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WHAT MIGRATION IS, AND WHY IT MATTERS

SFMC to Bloomreach Migration

Migration is the process of moving data, configurations, services, or entire applications from one system or platform, or to another.

Migration is a digital transformation. It requires internal processes optimisation, not just replication. Ideally, migration is not just a lift-and-shift, but it's time for identifying what brings value, discarding what does not, resolving workarounds and replacing band-aided solutions with a functional system.

When a deadline is tight, speed-to-market is a priority.
Focus on what's needed for Day 1: existing journeys,
recurring campaigns, transactional emails. Data
cleanup, and advanced redesigns or features will follow
once the fundamentals are in place.

During migration:

Rebuild only what drives value

Preserve revenue continuity
via dual-run + phased cutover

Establish healthy sending reputation on new IPs

Migration plan at a glance

Plan around realities such as contract end dates, peak season, code freeze, internal capacity limitations, competing projects, and IP warmup duration.

Preparation

- Use-case inventory: prioritize must-have use cases for day one
- Data audit: keep engaged customers, sunset cold, validate risky segments
- Technical scope: assess integrations map, data feeds, subscription states
- Email templates: HTML, Salesforce's AMPScrip (for personalised/dynamic content) → Jinja

Business as usual with Bloomreach (Post-cutover)

- Once IP warm up is done, clients is good to go BAU
- Continuous optimization, QA, reporting, backlog burn-down

Dual-run & IP warm-up (14 - 30 days needed for a warmup)

- Start with most engaged audiences
- IP warm-up is controlled volume ramp
- The larger the customer/subscriber audience, the longer the warm up
- Go slow to go fast, monitor KPIs, adjust plan

Scale & optimize

- Expand use cases, add triggers, refine frequency policies
- Decommission legacy components as goals are met

Migration is a phased process Go live with Bloomreach use cases SFMC turn off 1. Preparation & Prioritization Identify high-priority use cases, map data, and align stakeholders to build a realistic and focused 2. Build & Data Ingestion IP Warm Up & Trackina Business as usua Gradually ramp up sending on Bloomreach while keeping SFMC live to protect deliverability 3. Dual-run Import customer data & Track event. using Bloomreach migration plan. & Validation Switch active campaigns to Bloomreach, while still running campaigns in SFMC, and ensu 4. Cutover & Scale the transition ince monitoring and QA are in place KPIs and backlog prioritization

Average time to 1st value (first email sent) is 3-12 weeks, and average duration of dual-run is 1-4 weeks, both depending on your organization's size and IT resources.

What clients should do

- Identify & prioritize use cases (must-have first → nice-to-have later)
- Bring the right data: define sources used in Bloomreach
- Set up email: domains, authentication, subscription taxonomy
- Translate templates: AMPScript → Jinja
- Train the team: enroll in Bloomreach Academy
- Define KPIs: delivery, inbox placement, open/click, revenue per send, time-to-value

Deliverability & IP warm-up (Art & Science)

- Move carefully to move fast
- Start strong: send to highly engaged cohorts first
- Ramp: controlled daily volumes; segment slicing to hit targets
- Split-send: maintain SFMC for business as usual volume during ramp
- Expect adjustments: mailbox providers evolve; plans are adaptive, not static

Technical scope (Map → Plan → Deliver)

- Data plumbing: site tagging; warehouse feeds (e.g., Snowflake) rerouted from SFMC to Bloomreach; where needed, use CSV exports
- Templates & personalization: Jinja components; content governance
- Subscriptions/governance: preferences, lists, consent states alianed
- Integrations: inventory current connectors; prioritize takeover order by revenue or impact or effort

KPIs to track

- Time-to-first value (weeks to first revenue-positive campaign)
- Inbox placement / delivery, open/click, conversion
- % use-cases live vs. planned; defect rate (QA)
- Contact list health: engaged ratio, reactivation/sunset success

Proof Points & Case Studies







Strong partner ecosystem leading migration across EMEA, AMER





What to watch out for

- SFMC often stores separate profiles of the same customer per channel, which can cause duplicates during migration. With the right mapping, identities can be unified to enable better cross-channel personalization.
- Cold contacts in warm-up → Either attempt to reactivate them on SFMC, or exclude/sunset them.
- Seasonal peaks/code freeze → timebox milestones around peak; avoid cutover near Black Friday.
- Under-resourced teams → right-size scope; sequence; land-and-expand retainer with partner.
- Missed warm-up targets → ensure using the appropriate segmentation to stay on plan

In short, align on

- Incumbent contract end dates
- Internal team availability & competing projects
- IP warm-up window
- Peak season & code freeze
- Agency scope vs. client scope
- Resource plan & RACI
- Integration takeover order



SFMC to Bloomreach

MIGRATION CHECKLIST

PHASE 1: PREP & PRIORITIZATION

Define most important use cases

List Day 1 must-have journeys (Tier 1 use cases)

Flag any use case tied to revenue continuity and prioritize it. Do not duplicate every single journey.

√ Tip: Don't rebuild everything, just what makes money.

Audit Data & Decide what data to bring over

Map source systems (SFMC, CRM, web, POS, etc.)

Identify high-value segments (e.g. recent converters, active users)

Flag "cold" data (e.g. ≥12 months inactive) for reactivation or sunset Confirm required data fields (e.g. consent states, custom events)

ho Tip: Discard what you don't need. Inactive lists do not grow the business.

Map Integrations & Flag dependencies

List all current and required integrations

Flag critical dependencies early (e.g. real-time feeds, APIs)

ho Tip: Start with the most valuable feeds, don't boil the ocean.

Ensure stakeholder Alignment & Timeline: IT cooperation is necessary during migration

Define KPIs & metrics of success

Set expectations about IT team involvement on the migration

Collect blackout dates (e.g. Black Friday, promos, holidays)

Confirm cutover window (dual-run period, warm-up, etc.)

Tip: Design the timeline around real-world constraints.

PHASE 2: BUILD & IP WARM UP

Email & IP Setup

Configure sending domains and dedicated IPs

Usually, the newsletter is used for the IP warm up. Begin with highest-engagement segments and split audiences based on recipient providers (Gmail, Hotmail).

eal Tip: Start with your most engaged audience.

Template Migration - prioritise use cases and roll them up in phases

Inventory current SFMC templates (including AMPscript logic)

Rebuild templates as Jinja templates

QA subject lines, dynamic logic, mobile versions

ho Tip: Jinja is simpler, more powerful, and more user-friendly that AMPscript.

Map scenarios & tier 2 use cases

Plan for Tier 2 scenarios

ho Tip: Include edge cases such as empty carts, first-time buyers, opt-outs.

Training & Access

Enroll core users in Bloomreach Academy for self-paced learnings and live session

√ Tip: Early training = faster ROI.

PHASE 3: DUAL-RUN & VALIDATION

Launch dual-run: send campaigns from SFMC and Bloomreach

ho Tip: Use overlap to de-risk cutover, don't rush.

Monitor IP Warm-Up Progress Track daily send volume & monitor deliverability

Tip: Deliverability is not linear, so expect tweaks.

QA & Sign-off - Confirm rendering, logic, links, and personalization Tip: Involve real users—not just devs or QA.

PHASE 4: CUTOVER & SCALE

Confirm all Bloomreach journeys are live & turn off SFMC sends ho Tip: Backups aren't just for data, they help build confidence.

Expand use cases, reintroduce or expand Tier 3 campaigns

ho Tip: Crawl ightarrow Walk ightarrow Run is better than rebuild all.

Monitor KPIs: revenue per send, CLTV lift, unsubscribe rate

eal Tip: ROI grows post-cutover. Keep iterating.

FINAL OUTPUTS

Migration Summary Feedback

Document what worked (e.g. quick revenue wins, engagement spikes)

Identify remaining backlog items with clear owners

 ${rac{1}{V}}$ Tip: Reflect on processes.

FROM SFMC TO BLOON

FMC TO BLOOMREACH