PREPARING FOR A **CRM MIGRATION TO HUBSPOT**

Get Your Data In. Right.

A guide to help you plan your data's journey from your legacy CRM to its new, intuitive home in the HubSpot CRM.

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Congratulations on your move to HubSpot!

Even if you're dreading the process, you're probably anxious to import your legacy CRM's data into HubSpot right away. Unfortunately, it's not that simple … but it'll be worth it. (We promise!)

When it comes to data migration, there's no such thing as too much planning. Your data is one of the most crucial assets of your business, so you need to make sure things go smoothly.

Whether you're working with a third-party service like Import2, using the HubSpot CRM Data Migration service, or being brave and doing it yourself, there are crucial steps you always need to take to ensure a seamless migration.

This checklist serves as a list of steps to make sure you have everything you need to plan a successful migration.

Let's get planning!

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1 Understand HubSpot and its requirements.

The HubSpot CRM stores data on four standard objects: Contacts, Companies, Deals and Tickets. Each object houses its own unique properties, and each of these objects can be associated with the other three in specific ways. It's crucial to have a clear understanding of these four objects and how they're related to each other before planning your migration. Otherwise, you run the risk of mapping your data to the wrong objects during the migration.

a. ***Contacts*** are the individuals you'll be interacting with. Each contact can only be associated with one Company but can be associated with multiple Deals and/or Tasks.

b. ***Companies*** are the organizations where your Contacts work. Companies can have multiple Contacts, Deals and/or Tasks associated.

c. ***Deals*** are the opportunities used to manage and track potential sales. A Deal can have multiple associated Contacts but only one associated Company.

d. ***Tickets*** are the service interactions you have with your customers. Tickets can be associated with any Contact, Company and/or Deal.

2 Understand HubSpot's deduplication rules.

HubSpot's deduplication rules are designed to prevent you from creating multiple copies of the same records, keeping your database clean. They also allow you to make updates to existing HubSpot records via import without creating those same objects a second time. Contacts and companies are deduplicated based on specific property values.

a. When you add Contacts to HubSpot, the CRM will deduplicate by email address.

b. When you add Companies to HubSpot, the system will deduplicate by Company Domain Name.

c. When you add new Deals or Tickets, there is no deduplication.

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3 Determine what migration method you will use.

There are multiple approaches to getting your data into HubSpot. Time, expense and technological know-how are the key differentiating factors.

a. The ***file upload method*** is the least technical, but you will not be able to import tasks or engagements (notes, calls, emails) via CSV.

Pro tip: We recommend hiring a consultant to guide you through the process, especially if this is your first migration.

b. Using a ***Salesforce Integration*** allows you to import data to all objects associated with a Salesforce Contact or Lead. In addition, all Salesforce Contacts and Leads require an email address to sync, and you will need a HubSpot Marketing or HubSpot Sales Pro subscription to use this method.

c. Third-party platforms like Import2, Data2CRM and Trujay Group provide data migration services for a cost. However, note that you will still be responsible for reviewing and cleaning your data before and after the import.

d. A ***HubSpot Technical Consultant*** can also assist you with your migration for a cost, providing technical assistance and a personalized solution.

e. API endpoints allow you to import data to all CRM objects, but it is also the most technical route, requiring internal development resources not provided by HubSpot Support. Unlike Salesforce, which has native integration with HubSpot, other CRM systems must be integrated via HubSpot's REST API.

4 Get your team trained and excited.

Obtaining team buy-in is integral to the success of a software implementation. In most cases we encounter, at least one member of the sales and customer success teams is involved in the software selection process. Have these people help you evangelize HubSpot to the rest of the team before, during and after the migration. Transparency and clear, two-way communications are key to making your team feel valued in the process. Let them know the benefits of moving to HubSpot, such as the efficiencies it may create or how it addresses common pain points they currently have. Ask for feedback on the finer points of the migration, such as which data fields should be migrated and which ones can be left behind. Everyone should know how to use the CRM. And, if you are subscribed to them, your sales team should get acquainted with the Sales tools, and likewise, your service team with the Service Hub.

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a. Create your team's accounts and invite them to join HubSpot.

b. Train your team on HubSpot before the migration so they can comfortably use it right after import. This may also identify potential issues you haven't considered before they arise.

Pro tip: We recommend two training sessions before a migration and a third and final immediately afterward.

c. Identify at least one superuser. This is your most tech-savvy person who is comfortable learning new tools and can be an internal go-to resource for their peers when they encounter issues.

d. Provide your team with resources such as links to HubSpot Academy videos and Knowledge Base articles.

Reinforce everything — you're asking your team to absorb a lot of information. They won't be able to recall and apply all of it after just a few training sessions. Help them get into the habit by sending weekly (friendly) reminders to the team about using the tool. Include links, best practices, featured tips and standard operating procedures for how your team will be using the tool.

5 Review and understand your data and study the HubSpot CRM.

This may be the most critical part of the migration process. The old adage "measure twice, cut once" is applicable here. It will be the most time-consuming phase of the migration process but is worth investing the time and attention.

a. Review your legacy CRM and identify how your team currently uses the platform in order to gain a better understanding of which data properties you will need to migrate.

b. Compare your legacy CRM structure with HubSpot's.

c. Decide what data should and should not be migrated.

i. Identify the properties that will not be brought over to HubSpot.

ii. Make a list of properties that should be migrated.

iii. Note any exclusions of data you want to make. For example, do you want to exclude any records that were created before or have not been modified since a certain date?

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iv. Make sure to check for archived data that might be hidden in your UI.

d. Identify custom fields.

Take special note of custom fields that actually map to a similar but differently named property in HubSpot. For example, there is no default HubSpot property called "Cell Phone," but there is one called "Mobile Phone."

Pro tip: Be sure to let your third-party import specialist know if you need to split any legacy properties into multiple new properties in HubSpot.

6 Map your data to HubSpot properties.

With your data identified and your properties defined, you're now ready to map your data to existing HubSpot properties and create custom ones for those you identified. There are 11 different options for field types, ranging from drop-down select lists and checkbox selections to number and dates. We recommend limiting the amount of single or multi-line text properties you create since this may pose challenges in aggregating data for segmenting and reporting.

a. Make sure the HubSpot drop-down, multiple checkboxes, and radio select properties can accommodate all of the options from your legacy CRM. If not, create the options.

b. Set up your Deals pipeline(s). Map your legacy sales stage options to new Deal Stages in HubSpot.

c. Decide if your missing or incorrect data can be fixed after the import with automation or if it would be easier to clean up the data in legacy CRM before the import. Say, for instance, some of your leads in your legacy CRM are assigned to a former employee of your company. Can you easily mass edit the affected objects in your legacy CRM, or is it easier to migrate that data as is and do the mass edit via a HubSpot post-migration? Compile a list of necessary workflows.

d. If there are records tied to former employees in your CRM, you may wish to create dummy HubSpot accounts for these former employees to retain accuracy.

Pro tip: If you don't do this, that user info will be lost and records will indicate that user is the importer. This is a topic you might want to ask your import assistant about, if you have one.

e. Be aware that you cannot bring over the property "First Conversion" because it is not a writable field in HubSpot. If you want to preserve this field, you will have to create a custom field such as "Legacy First Conversion."

7 Run some test imports.

Despite your planning, there is always a risk that the import won't proceed as expected. When you're ready to import, start with a small sample set of your data to ensure that everything goes as planned.

a. Review the imported data in HubSpot and make sure that all of your data got pulled through. Make note of any data that did not get pulled through as expected, and alert your consultant if one is helping you.

b. Run two or three data import tests and review the results carefully each time.

c. Once you're satisfied, proceed with the rest of the process.

8 Migrate your data.

Decide on a time and make sure your team knows when they are expected to start recording and updating in HubSpot.

a. Consider doing the full migration on a Friday afternoon with the expectation that your team will begin working in HubSpot Monday morning.

b. Coordinate the migration with any third party that might be assisting you.

c. Conduct a post-migration training session with your team.

9 Review and clean up.

Review your migrated data and make sure it is appearing as expected. If you ran multiple test imports, then there should be no major errors, but there still might be some missing or spotty pieces.

a. If you find duplicates of an object, review the data of each and merge them or delete one as appropriate.

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b. Map properties from one object to another via workflows. For example, map Lead Source from Deals to Contacts.

Pro tip: Name your workflows so you can easily identify any created to clean up data on an ongoing basis after a migration.

c. Create the workflows you outlined in section five to update properties.

d. Encourage your team members to alert you to any issues they might come across while they're using HubSpot.

10 Continue to train your teammates.

Ideally, your team has already done some HubSpot training and is feeling excited about finally getting to use your new platform for real. However, you should still expect an adjustment period as your team gets acclimated.

a. Send them a reminder email that they should no longer be logging into your legacy CRM, but rather, recording all activity in HubSpot as soon as the migration is complete.

b. Encourage them to contact HubSpot Support if they run into any issues or have any questions.

Pro tip: Make this easy by including all the methods, such as phone, Knowledge Base and in-platform help tickets.

c. Send them a list of to-dos and/or reminders, tailored to their department. Here are some samples:

i. Connect your inbox to HubSpot. Be sure to log email activity in the CRM.

ii. When you create a new Deal, be sure to associate the appropriate Companies and Contacts.

iii. Add your phone number to HubSpot to make and record calls.

iv. Integrate your calendar with HubSpot and set up your Meetings link. (You might want to add this link to your email signature, too.)

v. Download and install the HubSpot mobile app.

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Conclusion

Your data is one of the most crucial resources of your business, and having accurate, complete data is the basis of using HubSpot effectively. Without it, you cannot accurately and consistently segment contacts for activities such as email marketing, chat bot logic, advertising or reporting. Migrating your CRM can be a cumbersome process, and most teams want to get it done quickly so they can use HubSpot right away. We cannot stress enough how important it is to do this thoughtfully and intentionally so your data remains accurate and meaningful. We highly recommend hiring a consultant for a process with so many steps and layers, especially if this is your first CRM migration.

About Us

As a Gold HubSpot Agency, Austin Lawrence Group helps companies migrate from their legacy CRMs to HubSpot and trains their teams on the full HubSpot Growth Stack (Sales, Service and Marketing). We dig into the gritty details of our clients' businesses and legacy CRMs to ensure successful migrations and smooth transitions to HubSpot.

If you have any questions or concerns about migrating to HubSpot, click here to schedule a call on our founder Ken's calendar.

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