

Set   
Close

pipedrive



HubSpot

# Pipedrive to HubSpot Migration Guide

This guide provides an overview of the key steps involved in migrating from Pipedrive to HubSpot CRM platform.

# Step 1: Evaluate your data

- **Customer and contact data**

Identify all the customer and contact records that need to be migrated from Pipedrive to HubSpot.

- **Deals**

Determine which deals in Pipedrive need to be transferred to the new HubSpot CRM.

- **Notes**

Evaluate any notes or comments associated with customer, contact or deal records that should be migrated.

- **Tasks**

Identify any tasks or activities related to contacts, deals or other records that need to be transferred.

- **Custom fields**

Review any custom fields or data you've created in Pipedrive and determine if they need to be migrated to HubSpot.

# Step 2: Map your data

## Identify Corresponding Fields

Evaluate the data fields in Pipedrive and map them to the corresponding fields in HubSpot. For example, map the 'Phone Number' field in Pipedrive to the 'Phone Number' field in HubSpot.

## Use Mapping Tools

Leverage tools like Import2 Wizard or Datadeck to automate the mapping process. These tools will help ensure the data fields are mapped correctly between the two platforms.

# Step 3: Export your data from Pipedrive

- **Go to Pipedrive Settings**

Navigate to the 'Settings' menu in your Pipedrive account.

- **Select 'Export data'**

From the Settings menu, choose the 'Export data' option.

- **Choose data to export**

Select the specific data you want to export, such as contacts, deals, notes, and any other relevant information.

- **Choose file format**

Decide on the file format you want to export your data in, either CSV or Excel.

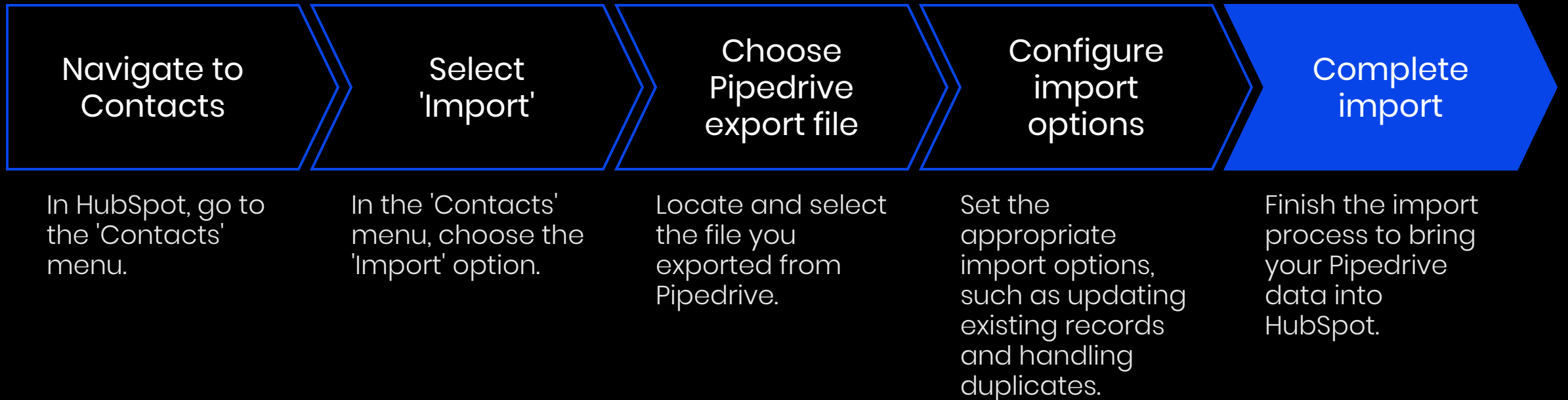
- **Export the data**

Once you've made your selections, proceed to export the data from Pipedrive.

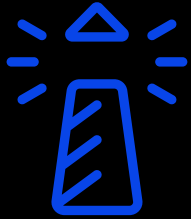
- **Verify exported data**

Check the exported file to ensure that all the data has been exported correctly.

# Step 4: Import your data into HubSpot



# Step 5: Clean up your data



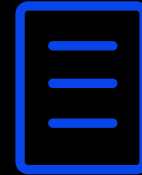
## Identify duplicate contacts, companies, and deals

Review your data to find any duplicate records and merge them to ensure you have a single, accurate version of each entity.



## Fill in missing data fields

Scan your records for any incomplete information and update the relevant fields to ensure your data is complete.



## Verify data accuracy

Double-check that all transferred data is correct and up-to-date, correcting any errors or inconsistencies.

Cleaning up your data before the migration will ensure a smooth transition to HubSpot and provide a solid foundation for your future marketing and sales efforts.

# Step 6: Set up your integrations



Identify Integrations

Review the integrations you were using with Pipedrive, such as email marketing tools or accounting software.

Set up Integrations in HubSpot

Reconnect those same integrations in HubSpot by checking the HubSpot App Marketplace or contacting your integration providers.

Explore New Integrations

Consider adding new custom-coded integrations to enhance your HubSpot workflow and connect other business tools.

# Step 7: Train your team



## Provide training materials

Create training guides, video tutorials, and other resources to help your team learn how to use HubSpot effectively.



## Encourage hands-on practice

Give your team time to explore HubSpot on their own and practice using the various tools and features.



## Conduct training sessions

Schedule in-person or virtual training sessions to walk your team through the key features and functionalities of HubSpot.



## Provide ongoing support

Designate a HubSpot champion or point of contact to assist your team with any questions or issues they encounter.

By providing comprehensive training and ongoing support, you can ensure your team is using HubSpot correctly and efficiently, and ultimately get the most value from the platform.



# Why migrate from Pipedrive to HubSpot?

HubSpot offers a more comprehensive suite of tools for managing the entire customer journey, including marketing, sales, operations, and customer service. In comparison, Pipedrive is primarily focused on customer relationship management and has limitations in these other areas.

