



Marketing Automation Migration Audit & Planning Guide

A practical, ops-first framework for
evaluating, planning, and executing a MAP
migration

Paminga – The MAP for MOps™

Finally a platform that loves the operator back

Written for **you** – a marketing operations professional.

You do not need to migrate everything. In fact, you shouldn't.

We created it for teams who are:

- Considering a move away from a long-standing MAP
- Actively evaluating new platforms
- Inheriting or consolidating existing instances
- Or simply trying to clean up years of operational debt

This guide exists to help you:

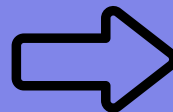
- Decide what actually matters
- Leave behind what no longer serves you
- Use a migration as a chance to improve how marketing operates – not just where it runs

The goal isn't a perfect replica. It's immediate operational wins post-go-live.

Why migrations feel harder than they are

Most MAP instances are:

- 5–15 years old
- Built by multiple teams with different goals
- Full of legacy assets, unused fields, and brittle logic



A migration is not about recreating the past.

It's an opportunity to:

- Reset how work gets done
- Simplify governance
- Improve speed and reliability



Phase 1: Discovery & Marketing Audit

Focus only on active or valuable assets.

Email Programs

- How many emails are sent weekly?
- Are there recurring sends (newsletters, operational emails)?
- Which nurtures are still relevant?
- What autoresponders exist – and why?

Landing Pages

- How many are live today?
- Which still receive traffic or submissions?
- What should be retired vs migrated?

Forms

- How many form structures exist?
- Are they standardized or bespoke?
- What data is actually being captured and used?

Tip: If an asset hasn't been used or touched in 12–18 months, it's usually a strong candidate for retirement.



Phase 2: Consent & Compliance Review

Before any data moves, confirm:

How consent is captured today

• Which regions or regulations apply (e.g. GDPR, CASL, CCPA)

• What records are safe to migrate

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Understand Your Current State

Document how consent and compliance are handled today:

- Where consent is captured (forms, events, imports, integrations)
- How consent is stored (fields, timestamps, sources)
- Which processes depend on consent status (email sends, routing, suppression)

This creates a clear baseline for what exists — not what you think exists.

Define Inclusion Criteria

Define clear inclusion criteria for people records and exclude:

- Opted-out contacts
- Invalid or bounced emails
- Records with no recent engagement

A smaller, cleaner database is a feature — not a loss.

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Define the Future State

Outline how consent and compliance should work in your new platform.

This is not a one-to-one recreation of your current setup. Instead, document:

- Which consent fields will exist going forward
- Which systems will be the source of truth
- How consent will be evaluated at send time
- Where logic will live (centralized vs asset-level)

Answer the key question: How should this process work once the migration is complete?

This step creates a clear map from where you are today to where you're going — and is often the best opportunity to simplify rules, remove edge cases, and reduce operational risk.



Phase 3: CRM Field & Data Analysis

Audit Your Current Field Usage

Start by auditing how data is actually used today between your CRM and marketing automation platform.

Document:

- Which CRM objects are actively synced and referenced in your MAP
- Which objects or fields are synced but never used
- Which objects or fields are not synced today but should be
- Total fields synced vs. fields actively referenced in workflows, segmentation, or reporting
- Fields with clear business meaning vs. fields with unclear ownership or purpose
- **This step helps answer a critical question: how much of what you sync today is actually doing work?**

Not all data deserves to move forward.

Flag:

- Fields that support core workflows (routing, compliance, personalization, reporting)
- Fields with inflated or outdated values (e.g. legacy lead scores)
- Fields that duplicate the same data under different names
- Fields with low usage or unclear value are strong candidates for retirement.

Define future-state field mapping

In your new platform, map only what supports current or future workflows.

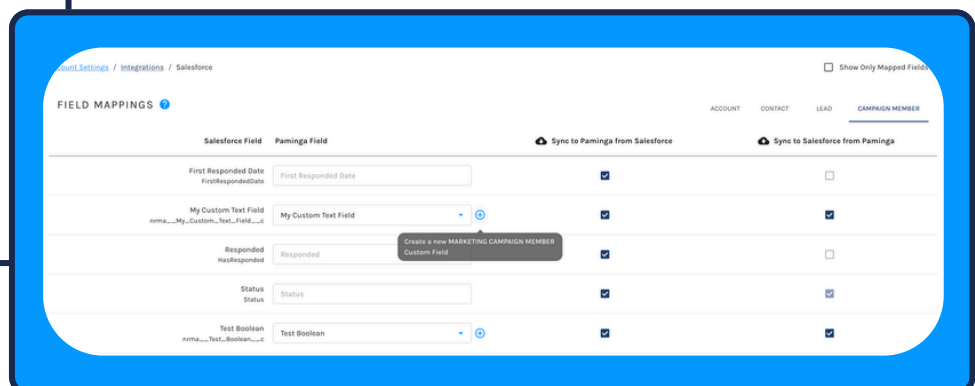
Use this phase to:

- Consolidate duplicative or overlapping fields before migration
- Combine legacy fields into a single source of truth where possible
- Clean and normalize values (e.g. lead source, country, status)
- Ensure the CRM remains the system of record for authoritative data

Do the cleanup before data moves.
Migration is the easiest time to standardize and simplify.

The goal is not parity — it's clarity.

A cleaner data model going in means fewer workarounds, clearer segmentation, and more confidence immediately after go-live.



Phase 4: Defining the Future State

Document how things should work after go-live:

- Lead → lifecycle flows
- Scoring logic
- Routing and notifications
- Reporting requirements
- Governance rules

This future-state definition becomes your source of truth

In Paminga specifically, teams often use this phase to:

- Centralize logic that used to live across programs
- Reduce one-off exceptions
- Give ops more direct control without support tickets

Phase 5: Data Migration Principles

What Typically Moves

- Active prospect records
- Recently engaged contacts
- Accounts and opportunities tied to pipeline

What usually doesn't

- Dormant leads
- Obsolete programs
- One-off historical experiments

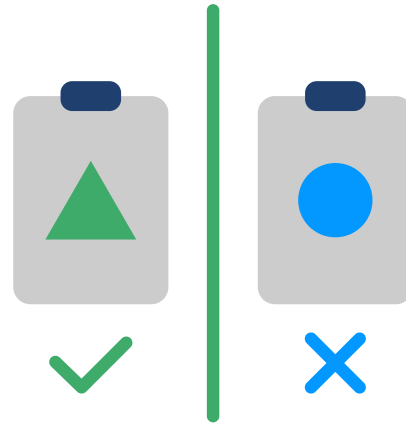
Apply validity thresholds based on recency and engagement.
You're not losing history — you're **protecting** velocity.



Phase 6: Validation & Quality Assurance

After migration:

- Compare source data to destination data
- Validate critical fields
- Confirm lifecycle and scoring behavior
- Test live flows end to end



Errors are normal. The goal is fast identification and clean correction.

Phase 7: Go-Live & Early Wins

The first 30 days matter.

Strong teams use this window to:

- Simplify core programs
- Retire unnecessary complexity
- Train teams on a single operating model

In platforms designed for marketing ops, this is where teams often feel immediate relief:

- Fewer dependencies
- Faster changes
- More confidence in day-to-day execution

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Final Thought

You don't stay on a platform because it's familiar. You stay because it **helps you operate better.**

A migration done intentionally is one of the fastest ways to **level up** how marketing actually works.

Schedule a Personalized Demo

A non-scripted demo covering whatever you'd like to focus on. You'll speak with a Paminga expert.

[Book a Demo](#)

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