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Migration Best Practices

A WORD TO THE WISE WHITE PAPER | BY LAURA ATKINS, CO-FOUNDER

Introduction

It seems like it should be so simple to migrate from one email service provider (ESP) to another. Good delivery in one place must certainly translate to good delivery in a second place. Unfortunately, as with much of email, reality isn't as simple as we might like. The good news is that your sender reputation can travel with you to your new ESP. The bad news is that it can take a few weeks to happen, and may require some careful attention along the way.

There are many factors in migrating from one ESP to another that affect delivery. Some of these are real effects, and senders transferring to new IP addresses can expect some delivery challenges during the move. But not all of the poor delivery you may perceive is real. Because many ESPs use the same terminology (opens, clicks, bounces, etc.) but calculate those measurements differently, it's not always possible to accurately compare metrics between ESPs.

Understanding the pitfalls — and what can be done to mitigate them — makes transitioning between ESPs significantly easier.

Making the transition: Best Practices

For some senders, making the transition from one ESP to another must be done with no overlap. They do not have the ability to send from two different ESPs at once. This isn't always the ideal situation. There can be some delivery challenges at a new ESP, particularly if the sender is moving to a dedicated IP address at the new ESP. In these cases, it's useful to move subscribers from the old ESP to new ESP in stages. This is mostly to warm up a new IP address; it's less important to move over in stages if a sender is moving to a shared IP.

The first group of recipients to move should be the most engaged. These are recipients that consistently open mail and click on the mail. Moving this group of subscribers over first ensures that the ISP sees lots of positive activity with email from a new IP address.

After a few days of sending to the highly engaged users, less engaged users should be moved over. This should be done in batches, so there isn't a rapid spike in volume, which might trigger volume-based thresholds at the ESPs.

Warming up IPs can take 4 to 8 weeks. It's important that subscribers continue to receive mail during this time; otherwise they may stop expecting the mail. Senders want recipients to expect mail and look for it in the bulk folder if needed. During the transition phase, having two ESPs ensures that subscribers are receiving mail on a regular schedule.

Real delivery changes

Some of the changes in delivery when switching from one ESP to another are real. Moving to a new ESP affects IP-based reputation and it may take a while to build a new reputation at a new ESP. Other real delivery changes may be due to failure to transfer full data from the old ESP to the new ESP. Failing to use the right email address list during a move can result in high bounce and complaint rates. Finally, some senders may make more simultaneous changes than just a new ESP, which may cause some delivery problems.

While the reputation of the ESP is not necessarily a major factor in delivery, there are cases where some ESPs have better reputations and receive preferential treatment for all customers. This is more common at ESPs that use shared IP addresses, where the reputation of the IP address depends mostly on the quality of customer.

Reputation changes

Some of the differences between delivery at one ESP and another are due to real changes in reputation triggered by sending mail from new IP addresses. Because IP addresses cannot be easily forged, they are used in many filtering processes. In fact, many of the current delivery rule filters are based on the reputation of the sending IP address.

Most non-internet companies don't have their own IP addresses; they use IPs provided by their service providers. When these companies change service providers they have to change to IP addresses owned by the new provider.

There is no way to transfer reputation from one IP address to a new one. Moving to an email service provider means a new IP reputation.

When transferring to an ESP with shared IP addresses it is very likely the first few sends will use a shared pool just for new customers. This is so the provider can evaluate the customer and

recipient response. After the first few sends the provider may move the sender to other shared IPs with customers that have similar sending profiles.

Moving to a new fixed IP address involves warming up a new IP address and creating a reputation for that IP address. It is a simple process to warm an IP but it will take some time to accomplish.

The vast majority of mail coming from unknown IP addresses is spam. Because of this, mail from an IP address that has not recently sent mail to an ISP is treated as more likely to be spam than not. The process of warming up an IP address consists of sending good mail over the IP so the recipient ISPs can identify that this IP sends wanted mail.

It takes approximately 50,000 to 100,000 emails to create a reputation. During the warm up process there may be transient delivery problems, like bulk foldering or deferrals during delivery. This is normal for any new IP address and is not indicative of any problem with the new ESP.

Data changes

Whether moving to a shared IP or dedicated IP at a new ESP, some senders see delivery problems because they fail to transfer all unsubscribe and bounce data from the old ESP. This can be intentional: the sender may decide to take the opportunity to reactivate addresses that have bounced off or unsubscribed. Other times this is unintentional: the old ESP doesn't tell the sender they need to download bounces or unsubscribes. Both situations can result in very high complaint and bounce rates. High complaint and bounce rates result in poor reputation and delivery, particularly when coming from an unknown IP address.

Of all the things that can cause delivery challenges, this is the easiest to fix. Senders should opt to send mail to the same recipients as they did at their previous ESP. They must download all bounce and unsubscribe data and apply those changes before sending through the new ESP. If there is significant internal pressure to reactivate bounces from the old ESP for some reason, then this should not be done until after IPs are fully warm and there is a history of good delivery at the new ESP.

Email changes

Sometimes there are a lot of changes that get wrapped up in the migration process but are not actually relevant to the transition from one service provider to another. These changes primarily affect the content of the email and may hurt inbox delivery.

One common fallacy about moving ESPs is related to domain identification. Many senders think that to move ESPs they need to change links and domains in the email as well as the email from address. These changes are not necessary, and, in fact, are actively harmful. Domains in emails and those used in from addresses also develop reputations. A good domain-based reputation can improve delivery for emails coming from new IP addresses.

Changing all the domains in the email and the IP addresses that email is coming from simultaneously means the spam filter is starting over from scratch. It can take even longer to get reliable delivery when changing everything at once than when just changing domains or just changing IP addresses.

Finally, many recipients do actually add email addresses to their address books to ensure inbox delivery. Changing the from address results in that mail no longer being whitelisted for those users. But these users are the core of creating a good reputation. They are the people who will see the mail and click on links and tell the ISP that this mail is wanted.

Changing domains and IP addresses at the same time is a recipe for delivery disaster.

Measurement changes

Changing IP addresses and failing to completely transfer data may cause real, if temporary, delivery problems. But not all delivery issues are actually real — sometimes they are a side effect of different ways of measuring delivery, opens, and clicks.

Currently there is no industry wide standard for email metrics. There are some industry groups working on standardized names and calculations, but these have not been widely adopted. Non-standard metrics make it impossible to compare open rates between ESPs.

When moving ESPs, some senders may see their metrics significantly increase or decrease. These aren't actually real changes, and the actual number of emails delivered may well be identical between the old ESP and the new ESP. Different calculations of key metrics may result in different reported open rates. It's not an actual difference, but rather an artifact of the various ways ESPs measure user engagement.

Even something as simple as how an ESP measures delivery has a significant effect on rate calculation. Some ESPs measure the open rates as number of emails opened divided by the number of emails sent. Others measure open rates as the number of emails sent minus those emails that bounced. Even with a very low number of bounces the different numbers may substantially change the open rates.

Similarly, click rates calculated by dividing the number of clicks by the number of emails sent will be very different from those rates calculated by the number of emails delivered.

In some rare cases, senders can get the raw data from both the old ESP and the new ESP. Senders can calculate rates using the same formulas and determine if there is an actual change in delivery. The amount of useful data this provides may not justify the amount of work, but for those senders that just have to compare delivery before and after moving, it is the only way to compare apples to apples.

Conclusion

Moving ESPs may result in different delivery metrics. Some of these differences may be real, particularly during the initial sends at the new ESPs. Many of these differences, however, are not true changes. There is no standard way to measure delivery, so even if there are zero changes in delivery the reported rates may differ.

Warming up IP addresses and establishing a new reputation may cause some transient delivery issues. These issues should resolve in 4 to 8 weeks. To minimize the impact of IP warmup on delivery, senders should use both old and new ESP during a transition period.

There are lots of good reasons to move ESPs: better customer service, better tools, and lower costs. But all ESPs have the same constraints on delivery. They all contend with the limits

enforced by ISPs. Just because there may be delivery problems at first does not mean the new ESP is a bad ESP. Short-term delivery issues are a fundamental part of moving ESPs due to the current nature of reputation. Strategic thinking by senders will ensure good delivery from any ESP.

Need help planning and executing an ESP migration?

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