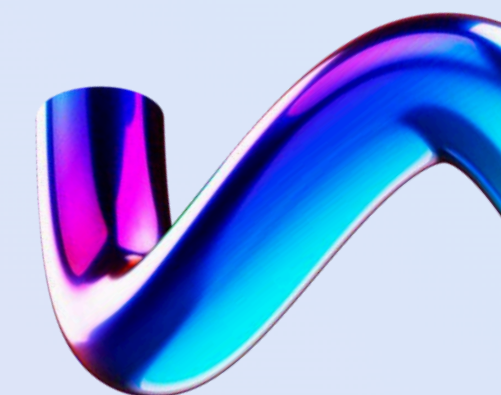


20 insights to keep in mind – before switching platforms





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](#)