



# Migrating from Salesforce to HubSpot

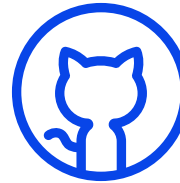
A step-by-step guide to successfully migrate your business from Salesforce to the HubSpot platform

# Introduction



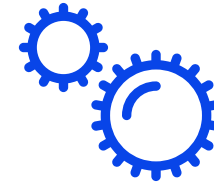
## Data Volume

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.



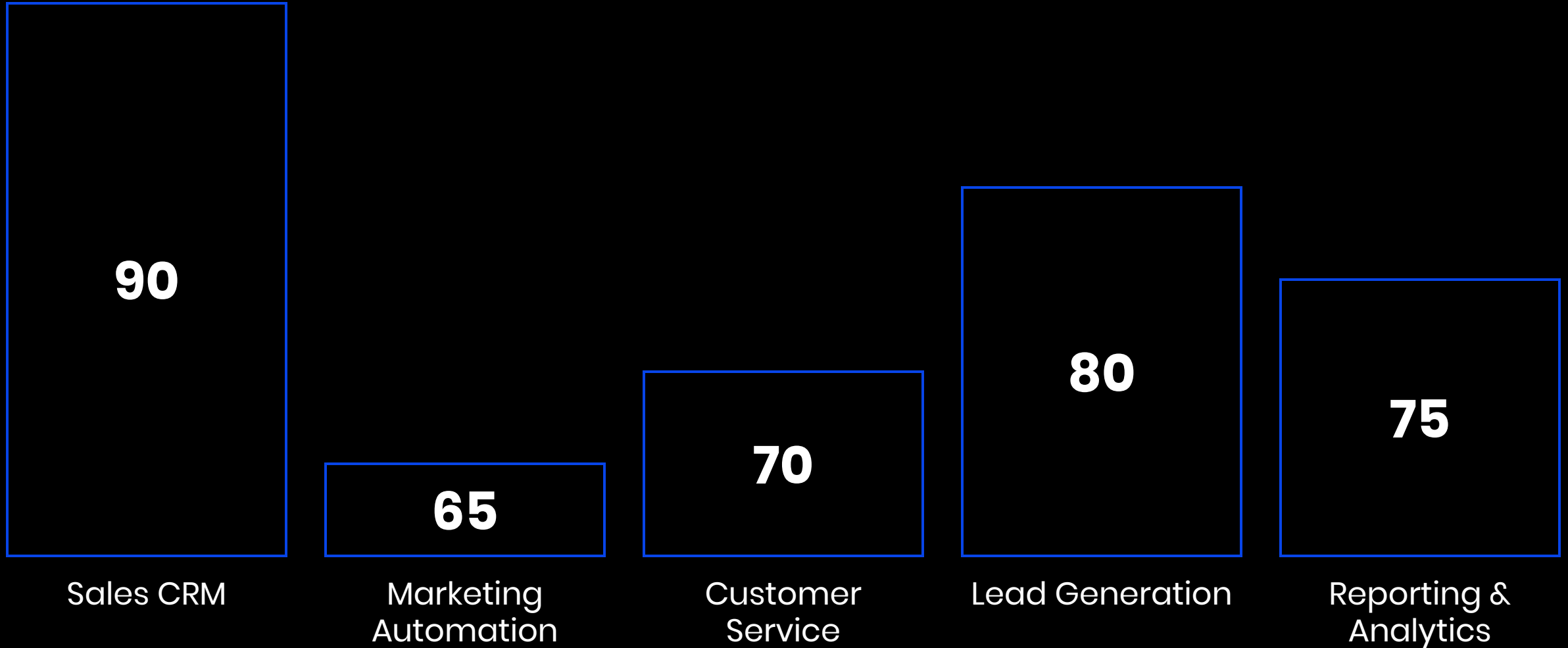
## Resources

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

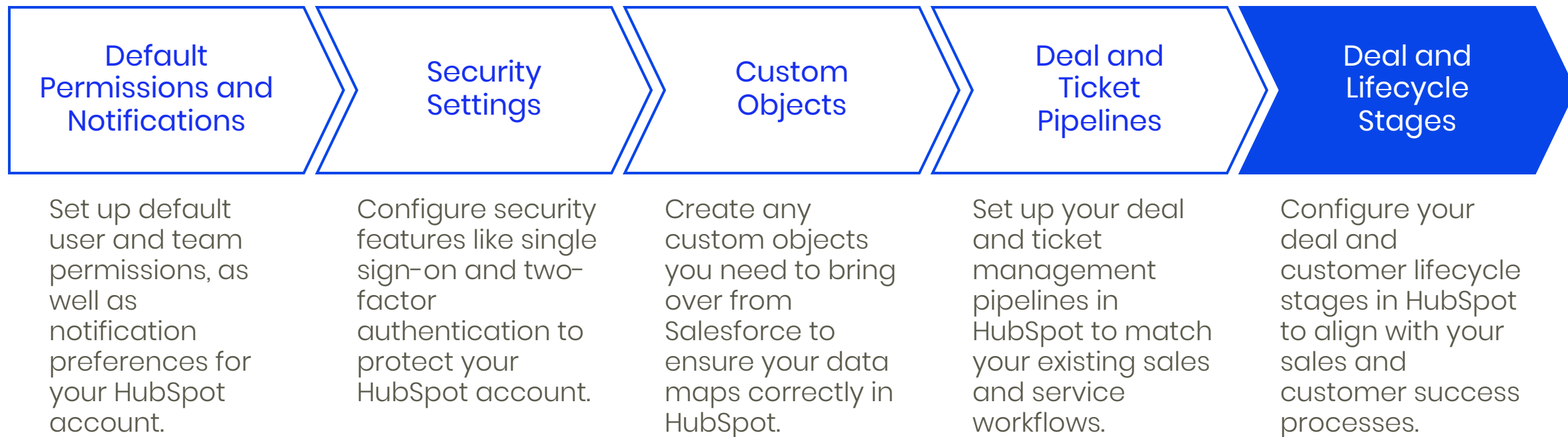
By considering these key factors, you can plan and execute a successful migration from Salesforce to HubSpot, ensuring a smooth transition for your organization.

# Salesforce vs. HubSpot

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



# Account Setup



# 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.




# 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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