

The Ultimate Platform Migration Checklist

Switching email tools is where most senders quietly tank their inbox placement. Work through these 23 steps, in order, to move your list between platforms without losing contacts, automations, or deliverability.

Before you migrate

- 1 Export your full subscriber list WITH engagement data (last open/click dates), not just emails.
- 2 Document every active automation, sequence, tag, and segment in your current tool.
- 3 Record your current sending domain, from-addresses, and reply-to setup.
- 4 Note your baseline metrics: open, click, bounce, spam-complaint, and delivery rates.
- 5 Pick a migration window during a low-volume period - never right before a big campaign.

Authentication & DNS

- 6 Set up SPF for the new platform's servers (remove the old record only after cutover).
- 7 Generate and publish DKIM keys from the new tool, then verify they resolve.
- 8 Publish or update DMARC - start at p=none with rua reporting, then tighten.
- 9 Configure a branded tracking/click domain (CNAME) so links aren't on a shared domain.

List hygiene & segmentation

- 10 Remove hard bounces, role addresses (info@, admin@), and obvious spam-traps before import.
- 11 Move anyone who hasn't engaged in 6-12 months into a separate 'cold' segment.
- 12 Import your suppression/unsubscribe list FIRST so you never email opt-outs.
- 13 Rebuild segments and tags in the new tool and verify counts match your export.

Warm-up & staged sending

- 14 Never blast the whole list on day one from a fresh IP/domain reputation.
- 15 Days 1-3: send only to your most engaged 10-20% (opened in the last 30 days).
- 16 Days 4-7: expand to 30- and 60-day engagers as long as metrics hold.
- 17 Increase volume gradually (roughly 2x per day) while watching deliverability.
- 18 Keep early content valuable and low-risk (no heavy promos) to earn inbox trust.
- 19 Send consistently during warm-up - gaps reset the reputation gains.

Monitor, confirm & finish

- 20 Watch bounce and complaint rates daily; pause if complaints exceed 0.1%.

- 21 Use seed/inbox-placement testing to confirm you land in Primary, not Promotions/Spam.
- 22 Rebuild and test every automation end-to-end before turning off the old tool.
- 23 Keep the old account active (read-only) for 30 days as a rollback safety net.