How to migrate from Salesforce to HubSpot

Creating the foundation for a successful CRM migration

Growth within your organisation is exciting! It demonstrates the hard work that your team has put in and showcases the value you provide to your customers.

However, as your business grows, your tools and technologies must evolve with it. One option that every company should consider is upgrading their current CRM system. By migrating your current system to a robust platform like HubSpot, you'll notice that your sales, service, and marketing teams are all better aligned.

This instructional guide was created to provide you with a plan for migrating your current Salesforce system to the HubSpot platform. Along with a comprehensive playbook on successfully migrating, you'll also learn the best way to keep your teams and projects operating efficiently throughout the entire process.

What's Inside?

INTRODUCTION

THE 3 STEPS TO SYSTEM MIGRATION

CONCLUSION

INTRODUCTION

Bridging the gap between sales, marketing, and service

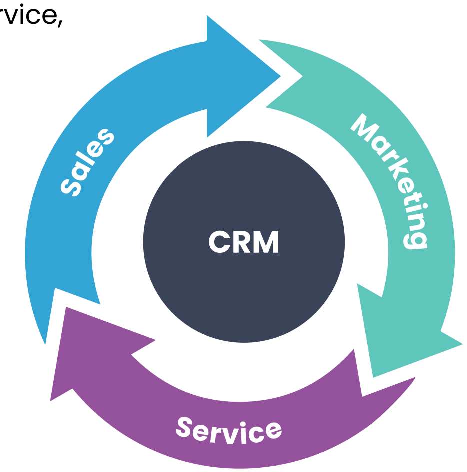
Even with the rise in omnichannel technologies, over 50% of customers feel a noticeable gap between the buying experience and their needs. While most contribute the gap to the age-old battle between sales and marketing teams, the truth is that many companies are naturally created with gaps based on the technology they use.

56% of customers feel a noticeable gap between the buying experience and their needs.

Most sales, marketing, and service teams have tools and platforms they prefer to use to complete their jobs. However, it can be difficult to collaborate across platforms in most instances.

This lack of collaboration is often the culprit for gaps occurring and can lead to a disconnect in the buyer's journey or, worse, the loss of customer data and conversion opportunities. This leads to time and money lost tracking down data or waiting for IT to dive in and fix it.

With HubSpot's CRM system, all three of your teams: sales, marketing, and service, can seamlessly operate within one platform.Collaboration amongst coworkers is easy, without having to plug any foreign softwares into it.



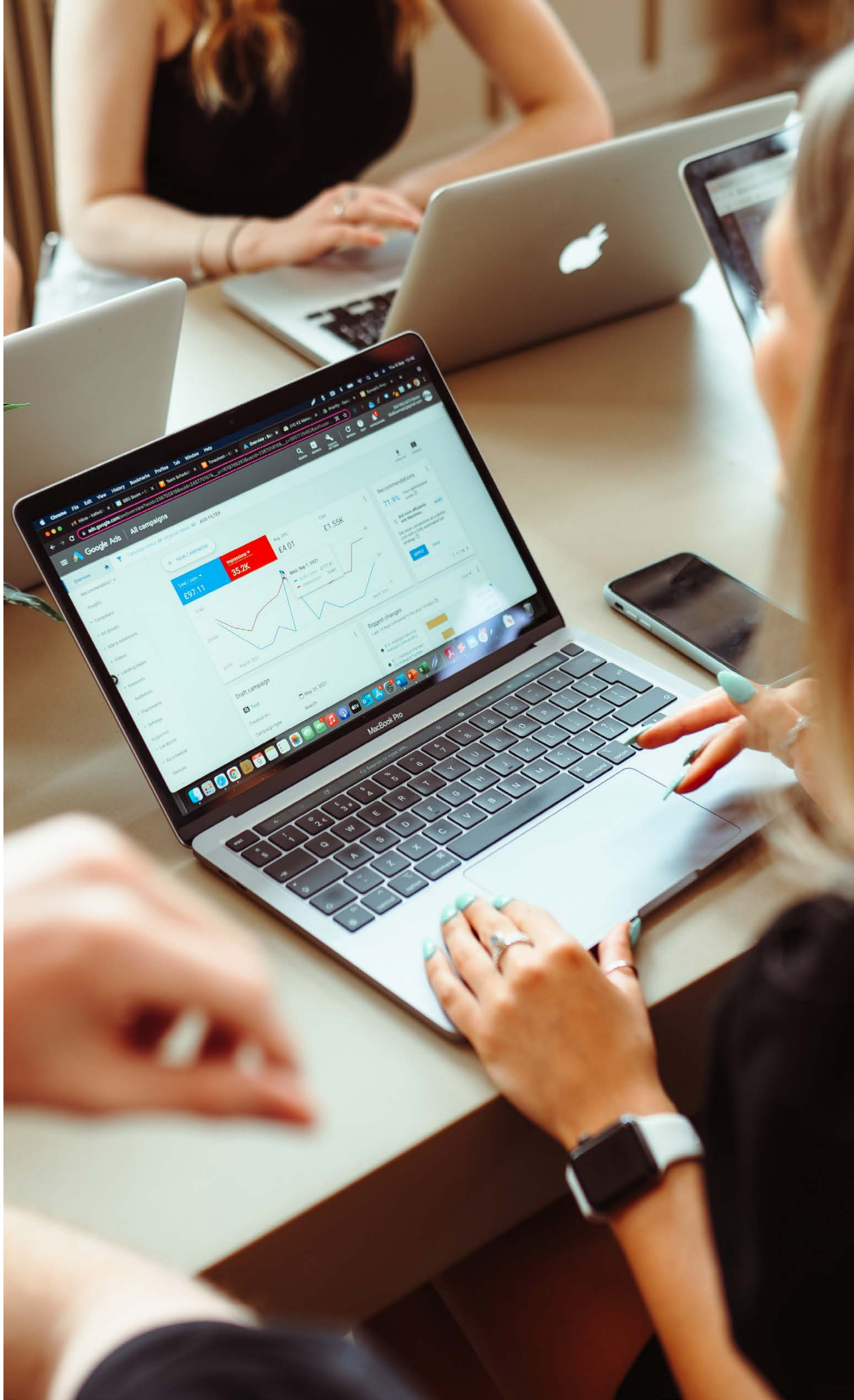
INTRODUCTION

The power of a single solution platform

As you review whether HubSpot's CRM system makes sense for your organisation, it's essential to consider your current business operations. Does your team currently face any of the following situations?

1. Your company currently utilises HubSpot to generate leads, but uses Salesforce to manage them
2. Your Salesforce reliance has grown too large or complicated to manage internally
3. You've lost a vital member of the team who was responsible for managing your Salesforce platform
4. Your organisation doesn't have a central location where customer data, reports, and record activity are stored or managed

If any of the situations above sound familiar, you're not alone. Many businesses that start out using Salesforce face issues similar to these.



Whether you're running into issues with managing the platform or simply want your sales, marketing, and service teams to collaborate, migrating to HubSpot's CRM can benefit your entire organisation.

With HubSpot, all of your teams have access to powerful features that will enable them to create an enjoyable customer experience. Sales and marketing teams can now work together on the same platform and reach out to prospects without the need for time-consuming, manual processes or help from the IT team.

The power of integrating your teams into a single platform doesn't just stop at the buying journey. Having a platform that combines sales, marketing, and service can also help increase customer lifetime value and reduce overhead costs.

INTRODUCTION

Understanding Salesforce and HubSpot terminology

Migrating to HubSpot from Salesforce doesn't just affect your processes; it affects how you talk to your CRM system and how it talks to you. Here's a helpful chart to share with your team that will help you understand the different terminology used by each platform:

Salesforce stores contact information in two ways:

- **Lead Objects** - represents users with no purchase history
- **Contact Objects** - represents contacts associated with an account or those with a purchase history

HubSpot utilises one consolidated silo **(Contact object)** to manage every user saved in your CRM

The **Opportunity object** is where information about any account in the sales cycle is stored in Salesforce	HubSpot utilises **Deal object** in the same manner
Organisations saved in your CRM are classified as an **Account object**	HubSpot refers to these organisations as **Company objects**
Fields are used to hold a piece of information about an object, such as name, currency, or location	HubSpot uses the term **Properties** to refer to the same defining information
A single marketing activity within Salesforce is considered a **Campaign**, regardless of whether it is an advertisement, conference, or direct mail	**Campaigns** consist of many marketing activities. For instance, a campaign would allow your team to tag content and related marketing assets to help track the effectiveness of an overall marketing campaign

The 3 steps to system migration

STEP 1

Before Migration

Even though it can be hard to hold back your excitement — starting the integration process without properly evaluating your current systems can be disastrous. That's why we begin the migration process with a preparation phase.

During the first step of your system migration, we focus on creating an in-depth roadmap to assist your team through the entire migration process.

Let's look at what you should do before we begin switching over to HubSpot.

STEP 1

Recreating data in your new CRM system

To give your team the best chance at a successful migration, you'll want to identify which assets you want to pass over from Salesforce to HubSpot. The easiest way to do this is by evaluating which assets you're currently using and which features you plan to use once your company is up and running on HubSpot.

A few places you may want to start are with items such as templates, contracts, or any custom fields you've created in your current CRM system. Having these items available in your new platform will help make the transition easier for your team. Condensing the list of items to transfer can also help streamline your new processes.

Once you've identified the list of items and assets you plan to reproduce in HubSpot, it's time to decide the best way to transfer the data between the two systems.

Generally, there are two options for reproducing your Salesforce data in HubSpot — Migration and Translation.

Migration:

Some features and capabilities match perfectly between Salesforce and HubSpot. You won't need to worry about modifying your data for these assets. Instead, the information will just carry over to the new platform.

Below are a few of these assets:

- Landing pages
- Emails
- Forms

Translation:

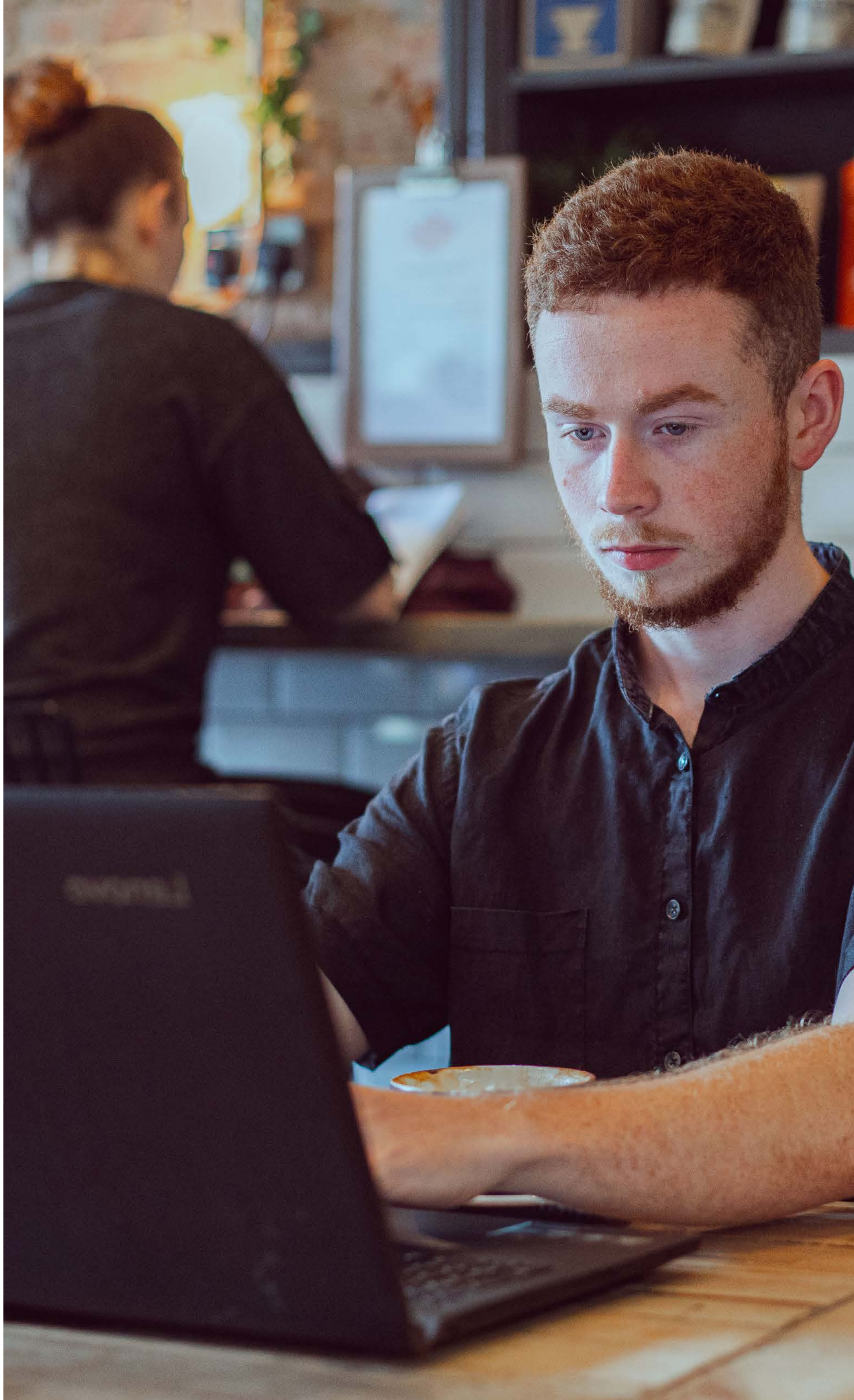
Since HubSpot combines multiple functions into a single platform, not everything maps perfectly from Salesforce to HubSpot. If there isn't a migration available, your team will need to manually recreate the information in HubSpot.

Here are a few areas where this often happens:

- Automations
- Workflows
- Lists
- Reports

After you have identified which assets you can migrate and which ones will need to be translated, it's time to start preparing for the actual migration of systems. Here are a few tips you'll want to keep in mind while prepping for the move:

- Create a spreadsheet to categorise and catalogue your assets
- Begin data mapping early on in the process
- Compile a list of any custom properties you currently have in Salesforce that will need to be moved over to HubSpot
- Establish a list of new properties you want to include in your new CRM system
- Double-check your spreadsheets and list to ensure you haven't forgotten anything



STEP 1

Ensure your data is clean

It happens with every CRM system — data becomes outdated, inaccurate, or incomplete. As you're planning to migrate from Salesforce to HubSpot, it's essential to scrub the data to ensure that your new system isn't full of unusable information.

One of the easiest ways to quickly audit the current information in Salesforce is to ask yourself whether the data falls into any of the following categories:

- Incomplete contacts
- Inactive customers
- Outdated notes, activities, and communications
- Duplicate customer records
- Repetitive notes and activities

If the data can be classified as one of the categories above, you should consider updating it or removing it from the list before migration.

STEP 1

Create backups

One of the most important parts of preparing for migration is to ensure you have created a backup of your information. While instances of data loss during the migration process are rare, they can still happen. Often, information such as timestamps or manually created notes tend to get lost when moving from Salesforce to HubSpot.

Creating a system-wide backup of all your information can be a great way to ensure you will have access to data if something were to happen.

You can use a standard CSV export to pull data from Salesforce, or set up an API or integration to back your data up outside of Salesforce and ensure nothing gets lost.

STEP 1

Laying the groundwork

Now that we have walked through the critical components of the first step in the migration process, it's time to lay the groundwork for your CRM transition by creating a plan. This comprehensive migration playbook will help your team understand their roles in making the migration process a success.

Your migration playbook will consist of four crucial components. These elements include:

1. **Team accountability**
   Giving assignments out to individuals or teams for each part of the migration process will help cut down on potential delays that result from accountability uncertainty.

2. **Set key milestones**
   Without the appropriate milestones and deadlines, there is no way of knowing how the migration process is coming along. The easiest way to set dates for your milestones is to review team bandwidth and the estimated length of time to completion. With this information, you can begin building out a timeline.

Here are a few milestones you should consider adding to your timeline:

- Finalise asset mapping
- Execute first import
- Complete all data migration
- Finish quality analysis and testing
- Perform staff training on the new CRM system

3 **Establish a timeline**

After you've settled on your milestones, your team should work to create a realistic timeline. Building a comprehensive timeline around your milestones will help you avoid delays by identifying potential bottleneck scenarios. Often using both short and long-term goals can be a great way to judge if a project is set to finish on time.

4 **Share playbook within the organisation**

When you feel like the migration plan is in a good place and has been finalised, it's important to share the process with everyone in the organisation. This will allow people throughout the company time to prepare for the changes that come with a new CRM system. Reassuring everyone that training will be available is also a great way to comfort those nervous about a new system.

STEP 2

The Migration

The second step in the system migration process revolves around the ability to execute the plans and strategies you put in place during the preparation phase. Throughout this phase, you'll cover what needs to be done, from technical configurations in HubSpot to the actual transferring of data between the two systems. In the end, you'll see the importance of QA, testing, and training.

STEP 2

Setting up your HubSpot platform

Whether HubSpot is your company's first CRM system or you're transitioning over from Salesforce, you'll want to ensure you set up the proper configurations to meet organisational goals and data requirements.

Depending on how the data in your business is set up, you might be able to do a simple 1:1 integration between the two platforms. Migrating data is much easier and allows you to migrate fields to properties directly.

However, if you notice that your data requires several complex translations, it could be good to look into custom integrations. This would allow you to automate some data transfer and streamline the process immensely.

As a helpful guide, you and your team will want to work through the following items during this step:

1. **Migrate fields and transfer assets**

   Remember the spreadsheet we worked on creating during the first step of the migration process? This is where it will come in handy. Utilising the sheet, you can begin to define and create custom properties in your new HubSpot CRM system. The transferring process for field-to-mapping is relatively straightforward for items such as name or company.

   However, items such as templates, landing pages, and deal pipelines will need to be reproduced by your team in the HubSpot platform.

2 Create operational workflows

After you have all of the properties and assets configured in the new platform, it's time to start working on creating operational workflows. One of the benefits of using HubSpot is the ability to interject automation into your current workflows. Most teams choose to start with automating routine tasks such as notifications, record updates, and contact engagements.

3 Create custom timeline objects

One unique feature of the HubSpot CRM platform is the ability to create timeline events that help to segment your contacts based on interaction activity. For instance, if you have a lead gen form that has a downloadable component, you can track how many people actually download the content after filling out the form.

STEP 2

The migration of your data

Now that we have done all the necessary prep work, it's time to move into the actual migration of data. When transferring information from Salesforce to HubSpot, there are several processes you might need to use. Odds are you'll need to utilise a couple of these strategies to ensure all of your data is migrated correctly.

Let's look at a few of these techniques:

- **Using a CSV to import information**
  Out of the three transfer options, this tends to be the easiest. Salesforce can export data to a .csv, which can be uploaded into HubSpot. This is a great way to import crucial data such as company names, products, deals, tickets, notes, and contacts.

- **Take advantage of the natural integration of Salesforce and HubSpot**
  Since it's common for companies to switch from Salesforce to HubSpot as they grow, the two companies have designed their platforms to easily integrate. Leveraging the natural integration will make it easy to transfer your Salesforce field data into the correct properties in HubSpot.

- **Reproduce hard to transfer assets**
  As we mentioned before, not everything in your current Salesforce CRM system will transfer perfectly to HubSpot. Utilising the custom properties you created during the configuration stage will help you recreate any of the assets that won't naturally migrate over.

- **Selecting the best option to use**
  While it would be nice to utilise one of the processes above and migrate all of your data, the truth is that it often takes all three to ensure all of your data is transferred correctly.

  The CSV method is the best place to start if you plan to utilise custom mapping and associations. This approach will allow you to pull different types of records and information from your current CRM. However, it does require quite a bit of technical configuration to execute.

  The natural integration approach should work perfectly if your organisation only needs to support standard or pre-existing mappings. Since an enormous amount of data needs to be transferred, it's best practice to migrate in phases. First, start with a small subset of data and test how the migration goes.

  Once you're happy with the results, you can transfer the rest of your data to the new CRM system.

- **Utilising APIs to migrate custom objects**
  Even though the natural integration between Salesforce and HubSpot enables you to transfer most data types, it doesn't account for everything. When migrating custom objects and unique datasets, you'll want to sync the data between the two platforms with an API.

STEP 2

The importance of quality assurance

After most of the data has been moved over to HubSpot, you should schedule a time to perform an audit to review that data is showing up correctly in your new CRM system. As you're evaluating the data, make sure to ask yourself the following questions:

- Are there any missing contact records or properties that didn't come over during the migration?
- Does your CRM data look organised and complete?
- Does the new formatting of the data appear correct?
- Does all the data in HubSpot look consistent and align with other subsets of data?
- Are your team members able to easily locate data based on the structure of your CRM and associated properties?
- Are there reliable ways to find different types of information on the platform?

STEP 2

Test for bugs and deficiencies

The urge to push your new platform live right away is tempting but can lead to issues quickly. Before you roll out the HubSpot CRM system to your sales and marketing teams, it's a good idea to create a team that's dedicated to detecting and fixing bugs.

While you may have team members who have been part of a QA team before, it's important to still provide them with guidance on properly testing for system issues.

Here are a few items you might want to consider suggesting to the team or providing them with:

- **Establish a timeline** for how long each phase of testing should take
- **A detailed list of the use cases and scenarios** in which they are to test for deficiencies
- **Create expectations** on how results should be reported and where notes on issues should live
- **Develop a plan** on how to resolve issues or create a list of dedicated team members they should contact when a bug is discovered

STEP 2

Time to launch!

With all of the hard work you've put into the project this far, it's finally time to enjoy your new CRM system. Pushing your HubSpot platform live is an exciting moment that everyone should participate in. Sending out notifications to employees throughout the organisation is a great way to bring them up to speed and spread the word about the new tool.

The 3 steps to system migration

STEP 3

After Migration

Even with the heavy technical migration complete, there is still work to be done. For instance, after you push your system live, you'll want to switch gears and begin focusing on change management, onboarding for end-users, and creating best practice documentation. These measures will help set your company up for long-term success.

STEP 3

HubSpot onboarding & training for end-users

With your HubSpot migration complete, it's time to bring your end-users up to speed on all of the new features and capabilities they have at their disposal. Ensure that you have a training program in place that focuses on onboarding and continued learning opportunities. Without these components, you could notice weak adoption throughout teams across the company.

While thinking through onboarding and training for your end-users, it's essential to consider how each person will interact with the platform. If you're still unsure of what should be included in the training, consider adding some of these tips to your program:

- **Create department-specific training** tailored to each employee's role and how they will interact with HubSpot
- **Break your adoption process into phases** instead of launching a whole new internal process in a day
- **Provide training exercises and schedule regular check-ins** to ensure your team is comfortable with the new system
- **Divide large training sessions into smaller group training sessions** — that way, trainees can engage with the instructor better

STEP 3

Create a data management plan

As your teams and system start to align, it's essential to look at all of the data living in your CRM. Since you spent the time cleaning up your data and categorising it before migration, you shouldn't have to worry about outdated information. However, without the proper data management plan in place, you could see a decrease in data accuracy.

You'll want to ensure that the data management plan you put in place focuses not just on quality but safety as well. Below are a couple ways you can create a comprehensive data management strategy for your organisation:

- **Consistently review and update processes** to comply with applicable compliance regulations
- **Leverage a lead validation tool** to help fill in gaps and identify accuracies as leads pour into your CRM system
- **Schedule monthly reports and audits** to evaluate the quality of your data
- **Utilise your new HubSpot CRM's automation features** to streamline data entry and reduce the risk of human error

CONCLUSION

Where do you go from here?

Congratulations! You're at the end of the migration process and at the beginning of your experience with the powerful HubSpot CRM system. As your team gets acquainted with the new platform, you'll want to ensure everyone gets the most out of the system.

Here are a couple of options for expanding with HubSpot that could benefit your teams greatly:

- **Keep an eye on new features and capabilities that HubSpot rolls out** — you'll want to ensure your team has access to training and support when things change in the CRM system

- **Plan ahead for growth in your system by constantly reevaluating your HubSpot CRM.** If you see opportunities to help your team do their jobs better, make suggestions to your change management team

- **Why just stop at the HubSpot CRM?** HubSpot offers additional services that you can integrate and explore that will take your customer services experience to the next level

CONCLUSION

About BBD Boom

Are you looking to migrate from Salesforce to HubSpot? We can help! As a UK-based HubSpot Elite Solutions Partner, our team is vastly experienced in helping businesses move from Salesforce to HubSpot.

We deliver seamless migration experiences with minimal costs and interruptions to your business. We take a careful approach to migrating your data to ensure it stays intact and clean, and you don't lose historical records. We'll make it easy to import your records and recreate your data, automation, reports and more.

Start your Salesforce HubSpot migration today!

Get in touch

BBD BOOM