



# HubSpot Migration Overview

# Hubspot Migration Overview

FullFunnel has been a Hubspot partner since 2015 and completed thousands of projects inside the Hubspot environment. We utilize Hubspot's recommended Objectives Based Onboarding process to handle all implementation, migration, and augmentation work leveraging the Hubspot ecosystem.

## Why Objectives Based Onboarding

The main reason is that each organization is unique. Imagine stepping into the realm of onboarding where the journey is intricately tailored to your personal objectives, a stark departure from the monotonous, one-size-fits-all approach. Welcome to Objectives-Based Onboarding, an innovative gateway designed with your unique goals and aspirations at its core. From the onset, we delve into understanding your ambitions, whether you're embarking on a new endeavor or furthering your expertise. Through a collaborative discovery process, we craft a bespoke onboarding path that resonates with your objectives.

This isn't just about achieving immediate milestones; it's a comprehensive strategy aimed at ensuring your enduring success and satisfaction with our offerings. Let's embark on this personalized journey together, setting the stage for a fruitful and engaging experience with our product.

## Why FullFunnel?

- At FullFunnel, we're all about powering revenue operations for everyone, from the big players in the Fortune 500 to the fastest growing startups.
- We're proud HubSpot Diamond Partners, diving deep into the HubSpot ecosystem since 2015 and loving every minute of it.
- Our team is stacked with talent, holding a ton of certifications in sales, marketing, and customer success. We're here to bring our A game to your projects.
- Think of us as more than just your go-to for migration. We're here for the long game, ready to back you up every step of the way.
- What sets us apart? We don't just plan; we execute. In fact, for many of our clients, we're the ones behind the curtain, running their programs as a full-on managed service provider.



# Sales Hub Migration Checklist

## Before Migration:

- **Data Audit**

Review Deal Pipelines, Email Sequences, Contacts and lifecycle stages.

- **Custom Field Analysis**

Understanding what data points not currently available inside of HubSpot “out of box” need to come over with your data migration.

- **Team & Stakeholder Buy In**

Gain the support of your team for the migration project.

## During Migration:

- **Pipeline Optimization**

Identify and making any changes in deal stages to match your existing setup.

- **Custom Field Creation**

Creating all custom field on deal, contact and company records before migrating any data.

- **Data Import**

Exporting deals & contacts from old environment and importing into HubSpot, matching stages and ensuring all data migrates with each deal/contact.

## After Migration:

- **Templates and Sequences**

Recreating all email templates and sales sequences inside of HubSpot.

- **Reporting and Analytics**

Ensuring all KPIs are being tracked inside of HubSpot.

- **Team Training and Process Review**

Working with the sales team to train them on their new CRM and to make sure they understand the new processes to keep HubSpot up-to-date.

# CMS Hub Migration Checklist

## Before Migration:

- **Content Audit**

Decide what content to retain and what to discard.

- **Data Assessment**

Analyze costs, timeline, and risks associated with migration.

- **Stakeholder Approval**

Ensure all relevant internal and external stakeholders agree to the migration plan.

## During Migration:

- **Data Architecture Analysis**

Identify any changes needed in your data structure.

- **Content Backup**

Secure a backup of your content to prevent data loss.

- **Automation**

Where possible, automate the migration process to save time and reduce errors.

## After Migration:

- **Data Integrity Testing**

Verify the accuracy and completeness of your migrated data.

- **Optimization**

Perform quality checks, such as ensuring there are no page loading issues.

- **CMS Shutdown**

Decommission your old CMS system.

- **Team Training**

Educate your team on the new CMS functionalities.

# Marketing Hub Migration Checklist

## Before Migration:

- **CRM Contract Review**

Note the expiration date of your current CRM contract if applicable.

- **Team BuyIn**

Gain the support of your team for the migration project.

- **Timeline Assessment**

Evaluate the migration timeline against your company's capacity.

- **Point Person**

Assign a leader for the migration to ensure clarity and organization.

## During Migration:

- **Data Import**

Import only the necessary and cleaned data.

- **Custom Record Properties**

Create custom fields as needed.

- **Content Transfer**

Move all videos, images, and blog content.

- **Social Media Reconnection**

Link your existing social media accounts to the new system.

## After Migration:

- **Lead Collection**

Recreate lead collection forms.

- **Segmented Lists**

Rebuild segmented lists for targeted marketing.

- **Email Campaigns**

Utilize HubSpot tools to recreate your email marketing campaigns.

- **Landing Pages**

Design new landing pages.

- **Team Training**

Educate your team on the new Marketing functionalities.

# Service Hub Migration Checklist

## Before Migration:

- **CutOff Date**

Establish a clear migration deadline.

- **Responsibilities**

Assign migration tasks to team members.

- **HubSpot Preparation**

Set up custom fields and customize the HubSpot homepage.

- **Integration and Automation Adjustment**

Disable integrations and ticket status automation to prevent data duplication.

## During Migration:

- **Ticket Migration**

Move closed tickets to a historic pipeline and transfer open tickets to HubSpot.

- **Open Ticket Management**

Address any unresolved tickets from the old system.

## After Migration:

- **Migration Review**

Ensure all data and settings are correctly migrated.

- **Notifications and Settings**

Activate all necessary notifications and review settings.

- **Team Training**

Educate your team on the new Service functionalities.

# Data Migration Challenges

## What Cannot Be Migrated:

Certain types of content and features may not be transferable to HubSpot, including database-driven pages, user-generated content, blog comments, third-party commenting features, live chat, gated content, nonlinked or image-based menus, and forms collecting Personally Identifiable Information.

## Common Mistakes:

- **Lack of Trial Runs:** Always perform a test migration with a sample data set.
- **Team Misalignment:** Ensure all departments are coordinated and not working in isolation.
- **Underestimating the Project:** Be realistic about the timeline and scope of the migration.
- **Inexperience:** Ensure your team has the necessary experience or access to the right migration tools.

## Contact FullFunnel

FullFunnel is a global revenue operations services firm that helps organizations solve capacity and capability challenges in their revenue programs. Request a consultation to discover how FullFunnel can revolutionize your revenue ops.

[Schedule a Consultation](#)