
The Ultimate Salesforce to HubSpot Migration Guide

NEW BREED  / HubSpot 

Building an attainable roadmap for your CRM migration

As your organization evolves, so do the tools and technologies you use to manage your operations and delight your end-users.

Whether you're a fast-growing brand or an industry veteran looking to optimize your tech stack, migrating to Hubspot's CRM will help your organization grow better, with a platform that promotes alignment between your marketing, sales, and service teams.

We designed this guide as an all-inclusive migration roadmap. Inside, you'll find everything you need to migrate successfully, plus some insider tips and best practices to keep your project running smoothly along the way.



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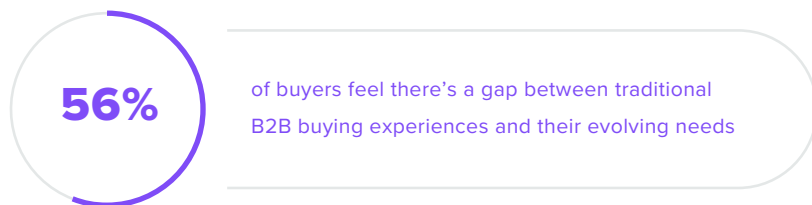
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Developing unified sales, marketing, and service operations

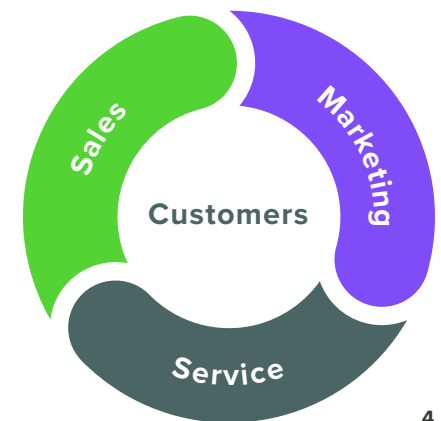
Despite an exponential rise in omni-channel technologies, 56% of buyers feel there's a gap between traditional B2B buying experiences and their evolving needs; a gap that many credit to the invisible yet impactful divide between sales and marketing teams.*



This misalignment typically doesn't develop from deep-seated rivalry or stubbornness on either side of the aisle. Instead, the true culprit is often the set of tools these teams use to grow their business. Add a third system for the services department, and it's easy to see how customers might notice a disconnect.

If your sales, marketing, and service departments operate in multiple siloed systems, critical information will inevitably fall through the cracks, which means gaps in customer data and missed conversion opportunities. Teams may spend hours tracking down critical data or days waiting for IT to re-connect platforms.

HubSpot's CRM helps you bridge the divide between your sales and marketing teams and even supports your services department. Rather than connecting systems manually or hunting down critical data, your teams can operate through one easy-to-use platform that offers powerful features for all.



*The Next Generation of B2B Purchasing: Millennials, Marketplaces and Digital Buying Preferences
https://www.oracle.com/webfolder/s/delivery_production/docs/FY16h1/doc8/B2B-Online-B2BBuyer-Trends.pdf

Aligning behind a single solution

As you build a business case for HubSpot's CRM, consider your organization's current state of operations. Do any of the following scenarios sound familiar?

SCENARIO 1

Your teams use HubSpot for marketing activities, then pass SQLs over the fence to Salesforce, creating a disconnect between sales and marketing.

SCENARIO 2

Your Salesforce instance has become too large or complex to manage in-house, and you're looking for a simpler solution.

SCENARIO 3

Your Salesforce administrator recently left, and you don't have the internal resources to continue managing it.

SCENARIO 4

Your teams need a central platform to manage and store customer data, record activities, and evaluate performance metrics.



Maybe Salesforce's complexity creates more challenges than it solves. Or perhaps you're most concerned with combining your marketing, sales, and services operations in one unified system.

No matter where you fall on the list above, migrating to HubSpot's centralized CRM will empower your teams to grow better, together.

HubSpot makes it possible to enjoy a single pane of truth into the entire customer lifecycle without sacrificing functionality or customization. Your teams can leverage an array of out-of-the-box features and capabilities to reach prospects without a heavy technical lift or time-consuming workarounds.

Over the long term, this platform centricity enables more customer lifetime value with significantly reduced overhead costs. Plus, marrying your operations on the backend makes it even easier to deliver seamless experiences to everyone who interacts with your brand.



Salesforce to HubSpot conversion table

Both CRMs have their own unique naming conventions, but they share several common terms too.

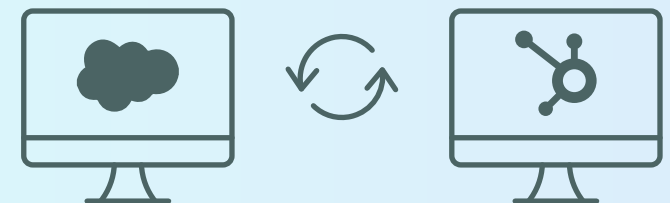
Use this conversion table to translate terminology between the two systems or learn more about HubSpot objects.



In Salesforce, contact information is stored in two ways:

- **Lead objects** designate users with no purchase history; this is the default object for storing new user information.
- **Contact objects** refer to any contacts associated with an Account object, or those who have some level of purchase history with your organization.

In HubSpot, these objects are consolidated into a single **Contact object**, which is used for any person saved in your CRM.





In Salesforce, the **Opportunity object** is used to store information about any account in the sales cycles.

This maps directly to HubSpot's **Deal object**.

In Salesforce, an **Account object** refers to any organization saved in your CRM.

This maps directly to HubSpot's **Company object**.

In Salesforce, a **Field** is a part of an object that holds a specific piece of information — like currency, last name, etc.

In HubSpot, these same assets are referred to as **Properties**.

In Salesforce, a **Campaign** refers to a single marketing activity, such as an advertisement, direct mail, or conference.

In HubSpot, a **Campaign** refers to a larger string of related activities, rather than a single activity. A HubSpot campaign allows you to tag related marketing assets and content together so you can easily measure the effectiveness of your collective marketing efforts.



The migration process

Phase 1

Pre-Migration

Before you get into the nitty-gritty details of integrations, data imports, and system configuration, there are several steps you can take to ensure your migration goes smoothly and your teams are aligned on exactly how the process will unfold.

The pre-migration phase focuses on evaluating your current systems and creating a detailed plan to guide your teams through the migration itself.

HERE'S HOW TO GET STARTED



Evaluate migration and translation needs

The first step to any successful migration is articulating what you want to pass over to your new system, based on which assets you use today and which ones you plan to start using in the near future.

Start by identifying what you want to pass over from Salesforce to HubSpot.

Be specific and base your decisions on which assets your teams use today and will need for the long haul — like contacts, templates, and custom fields. Narrowing down your list at the start prevents unnecessary data transfers that will clutter your new platform.

Next, it's time to determine how you'll recreate all of these assets in HubSpot. And while several of them map 1:1 between the two systems, you'll likely need to adapt others to fit HubSpot's unique functionality.

Need to map your Salesforce fields to HubSpot properties?

Use HubSpot's Data Migration Property Matching Template to organize and map your data before you migrate.

[Get the Template →](#)



There are two distinct approaches to recreating your Salesforce data in HubSpot:

Migration

Assets that support the exact same functionality from one system to another will follow the typical migration process — think straightforward copy-paste functionality. These assets don't require any modifications to function the same in HubSpot as they did in Salesforce.

These assets typically include:



Emails



Forms



Landing pages

Translation

Assets that don't map directly to HubSpot will need to be adapted to fit your new platform in order to function properly when they go live. These assets likely require manual recreation and certain structural changes to produce the intended results in your HubSpot instance.

These assets typically include:



Lists



Automation/workflows



Reports

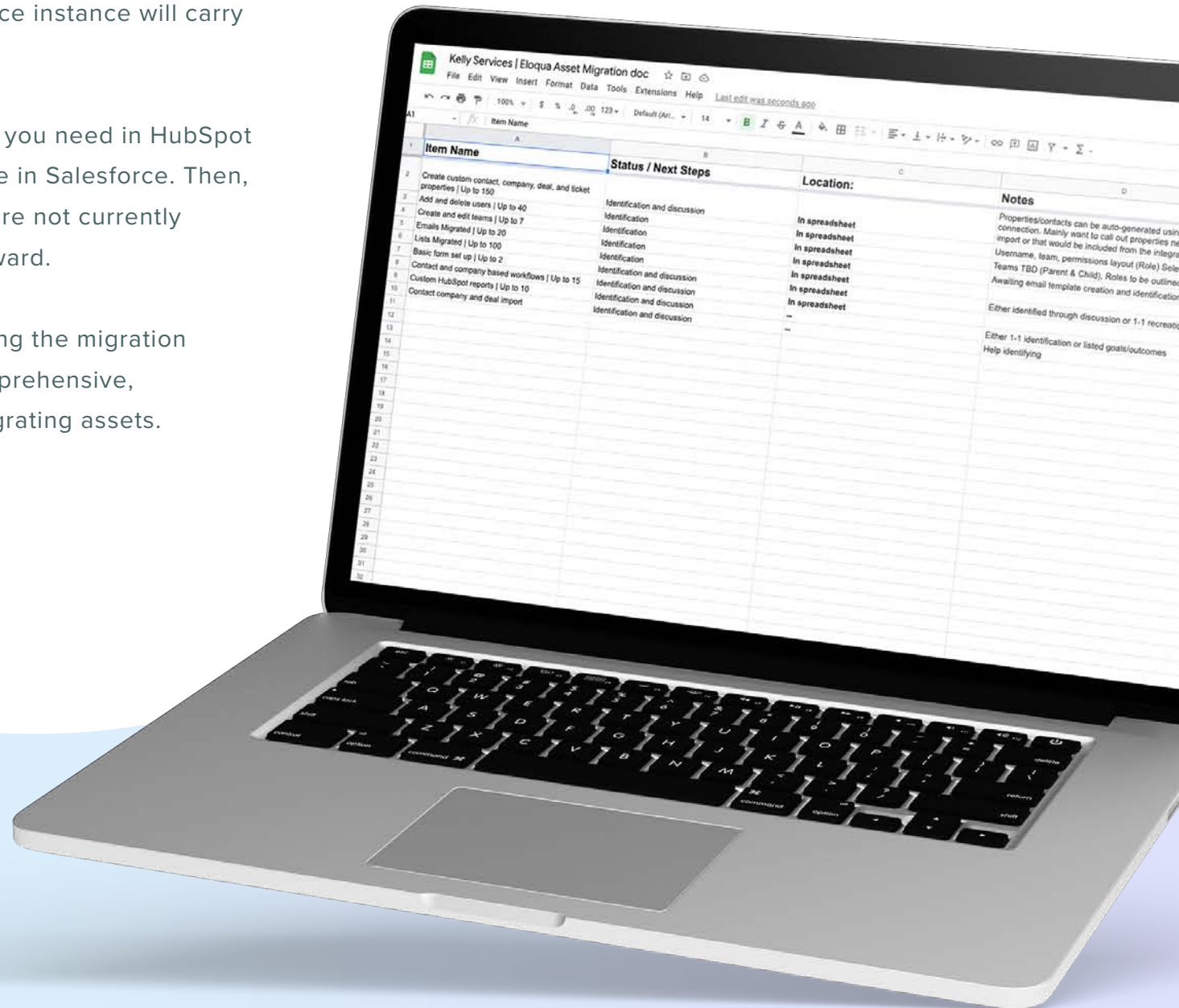
Tip: If you come across any assets that can't be translated or migrated easily, establish a plan for them before your migration begins. You may need to back them up in the third-party system or you may choose not to carry them over to HubSpot.



Categorize and catalog your assets in a spreadsheet or similar format. Start data mapping, accounting for when and how everything in your Salesforce instance will carry over to HubSpot.

Make a list of the custom properties you need in HubSpot based on the fields you currently use in Salesforce. Then, compile a list of new properties you're not currently recording but wish to use going forward.

You'll refer back to this catalog during the migration phase, so be sure it's accurate, comprehensive, and easy to modify as you begin migrating assets.



Clean up your Salesforce data

As you prepare to migrate, take some time to assess the data that lives in your Salesforce instance. Your platform houses an expansive library of customer data, and it's important to assess the quality and integrity of this data before you invest in migrating it over to HubSpot.

Migrating inaccurate, outdated, or incomplete data is a waste of resources, and there's not much benefit in cluttering your new platform with unusable information.

Audit your Salesforce instance and remove any data you don't plan to use in the future, such as:

- Inactive or incomplete contacts
- Unengaged contacts that violate compliance regulations
- Outdated records, including all notes, activities, and communications
- Duplicate contact records and other redundant information

You can leverage data cleanup tools to automatically remove duplicate records, identify incomplete ones, and assess the overall integrity of your Salesforce data. Popular options include [Cloudingo](#), [InfoCleanse](#), and [Tye](#).

Tip: Ensure your data meets all relevant compliance requirements so you can import explicit consent alongside contact information. For example, retaining unengaged contacts for over two years violates GDPR, so avoid carrying their non-compliant data over to HubSpot.

Back up your data

Once you've mapped out the data you want to migrate and cleared out the excess, it's time to create a backup plan. Whether or not you'll still have access to Salesforce post-migration, it's always a good idea to back up your entire data library in case anything goes awry during the migration process.

Create a system-wide backup, but pay close attention to the data you're most likely to lose during migration — like timestamps or manually logged notes — and establish a dedicated backup or retention plan to keep this information safe.

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 in the shuffle.



Create a migration plan

Now it's time to turn your migration requirements, platform mapping, and list of assets into a cohesive migration plan. This plan won't just help you get organized, it will also guide your teams through the process and ensure everyone understands their distinct roles and responsibilities.

- **Hold your teams accountable.** Assign a responsible party for each stage in the migration process. Establishing accountability upfront will help you resolve potential escalations more efficiently and prevent your project from stalling down the road.
- **Identify key milestones.** No matter your specific goals, there are several essential milestones to track along the way. Document these based on stakeholder priorities, team bandwidth, and estimated completion dates. Then use them to build out your comprehensive project timeline.

Milestones are central to carrying your migration project across the finish line. Here are a few key events to include in your migration plan:

- 1 **Complete asset mapping**
- 2 **Complete first import**
- 3 **Finalize all data migration**
- 4 **Complete QA and testing**
- 5 **Complete staff training**
- 6 **Sunset Salesforce instance**



- **Build a realistic timeline.** Map out your key milestones and build a comprehensive timeline around them, identifying dependencies, non-negotiable deadlines, and areas with schedule flexibility. Set short and long-term goals, with the note that you'll need to go back and adjust your timeline if you don't meet them as expected.

Tip: Use the DARCI framework to establish clear roles and responsibilities, and hold teams accountable during your migration project. Check out HubSpot's [CRM Data Migration Project Management Model](#) to get started.

- **Spread the word.** Once you've finalized your migration plan, share it with everyone in your organization, especially people who will be impacted directly by system downtime or temporary process changes — as well as those who will be impacted by the new systems and processes you put in place.



The migration process

Migration

The migration phase is all about executing on the plans and processes you defined above. It focuses on technical configurations in HubSpot and the actual transfer of your Salesforce data, plus QA, testing, and every other element leading up to when your new solution goes live.

Phase 2





Configure your HubSpot instance

Whether you're starting from scratch or migrating Salesforce data into a well-established HubSpot instance, you'll need to configure various elements based on your organization's specific migration goals and data requirements.

If most of your data can be migrated 1:1, simply integrate Salesforce and HubSpot to migrate fields to properties directly, leaving a bit of wiggle room for one-off translations.



New to the world of HubSpot?

HubSpot Academy offers free courses to help you get started.

- [Set Up Your HubSpot CRM for Growth →](#)
- [Importing Your Data Into the HubSpot CRM →](#)

On the flip side, it may be worth exploring custom integrations and automation to streamline the process if you need to facilitate several complex translations.

- **Migrate fields over to HubSpot.** Using the spreadsheet you created during the pre-migration phase, define and **create custom properties** in HubSpot CRM. Direct field-to-property mapping is pretty straightforward (First Name to First Name, Company to Company, etc.), but items like Deal Pipelines, Sales Processes, and Templates will need to be recreated from scratch in your HubSpot CRM. If you're using an API in your migration, pull activities like tasks, calls, and documents into it to ensure they're translated correctly.

Tip: Integrate your Salesforce and HubSpot instances to migrate existing Salesforce fields automatically. You can activate field/property sync but leave data sync inactive to prevent premature data transfers.

[Read More on HubSpot's Blog →](#)

- **Transfer and recreate assets.** While some of your assets can be migrated 1:1, others will be recreated from scratch. Along with individual fields, properties, and objects, you'll need to rebuild various templates within your HubSpot CRM. Create each asset — like email templates, forms, and landing pages — based on your data mapping spreadsheet, noting any structural adjustments and parameters for future use. Now's also the perfect time to add in the net new assets you identified in your initial migration plan.

- **Create operational workflows.** With all of your properties and assets configured, it's time to set up workflows and other automated features to ensure your teams get the most out of their new CRM. These enable teams to automate routine tasks, notifications, and record updates, making it even easier to streamline marketing and sales operations. This is the time to set up notifications for handoff to sales, contact engagement, and any other processes that will help unify your sales, services, and marketing departments.
- **Customize timeline objects.** You can use HubSpot's CRM API to create timeline events that segment your contacts based on their interactions with your company and provide valuable context into their activities — like whether they actually attended the webinar they registered for or downloaded their content offer after completing a lead gen. form. Create event templates, add tokens, and customize the details so that your event tracking is ready to go once your Salesforce data is imported.



Migrate your data into HubSpot

Now it's time to start **moving your data from Salesforce to HubSpot**. This process can be accomplished in several ways, and you'll likely use more than one method to bring all of your information over and ensure it's accessible inside HubSpot.

- **Import via a CSV** — This is a fairly simple process and probably the least technical option for moving your data. Simply export your Salesforce CRM data into a .csv and upload it into HubSpot to import contacts, companies, deals, tickets, products, and notes.
- **Leverage the Salesforce/HubSpot integration** — **HubSpot's Salesforce integration** makes it easy to extract all of your data from Salesforce in one go. Set it up and use the data sync feature to migrate your Salesforce field data into the corresponding properties in HubSpot.
- **Recreate non-transferable assets** — Use the custom properties you created above to store Salesforce data that doesn't map to an out-of-the-box property in HubSpot. If you're pulling in data for an object outside of HubSpot's import tool, consider using an APEX batch sync to avoid disrupting any associations.

Tip: Make sure you're using the right import type for .csv uploads. If you're only importing contacts, choose the 'one object' import. If you're importing contacts and deals at the same time you'll need to choose the 'multiple objects' import.



Not sure which migration method to use?

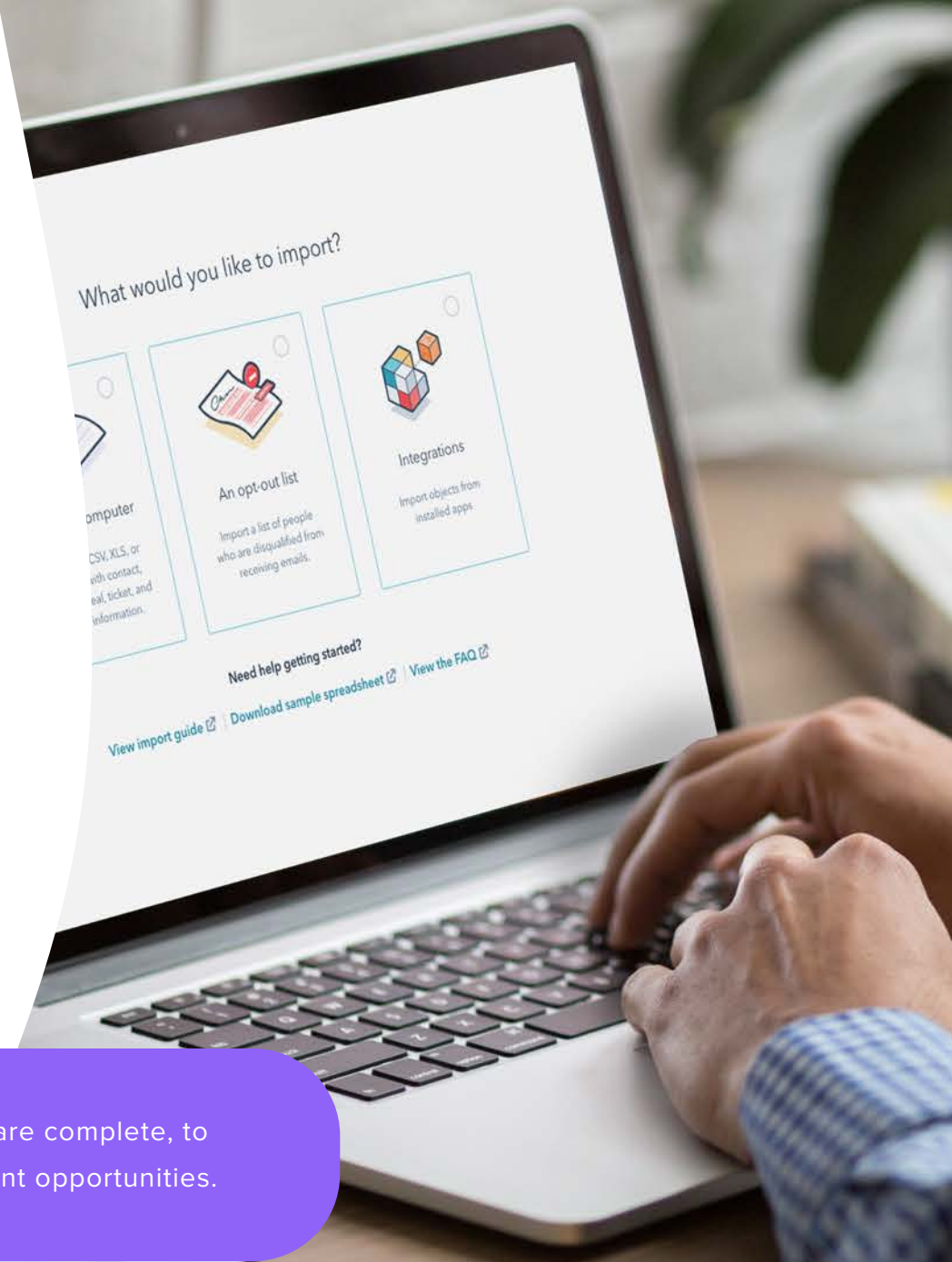
Keep in mind that the CSV approach is ideal for custom mappings and associations. It also enables you to pull subsets of records but requires upfront technical work to configure correctly.

On the flip side, an integration only allows “All data” for one or more object types. Integration is the ideal choice if you need to support standard or pre-existing mappings since it’s the easiest to use but offers significantly less customization than a manual CSV import.

Even if you’re fully confident in your data mapping, it’s smart to migrate in phases, testing a small batch of data first rather than sending your entire library over in one go. That way, you can make a note of any concerns and adjust your import process to resolve them.

Rinse and repeat the adjustment and monitoring process until you achieve error-free import status, then go in and import the rest of your data.

Tip: Import active Salesforce contacts last, once QA and testing are complete, to avoid disrupting the sales cycle or missing out on key engagement opportunities.



How to Migrate Custom Objects with APIs

The Salesforce/HubSpot integration makes it easy to migrate specific Salesforce fields over to HubSpot, but it doesn't account for all data types. To migrate custom objects or unique datasets, you'll need to set up an API to sync data between the two systems and ensure all of your information is organized correctly in your new CRM.

Many HubSpot APIs are available for different use cases and objects, such as Custom Behavioral Events, Marketing Calendars, and more.

For example, the **Ecommerce Bridge API** allows you to migrate Ecommerce data from Salesforce into HubSpot and configure out-of-the-box Ecommerce features in your new HubSpot instance, including:



Cart abandonment email workflows



List segmentation based on customer activity



Ecommerce reporting dashboards



- [Learn More About the API →](#)
- [Read the Developer Documentation →](#)

Make way for QA

Once you've migrated most of your data into HubSpot, it's time to review and QA your team's work and check if your new data is showing up in HubSpot as you intended.

Evaluate your data for:

- **Quality:** Is your CRM data organized and complete? Are there any missing properties (or even entire contact records) that need to be accounted for?
- **Consistency:** Is all of your new data formatted correctly? Does it look consistent across the board and align with any existing data you had in HubSpot?
- **Accessibility:** Is data easy to locate based on the structure of your CRM and associated properties? Do users have a reliable way to find various types of information?

You can set up test reports and dashboards to see an overview, but you should also dig into the specifics here to ensure everything is working correctly behind the scenes, down to how records are organized or contact notes were carried over from Salesforce.

Tip: When you develop your migration timeline, build in a 30-day buffer to conduct QA, review, and testing before go-live.



Conduct testing and associated bug fixes

While it can be tempting to turn your new solution on as soon as you've finished migrating data, it's better to handle bugs and other deficiencies with a small, dedicated team before scaling the tool to a variety of marketing and sales users.

Use a mix of tactics to assess system performance and root out any potential problems. Effective testing requires more than an automated script, so take the time to train a testing team as well, offering guidance on:

- **Timing:** Clarify how much time they should dedicate to testing and explain how to follow up if they need more time or resources.
- **Use cases:** Provide detailed instructions on which use cases and scenarios to test.
- **Feedback:** Set expectations on how, where, and when they should record their results, along with any additional notes or feedback that could inform issue resolution.

- **Remediation:** Explain how to resolve issues or provide dedicated points of contact to follow up with if another team is managing remediation.

We also recommend investing in user testing to ensure that your end-users understand how the CRM is set up, and how it applies to their respective job functions.

This process also gives you a chance to gain additional insights from daily users.

Tip: When user testing, be sure to pull a diverse sample of end-users — from your tech-savvy data analyst to the content marketer that has minimal CRM experience. This wide net ensures your new solution effectively serves everyone on your team.

Phase 2

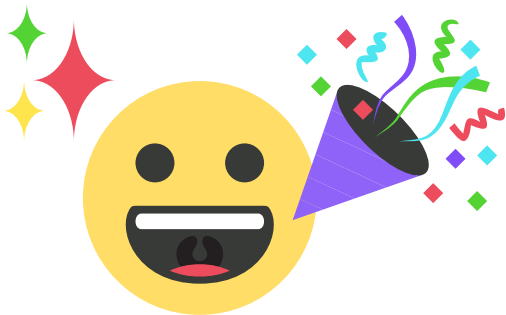
[Go back to conversion table →](#)

Go live!

You made it!

Now it's finally time to deploy all of your new automated features and assets into a live state through the HubSpot portal.

Once your latest HubSpot instance goes live, remind your team to stop entering data into your old Salesforce CRM, even if you haven't fully sunset the system. This prevents any data from ending up in limbo.



The migration process

Phase 3

Post-Migration

While you may be across the tech-heavy finish line, there are still several critical steps you should take to ensure you extract the highest possible value from your newly centralized CRM.

The post-migration phase is all about change management, from onboarding your end-users to establishing best practices and documentation for long-term success.



Get your teams up to speed

Now that your CRM migration is complete, it's time to bring your end-users on board and help them learn how to use all of HubSpot's features and capabilities effectively. Without sufficient change management processes — like onboarding, training, and continued learning — you'll likely see weak adoption and under-utilization of powerful features.

Work with stakeholders, managers, and a focus group of end-users to walk through how everyone plans to use HubSpot alongside existing tools and processes. Use the insights you uncover, plus [HubSpot's CRM Knowledge Base articles](#), to develop a training plan for your organization. Here are several training tips to keep in mind:

- **Take a phased approach to adoption.** Rather than overhauling your internal processes overnight, roll out new feature sets in small chunks. If you find a team member who loves a specific feature, lean on them to become the SME and share their passion and knowledge with the rest of the team.
- **Hold multiple close-knit training sessions** rather than one enterprise-wide presentation. This approach allows you to engage with trainees and make sure that they're using the system effectively — by asking them to explain their process or demonstrate newly acquired skills.
- **Assign homework and conduct regular check-ins** for the first several months. Applied learning is more effective than watching instructional videos, so give your teams practice exercises or encourage them to explore certain feature sets as they progress through training.
- **Tailor training by department or job function** to empower key users with the tools and techniques to launch campaigns, analyze data, etc. The more focused each team's training is, the more likely they are to master the parts of HubSpot that will impact their day-to-day performance.

Prioritize data management

With your teams and systems aligned, it's time to circle back to the expansive library of data that lives in your newly consolidated platform.

Follow up on your pre-migration data cleanup efforts by establishing a scalable data management process for your operations. Implement quality and security standards based on industry best practices and your organization's specific data requirements — based on industry or region.

Here are several recommendations:

- **Use compliance to drive data clarity.** Review applicable compliance regulations and ensure they're reflected in your organization's data management practices.
- **Validate lead data as it enters your CRM.** Use a lead validation tool to assess user data as it enters your system, filling in gaps and correcting inaccuracies as soon as possible.

- **Conduct routine cleanups and data audits.** Run monthly exception reports and schedule audits to evaluate data quality and identify gaps or inconsistencies.
- **Automate as much as possible.** Streamline data entry with [HubSpot's automation software](#) to save your teams time and effort while reducing the risk of human error.



Interested in learning more about data management?

HubSpot has some educational resources to help you get started:

- [How to Manage and Clean Data →](#)
- [Data Protection in Hubspot →](#)

What's next?

With all of your customer, sales, and marketing data in HubSpot's CRM, you're well on your way to creating exceptional experiences for everyone who interacts with your brand.

As you adjust to updated tools and processes, remember that migrating to HubSpot isn't the final step toward unified operations. In fact, it's a crucial first step that opens many new opportunities for growth, optimization, and alignment.

Here are a few ways to keep growing with HubSpot:

- **Provide ongoing training and support for new features.** The HubSpot CRM is always expanding to include new features and integration opportunities. Keep your teams up to date with the latest rollouts and offer continued learning resources to help them master new features and functionality.

- **Create a CRM that grows with you.** No CRM is meant to be static. Instead, it should evolve alongside your business and adapt to meet customer demands and business needs. Invest in expert partnerships and focus on sustainability to ensure your CRM always fits your business operations.
- **Explore the entire HubSpot ecosystem.** Add additional Hubs to your CRM to support operations, sales, services, and more. HubSpot offers exciting integrations and extensive toolsets to help you develop an end-to-end solution centered around customer success.



Conclusion

About New Breed

New Breed is the premier revenue performance management partner for the world's fastest-growing companies. A HubSpot North American Partner of the Year, we help clients drive sustainable and scalable growth on HubSpot through a uniquely integrated platform of demand generation, revenue operations, and web design and development services, as well as proprietary technologies and applications.

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