

# Email Migration Readiness CHECKLIST

Complete every step before switching your email platform — so nothing breaks on go-live day.

For: Marketing Ops · Salesforce Admins · RevOps · IT Teams  
Use when: Moving to MassMailer from any email platform

**1 Audit**

**2 Export**

**3 Configure**

**4 Test**

**5 Go Live**

**PHASE 1 — AUDIT YOUR CURRENT SETUP**

- Document every email tool currently connected to your Salesforce org Critical
- List all active campaigns, automations, and triggered sends Critical
- Export all email templates — HTML source, not screenshots Critical
- Record current sending volume — daily and monthly averages
- Note current From addresses, Reply-To addresses, and sender names
- Identify stakeholders who need to approve the migration

**PHASE 3 — SALESFORCE CONFIGURATION**

- MassMailer installed and configured in your Salesforce org Critical
- Sending domain verified and approved inside MassMailer Critical
- User permissions and profiles set for relevant team members
- Campaign Member statuses configured to capture send, open, click
- Unsubscribe field mapped to Salesforce contact record correctly Critical
- Suppression list imported and active before first send Critical

**PHASE 2 — EXPORT AND CLEAN YOUR LISTS**

- Export full contact list including all custom fields Critical
- Critical Export suppression list — unsubscribes, bounces, and complaints Critical
- Remove all hard bounces before importing to new platform Critical
- Deduplicate contacts — one record per email address Critical
- Document all list segments and the logic used to build them
- Export campaign engagement history — opens, clicks, last send date

**PHASE 4 — TEST BEFORE GO-LIVE**

- Test send to internal team across Outlook, Gmail, and mobile Critical
- All merge fields populate correctly — no broken placeholders Critical
- All links resolve to correct destinations Critical
- Unsubscribe link works and triggers correct suppression in Salesforce Critical
- Spam score tested via Mail-Tester or similar tool — aim for 9+/10
- Seed list tested for inbox placement across major ISPs

**PHASE 3 — CONFIGURE AUTHENTICATION**

- SPF record updated to include new sending domain or IP Critical
- DKIM signing enabled and validated for the new platform Critical
- DMARC policy verified — p=none minimum before go-live Critical
- Reverse DNS (PTR) configured if using a dedicated IP
- Critical From domain and envelope sender match — no domain spoofing Critical
- All DNS changes propagated and tested via MXToolbox

**PHASE 5 — GO-LIVE & POST MIGRATION**

- Start sends with most engaged contacts first — warm up the new setup Critical
- Pause or decommission sends from old platform on go-live day Critical
- Monitor bounce and complaint rates closely for the first 7 days Critical
- Old platform contract cancelled or paused to avoid double-sending
- Team trained on MassMailer campaign creation and reporting
- Migration log and config documented and saved for future reference

**MIGRATION TIPS**

- 1. Never migrate and send on the same day.** Allow 48 hours after setup before your first live send.
- 2. Keep old platform active for 30 days.** Run both briefly in parallel in case you need to roll back.
- 3. Start small on the new platform.** First send to 500 engaged contacts — not your full list.
- 4. Migrate your suppression list first.** Never send before your suppression list is fully imported.

Unchecked Item

Critical Must complete before proceeding to next phase

**READY TO MIGRATE TO A SALESFORCE-NATIVE EMAIL SOLUTION?**

MassMailer installs directly into Salesforce in minutes — no data sync, no external ESP, and a guided setup to get you sending fast.

**INSTALL FREE**

[massmailer.io/install](https://massmailer.io/install)

**BOOK A DEMO**

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