



YOUR GUIDED PATH TO A SMOOTH MIGRATION

Migrating to the new Staffbase Email is more than just a technical upgrade - it's your opportunity to modernize, simplify, and unlock new possibilities for your communications.

We've designed this self-service migration process to be clear, achievable, and fully supported, so you can complete it with confidence in a short period of time.

You won't be on your own. Every step is backed by clear documentation, expert guidance, and helpful resources from Staffbase to make the journey straightforward.

Here's what to expect:

1

Kickoff & Preparation

Kick off your migration right: define your team, declutter your data, and understand the scope of your transition.

2

Data Migration & Technical Setup

You bring over your selected data and make your technical setup - from secure sign-on and sending domains to contact management - so your foundation is ready to go.

3

Core Configuration & Platform Optimization

Configure your platform, define governance, and train your team so everyone is confident using the new platform.

4

Completion & Go-Live

You're ready to run on Staffbase Email. We'll perform a final review to ensure the quality of your migration and coordinate the farewell of your Email Classic access.

With this approach, you control the pace, and we provide the tools, know-how, and support to get you there - with no unnecessary complexity and no surprises.

Staffbase Email Setup

Action	What	Why
Phase 1		
<input type="checkbox"/>	Preparation / Cleanup in Email Classic Check if there is anything unused, outdated or empty in Email Classic that doesn't need to be migrated: <ul style="list-style-type: none"> • Attributes • Distribution lists • User groups • Branding colors • Templates & Drafts • Integrations • Aliases Read here for some more information about preparation.	<input checked="" type="checkbox"/> To start with an organised platform nothing should be migrated that isn't used.
<input type="checkbox"/>	Writing up your Governance and platform guidelines and share it with your team Define usage policies, roles, and best practices for managing email communications within the organization. Establish rules for template usage, approval workflows, and audience segmentation.	<input checked="" type="checkbox"/> Ensures teams follow best practices and maintain compliance. <input checked="" type="checkbox"/> Prevents misuse or inconsistent communication strategies. <input checked="" type="checkbox"/> Provides clarity on responsibilities, reducing errors and confusion.
<input type="checkbox"/>	Folder concept enablement Familiarize yourself with the new folder concept used in Staffbase Email. Resource: Rights, Permissions and Governance (PDF, EN)	<input checked="" type="checkbox"/> A folder contains sender names, drafts, scheduled emails, and individual analyses for emails based on specific teams or topics.
Phase 2		
<input type="checkbox"/>	Data Migration Make yourself familiar with the overview of migrated data (what will be included and excluded). Once the preparation is done, you can use the migration feature to actually bring over your selected data. Resource: Overview of Data Migration Migrate data in the Staffbase Studio	<input checked="" type="checkbox"/> Knowing what data will be included and what will be excluded helps you identify any additional tasks you will have to do as part of the migration.

Action	What	Why
<input type="checkbox"/>	<p>Set Up Custom Domain (optional)</p> <p>You can set up a custom domain that is used for accessing your Studio, email tracking and allowlisting as well as hosting URL of all your uploaded media files. If you decide to use a custom domain, we recommend setting it up at the very beginning of a new Staffbase configuration as any change later has implications to existing allowlisting and SSO configurations.</p> <p>Resource: Overview of Custom Domain Configure a Custom Domain</p>	<ul style="list-style-type: none"> ✓ Maintains a consistent brand image across all Studio users and email recipients. ✓ Builds trust and engagement by providing a familiar look and feel.
<input type="checkbox"/>	<p>Set up Profile Fields</p> <p>Define and configure profile fields to map contact attributes from sources like CSV imports, Entra ID, or Workday sync. These fields store key user information (e.g., department, role, location) and help organize your contact database. Profile fields enable the creation of conditional groups for targeted communication.</p> <p>Resource: Overview of Profile Fields</p>	<ul style="list-style-type: none"> ✓ Ensures seamless data integration from HR or directory systems. ✓ Allows dynamic segmentation for more relevant and personalized messaging. ✓ Improves targeting accuracy by filtering contacts based on specific attributes.
<input type="checkbox"/>	<p>Add Your Core Admins and Email Creators</p> <p>Admins can add users to grant access to the tool. New users get an automated email from Staffbase with a temporary password and login instructions.</p> <p>Resource: Overview of User Rights and Roles in Staffbase Email User Management via CSV Files Automated User Management via</p> <ul style="list-style-type: none"> - CSV Import - User API <p><i>Note: Users and user groups can be migrated from Email Classic.</i></p>	<ul style="list-style-type: none"> ✓ Set up users and groups early to manage access to sending, drafts, templates, and metrics. We recommend adding admins or core users as soon as possible so they can get familiar with the tool.
<input type="checkbox"/>	<p>Create (manual / conditional) groups or import groups from Entra ID</p> <p>Determine necessary recipient attributes or import existing groups from Entra ID for email team.</p> <p>Resource: User Groups in Staffbase Email</p> <p><i>Note: Only non-empty static & dynamic lists will be migrated. Lists from Entra ID are excluded.</i></p>	<ul style="list-style-type: none"> ✓ Creating groups allows you to target your communications to specific audiences. "Groups" is the new name of Distributions Lists.

Action	What	Why
<input type="checkbox"/>	<p>Set Up SSO</p> <p>Establish connection to existing Identity provider for user authentication</p> <p>Resource: Onboarding with SSO Overview of SSO in the Staffbase Studio SSO Configuration Details Configure SSO in the Staffbase Studio</p>	<ul style="list-style-type: none"> ✓ Allows your users (platform senders) to use your organization's IdP SSO setup, enabling quicker, more secure access with existing credentials.
<input type="checkbox"/>	<p>Set Up Sending Domain</p> <p>Define your organization's sending domain so Staffbase can send emails on your behalf. You can review the new DNS records of the domain in the "Actions" column.</p> <p>Resource: Sending From Multiple Domains</p> <p><i>Note: Sending domains can be added to Staffbase Email with the migration feature. However, the domain verification needs to be done again (due to new DNS records generated from AWS).</i></p>	<ul style="list-style-type: none"> ✓ All sender addresses must be from verified sending domains. ✓ Business pricing: one domain ✓ Enterprise pricing: multiple domains
<input type="checkbox"/>	<p>Set Up Sender Addresses (formerly known as "Aliases")</p> <p>Staffbase Email supports multiple combinations of sender and reply-to addresses.</p> <p>Resource: Using Flexible Sender Addresses</p> <p><i>Note: Sender addresses can be added to Staffbase Email with the migration feature. However, only addresses can be added that belong to a sending domain present in Staffbase Email.</i></p>	<ul style="list-style-type: none"> ✓ If your organization can send emails from only one domain, the sender and reply-to addresses have to be from the same domain. If sending from multiple domains is available for your organization, your sender addresses can be from any of your verified domains.
<input type="checkbox"/>	<p>Set Up Allowlisting</p> <p>Allowlisting select Staffbase Email domains is required to ensure the successful delivery, tracking of emails, and avoiding spam folders.</p> <p>Resource: Allowlisting Staffbase Platform</p>	<ul style="list-style-type: none"> ✓ Allowlisting Staffbase prevents the "external sender warning" in your email client and shows Staffbase is a trusted sender. It also ensures that the tracking pixel gets automatically downloaded, which is important for tracking metrics. Please let us know if you use any security software to check for phishing like Mimecast or Proofpoint.

	Action	What	Why
<input type="checkbox"/>	Complete a test send	Send a test email to a few recipients and confirm: <ul style="list-style-type: none"> - No "external sender" warning appears - Images load automatically - Opens and clicks are tracked as expected 	✓ This helps verify if further allowlisting is needed.
<input type="checkbox"/>	Import contacts via CSV (manual or automated via API) or Entra ID	Creates the connection between your organization's directory and Staffbase. Resource: Automated contact management via CSV Import Entra ID Contacts / Attributes / Groups Sync <i>Note: Only contacts created via CSV import will be migrated to Staffbase Email. Entra ID and Workday integrations need to be set up again.</i>	✓ Importing or syncing contacts lets you build lists and segmenting data based on your directory data. Include additional attributes to create targeted groups and understand how recipients engage with your emails
<input type="checkbox"/>	Workday contact management	Create the connection between your organization's directory and Staffbase. Resource: Overview of Workday Contact Management Integration with Staffbase Email <i>Note: Only contacts created via CSV import will be migrated to Staffbase Email. Entra ID and Workday integrations need to be set up again.</i>	✓ Importing or syncing contacts lets you build lists and segmenting data based on your directory data. Include additional attributes to create targeted groups and understand how recipients engage with your emails

Phase 3

<input type="checkbox"/>	Set up Branding	Configure logos, colours, fonts, and design elements to align with your company's branding. Ensure email templates and system-generated emails reflect your organization's visual identity. Resource: Branding in Staffbase Email <i>Note: Branding settings can be migrated with the migration feature.</i>	<ul style="list-style-type: none"> ✓ Maintains a consistent brand image across all employee communications. ✓ Enhances recognition and professionalism in internal and external messaging. ✓ Builds trust and engagement by providing a familiar look and feel.
<input type="checkbox"/>	Set up Email Logo and Support Email Address	Staffbase allows you to manage the system email address and icon directly in the Studio. Resource: Customizing the System Email <i>Note: This feature is only available for email-only customers.</i>	<ul style="list-style-type: none"> ✓ Maintains a consistent email logo in all system emails. ✓ Make use of one support email address on the login page and system email footer.

	Action	What	Why
<input type="checkbox"/>	Create Email Templates	<p>Design pre-approved email templates for consistency in branding, messaging, and structure. Ensure templates align with corporate style guides and compliance requirements. You need to create a Gallery first, to be able to create a template.</p> <p>Resource: Overview of Templates</p> <p><i>Note: Email templates can be migrated with the migration feature. This will automatically create Galleries.</i></p>	<ul style="list-style-type: none"> ✓ Saves time by reducing the need to create emails from scratch. ✓ Ensures brand consistency across all employee communications. ✓ Helps standardize messaging across different teams and departments.
<input type="checkbox"/>	Uploading and preparing your File Collections	<p>Organize and upload assets (logos, images, attachments) to ensure they are ready for use in email campaigns. Structure folders for easy access.</p>	<ul style="list-style-type: none"> ✓ Speeds up email creation by having all necessary assets in place. ✓ Reduces duplication and ensures teams use the latest approved files. ✓ Enhances collaboration and efficiency across departments.
<input type="checkbox"/>	Training Admins and Editors on email design, sending and measuring email performance	<p>Conduct role-based (Folder Admins, Folder Editors) training on how to create, send, and analyze email campaigns. Teach best practices for design, audience segmentation, scheduling, and performance tracking.</p> <p><i>Note: You can find specific courses for admins and editors in Staffbase Campus.</i> Staffbase Campus Registration</p>	<ul style="list-style-type: none"> ✓ Empower teams to use the platform efficiently and maximize engagement. ✓ Ensures stakeholders can interpret analytics to optimize communication strategies. ✓ Reduces the risk of errors and improves email effectiveness.

Phase 4

<input type="checkbox"/>	Spaces (Enterprise Customers only)	<p>Spaces help organize and manage email communications for specific groups (e.g., departments, locations). Each space has dedicated admins who control emails, audience, and content.</p> <p>Resource: Spaces in Staffbase Email Rights, Permissions and Governance</p>	<ul style="list-style-type: none"> ✓ Improves targeting by segmenting communications. ✓ Gives admins autonomy while maintaining oversight. ✓ Simplifies management by applying settings at the space level. ✓ Enhances analytics for space-specific insights.
<input type="checkbox"/>	Request final review	<p>Reach out to Staffbase to request a review of your migration once all the steps include the preferred date of removing Email Classic access. You have to send an email to email-review@staffbase.com</p>	<p>To ensure the quality and integrity of your data migration before deactivating your access to Email Classic, we'll perform a review of your migration.</p>



Once you've done all the tasks, **please reach out to email-review@staffbase.com** to request a review, including the date to remove the **E-Mail Classic access**.

Thanks!