# MIGRATION CHECKLIST:

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# Mailchimp to Eloqua

Migrating from Mailchimp to Eloqua can feel like a daunting task, but it doesn't have to be. With a knowledgeable support team and thoughtfully organized, step-by-step processes, you can make the transition to Eloqua as efficient and seamless as possible.

This checklist will take you through each aspect of the migration process from Mailchimp to Eloqua and lay out the best practices for your transition.

## Before You Begin

As a rule of thumb, we recommend that you export and save all historical data from Mailchimp if possible.

When naming your assets, we recommend the following naming conventions
• Have a date at the beginning of the asset
• Use 3-4 words for a description, here are some examples:
   • For Campaigns: 201910 Newsletter, 2019Q3 Prospect Nurturing, etc.
   • For Emails: 20191015 Newsletter, 2019Q3 Prospect Nurturing Welcoming Email, etc.
   • For files: Event Email Header, Facebook Logo for Footer, etc.

## PART 1:
## Contacts Database & Lists

1.    If you have lists in Mailchimp, we recommend importing your contacts to Eloqua by list.
2.    In Mailchimp, you will have two options to download your contacts: by audience, or by segment.
3.    Export by audience.
4.    Your export will include a ZIP of separate CSV files for each of the following types of contacts: "Subscribed," "Unsubscribed," "Non-Subscribed," and "Cleaned."
5.    Go to the audience section in Mailchimp.
6.    Click "Current Audience" and select all the lists. Then click View Contacts -> Export Audience -> Export as CSV.
7.    You may also want to write down any list filters used in Mailchimp so you can recreate them in Eloqua.
8.    If you need to do any clean up or remove unnecessary fields, you can do this from the export sheet before importing to Eloqua.
9.    Now navigate back over to Eloqua.

10. Go to Audience -> Tools, then click Data Export and Import -> Add -> New Contact Import.
11. Configure your import settings.
12. Click the Field Mapping tab to map the columns in the import file to contact or account fields. If you need to update a mapping, double-click the row. After updating, be sure to click Save.
13. To begin the import, click the Overview tab and click Run now.
14. Scan briefly to ensure everything mapped over correctly.
15. Convert your imported contacts into a list by navigating to Audience -> Tools -> Shared Lists -> Create a New List. Then add your contacts.

## PART **2:**
## Lead Scoring

16. Document your criteria and point assignments from Mailchimp.
17. Depending on how mature your scoring is, the scoring can live in the scoring page, completion actions, page rules, or automation rules.
18. You can customize the prospect scoring system in Eloqua so that you can recreate a similar, or better, system. For best practices, you can use **this guide** to setup your Eloqua lead scoring system.

## PART **3:**
## Email Content

19. Open both Mailchimp and Eloqua.
20. Create your emails in Eloqua under Assets -> Emails -> Create an Email to use one of their premade templates to replicate your Mailchimp emails.
21. For text, the solution is as simple as copying and pasting email text from Mailchimp into Eloqua.
22. For images, you will need to save the asset to your computer and upload into Eloqua.
23. For more complex emails, such as those with customizations or dynamic content, we recommend saving the HTML file and having someone with coding knowledge set it up in your new system.

## PART **4:**
## Automation Campaigns

24. In Eloqua, your automation capabilities will consist of decision and action elements.
25. Open both Mailchimp and Eloqua side by side.
26. Recreate your automation sequences in Eloqua by navigating to the Orchestration -> Campaigns -> Create a Multi-Step Campaign and carefully replicating your Mailchimp actions into your new Eloqua automations.
27. You will not see a 1:1 equivalent in Eloqua, but by having both programs open at the same time you will be able to compare and find equivalent or better options.
28. Test each of your campaigns fully to work out any bugs before terminating your Mailchimp services.

## PART **5:**
## Landing Pages

29.   Similar to your email migration, you will need to go into both programs at once and copy all of your content for each landing page that you wish to recreate in Eloqua.

30.   Again you may not have a 1:1 equivalent in Eloqua, but you can get them fairly close with templates. To begin, go to Assets -> Landing Pages -> Create a Landing Page and use the template chooser.

31.   For more complex landing pages, such as those with customizations or dynamic content, we recommend saving the HTML file and having someone with coding knowledge set it up in your new system.

## PART **6:**
## Forms

32.   Take note of your form fields and recreate them in Eloqua's Design Editor.

33.   Recreate the automation activities for each form after it is submitted by a prospect. To do this open your form. Click Processing -> + ->Add to Campaign.

34.   Specify when to process this step.

35.   Click save.

## PART **7:**
## Files

36.   Save your gated content/images from Hubspot to an external folder. You can find them by going to Content Studio -> My Files.

37.   Upload the folder to Eloqua under Assets -> Components, then click Images or File Storage -> Upload -> Select your file.

38.   All images and files that were hosted in Mailchimp and will now be in Eloqua will need to be relinked in all emails and landing pages that use them or they will appear broken.

We hope that you have found this checklist to be a useful tool for your transition from Mailchimp to Eloqua. It's important to note that depending on your level of expertise with automation tools and the amount of data your current tool contains, migration can take anywhere from a few days to a few weeks.

If this checklist has left you feeling overwhelmed and out of your wheelhouse, we'd love to schedule a chat with you to discuss how we at Interrupt Media can use our marketing automation expertise to assist you with a major migration from one tool to another.