

Migrating from Salesforce to HubSpot

A step-by-step guide to successfully migrate your business from Salesforce to the HubSpot platform

Introduction



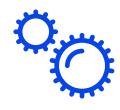
Data Volume

The amount of data you have in Salesforce will affect the complexity and timeline of the migration process.



Customization

The level of customization and integrations in your Salesforce instance will impact the effort required to migrate to HubSpot.



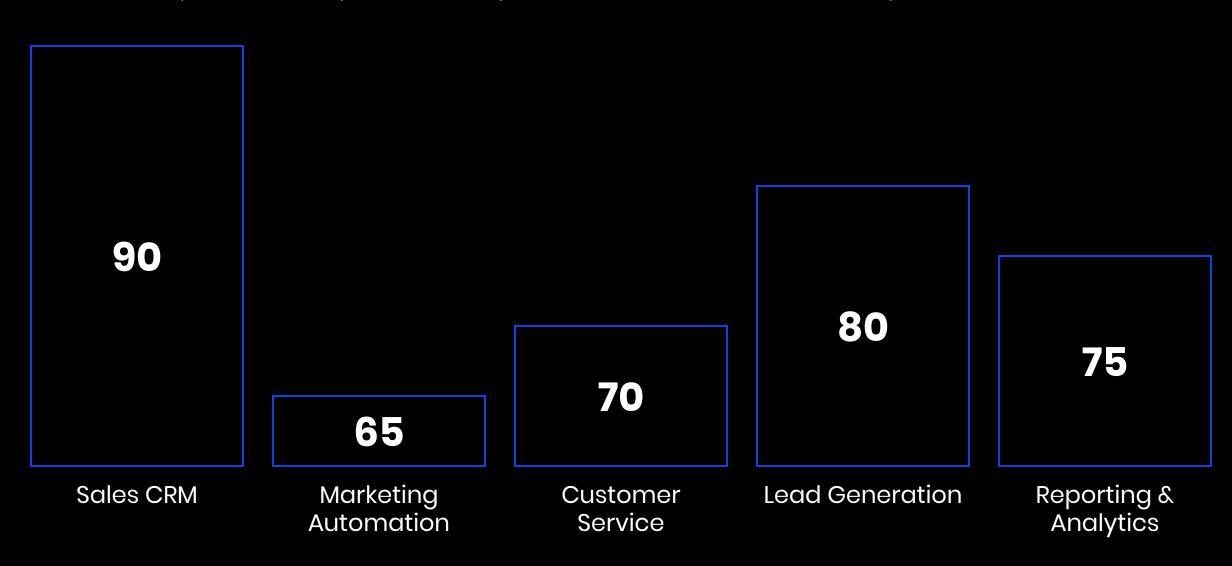
Resources

The availability of internal resources or the need to work with an experienced consultant will influence the migration timeline.

By considering these key factors, you can plan and execute a successful migration from Salesforce to HubSpot, ensuring a smooth transition for your organization.

Salesforce vs. HubSpot

Comparison of key functionality between Salesforce and HubSpot (scale of 0-100)



Account Setup

Default Permissions and Notifications

Security Settings Custom Objects Deal and Ticket Pipelines Deal and Lifecycle Stages

Set up default user and team permissions, as well as notification preferences for your HubSpot account. Configure security features like single sign-on and twofactor authentication to protect your HubSpot account. Create any custom objects you need to bring over from Salesforce to ensure your data maps correctly in HubSpot.

Set up your deal and ticket management pipelines in HubSpot to match your existing sales and service workflows. Configure your deal and customer lifecycle stages in HubSpot to align with your sales and customer success processes.

Asset Migration

Users

Ensure all your users have access to HubSpot and have the appropriate permissions set up. Map your Salesforce user permissions to the corresponding HubSpot roles.

Properties

Map your Salesforce properties to the corresponding HubSpot properties. Utilize default HubSpot properties where possible to avoid creating duplicative custom properties.

Lists

Recreate your Salesforce views and queues in HubSpot as lists, both static and active, to organize and segment your contacts and companies.

Automations

Migrate your Salesforce flows to HubSpot workflows to ensure your lead nurturing, assignment, and follow-up sequences continue to function correctly. Utilize HubSpot's Operations Hub Pro if you have complex customized flows or Apex triggers.

Reports

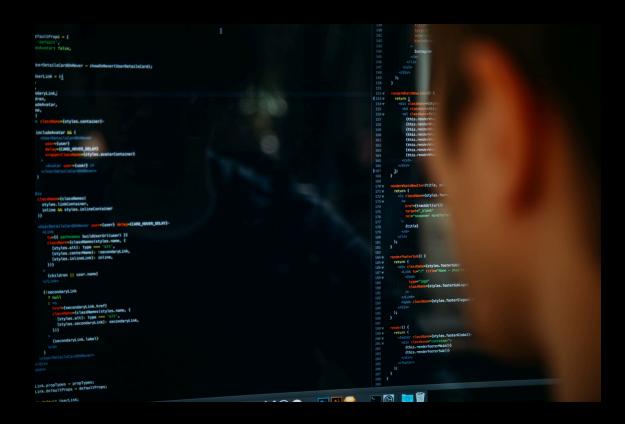
Recreate your Salesforce reports in HubSpot's reporting system, and use third-party data platforms like Databox for reports that cannot be directly migrated.

Campaigns

Map your Salesforce campaign structure to HubSpot's campaign system, which focuses on gathering and reporting on related marketing assets like landing pages, emails, forms, and workflows.

Email Templates and Sequences

Recreate your Salesforce email templates and sequences in HubSpot, as the two platforms have similar email marketing functionality.



Data Migration

When migrating from Salesforce to HubSpot, you'll need to transfer your contact, company, and opportunity data. This can be done via integration or manual export. Integration options like the HubSpot Salesforce integration provide a bi-directional sync, while manual export involves exporting data from Salesforce in CSV format and importing it into HubSpot.

QA Process

Test Workflow Automation

Validate Lead Scoring Setup

Evaluate Email Sequences

Verify Data Mapping

Going Live with HubSpot

Timing

Choose a time to make the cutover when it will have the least impact on your business, such as during a slow period or on a weekend.

Communication

Communicate with your team members and stakeholders about the cutover and what to expect. Ensure everyone is aware of the changes and has the information they need to continue working effectively.

Training

Provide training to your team members on how to use HubSpot effectively. This will help them get up to speed quickly and ensure they can continue working effectively after the cutover.

Data Backup

Make sure to backup your Salesforce data before making the cutover. This will ensure that you have a copy of your data in case anything goes wrong.

Post-Cutover Testing

Continue to monitor automations and other processes after the transition. Even the best QA process can't account for every circumstance that may arise. This will help you identify any issues that you may have missed.

"By following these steps, you can migrate from Salesforce to HubSpot with confidence and set your organization up for success."

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