CONVIO → MARKETO
A GUIDE FOR ASSET MIGRATION

IMPORTANT INFORMATION
Our goal is to build an image library within Marketo that will serve your future communications. The goal is not to transfer (aka migrate) every image within Convio over to Marketo. Think of this as a massive spring cleaning!

WHAT YOU NEED TO DO
• Identify images needed for future emails (ie. Signatures, unit logos, staff/dean headshots.)
• Update the Convio Inventory Asset spreadsheet for your unit with the following information: the name of the image and the current image size within Convio.
• If an asset does not meet the guidelines for these actions, it can be left in Convio and thus retired when Convio goes offline. There is no need to delete them from Convio.

NOTE: Our team is creating a library of University branded materials within Marketo. Anything you identify should be specific to your unit.

WHAT WE CAN HELP YOU WITH
• Due to Marketo template specs, you’re going to need to edit and potentially resize some of these images. We will provide you with a list of the image sizes that will work with Marketo templates at a future date. We can also provide you with training and support for resizing images if that is something you need.
• During training, you will learn how to import these images into your Marketo image library.

IMPORTANT INFORMATION
First, it is important to note that stationery within Convio is equivalent to templates within Marketo – except that templates are more powerful! We are rolling out beautiful and responsive templates that have been built and tested across various platforms. These will be much improved replacements to the Convio stationery. We strongly discourage using Convio stationery HTML.

WHAT YOU NEED TO DO
• Identify the types of communications your unit is sending (i.e. newsletters, Dean’s letters, invitations, internal communications.) Have a copy of these communications available for review during your 1:1 meeting to discuss your unit’s conversion plan.

WHAT WE CAN HELP YOU WITH
• UMAC will review your existing communications and help to ensure we have a template within Marketo that meets your needs.
• If you don’t have a designer in your unit, or you are unsure about the types of communications you send, we will be happy to help you through this discovery process.
• We will be training all “Designers” first. This will ensure that your templates will be set-up and ready to go before you begin assembling your emails.

UNIVERSITY of WASHINGTON
**GROUPS**

**IMPORTANT INFORMATION**
Our goal is to identify groups being actively used within Convio that cannot be easily recreated using one of our population selection tools (i.e. Reportal/ReportWriter.net, Michelangelo, Adhoc reports, etc.) and migrate those to Marketo. We will not be automatically migrating every group within Convio over to Marketo.

**WHAT YOU NEED TO DO**
- Identify which groups you are actively using. If you have a group that was primarily built and maintained within Convio, and cannot be easily recreated from a different source, you will need to identify and document that group information, including interest options and opt out groups.
- Update the Convio Inventory Asset spreadsheet for your unit with the following information: the Convio Group ID # and Group Name.

**WHAT WE CAN HELP YOU WITH**
- We will migrate all of the groups that you identify based on the above information by downloading the constituents from Convio and uploading them to Marketo.
  During training, you will learn how to import a static list from a different source (i.e. your own spreadsheet, Reportal/ReportWriter.net, Michelangelo, Adhoc reports.)
  NOTE: We are still working on mapping Convio Interest Groups to future subscription options in Marketo, we'll provide more information at a later date.

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**ARCHIVING MESSAGES**

**IMPORTANT INFORMATION**
If you would like to maintain newsletters that your unit has sent in the past, they will need to be hosted outside of Convio. If this is already a standard practice for your department, then you do not need to take additional steps.

**WHAT YOU NEED TO DO**
- Determine if any of your past newsletters are currently hosted on Convio (engage.washington.edu). If they are, reach out to the person who manages your unit’s website and ask if they can begin to host those newsletters.

**WHAT WE CAN HELP YOU WITH**
- If you do not host archives on your own website AND your web developer will not allow you access by September, then Central Advancement will help to find you temporary space.
- If you need help downloading prior newsletters from Convio, we can provide you with step by step instructions.

*There are a handful of Convio Admins that have created other assets not covered in this guide. If you have questions regarding Landing Pages, Surveys or Reports, please contact advtrain@uw.edu.*