



Migration Checklist:

These are just a few very important steps you need think about, while you are creating your migration plan.

- Domains: Decide on your domain, subdomain and From Address ahead of time. You don't have to create a new one, unless your new ESP recommends it (to improve deliverability potentially.)
- Deliverability: You need a good warm-up plan to make sure that your deliverability won't suffer or will improve when you make the switch. See what our [deliverability experts think](#).
- Data: When you move your data, everything needs to go including unsubscribes and bounces. Don't just send the current list.
- Integrations: Use your system map to make sure your new ESP gets plugged into every system – CRM, campaign management, database, data management platforms, etc.
- Opt-in Forms: Comb through websites, landing pages, direct mail pieces – anywhere you are directing people to sign-up for email and make sure everything is working as needed.
- Opt-out: Make sure all unsubscribe links are similarly pointing to your new ESP if required. And don't forget to check the terms & conditions statements on your website to see if they need to be updated.
- Templates: You can plan with your team and develop new templates to use with your new ESP if that is recommended.

Some additional plans you might want to put into place:

- ❖ Data Cleansing: It might be a good opportunity to do a [cleanse on your email data](#) before sending to your new ESP.
- ❖ Clean Migration Plan: Once your new domain is up and running, don't keep the old one as a backup if there were any deliverability issues. You may still be impacted unless you wipe the slate clean.
 - For example, if you are having spam issues with ESP A, and you choose to use ESP B, you should migrate your emails entirely over through your warming process to ESP B. If you send many emails and your reasons to change have more to do with volume or requiring redundancy, you could split your email between ESP A and B.
- ❖ Documentation: Sometimes we just forget to write things down! Take the opportunity to fully document your email processes as you create new ones and update your functional requirements. Someone else may owe you a big favor one day.

Read on for specific migration instructions for:

- For Mandrill: <https://www.pepipost.com/developers/migration-guides/mandrill>
- For SendGrid: <https://www.pepipost.com/developers/migration-guides/sendgrid>
- For Amazon SES: <https://www.pepipost.com/migration-guides/amazon-ses>

If you have any questions or need help, reach out to Support@pepipost.com.