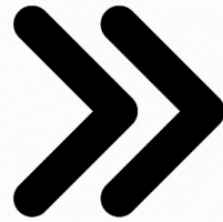


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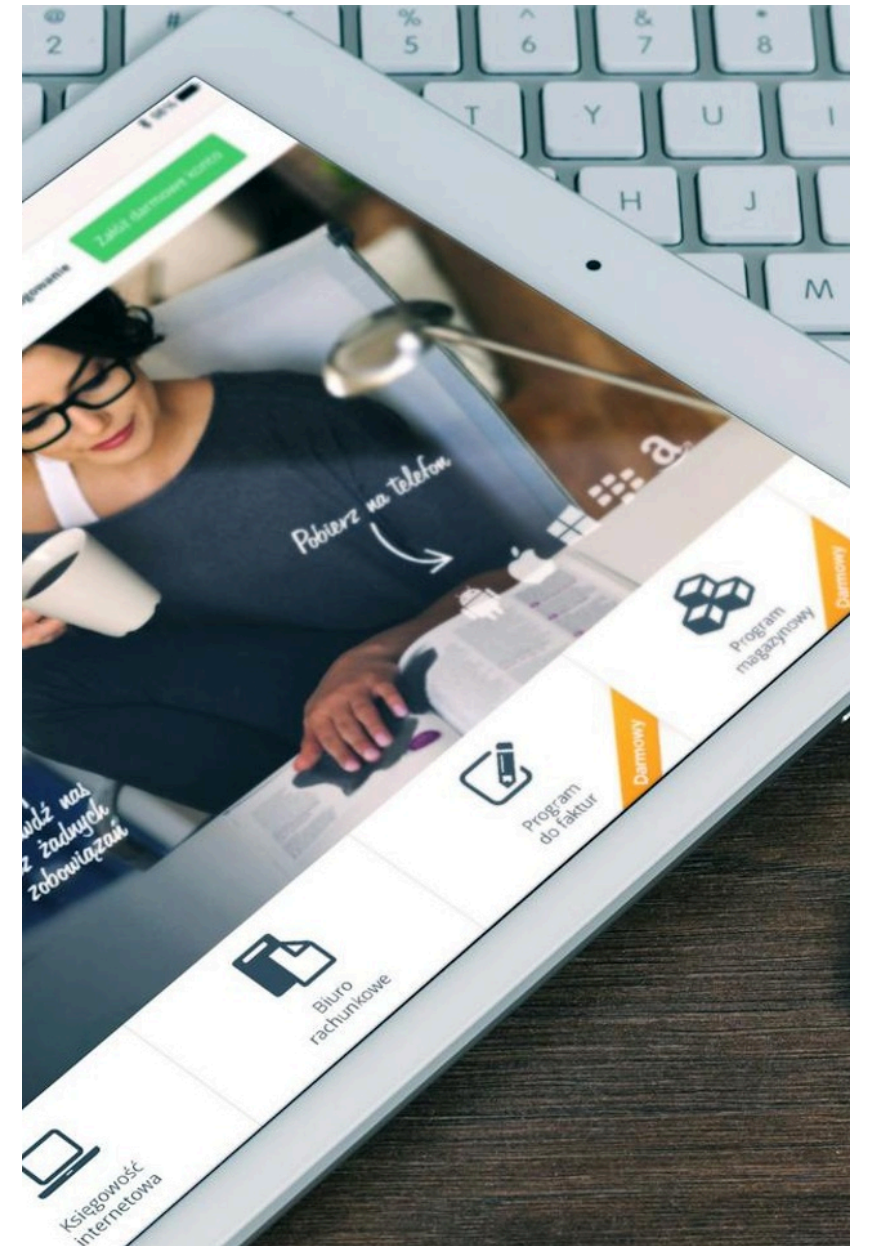
HubSpot

Microsoft Dynamics to HubSpot Migration Guide

Provide your team with a highly customizable, easy-to-use CRM by migrating from Microsoft Dynamics 365 to HubSpot.

Give your team a highly customisable, easy to use CRM

Migrate from your outdated Microsoft Dynamics 365 CRM to the highly customizable and easy-to-use HubSpot CRM. Our experts will work with you to seamlessly transition your contacts, data, and automations, ensuring a smooth migration process that maximizes productivity and user satisfaction.



Stage One: Needs assessment



Understand your CRM data

We'll work closely with your team to identify the key data that needs to be migrated from your Microsoft Dynamics 365 CRM. This includes contacts, leads, accounts, opportunities, and any custom objects you have.

Determine migration scope

We'll discuss which data elements are critical to your business operations and need to be preserved during the migration. This could include activity history, timeline data, and existing automations.

Align expectations

By thoroughly understanding your specific needs, we can ensure our migration plan meets your requirements and set appropriate timelines and budgets before the project begins.

Stage Two: Dynamics audit

Assess Implementation

Examine your Dynamics portal for any non-standard implementations that may require updates to our software or processes.

Review Automations

Analyze your existing automations to identify how they can be adapted to achieve the same results in HubSpot.

Identify Data Needs

Determine the data that should be included in the migration, such as contacts, leads, accounts, opportunities, and custom objects.

Determine Timeline Data

Assess whether activity and timeline data need to be migrated as part of the transition.

Preserve Existing Workflows

Identify which existing automations and workflows should be preserved during the migration to HubSpot.

Stage Three: Plan

● Milestone 1

Document the migration plan based on the Dynamics audit and your requirements

● Milestone 3

Finalize the migration plan timeline to avoid any business interruptions

● Milestone 2

Review the migration plan with you and incorporate any necessary changes or adaptations

● Milestone 4

Obtain your approval on the migration plan before proceeding to the next stage

Stage Four: Migrate

- **Conduct Migration**

We'll execute the migration plan we've outlined, seamlessly transitioning your data and configurations from Microsoft Dynamics 365 to HubSpot.

- **Quality Assurance**

Our team will thoroughly quality assure the migration, using specialized software to detect and correct any errors or issues that may have occurred during the transition.

- **Review Success**

Once the migration is complete, we'll schedule a video call to walk you through the success of the project and ensure you're fully satisfied with the outcome.

Preserve your timeline/activity data



Move your contacts

Seamlessly transfer all your existing contacts from Microsoft Dynamics 365 to HubSpot, preserving the data you've already collected.



Configure ongoing synchronization

Optionally, set up a continuous sync between your Dynamics database and HubSpot to keep your data up-to-date across both platforms.



Preserve timeline and activity data

Ensure your historical records, such as interaction timelines and activity logs, are securely migrated from Dynamics to HubSpot.

By preserving your contacts, activity data, and enabling ongoing synchronization, your team can seamlessly transition to a highly customizable and easy-to-use HubSpot CRM.

Migrate all your existing automations

