



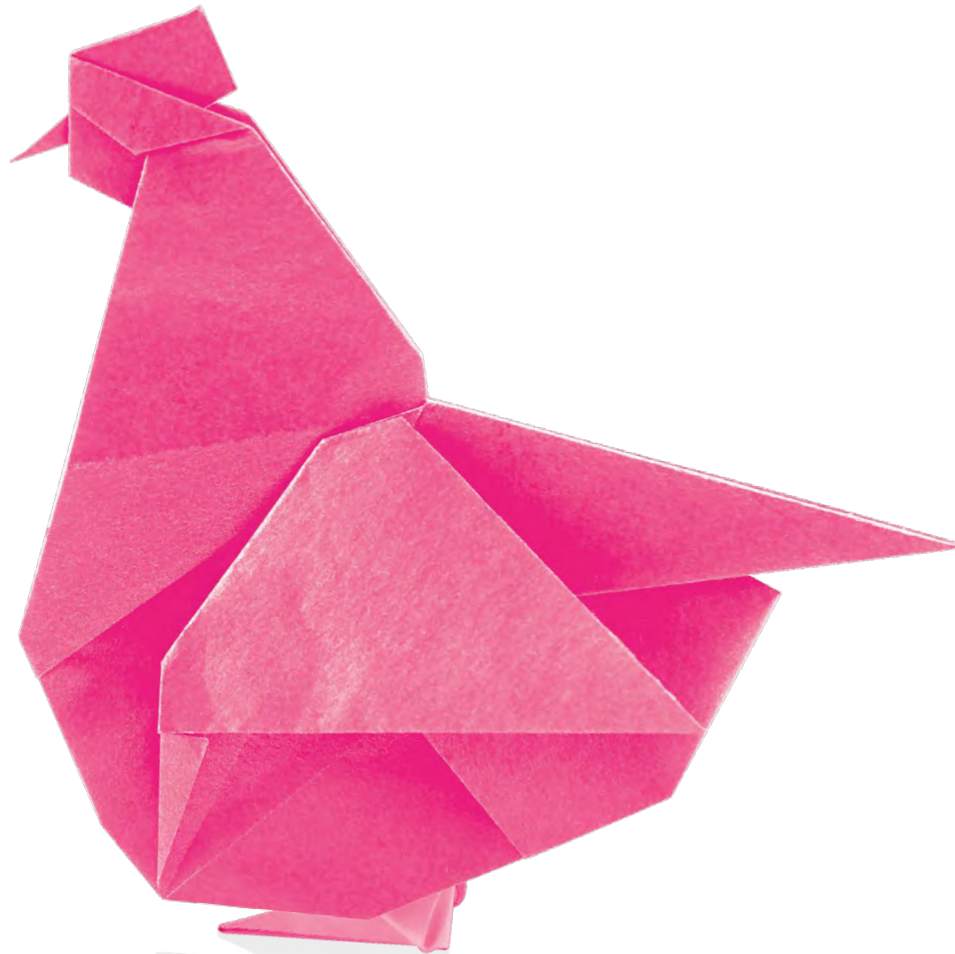
Trust us to lead your Martech Migration

WARC

WARC Migration

HubSpot to Marketo

CASE STUDY



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WARC

Background

Founded in 1985, WARC provides the global advertising industry with the latest marketing evidence, expertise and guidance to make smarter, more effective marketing. Their clients include some of the world's leading brands such as the likes of Coca Cola, Unilever and Heineken.

Back in 2018, they became a part of Ascential plc, the *Global Specialist Information company*, and as a result of this, WARC was introduced to the Ascential technology stack. As is the norm for these kinds of acquisitions, the next stage was to begin the process of standardising WARC's marketing technology environment to that of Ascential.

This included adopting *Marketo* as their martech platform provider, migrating from *HubSpot*.

Clevertouch was chosen to support this project.

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"We wanted a consultancy that had a close relationship with Marketo, based in the UK, and with a strong reputation in delivering high quality Martech services globally. Clevertouch met our requirements here perfectly, providing us with end to end visibility of a seamless martech migration, specific to our business needs"

Marty Lyon, Head of Marketing Automation, Ascential





Objectives

Clevertouch began this process with an in-depth platform investigation.

This provided us with key information surrounding:

- The assets (lists, templates, forms, campaigns..) that needed migrating.
- The data migration and field configuration required.
- The dedicated IP so we could make best practice recommendations on IP warming for a smooth transition.
- Marketo training requirements for their global teams in the new platform.

Once the above scope was agreed, Clevertouch was given 3 months to achieve a full migration from *HubSpot* to *Marketo*. The strategy behind the migration was to retain the value of the WARC brand and continue business as usual, whilst implementing Ascential's marketing technology stack and processes throughout.

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Clevertouch was the perfect consultancy to complete this migration:

- WARC wanted a consultancy that has a strategic partnership with Marketo, and is UK based, both of which Clevertouch is well placed for.
- Ascential did not have the resources internally to maintain business as usual, as well as undertake time consuming projects such as a platform migration.

A lack of martech resource is becoming an increasingly common issue in most organisations, and one that a consultancy is perfectly placed to step in for. According to our 2020 State of Martech Report, 72% of marketers have struggled to hire individuals with martech skills.



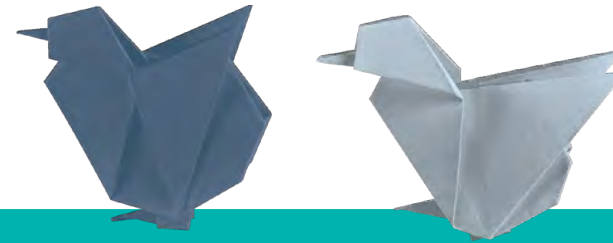


Problems and Solutions

Time Frames

WARC's HubSpot account was up for renewal, and so Marketo needed to be fully up and running in the 3 months before that expired. This is a common request from organisations as they want migrations to be done as quickly and seamlessly as possible.

No martech migration is the same, so the ability to understand the business and their current processes is crucial to help mitigate obstacles - some only surface during the migration which can cause a challenge, particularly with a tight timeline!



Our Solution

Efficient operations were key to the success of the entire project. Clevertouch ensured there were always dedicated martech specialists on hand ready to answer queries and help with any issues as quickly as possible. It was this close relationship, combined with Clevertouch's efficiency of QA and a dedicated team, that led to this migration being delivered in scope and on time.

Many organisations underestimate the complexity of platform migrations. These systems aren't made to be ripped apart and made anew, and each platform has a different interface, with a variety of different uses.

This is another reason why a consultancy is the perfect migration solution. Most consultancies are proficient in most, if not all, of the main automation platforms, and so are well placed to deal with any issues, from all angles of the migration.



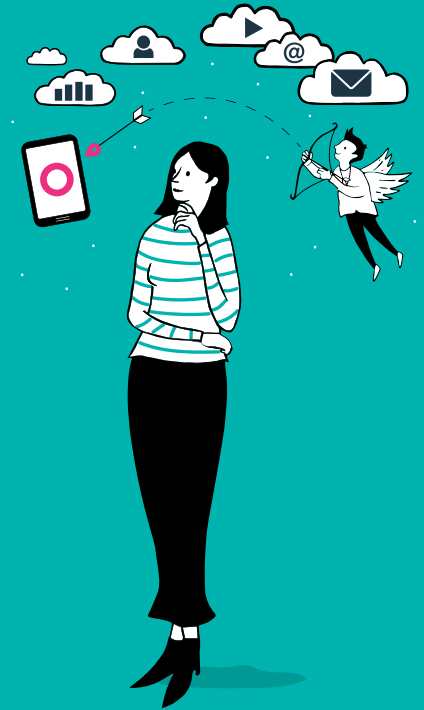
Scoping

The various platforms present alternate routes to solving what are essentially the same problems. Clevertouch needed to investigate the relationship between the two platforms in order to work out how the assets, data, logic and processes are similar, and consequently how they can be migrated from one to the other.

Our Solution

The Technical Lead involved in this migration carried out technical and data discovery within HubSpot and Salesforce, alongside detailed scoping calls with WARC. This gave Clevertouch the ability to accurately scope out the length of time the migration would take, as well as pick out any potential issues that may appear further down the line as the project develops.

The detailed scoping of the migration enabled us to work efficiently and provide accurate timescales and costs - helping save WARC time and money!





Data

GDPR is fast becoming the foundation from which marketers must operate, and more rules and regulations are to set to follow in its footsteps over the coming years.

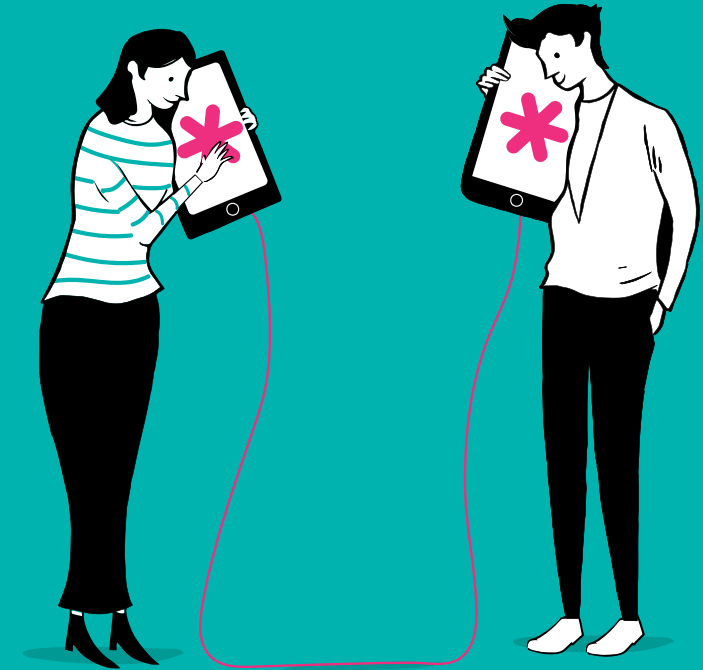
When moving vast amounts of data from one platform to another, there is a risk of altering lead statuses and consequently breaching GDPR. There is also a risk of duplicating or losing records when moving vast quantities of data.

Our Solution

Clevertouch and WARC, viewed the data migration as a gradual process, one that Clevertouch ensured always maintained WARC's high standards and data proficiency, as well as enabling their marketers to gain knowledge of the new platform along the way.

To further ensure data integrity, Clevertouch identified and re-created WARC's preference centre within Marketo, using core functionality to ensure preferences were maintained as part of the migration.

Thorough data QA by our insights and tech team played an important role throughout the above!





Recreation of Assets and Logic

A series of assets needed to be recreated within WARC's new Marketo instance:

- All campaign logic needed to be rebuilt within Marketo. This included data, programs and campaigns, with many of the campaigns needing to stay live throughout the entire migration.
- All landing page and email templates, as well as forms had to be recreated within Marketo so they were compatible with Marketo's HTML, CSS and JavaScript processes.

Our Solution

When recreating WARC assets and campaign/program logic, the CT team ensured that it was all fully compatible with Marketo processes, and would not retain any of the issues that may have been prevalent in their Hubspot platform.

With this comes the possibility of a rescope of what can be achieved within the time frame. If an issue arises that wasn't originally foreseen, or there's an opportunity to improve a process, then the project would need to be rescope. This ultimately creates a better result.

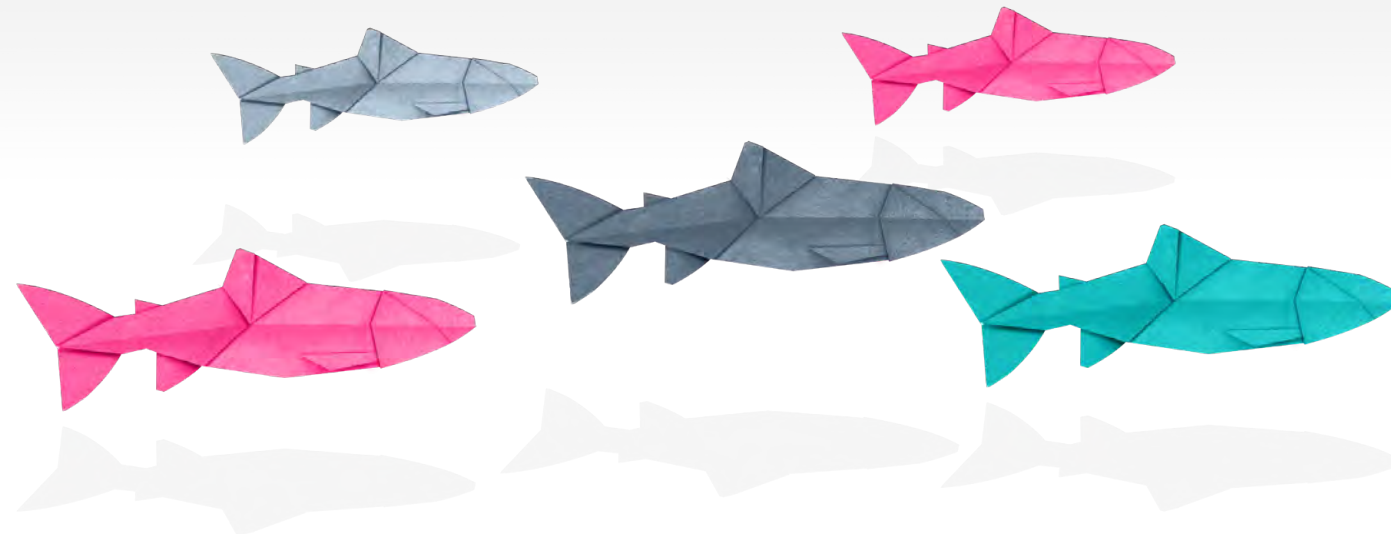




Conclusion

Migration provides the perfect opportunity to further streamline existing processes and develop more professional and up to date assets.

It isn't just about leveraging the advantages of a new platform, but a chance to overhaul the entire system, work out what was going right, what was going wrong, and from that, what should be carried over to the new platform, what needs slight tweaking, and what can be left behind or made anew.





About

Did any of this resonate with you and any issues you may have within your business? If so, please get in touch using the contact details below:

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Clevertouch Marketing is Europe's leading martech software and services provider, the B2B Marketing Consulting partner of the year, an accredited 3-star Best Company for extraordinary levels of employee engagement, and a Sunday Times' Top 100 Companies to Work For.

Created by marketers with martech in mind, Clevertouch's purpose is to help clients make sense of their martech investment and prove the ROI. Clevertouch pioneered the concept of the Martech Spine™, primarily based around Marketing Automation and Marketing Cloud platforms.

The only Marketo Platinum Partner domiciled in Europe, and the first strategic partner of both Seismic and Percolate in EMEA, Clevertouch has supported over 500 blue chip and ambitious clients on their martech journey, including PayPal, Fujitsu, UK Cloud, and Shell.

For more information please visit **clever-touch.com**.

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