



# **20 insights to keep in mind – before switching platforms**



1.

## Why do we want to switch?

Identify the reasons why you want to switch platforms. Is it about time, results, user-friendliness, or support for more channels?



2.

## What matters most to us?

Think about what matters most to your team. Simplicity, automation, design freedom, or the ability to reach customers across multiple channels.



3.

## **What do we really want to achieve, and how will we know if we succeed?**

What are your goals with the change? More leads, better open rates, or less manual work? Set goals that are easy to follow up on.



4.

## **What is the reason for reviewing our current solution?**

What challenges do you want to avoid going forward, and what is working today that you actually want to keep?



5.

## **What security requirements do we impose on the new platform?**

How are personal data, consent, and data storage handled? Does the platform support GDPR and modern tracking such as Consent Mode?



# 6.

## **How will our integrations and other systems be affected?**

How easily can the platform be connected to your existing tools such as CRM, e-commerce, booking systems, or customer databases?



7.

## **What does the change mean for our availability?**

Can everyone in the team work in the platform regardless of their technical level? What are the support, interface, and user-friendliness like?



# 8.

## **What does the cost picture look like now and going forward?**

And how does the cost change as you grow? Is there a risk that you will pay for features you don't use?



9.

## **How much time do we really need to spend internally on launching a new platform?**

What resources are needed to get started? Who is responsible for transition, testing, and follow-up?



10.

## **How do we get the organization on board?**

How do you engage the team in the change, from the marketing manager to the person who sends out the newsletters?



11.

## **How do we know we have chosen the right partner for the future?**

Look beyond the first mailing. A good collaboration should work over time, not just at launch.



12.

## **How should we handle training and support?**

Are onboarding, webinars, manuals, and ongoing support available? Can you get help with strategy, not just technology?



13.

## **How much of our content is worth bringing along?**

Do you need to clear out, prioritize, or build something new? Here's your chance to make a fresh start.



14.

## **How do we manage the transition without losing momentum?**

How do you ensure that data, mailings, and communications continue to function during the transition period?



15.

## Do we need a partner?

Maybe. A partner can help you leverage the platform's full potential, optimize flows, and build a data-driven strategy.



**16.**

## **How do we test that everything works before we go live?**

Is there a test environment, quality assurance, and a plan if something does not work as intended?



17.

**How can we ensure that we are not in the same situation again in five years' time?**

Choose a platform that grows with you, offering flexibility, continuous development, and support for new channels.



18.

## **How do we document decisions and lessons learned along the way?**

Write down what works and what doesn't, so you don't have to  
start from scratch the next time you make a change.



19.

## **What do our marketers need to succeed on the new platform?**

How do you make it fun and meaningful to create content and track results? A good tool should inspire.



20.

## **How can we get involved and make a difference?**

Choose a provider that develops its platform together with its customers and understands both your needs and market developments.



# Are you considering switching platforms?

Book a meeting with us, and we will help you find the right solution!

[Book a meeting](#)