

How Workamajig Persuaded 100% of Their Customers to Migrate to Their New Platform

Case Study

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ESTHER COHEN,

Director of Marketing, Workamajig



Workamajig is the top ERP solution for creative teams. The all-in-one tool handles operations for over 3000 agencies, including 20% of the Fortune 500.

Highlights

Challenges

- Hard deadline approaching for end of service
- Tens of thousands of projects still active on the old platform
- Risk of thousands of clients reaching the deadline unprepared

Solution

- An email approach balancing urgency and empathy
- Strategic CTAs that gather info and drive engagement
- Email responses that capture Voice of Customer
- An adaptable tone that moves the needle
- A sequence that elicits personal responses

Results

- 100% of customers migrated on time
- 31% open rate on the first email
- 500+ personal responses

Challenges

Migrating a bustling user base to a new platform

Workamajig was thriving.

With thousands of customers and tens of thousands projects on the platform, their client base was growing by the day.

But when Adobe announced the final sunset of Flash, the large number of users who still preferred Workamajig's original Flash version posed a challenge.

Although there was a new version on HTML5—called Workamajig Platinum—a number of older customers hadn't yet made the switch.

Because of Adobe's end of service, those customers still using Flash only had a certain window to get support for the transition. Once the deadline passed, they'd be forced to migrate suddenly on their own.

Workamajig was keen to deliver outstanding support so their customers could complete the migration with ease and get back to running their businesses.

But how could they persuade so many busy agencies to invest in training time to make the switch?

Esther Cohen, Director of Marketing, led the effort to guide everyone onto Workamajig Platinum.



“The new version was safer, more secure, and more responsive. It even worked seamlessly on mobile devices.” Esther says. “But no matter how much better it was going to be, we knew that some people would just want to stick with what they knew.”

As the deadline for the Flash phase-out drew nearer, Esther was concerned to see that many customers were still regularly using the soon-to-be defunct platform.

“When you have a software like ours that’s being used across the entire business, it impacts thousands of employees. If we couldn’t get our clients transitioned, it would cause a huge disruption to their work.”

Esther’s team knew that to convince their clients to go through the hassle of migrating and ramping up on the new system, they would need to:

1. Gather information about what obstacles and objections were holding them back.
2. Address those objections and dispel unfounded fears.
3. Gently guide them into a venue where their support team could provide customized guidance and get the migration process started.

Normally, they would run extensive customer research to inform such an urgent campaign.

But with no time to coordinate dozens of interviews, hundreds of surveys, and an entire research campaign unto itself, Esther and her colleagues pulled out a rocket-powered tool in their communications arsenal.

They called a meeting with their email specialist, Samar Owais.

“Samar always helped us provide value and move people with our emails. It’s what she did for other companies all day, and she consistently produced great work for us.”



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Solution

Email strategy that solves business problems

The urgency of the campaign was a challenge for Workamajig, with their brand built on persuading readers through empathy and genuine value.

“We needed to give our clients an opportunity to become familiar with the new system and get them on board before the deadline,” Esther says.

She knew that Samar was more than ready for the task.

“Samar is very familiar with our approach. She understands the value of customer service and that comes through in every email that she writes.”

To get all of Workamajig’s clients onto Workamajig Platinum, Samar suggested an email campaign leading to a webinar.

“We wanted to encourage our users to sign up for a webinar, so we could show them what was involved in making the transition to the new platform,” Esther says.

The emails were meant to gather information about users’ obstacles and objections so they could be addressed in the webinar session.

Leveraging empathy and CTA strategy

Knowing how important it was to keep the users on her side, Samar approached the migration campaign with a soft hand and a sharp strategy.

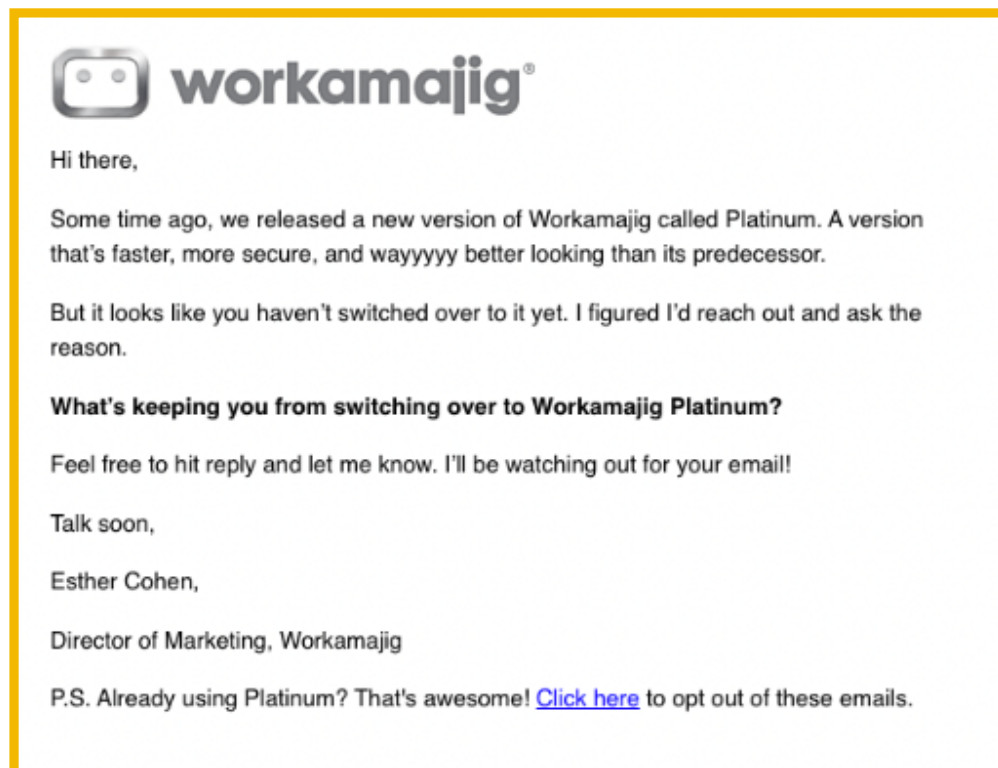
Her first step was to create a storyboard of the campaign to share the major messaging and CTA goals with Esther's team.

"Every email had a clear goal," Esther says. "We knew exactly what we'd be trying to communicate, which benefits we'd discuss, and which piece of information we'd share at each moment."

The clear communication made it easy to get on board with Samar's plan.

"The first email was a really good example of how Samar works and how we work together," Esther says. "It was short and simple, with a clear CTA and a chance to opt out of the sequence."

Samar centered the message around one question—What's keeping you from switching to Workamajig Platinum?



Her direct and friendly tone hit the bullseye with Workamajig's users.



Esther says, “It was exactly the type of tone that our users love—personal, direct, and clearly communicating what we’re trying to say. That first email asked a very specific question, and we got over 500 personal responses.”

Hundreds of subscribers wrote back to share their objections and pain points.

“That email opened the door for us to give all of our users the support they needed,” she says.

A responsive tone that moves the needle

In addition to the basic content, Samar’s strategy also showed how she would get clients to make the switch without feeling pressured or coerced.

Esther says, “She designed a progression in the tone. Early on in the sequence, it was softer. And by the end, for people who were still holding out, it communicated more urgently.”

Because the end of service was coming from Adobe, Workamajig had no choice about phasing out Flash. They were eager to help everyone switch smoothly before it was too late.

“Samar helped us express the urgency while maintaining our helpful intent,” Esther adds.

Unheard of engagement levels

The first email’s flood of replies was on track with the level of engagement the sequence received.

With open rates from 23-31%, it was clear that the messages were speaking to exactly what was on user’s minds about the upcoming transition.

“We got a lot of responses throughout that campaign that were addressed on a personal level,” Esther says.

She notes that personal replies are the norm with all the emails that Samar writes for Workamajig, whether they’re for double opt-in, onboarding, or just blog post sharing.

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“With Samar’s emails, people feel like they’re talking to a real person, and they respond in a personal way. Even in the webinar sequence, you could tell they were building a relationship with our company and with the individuals on our team.”

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Results

100% of users migrated on time

With a single email sequence, Samar helped Workamajig engage even the staunchest holdouts and make sure no one got left behind after the Flash phase-out.

“Using that campaign, we were able to get people to join the webinar and engage with support to make the move. It did a really good job,” she says.

Esther was delighted with the outcome, but not at all surprised.

She says, “Samar spends a lot of time getting to know our clients. She’s able to then jump in and come up with a really good strategy to help us accomplish our goals.”

With open rates from 23-31%, Esther credits the webinar sequence with maintaining customer satisfaction through the challenging transition.

“It was phenomenal,” Esther says. “The biggest benefit was that we were able to accomplish that migration without any frustrated customers. Everyone knew what was coming down the line, and their responses gave us clarity so that our support team could jump in and help.”

With over 500 personal responses to the first email alone, it’s clear that Workamajig’s users loved Samar’s approach as much as the marketing team did.

Esther’s words for other marketers looking for an email specialist?

“The real benefit you’re going to get with Samar is the strategy and thought that goes into every email. It’s a complete focus on details and a level of expertise that you’re not going to get with other partners.”



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