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LIVE

Taking the Sting out of the Migration Process

Andrew Harner

Lead Email Manager, Scribd

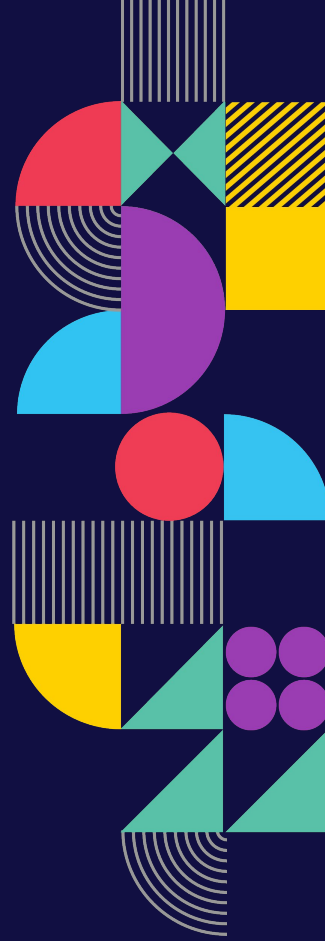


Our Agenda

1. When is the right time to migrate?
2. Practical steps in migrating
 - a. Buy-in from stakeholders
 - b. Align the vision of the migration with your team
 - c. Develop a robust migration roadmap
 - d. Stick the landing: Project management and execution
3. Beyond the migration



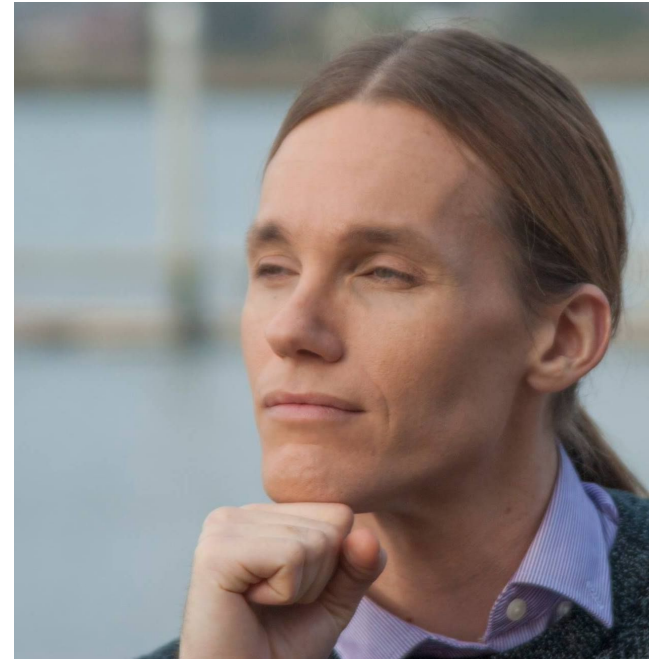
**But first,
introductions**



Andrew Harner

Lead Email Manager, Scribd

- Lazy bike rides
- All levels slow-flow yoga
- Cooking with veggies
- Playing with Wesley



Wesley

8 pounds, 2 ounces



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TODAY'S TOP PICK

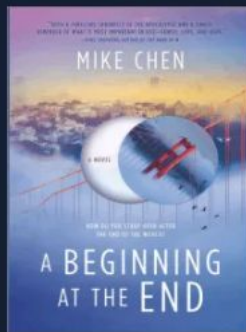
A Beginning at the End

by Mike Chen

How do you start over after the end of the world? "Not just an apocalyptic thriller, but also a timely reminder of what is most important in life—family, love, and hope." —Peng Shepherd, author of The... [More](#)

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Titles You've Saved

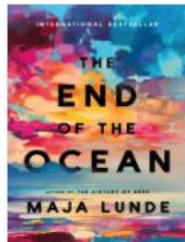
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200 Outcomes Over Output is Product Management:...

This is Product Management

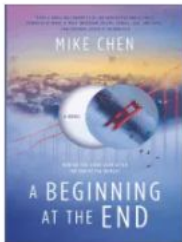
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The End of the Ocean: A Novel

Maja Lunde

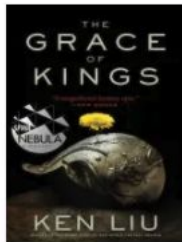
359 pages left



A Beginning at the End

Mike Chen

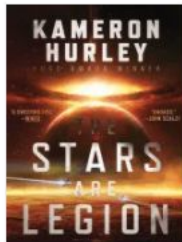
418 pages left



The Grace of Kings

Ken Liu

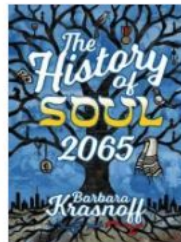
756 pages left



The Stars Are Legion

Kameron Hurley

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The History of Soul 2065

Barbara Krasnoff

297 pages left



Kook: What Sur Taught Me About

Peter Heller

342 pages left

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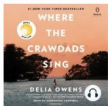
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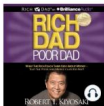
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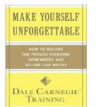
Where the
Crawdads Sing: A
Novel



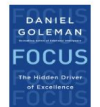
Educated: A Memoir



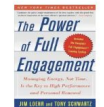
Rich Dad Poor Dad:
What The Rich
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to B...



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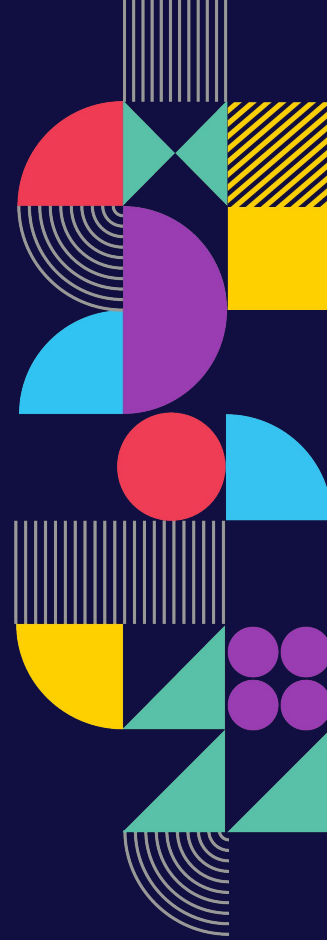
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Deciding to migrate



Why migrate?

Clear need



OUR OBJECTIVE	WHAT WE NEEDED
Reduce the time it takes to create new email campaigns and tests	A streamlined, intuitive interface
Increase the metrics and attributes that can be used to trigger sends	JSON data structure, Elasticsearch-based auto-complete of queries
Improved engagement reporting	Heatmaps, well-organized reports, internal dashboards, and webhooks for exports
User-level investigation	Email send and engagement history, as well as user profile and event data for every individual user

Why migrate?

Clear need



OUR OBJECTIVE	WHAT WE NEEDED
Increase value of relationship with vendor	An account management relationship that focuses on success over sales
Reduce engineering time spent troubleshooting	Transparent error management and clearly documented API codes
Reduce marketing time spent troubleshooting	A support team that's available in-platform via chat
Better deliverability	An accessible deliverability director and bundled deliverability platform

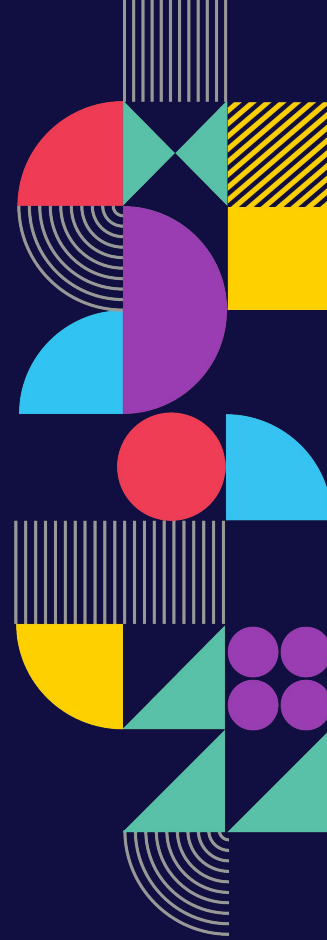
Can you generate executive buy-in?

Finding the right time (2 years for us! Hopefully less for you)



- Is there immediate need and value to be gained?
- Is there clarity on future business requirements?
- Do you have the right people on your team?
 - Marketing and/or product
 - Engineering
 - Project management

Platform evaluation



Timeline for migration

How we did it

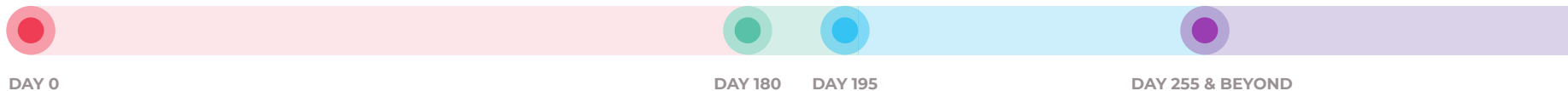


Platform Evaluation (6 months)

- Define business requirements
- Narrow the field
- Be thorough
- Selecting the right partner

Trial Implementation (2 weeks)

- Project brief and technical doc to define scope
- Kickoff, daily, and retro meetings
- Grading sheet



Proof-of-Concept Implementation (2 months)

- Laying the groundwork
- Technical framework
- IP warmup
- Project management

Actually Migrating (2 months)

- Migrate the rest of the emails and data flows
- Prioritize for efficiency
- Defer documentation, optimization and cleanup

So you've decided to migrate

But which platform?

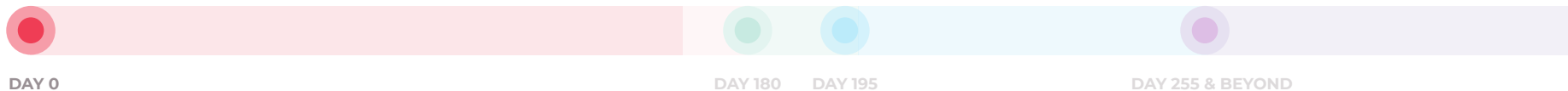


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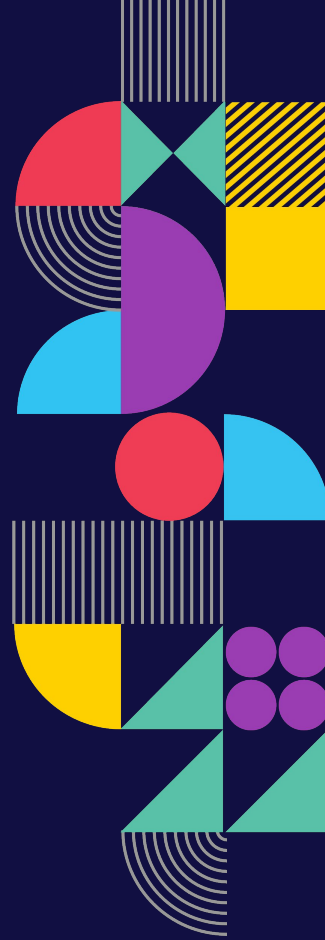
Building the team

How we did it



EXECUTIVE SPONSORS	IMPLEMENTATION TEAM	IMPLEMENTATION TEAM (BORROWED)
VP, Marketing	Lead Email Manager	Senior Engineer
Chief Technical Officer	Email Marketing Specialist	Technical Project Manager
Chief Operating Officer	Email Engineer	Technical Product Manager
	Engineering Manager	2 QA Engineers

Trial Implementation



Phased decision-making

Evaluating for parity

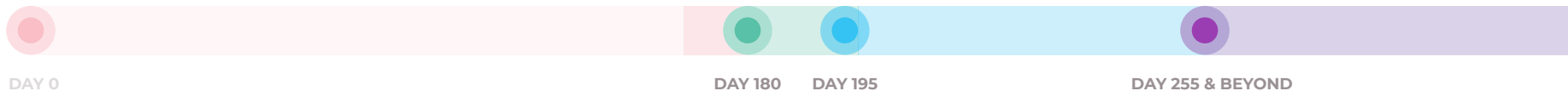


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- Laying the groundwork
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Actually Migrating (2 months)

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Phased decision-making

Evaluating for parity (2 weeks)



- To evaluate if Iterable met our **bare minimum requirements**, we looked for affirmative answers to these high-level questions:
 - Are the data structures and APIs usable by marketing and software devs?
 - Are we able to send our existing transactional and marketing emails?
 - Is campaign reporting adequate?

Framework for evaluation

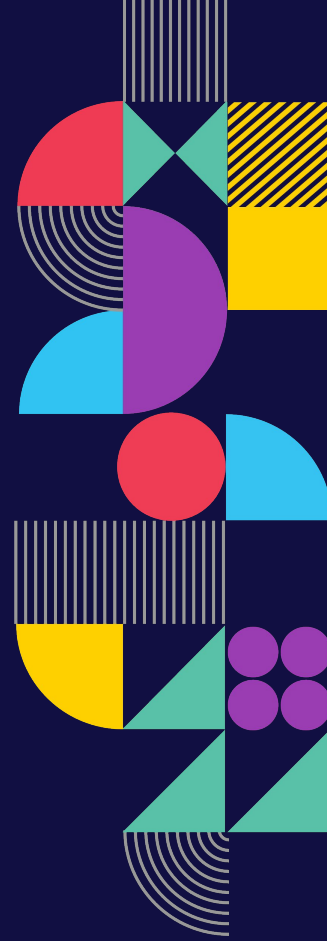
How we did it



Winner:
Iterable

✓	<i>Triggers emails from changes in nested in user data</i>
✓	<i>Reduces backend engineering</i>
✓	<i>Supports additional channels, like mobile push</i>
✓	<i>Easily re-creates existing marketing user segments</i>
✓	<i>Ingests real-time platform data</i>
✓	<i>Offers send-time personalization</i>
✓	<i>WYSIWYG and templates</i>
✓	<i>Flexible data structure</i>
✓	<i>Integrations with deliverability and analytics platforms</i>
✓	<i>Strong customer support process and reputation</i>

Proof-of-concept Implementation



Proof-of-Concept Implementation



Platform Evaluation (6 months)

- Define business requirements
- Narrow the field
- Be thorough
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Trial Implementation (2 weeks)

- Project brief and technical doc to define scope
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Proof-of-Concept Implementation (2 months)

- **Laying the groundwork**
- **Technical framework**
- **IP warmup**
- **Project management**

Actually Migrating (2 months)

- Migrate the rest of the emails and data flows
- Prioritize for efficiency
- Defer documentation, optimization and cleanup

Laying the groundwork

Proof-of-concept implementation (2 months)



▼ Project Brief: Iterable Improvements Testing 2019 Q3

- Project Brief: Iterable Parity Evaluation 2019 Q3
- Weekly check-in 2019 July 29
- 3rd Parties - Checklist
- Phase 2 kickoff call with Iterable 2019 July 30
- Project Brief: Unsubscribe requirements for Iterable 2019 Q3
- Project Plan call with Iterable 2019 August 1
- Iterable managers' weekly sync 2019 August 2
- Project brief: Email migration for Iterable trial
- Weekly check-in 2019 August 5
- Project Plan call with Iterable 2019 August 7
- Deliverability call with Iterable 2019 August 8
- Iterable managers' weekly sync 2019 August 9
- Weekly check-in 2019 August 12
- Iterable managers' weekly sync 2019 August 16
- Weekly check-in 2019 August 19
- Iterable weekly call 2019 August 21
- Iterable managers' weekly sync 2019 August 22
- Weekly check-in 2019 August 29

- Elevator Pitch for the Project
- Initial User Stories
- Evaluation of Questions
- Out of Scope
- Future Considerations
- Background
- Research

Elevator Pitch for the Project

Moving to a new marketing automation platform is a five- to 10-year, multimillion dollar commitment, so we want a high level of confidence before embarking on such a migration.

That's why we're going to spend two months on a "proof of concept" implementation of Iterable, to vet the platform in production before committing to the migration. We will confirm that it offers substantive improvements over our current marketing automation platform, Salesforce Marketing Cloud.

Initial User Stories

To evaluate if Iterable offer significant improvements, we'll look for affirmative answers to these questions:

- Does Iterable reduce the time to create a new campaign/test (both for email and push)?
 - Once integrated, we should be able to test, validate and have email and push campaigns ready for deployment within a session.
 - Determination to be made by [@Andrew Harner](#) (email) and [@Augustin Bralley](#) (push).
- Sub-question: Do Iterable features offer practical testing optimizations?
 - Specific to our use case, we will test the send-time-localization feature that comes out-of-box with Iterable. An ongoing challenge with our email program is localizing send times for our international audience. We'll run this test with the "weekly recommendations to nonsubscribers" email.
 - Determination to be made by [@Andrew Harner](#).
- templates
 - are they better / cleaner?
 - do they make it easier/cheaper?
 - how much work to make templates, manage templates
- Does Iterable increase the metrics and attributes that can easily trigger sends?
 - Iterable should maintain user level tracking of push and email sends, opens, bounces, opens, clicks, unsubscribes, uninstalls, and more, along

Laying the groundwork

Proof-of-concept implementation (2 months)

- Principles of migration
- Technical framework
- Project plan with focus on
 - Data
 - Deliverability management
 - Variety of emails that cover all use cases
- Project management



Principles of implementation

How we did it

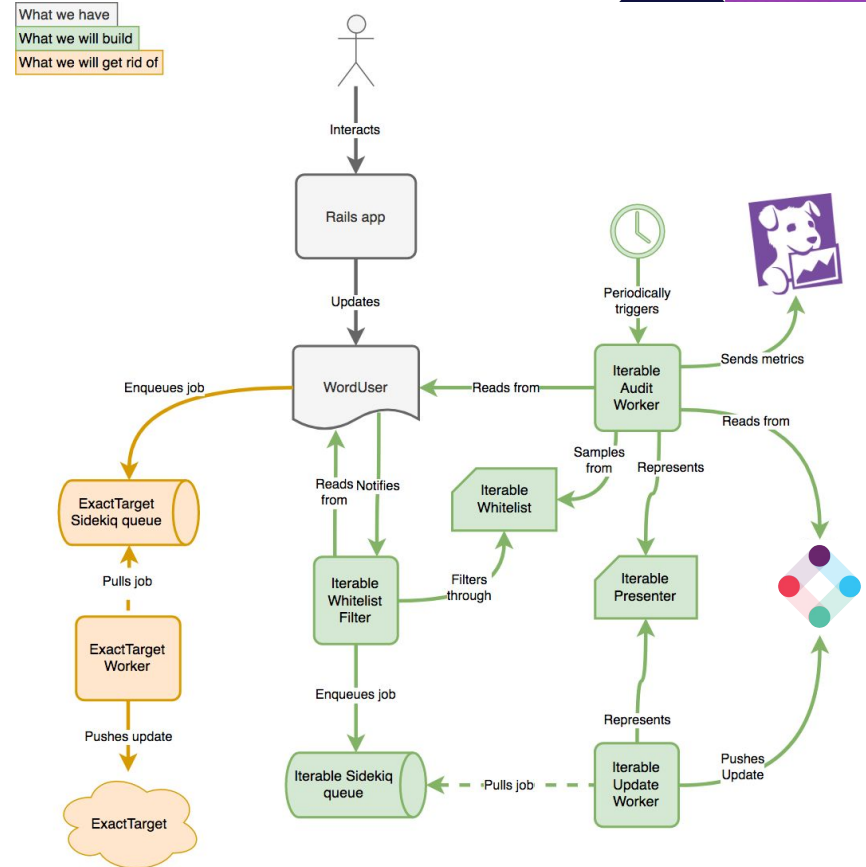


- Plan and scope in advance
- Migrate “as is” except when optimization provides simplification
- Implement features and data as needed (rather than for theoretical use cases)
- Document, document, document. Communicate, communicate, communicate.

Technical framework

How we did it

- Whiteboard and discuss. And discuss. And discuss. And whiteboard again.
- Platform-agnostic code
- Plan ahead for “plug and play” add-ons
- Data SLA and data auditing



Project plan

Working closely with Iterable



Base Templates & Initial Campaigns						
Priority	Task	Status	Owner	Target Date	Completion	Notes
P1	Create/Import Base Templates - P1 only	Complete	Marketing	Aug-23	8/28/2019	https://app.iterable.com/templates/import
P1	Create Blast & API-Triggered Campaigns - P1 only	Complete	Marketing	Sep-3	9/4/2019	https://app.iterable.com/campaigns/create
P2	Create Snippets	Complete	Marketing	Aug-23	8/28/2019	https://support.iterable.com/hc/en-us/articles/115003387883-Snippets-Overview
P2	Add In Merge Parameters & Handlebars Logic	Complete	Marketing	Aug-23	8/28/2019	https://support.iterable.com/hc/en-us/articles/206514205-Universal-Merge-Parameters
Workflows						
Priority	Task	Status	Owner	Target Date	Completion	Notes
P2	Create Workflow Campaigns - P1 only	In Progress	Marketing	Sep-30		https://app.iterable.com/workflows/create
P2	Workflow Testing	Not Started	Marketing	Sep-30		
Experiments						
Priority	Task	Status	Owner	Target Date	Completion	Notes
P2	Create A/B Experiments (OPTIONAL)	Not Started	Marketing	Sep-20		https://app.iterable.com/experiments/choose * We will create at least one A/B test for one of our 6M-volume sends, leveraging the send-time localization feature
P2	Create Message Medium Experiments using Workflows (OPTIONAL)	Not Started	Marketing	Sep-27		
Conversion Tracking						
Priority	Task	Status	Owner	Target Date	Completion	Notes
P2	Configure Custom Conversion Tracking (OPTIONAL)	Not Started	Engineering			https://support.iterable.com/hc/en-us/articles/204780559-Custom-Conversion-Tracking
Analytics						
Priority	Task	Status	Owner	Target Date	Completion	Notes
P2	Build Dashboards	In Progress	Marketing	Sep-27		https://app.iterable.com/dashboard

IP Warmup

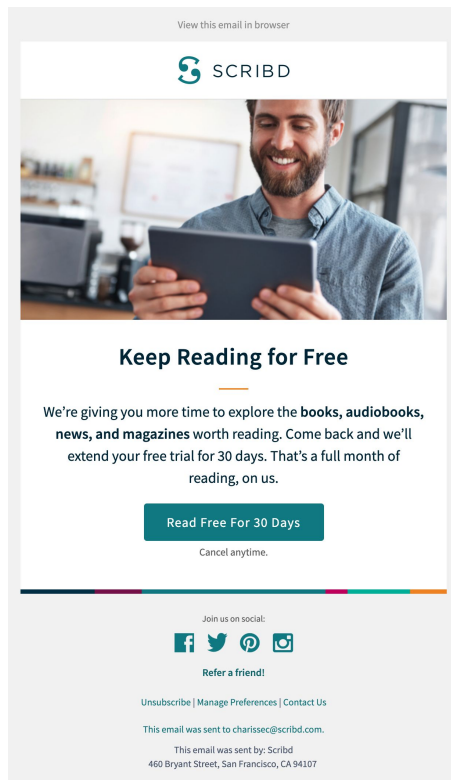
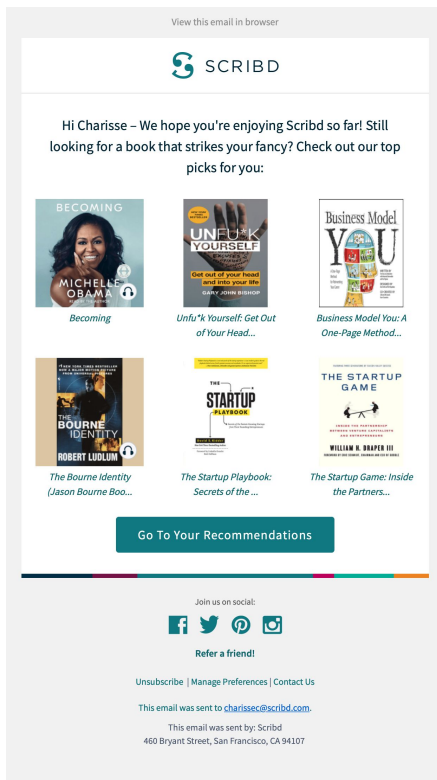
Predictable volumes



Calendar Date	Subscriber recommendations (Actual)	Password reset confirmation (Actual)	Dunning (All Actuals)	Continuous Free Trial (All Actuals)	Admin Mailer (Actual)	Nonsubscriber recommendations (Actuals)	Actual delivered volume-to-date	Target volume-to-date	Master volume-to-date	Campaign / phase
Friday, 9/6/19	0	2,801	0	0		0	63,845	69,700	171,000	-
Saturday, 9/7/19	0	2,718	0	0		0	66,563	75,100	171,000	-
Sunday, 9/8/19	0	3,339	0	0		0	69,902	80,500	171,000	-
Monday, 9/9/19	0	4,206	0	0		95,416	169,524	85,900	171,000	Campaign 6
Tuesday, 9/10/19	0	4,189	0	0		0	173,713	91,300	171,000	Campaign 7
Wednesday, 9/11/19	0	3,986	0	0		0	177,699	98,800	171,000	-
Thursday, 9/12/19	0	3,441	0	0		0	181,140	111,800	171,000	-
Friday, 9/13/19	0	2,809	1,576	0		0	185,525	124,800	291,000	-
Saturday, 9/14/19	0	2,487	13,492	0		0	201,504	137,800	291,000	-
Sunday, 9/15/19	0	2,993	21,226	0		0	225,723	150,800	291,000	-
Monday, 9/16/19	0	3,876	5,477	0		0	235,076	163,800	291,000	-
Tuesday, 9/17/19	0	4,011	10,911	0		0	249,998	176,800	291,000	-
Wednesday, 9/18/19	0	3,593	4,987	0		0	258,578	189,800	291,000	-
Thursday, 9/19/19	0	3,497	12,811	0		0	274,886	202,800	531,000	-
Friday, 9/20/19	0	2,794	15,469	0		0	293,149	215,800	1,011,000	Campaign 8
Saturday, 9/21/19	0	2,607	17,920	759		0	314,435	228,800	1,911,000	-
Sunday, 9/22/19	0	3,221	33,683	2,147		0	353,486	241,800	3,111,000	-
Monday, 9/23/19	0	4,049	5,189	2,932	25	0	365,681	254,800	4,911,000	-
Tuesday, 9/24/19	0	4,697	4,453	3,572	5	0	378,408	267,800	7,911,000	-
Wednesday, 9/25/19	0	5193	5470	3311	2697	0	395,079			
Thursday, 9/26/19	0	4956	14101	3331	3982	0	421,449			
Friday, 9/27/19	0	3830	16003	3864	3203	0	448,349			
Saturday, 9/28/19	0	3353	18599	4707	2585	0	477,593			
Sunday, 9/29/19	0	4186	35424	5203	3042	0	525,448			
Monday, 9/30/19	0	4753	5540	6491	3375	0	545,607			

IP Warmup

Range of email use cases



{{ snippet "blue_header" }}

Hello {{first_name_or_login}}, --

{{#eq delete_reason "instant"}} You recently canceled Facebook Instant Personalization on Scribd, and as a result your personalized Scribd profile has been deleted.{{/eq}} {{#eq delete_reason "removed"}} You recently removed Scribd from your Facebook application settings, and as a result we were required to delete your personalized Scribd profile.{{/eq}} {{#eq delete_reason "deleted"}} You recently deleted your Scribd account.{{/eq}}

{{#if has_assets }}

However, we noticed you had some assets in your profile that you might still want:

{{/if}} {{#if docs_message }}

- You uploaded one or more documents to Scribd. If you want them to remain accessible to you or to anyone else then they need to be recovered.

{{/if}} {{#if archive_message }} {{#if archive_expires_at}}

- Your Archived Membership doesn't expire until {{archive_expires_at}}. If you recover your account you'll be able to use your Membership until then. After your Membership expires you're welcome to keep using your free Scribd account to read and share with friends. {{else}} - You have an active Archived Membership. If you recover your account you'll be able to use your Membership until the end of your current billing cycle. After your Membership expires you're welcome to keep using your free Scribd account to read and share with friends.

{{/if}} {{/if}} {{#if purchased_docs_message }}

- You bought one or more documents from the Scribd Store; to read them in their entirety you must be signed into the account with which you bought them.

{{/if}}

If you'd like to recover your Scribd account{{#if has_assets }} and these assets{{/if}} please follow the link below.

{{undelete_account_url}}

If you intended to delete your account then you can safely disregard this email and we won't bother you again.

-The Scribd Team

{{ snippet "trn_snippet_inline" }}

Project management

Shared Slack channel and weekly syncs with Iterable



iterable-scribdpoc ☆

13 | Add a topic

July 12th, 2019

aharner 10:56 AM
This is great, thanks both! @Dan Borenstein I'll add the other members of our implementation team from Scribd.

Dan Borenstein 10:56 AM
Sounds good

katerinah 10:56 AM
was added to iterable-scribdpoc by aharner, along with 3 others.

B-Marks 10:58 AM
Hey Scribd team!

paiges 10:58 AM
👋

aharner 10:58 AM
👋 Introductions!
- @paiges, our email engineer who's owning the API development
- @katerinah, her manager
- @kostask from content engineering, who's owning the data integration from Scribd's backend
- @Shane Arney, his manager

Shane Arney 10:59 AM
👋

augustin 10:59 AM
was added to iterable-scribdpoc by AdrianC (IT).

B-Marks 10:59 AM
@Jamie Griffith

Jamie Griffith 10:59 AM
was added to iterable-scribdpoc by B-Marks
Iterable is in this channel

Project Plan call with Iterable 2019 August 1



Created by Andrew Harner
Last updated Aug 07, 2019 • Analytics

Agenda

- Review [Project Plan](#) worksheet from Iterable
- Review [platform introduction deck](#) from Iterable

Attendees

- @Andrew Harner
- @Paige Stone
- @Charisse Ceballos
- @Katerina Hanson
- @Alex Bernardin
- Derek Lau (Iterable implementation manager, **primary contact**)
- Derek Baines (Iterable, enterprise customer success manager; our main point of contact if we proceed to full migration)
- Bryan Marks (Iterable, **technical contact**)
- Jamie Griffith (Iterable sales account manager)

Action Items

- @Paige Stone to work with Ops team for the "@scribd" domain for emails through Iterable by **02 Aug 2019** (or as soon as possible)
- Derek Lau to complete IP configuration by **02 Aug 2019**
- @Andrew Harner and @Katerina Hanson to make recommendation about subscription preference management by **02 Aug 2019**
- @Andrew Harner to make recommendation for hosted unsubscribe URL based on two options provided by @Paige Stone by **09 Aug 2019**
- @Andrew Harner and @Katerina Hanson to sync with Joe about mobile integration by **05 Aug 2019**
- Weekly facetime calls scheduled for Wednesday afternoons. @Andrew Harner to set up recurring invite.
- @Andrew Harner to work with Derek Lau to schedule mid-POC onsite
- @Paige Stone to investigate HSTS/HTTPS compliance

Project management

Multiple Jira epics with hundreds of linked tickets



JIRA Epic	Key	Summary	T
	PROD-2904	Iterable data integration 2019 Q3	+
	EMAIL-950	Create the event mailer for Iterable	✓
	EMAIL-932	Build Continuous Free Trial emails in Iterable	+
	EMAIL-872	Iterable marketing IP warmup 2019 Q3	+
	EMAIL-871	Iterable 6 million send 2019 Q3	+
	EMAIL-822	250ok implementation	+
	EMAIL-690	Does Iterable improve upon Marketing Cloud? 2019 Q3	+

Projects / Email / EMAIL-1030 / EMAIL-1044

Pause/Unpause Subscription emails migration to Iterable

Attach Create subtask Link issue

Description

The "pause subscription" and "unpause subscription" emails need to be migrated to Iterable.

Subtasks

100% Done

EMAIL-1045	"Pause subscription" template and campaign in Iterable	↑	Charisse Ceballos	DONE
EMAIL-1046	"Unpause subscription" template and campaign in Iterable	↑	Charisse Ceballos	DONE
EMAIL-1047	"Pause subscription" trigger for Iterable	↑	Charisse Ceballos	DONE
EMAIL-1048	"Unpause subscription" trigger for Iterable	↑	Charisse Ceballos	DONE
EMAIL-1049	"Pause subscription" end-to-end testing	↑	Charisse Ceballos	DONE
EMAIL-1050	"Unpause subscription" end-to-end testing	↑	Charisse Ceballos	DONE
EMAIL-1051	Activation of "pause/unpause subscription" emails	↑	Charisse Ceballos	DONE
EMAIL-1052	Validation of "pause/unpause subscription" emails	↑	Charisse Ceballos	DONE
EMAIL-1054	Documentation of "pause/unpause subscription" emails	↑	Charisse Ceballos	DONE

Done ✓ Done

Assignee

Charisse Ceballos

Reporter

Andrew Harner

Labels

iterable-migration-2019q4

ProjectTeam

Email

Epic Link

Iterable triggered transact...

Sprint

None +1

Priority

P3 - Major

Automation

Rule executions

How did it go?

The team knocked it out of the park! And I took a three-week vacation.



How did it go?

Thorough retrospective with internal stakeholders



Generated by FurPietro.io - Iterable 7 questions - Make an informed choice about Iterable

1 - reduce time to create campaign/test	2 - increase metrics and attributes for triggering seeds	3 - improved engagement reporting?	4 - reduce eng effort to create n-way tests?	5 - increase send success rate of automated emails	6 - reduction in API errors	7 - easier user-level investigation for CS	8 - send recommendations emails to femail without DOOSing Scribble	any else?
<p>we didn't actually set up a Workflow in the two month trial period. But we will be doing at least one in the next week or so</p> <p>Definitely cleaner, better save features. Snippets are useful (although we will have to inline css on imports, while we can't even use block style on Templates, multi-renderers). More predictable and industry standard. Has not been tested end-to-end, but each piece has a path forward and no blockers</p> <p>Everything I've seen looks great in this regard but a full investigation should include at least one workflow. We'll be implementing the Subscriber Welcome Flow in the next few days as well as the Continuous Free Trial emails which may be set up as workflow.</p>	<p>Yes, this is definitely more flexible. We can add metrics and events as well, without major data migrations. We need to be careful about our organization, but we have all of the metrics we need to trigger correct and future work as predicted.</p>	<p>Absolutely better. Heatmaps are more effective. Reports are organized in an effective manner. We can drill down to individual users to see exactly what we sent them. This has already been instrumental in diagnosing a security issue. We have kept working to pulling data via webhooks. 250 OK has been reasonable so far.</p>	<p>We tested the experiments system with simple copy changes (which is expected to be the bulk of the rapid marketing tests). We have a path forward for integrating to engineering / tableau, although that system is not built out yet.</p> <p>In order to get data from Iterable back into Scribble's tableau, there is a viable manual process, but a tighter integration is possible.</p> <p>We've done many of the steps that we would need to do to support n-way integration, just in other contexts, so the necessary pieces have been verified.</p> <p>charisse says that there's a reduction in effort for setting up experiments.</p> <p>If necessary, n-way test assignments made on the Scribble side can be passed through to Iterable per user, allowing segmentation rules to work.</p> <p>segmentation for experiments is much easier.</p> <p>The integrate with the n-way test system. Was not done.</p> <p>Enter your comment...</p> <p>we have parity with the existing system.</p>	<p>Iterable has automated retries.</p> <p>andrew clarifies that is about marketing cloud automation runs failing to associate with errors that are inscrutable.</p> <p>Automations have not been failing in Iterable. We will not get burned on duplicates. We get reasonable and readable error messages, and better communication with the Iterable team on errors. Thinking about our 2 attempts at TM.</p> <p>Iterable offers audit data, allowing much better visibility and follow up.</p> <p>The evaluation in https://docs.iterable.com/docs/marketing-automation/segmentation/segmentation, that we "achieved deliverability parity with peer-level send conversion" may miss the original intent of reducing the failed automation runs in Marketing Cloud.</p>	<p>API errors are much easier to track and find.</p> <p>API response codes not 100% standard.</p>	<p>We can easily add CS tools via the API.</p> <p>User level access to events! We will lose event data in Iterable for users we delete due to space constraints. Something to be aware of in setting deletion parameters.</p>	<p>DOOS concerns have been allayed via TM send.</p> <p>basic tests with QA show we DOOS at about 4% our planned send rate. With AWS this bar will only go up.</p> <p>additional guardrails (throttles) have been configured to minimize risk around this.</p> <p>Paige has checked in with Adrian and Adrian reports that has conflictable.</p> <p>we added security guardrails to reduce risk around remote DOOSing.</p>	<p>good comms with Iterable's team (Stack channel has been invaluable)</p> <p>API in general is pretty well structured.</p> <p>API has good enough performance. Will (probably) get better once we're on AWS.</p> <p>We see a lot of improvements, but do the improvements add up to significant work-savings and improved opportunities that justify investing additional time in the migration? Can we get basically this same functionality improvements by opening the next month or two cleaning up our Marketing Cloud instance?</p> <p>Enter your comment...</p> <p>volume limits on tables</p> <p>difficulty with SQL tweaking</p> <p>poor customer support</p>

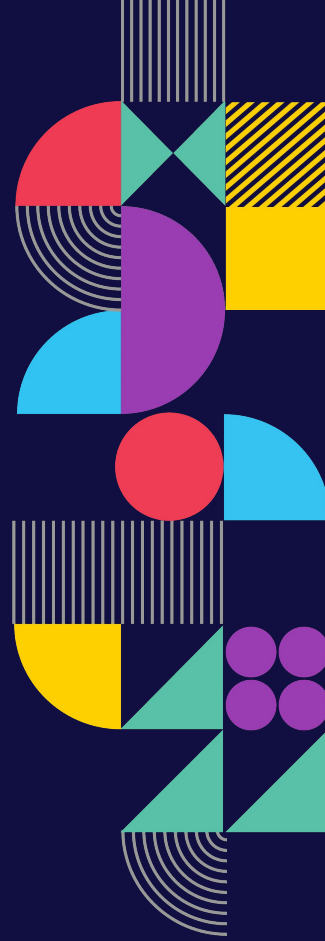


Iterable offers massive improvements including the Json data format, Elasticsearch queries, an intuitive, streamlined user interface, and a transparent company culture.

The notifications team is excited to complete this migration.



**Actually
migrating**



We still have to migrate???



Platform Evaluation (6 months)

- Define business requirements
- Narrow the field
- Be thorough
- Selecting the right partner

Trial Implementation (2 weeks)

- Project brief and technical doc to define scope
- Kickoff, daily, and retro meetings
- Grading sheet



Proof-of-Concept Implementation (2 months)

- Laying the groundwork
- Technical framework
- IP warmup
- Project management

Actually Migrating (2 months)

- **Migrate the rest of the emails and data flows**
- **Prioritize for efficiency**
- **Defer documentation, optimization and cleanup**

We still have to migrate???

Process-first

Brief notes

The Lead Email Manager is responsible for prioritizing the order in which emails are migrated to ensure a successful IP warmup.

After giving priority to a successful IP Warmup, we will generally migrate emails in groups that target coherent customer segments, i.e., first we will migrate subscriber-facing emails; then we will migrate nonsubscriber-facing emails.

Transactional triggered emails will be migrated on a one-off basis, where appropriate; multiple associated emails (like the NYT Bundle) and journeys will be migrated in batches.

The process

1. Create a Jira story
2. Whiteboard the data and/or workflow
 - a. Engineering and marketing resources should be involved for this
 - b. Identify changes that are implicit to moving from relational databases with SQL queries to a json data structure with elastic search
 - c. Notes and the agreed-upon plan should be documented in the jira ticket
3. Build out subtasks within the Jira story
 - a. This will include a task for each email template, with notes for the implementation
 - b. Workflows, event datas, user profile data, documentation, and shutting off the email/s in Marketing Cloud are each their own task
4. Engineer builds the event and user profile data that is necessary to the migration
 - a. This can be done before and separately from the work of building the templates and workflows
 - b. Validation
 - i. (needs more detail)
5. Marketers build the email templates
 - a. Adhere to naming conventions for template name and UTM
 - b. Ensure all images are hosted in Iterable, not Marketing Cloud
 - c. Validation
 - i. Review production samples in your inbox on multiple devices, e.g., desktop + phone
 - ii. Review multi-device display either internally in Iterable via the Emails On Acid integration or externally in Litmus for data feed emails
 - iii. Review by additional member of email team
 - iv. TBD: Will we include #email-design-QA review in the migration?
6. Marketers build the workflow or triggered campaigns

- Developed a clear process for migrating the remaining ~60 emails
- Broke out the work into discrete engineering and marketing tasks in our task-management tool, JIRA
- Worked in parallel to implement new user profile fields and events (engineering) and campaigns and workflows (marketing)
- With a detailed roadmap, we executed this migration on time and error-free despite upstream bugs



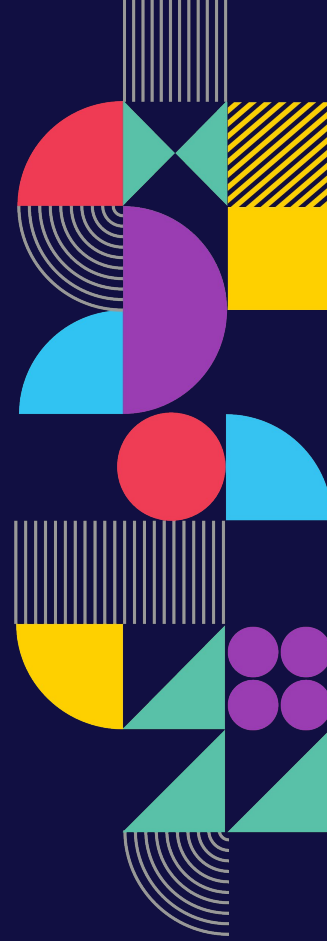
Cleanup

Process-first

- Exporting data and closing down the old platform
- Backend code removal
- Deferred documentation



Beyond the migration



Mini-case study

Scribd responded to shelter-in-place with a “Read Free” offer on social media.

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The many rewards of reading

Reading is one of the original forms of self-care. But did you know it has tons of proven benefits? Here are a few:



Boost happiness
Readers are 21% less likely to report feelings of depression than non-readers.*



Reduce stress
Six minutes of reading can reduce stress by up to 68%.*



Feel accomplished
69% of people surveyed say they feel accomplished after reading.**

Start reading

*Psychologies.co.uk, “Reading books can make you happy”
**Scribd.com, “Reading Makes You Feel Relaxed, Informed & Happier”

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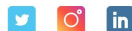
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The Creative Habit



At the Center of All Beauty

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Keeping Kids Entertained:



The Girl Who Drank the Moon



Mr. Popper's Penguins



The Adventures of Captain Underpants

See more

Tips for Working From Home:



The Productivity Project



Why We Sleep





What the Most Successful People Do Before Breakfast

See more

Mini-case study

Engagement with these emails correlated to a 300% lift in conversion rate.

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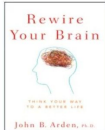
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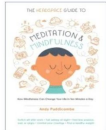
The Weeknd - Starboy



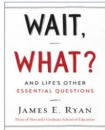
Rewire Your Brain: Think Your Way to ...



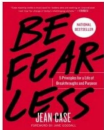
John Legend - Get Lifted



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Wait, What?: And Live Other Essential Questions



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
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Sapient: A Brief History of Humankind
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In Five Years: A Novel
Perfect for fans of *Me Before You* and *One Day*—a striking, powerful, and moving love story following an ambitious lawyer who experiences an astonishing vision that could change her life forever.

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Why We Sleep: Unlocking the Power of Sleep and Dreams
The first sleep book by a leading scientific expert—Professor Matthew Walker, Director of UC Berkeley's Sleep and Neuroimaging Lab—reveals his groundbreaking exploration of sleep, explaining how we can harness its transformative power to change our lives for the better.

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