course, we ended up creating these plugins ourselves and sometimes we had to wait for Mautic community members to finish projects they had initiated. The beauty is, once these plugins have been created, they are available to all!

One plugin, from start to finish, averaged about six weeks.

mautic

Mautic Community

Supporting the World's Largest Open-Source Marketing Automation Project

Nearly a Quarter Million Organizations

Working in 35 Languages

And Over a Thousand Volunteers

200,000+
Organizations using mautic

35+
Language Translations

1,000+
Community Contributors

5. TESTING, TESTING, TESTING

All along the way, you need to be testing to make sure your integrations work, your automations work, your forms work and so on. Everything needs to be in place on day one and, as we found, testing is the only way to ensure it is. Testing can never end, but our dedicated testing took about four weeks.

6. FREEZING WORK IN MARKETO

As you get closer to switching over, there comes a time when you cannot add any more content, emails, campaigns or data to Marketo. We let everyone know about the freezes in a timely fashion and helped them if they needed it.

7. LAUNCHING

Finally the moment came for the big switchover. Again, it was critical that all relevant teams and stakeholders understood when this was going to happen and what changes to expect in their process.

8. MANAGING THE FIRST MONTH

As with any significant migration, not everything will work perfectly out of the gate. We had a smokejumper team of Customer Success folks ready to address emergent issues and help people as they began working with Acquia Campaign Studio.

9. CELEBRATING!

When we were finished, we cracked open a cold one and kicked back! Just joking. Yes, we were happy we had done it. But then we got to work using the new system.

SECTION 04

WHAT
WE LEARNED

**The challenges we encountered
and the lessons we learned**

WHAT WE LEARNED

When moving from Marketo to Acquia Campaign Studio, it would be nice to say that we didn't run into any hiccups. Of course, we did. Here's what those hiccups taught us.

DOCUMENT EVERYTHING

Organizational memory can be short. You want to make sure that future generations will be able to use Acquia Campaign Studio as needed. For this reason, you should carefully document the steps you take in the migration process. This must include documenting everything you inventoried, especially what got archived and what made it into Acquia Campaign Studio.

As the migration progresses, you will still need to use Marketo. You will be creating more emails, content, forms and automations after your initial inventory. In other words, you need to keep updating your documentation to keep track of these new additions and changes.

UNDERSTAND THE AVAILABILITY OF TEAMS AND RESOURCES

Migrating a core system is like changing the engine while the plane is still in the air. The teams who need to do the work also have to take care of their ongoing responsibilities. Your project plan needs to account for this. Creating and maintaining schedules requires regular communications with relevant stakeholders to understand what will be possible when.

KNOW YOUR ORGANIZATION'S DEVELOPMENT SCHEDULE

We needed development resources because we were actively modifying Acquia Campaign Studio as we went along. You may have your own development needs depending on the complexity of your marketing operations.

Our dev team, like many dev teams, works on two-week sprints. The sprints did not always align perfectly with our project plans, calling for workarounds and schedule adjustments.

We also depended on the Mautic community to develop components that would facilitate integrations or provide additional functionality. The decentralized nature of open source development meant that sometimes we had to wait or create solutions ourselves.

START TESTING AS SOON AS POSSIBLE

Marketing automation systems are complex. They orchestrate and automate connections between many solutions. They are also dependent on customer behaviors and the application of contingent business logic. Making sure that things work when you flip the switch calls for testing early and often.

EXPECT ROADBLOCKS

In a migration like this, you will encounter roadblocks. As we've said, sometimes we had to accommodate development cycles or wait for much-needed solutions to be created. Synchronizing with your CRM or other major systems can also slow things down. And testing may reveal that something you thought was working actually isn't.

While roadblocks can be stressful, relax. Before you know it, the migration will be complete!

THE TEAMS WHO NEED TO DO THE WORK ALSO HAVE TO TAKE CARE OF THEIR ONGOING RESPONSIBILITIES. YOUR PROJECT PLAN NEEDS TO ACCOUNT FOR THIS.

SECTION 05

NEW FEATURES AND PLUGINS

Integrate Acquia Campaign Studio with common enterprise solutions

NEW FEATURES AND PLUGINS

To evolve the Acquia Campaign Studio platform and anticipate challenges faced by organizations migrating from Marketo, we built a number of plugins for Acquia Campaign Studio. These plugins facilitate the seamless integration of Acquia Campaign Studio and many common enterprise solutions, including Salesforce, Zoom, BrightTALK and Drift. We anticipated what other companies might need and we didn't want to move forward until it was correct.

REVAMPED FORM EXPERIENCE

We integrated Drupal with the Acquia Campaign Studio API to make it easier for content editors to find and add forms to web pages. Users can now take advantage of a new field type to add a form to a page simply by typing in the name of the form. We also created a dynamic form option (also known as "dependent fields"), ensuring that someone in Europe won't get a form asking them to choose a state, for example.

EASIER MIGRATION OF TRACKING CODES

You can now translate your Marketo custom tracking into a Acquia Campaign Studio UTM equivalent with cookie functionality. By configuring cookies to read existing Marketo tracking codes as well as UTMs, organizations moving to Acquia Campaign Studio can avoid updating thousands of links used in emails, online advertising and so on.

Also, with Acquia Campaign Studio's native tracking functionality, we have been able to broaden the support of projects for personalization across different teams.

A NEW WORLD OF POSSIBILITY

Unlocking the power of an open marketing and digital experience stack

As we said up top, we switched from Marketo to Acquia Campaign Studio for a number of practical reasons including cost and ease of use. But we also switched because Acquia Campaign Studio fits our vision for an open marketing and digital experience stack.

No vendor should dictate what tools you use. No vendor should control your content or your data. And no vendor should hold content or data hostage if you decide to switch platforms. Open technologies mean no vendor lock-in. Flexibility and agility demand freedom of choice, which is what open technologies give you.

Acquia is built on Drupal, an open source framework. Being open is part of our DNA. With our powerful, open solutions, you can understand your customers better, provide a more relevant, personalized experience and run more effective and efficient marketing programs.

Once you've made the switch, you'll wonder why you didn't do it sooner.

MOVE ON FROM MARKETO

Click below to explore further or sign up for a sandbox.

LEARN MORE ▶

ACQUIA

FROM MARKETO TO ACQUIA CAMPAIGN STUDIO

ABOUT ACQUIA

Acquia is the open digital experience platform that enables organizations to build, host, analyze and communicate with their customers at scale through websites and digital applications. As the trusted open source leader, we use adaptive intelligence to produce better business outcomes for CX leaders.