

HubSpot to Salesforce

Migration Preparation Checklist

PROJECT SCOPING

What do you want Salesforce and HubSpot to look like post migration?

Are you keeping HubSpot post-migration, or moving all operations to Salesforce?

Who is moving to Salesforce?

- A subset of the Sales team? All of CS, Support, etc.?

What automations are needed?

- What are standard features of Salesforce and what do you need to build or buy?

What's happening with integrations?

- Will integrations (eg: ZoomInfo) continue to enrich HubSpot and pass to Salesforce via integration? Or bypass HubSpot entirely? (**Check with your Integrations providers on this*)

What objects are migrating?

- The most common are Companies, Deals, Contacts and Tickets
- Of those objects, which records will you migrate?
- If you're keeping HubSpot, which records are syncing between HubSpot and Salesforce?
- Which Contact records are to be migrated into Salesforce Leads vs Salesforce Contacts?

The HubSpot to Salesforce Migration is a fairly standard migration, and not something that needs to be overly complicated. That being said, the most successful migrations are those which have been thoroughly planned for. This list (while not exhaustive) should help your team establish the plans and details that will guide you towards a seamless transition.

DATA CLEANING AND PREP

Is your data ready to move?

- Review/clean-up duplicate Contacts and Companies in advance of migration
- Review blank/incomplete property values in HubSpot
- Review orphan Contacts
- Review Contacts with multiple Account relationships
 - *Note that while it's possible to have Contacts related to multiple Accounts in Salesforce, it's a non-standard feature and should be planned for accordingly. Most companies will remove multiple Company relationships from Contacts in HubSpot before starting a migration.*

CHANGE MANAGEMENT & TRAINING PLAN

Document the process and prepare users

- How are you gathering feedback from teams?
- Who on the RevOps teams approves new features and projects get built?
- Where do developers and administrators build these new projects?
- When and how do new releases get deployed?
- How often are you deploying? Quarterly, bi-weekly, monthly?
- What's the level of flexibility and comfort with these changes?
- For training questions - How are you training your users?
- Who is the liaison to end users?
- Are you going through a sales enablement team or simply speaking directly to sales managers?
- Where do you communicate changes to teams? (Slack, Teams, email, video conferences, etc.)

FACTORS THAT COULD IMPACT DEPLOYMENT WINDOW

Identify everything you can that could have an effect

- When is the HubSpot license expiring?
- When are integration licenses expiring?
- When are integration Partners going to allow you to move to a new environment?
- When is the beginning and end of the fiscal period?
- Do you have an SKO or a company-wide event?
- Do you have vacation plans for critical team members?
- Are there stat holidays you need to be aware of?
- Are you entering a busy selling season you need to account for?
- Are the HubSpot administrators ready to become Salesforce administrators?
- Are the third-party Consultants able to work on timelines that match our expectations?

Need some help with a Migration?

Contact sales@ateko.com or 1-800-878-4756 ext. 202