Migration Guide: Moving from Another Video Tool to coReel

General · https://coreel.ai/help/migration-guide-moving-from-another-video-tool-to-myvideo-email/

This guide helps teams transition with minimal disruption.

Step 1: Define Migration Scope

- Who is migrating (team/users)
- Which templates/scripts to keep
- Which workflows must be live on Day 1

Step 2: Set Up Core Infrastructure

1. Create/verify user accounts and roles.
2. Connect integrations (Google/Microsoft/Keap).
3. Install and test Chrome extension.
4. Confirm camera/mic permissions.

Step 3: Rebuild Essentials

- Recreate top templates in **My Emails**
- Record new videos or upload old videos in **My Videos**
- Set naming conventions for consistency

Step 4: Pilot Rollout

- Select 1–3 users for pilot
- Run internal test sends

- Validate tracking, replies, and workflow fit

Step 5: Full Rollout

- Migrate remaining users
- Train on new SOPs
- Monitor first-week KPIs (sends, views, replies)

Step 6: Decommission Old Workflow

- Freeze old templates/tools
- Update internal docs/playbooks
- Set cutover date and communicate to team

Migration Success Metrics

- Time to first send per user
- % users active in week 1
- Reply rate vs prior tool baseline
- Reduction in support issues after week 2