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Enterprise Platform Switch Decision Framework (PDF)

A practical checklist for marketing ops teams managing enterprise email marketing operations at scale.

This Maropost resource supports **enterprise email marketing** teams running enterprise email marketing operations. Use it to assign owners, run QA gates, and document outcomes across campaigns, journeys, and deliverability — built for high-volume senders and multi-brand email programs.

Enterprise email marketing resource · maropost.com

What this resource is for

A fill-in workbook for integration design, field mapping, testing, and go-live checklists.

Complete the worksheets below with your team. For full strategy, context, and benchmarks, read the companion article on maropost.com.

When to use this resource

Trigger	Use this workbook when...
New connector	Connecting CRM, ecommerce, or data warehouse
Sync failure	Contacts or events not flowing correctly
Go-live	Final validation before production traffic
API change	New middleware or field map in scope

Worksheet 1: The 12 switching triggers, score your situation (#)

#	Trigger	Critical looks like	Deep dive	Owner	Status	Notes
1	Deliverability failure	Repeated placement collapse after auth/hygiene fixes; no dedicated IP or ISP reporting	Email deliverability dropped, what to do next			
2	Scale limits	Contact caps, send throttling, duplicate accounts per brand	Outgrowing platform limits			
3	Automation breakdown	Missed triggers, duplicate sends, journeys fail at peak	When automation breaks at scale			
4	Revenue drag	Velocity delays, attribution blind spots, retention underperformance	7 signs platform holds back revenue			
5	Security / compliance gaps	RBAC, audit trail, consent scoping fail enterprise review	Legal + security assessment			

Worksheet 2: Timing matrix: urgent vs. planned migration (Timing tier)

Timing tier	When it applies	Recommended action	Owner	Status	Notes
Urgent (0–90 days)	Acute deliverability collapse, compliance incident, vendor outage pattern, M&A mandate with hard deadline	Executive war room; throttle risky sends; accelerated RFP + POC on Tier A journey; accept early termination cost if stay-risk exceeds fee			
Planned (3–9 months)	Score \geq 15; renewal in 6–12 months; no acute compliance event	Audit → requirements → RFP → pilot → migrate before renewal; negotiate parallel run in SOW			
Evaluate only (9–18 months)	Score 8–14; fixable roadmap from incumbent; peak blackout	Document triggers; run POC; re-score at renewal minus 9 months			
Stay (re-score quarterly)	Score < 8; issues trace to process not platform	Fix integrations and governance; do not consume org with migration			

Worksheet 3: Stakeholder alignment before you switch

Stakeholder	Primary question	Evidence they need	Typical approval	Owner	Status	Notes
CMO / VP Marketing	Will we ship revenue programs faster?	Trigger scorecard, revenue drag model	Business sponsor			
Marketing ops	Can we rebuild journeys with less friction?	Journey audit, workaround hours	Technical owner			
IT / engineering	Can we integrate safely at scale?	Integration map, API throughput, SSO	Architecture sign-off			
Security	Data handling, access, residency	DPIA, RBAC demo, subprocessors	Security review			
Legal / compliance	Consent, unsubscribe, audit trail	Multi-brand compliance gap analysis	Legal sign-off			

Worksheet 4: Stakeholder alignment before you switch (Activity)

Activity	Marketing	IT	Security	Legal	Finance	Procurement	Owner	Status	Notes
Trigger scorecard	R/A	C	C	C	I	I			
Requirements doc	R	A	C	C	I	C			
Vendor RFP	C	C	C	I	A	R			
POC / pilot	R	A	C	I	I	I			
Migration SOW	C	R	A	A	A	R			

Stakeholder alignment

Stakeholder	Focus	Named contact
Marketing ops	Execution, QA, reporting	
IT / Security	Integrations, auth, data	
Program owner	Sign-off, executive updates	

Program sign-off

Role	Name	Date
Marketing Ops Lead		
Technical owner		
Program Owner		

Complete criteria

Criterion	Met? (Y/N)
Worksheets completed with owners	
Stakeholder sign-off recorded	
Archived in ops wiki	

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About Maropost

Maropost is a **global** customer engagement platform trusted by enterprise brands worldwide, with teams across the **United States, Canada, Australia**, and beyond. This resource focuses on **enterprise email marketing**: campaigns, lifecycle automation, deliverability, and revenue attribution, powered by Maropost **Marketing Cloud**, which serves high-volume senders worldwide. Explore the full platform at maropost.com.

Maropost platform (global product suite):

Marketing Cloud: email, SMS, journeys, segmentation, and analytics for enterprise teams worldwide

Commerce Cloud: ecommerce storefronts, inventory, and order management at scale

Retail Cloud: unified retail operations, POS, and omnichannel commerce

Merchandising Cloud: product data, catalog, and merchandising workflows at scale

Service Cloud: customer service, sales, and marketing connected in one experience

Da Vinci: AI-driven insights and personalization across the Maropost platform

Maropost strengthened its global commerce footprint through the acquisitions of **Neto** and **Retail Express**, adding proven ecommerce and retail capabilities for enterprise brands worldwide, alongside email and marketing programs.

Neto: acquired ecommerce platform for online storefronts, inventory, and order management; now part of Maropost Commerce Cloud

Retail Express: acquired retail operations and POS platform for omnichannel commerce; now part of Maropost Retail Cloud

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