

The Platform Switching Kit

Move your digital product store without losing your customers.

1 Export everything first

Before you announce, unpublish, or cancel anything.

- ☐ **Sales history CSV** - buyer emails, orders, amounts, dates. Your most valuable file.
- ☐ **Audience / followers export** - people who follow you but haven't bought yet.
- ☐ **Product descriptions + settings** - copy each listing's text and pricing somewhere safe.
- ☐ **Your product files** - download anything you don't have a local source copy of.
- ☐ **Payout + tax records** - you'll need these at filing time no matter where you sell.

Data you export today is yours forever. Keep the old store fully live while you do this.

2 Choose your destination

Two questions most comparisons skip.

- ☐ **Who owns the payment relationship?** Your own Stripe/PayPal account means subscribers follow you next time.
- ☐ **Can it import your CSV?** Some platforms rebuild your customer list from the export; others start you at zero.
- ☐ **Run your real numbers** - fees at YOUR price and volume: surcopay.com/tools/fee-calculator

3 Rebuild your catalog

- ☐ **Best sellers first** - migrate the products that drive revenue, backfill the rest later.
- ☐ **Reuse descriptions that already convert** - paste, don't rewrite from scratch.
- ☐ **Re-upload files from source copies** - no platform exports the actual bytes.
- ☐ **Sanity-check prices against the new fee model** - a fee change is a pricing moment.

4 Move your customer list

- ☐ **Import the sales CSV** into the new platform (or your email tool if it can't).
- ☐ **Put emails in a tool you control** - your buyer list should never live only inside a sales platform.
- ☐ **Follow email basics** - identify yourself, include unsubscribe, honor opt-outs.

5 Flip every link that points at the old store

Old links left standing quietly send buyers to the store you left.

- ☐ **Bio links** - Instagram, TikTok, X, and every other profile.
- ☐ **Link-in-bio pages** - Linktree, Beacons, your own landing page.
- ☐ **Pinned posts + story highlights**
- ☐ **YouTube descriptions** - start with your most-viewed videos.
- ☐ **Your website / blog** - buttons, banners, embedded checkouts.
- ☐ **Email signatures, templates, automations**
- ☐ **Podcast notes, communities, Discord** - anywhere you ever dropped a product link.

6 Run the subscriber campaign

Subscriptions cannot be transferred - by anyone. Their card lives with the old platform.

- ☐ **Set up equivalent tiers first** - same price, same benefits, so the ask is "move", not "re-evaluate".
- ☐ **Email every active subscriber** - short: where, why, one link, one action.
- ☐ **Give a reason to act now** - discount, bonus, or grandfathered pricing with a deadline.
- ☐ **Send at least 3 emails** - launch, reminder, final week.
- ☐ **Expect some churn** - price it in; migrate before the list gets bigger.

7 Wind down

- ☐ **Announce everywhere** - frame around what buyers get, not platform grievances.
- ☐ **Run both stores in parallel** for a few weeks to catch stragglers.
- ☐ **Decide what happens to past buyers' downloads** BEFORE closing the old account.
- ☐ **Archive your records** - old-platform sales still count toward your income and taxes.

Rough timing

Week 0

Export +
pick platform

Week 1

Rebuild +
import customers

Week 2

Flip your
links

Weeks 2-5

Subscriber
campaign

Weeks 2-6

Parallel running,
wind down