



Migration to Hubspot CRM

Design Successful Business Environment

WhitePaper Outlines

- Why HubSpot CRM?
- Secret to the Swift CRM Data Import
- Pre-Migration Arrangements
- Migration to HubSpot CRM: How to Guide
- Post-Migration Arrangements

Table of Contents

Reasons to CRM switch.....	3
HubSpot CRM: Gain More Ground with an Advanced Platform	4
Migration to HubSpot CRM: Secret to the Swift Data Import	7
Pre-Migration Arrangements	8
Migration to HubSpot CRM: Quick Guide to Smooth Transition	9
Post-Migration Arrangements	11
Drawing up Conclusion	12

Lead-In

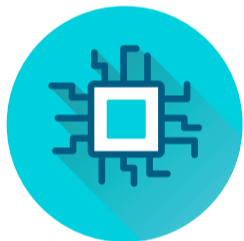
The extremely competitive business environment induces CRM market to be saturated with the platforms with more advanced features. Today's organizations require the solutions with the holistic and less-complicated functionality options without overinvestment in the software. As a result, some companies decide to migrate CRM records from the existing systems to more efficient ones for a host of reasons:



Solution obtains an outdated interface



Platform fails in meeting the industry demands and specific company objectives



System is too complicated to use and makes data access difficult



CRM includes costly capabilities rarely applied during the performance

When the organizations encounter some of the above-mentioned challenges, they start searching for a game-changer solution. Full of light-weight, yet compelling features at the affordable price, **HubSpot** CRM is the platform to consider.

The idea of the whitepaper is to lead the business owner through **the main HubSpot CRM capabilities**, as well as the crucial stages of CRM data migration to the platform.

Why the Business Owner Choose



HubSpot CRM is a lightweight solution with functionality designed to increase the productivity of the small and mid-sized companies. Launched in 2015, this relatively young CRM stands out for the simple-to-use, yet robust features. Before going deeper into the world of HubSpot CRM, it's pivotal to have a firm grasp of 4 standard objects that the platform is centered around:



Contacts

These are individuals you interact with. A Contact record includes the data like First Name, Last Name, Email, and Phone Number, as well as a history of when and who last engaged with them. Each Contact can be associated with many Deals and/or Tasks, but only with one company.



Companies

These records identify the organizations your Contacts work. A Company can store data like Name, Domain, Industry, and Phone Number. Besides, you can add information like the location of the business, as well as a number of employees. Companies can have multiple Contacts, Deals and/or Tasks associated.



Deals

Deals help manage the sales process, move through the stages starting at the beginning of the sales process and ending with a sale (Closed Won) or not (Closed Lost).



Tasks

These items are daily alerts for following up and keeping track of your Contacts, Companies, and Deals. You can set the due dates to be reminded, and move Tasks through stages. Tasks can be associated with any Contact, Company, and/or Deal.



All-in-One at a Glance

Take an opportunity to get a 360-degree view of the potential customers who matter the most to your business from an efficient dashboard. HubSpot CRM timeline allows you to arrange the emails, calls, notes, even website visits into one view.

Email and Templates

Integrate HubSpot CRM with Outlook, Gmail, Google Apps easily. The platform lets you connect with Google Calendar for scheduling the meetings and setting up the new ones. Besides, you can improve an efficiency of your reps by creating the templates for repeatable follow-ups. Send, manage, and personalize the email template from each contact's timeline.



Social Media

Connect and keep in touch with clients via social networks without any issues. The platform automatically pulls in the important data from the social media profiles to help you clearly understand the clients' needs, as well as provide the superior customer service.



SideKick Extension

An optional browser plugin integrates with your inbox and CRM system for providing you with the valuable insights about the prospects and companies you find or talk with. The real-time alerts allow you to know when, where and how the potential clients are engaging with your company.



Price Matter



For now, **HubSpot CRM is absolutely free without limitations.** Store as many as 1,000,000 contacts, companies, deals, and tasks, etc., as well as add the unlimited users.

Migration to HubSpot CRM: Secret to the Swift Data Import

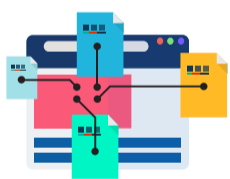
Time is the most precious currency in the business, so an automated data transition gets a lot of attention.

One of the practical solutions for the fast and secure ways of HubSpot CRM data transfer is **an automated migration service** [Data2CRM](#).



Security Regulations. Exclude the possibility of any records **loss as the service** treats the information privately and offers to sign the Non-Disclosure Agreement (NDA).

Both CRMs Uptime. Eliminate the interruptions **of the business processes** as the SaaS ensures the systems will run properly during migration to HubSpot CRM.



Fields and Users Mapping. Get a total control of the modules mapping. In case you observe the notification that **some items are not mapped**, select the available choices and map them in accordance with your business needs.

Free Demo Migration. Take a chance to check if the service works properly and run a free Demo Migration. The SaaS transfers the limited amount of records together with the relations between the items.



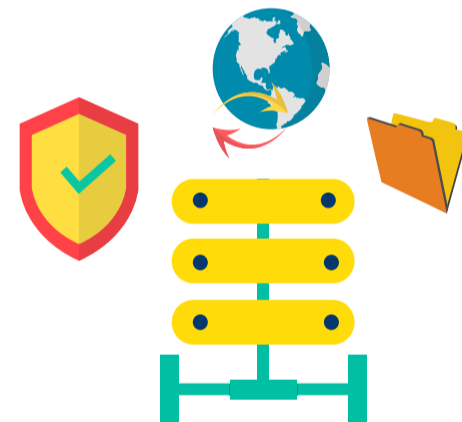
Pre-Migration Arrangements

Test a new system. Considering the fact that HubSpot CRM is free, try out a platform before making any revolutionary changes and transfer all items.



Improve your database. Analyze and filter your records, as well as delete the copies of data to make the CRM migration swift and cost-effective.

Prepare a backup. Run a backup to avoid the possibilities of any data loss and keep it even after the transfer is over.



Notify the employees. Hold the meeting and announce your team about the upcoming CRM transition and explain how the company can benefit from a change.

Migration to HubSpot CRM: Quick Guide

1. Register your account at app.data2crm.com or sign in with social networks.

Sign Up

Name *

Email *

Password *

Password Verify *

Phone Number *

CAPTCHA

Register [Already registered? Login here](#)

or login via social networks:

Facebook Google LinkedIn

- 1 Register an account.
- 2 Provide your existing and new CRM details.
- 3 Select migration options.
- 4 Start free demo.
- 5 Complete the migration.

Migrate your CRM data from

Data2CRM guarantees the total security for your business data transfer.

Existing CRM type

SugarCRM

Please note: During data migration, it's only possible to move the entities that are accessible to the user who performs the transaction.

[Sign up Non-Disclosure Agreement \(optional\)](#)

Uri REQUIRED

Username REQUIRED

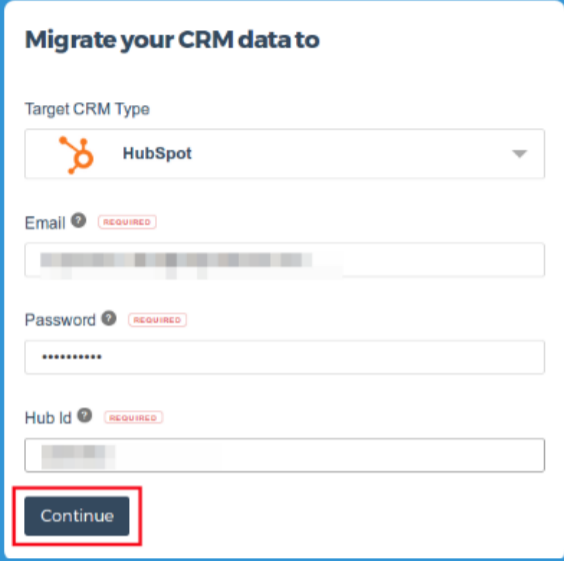
Password REQUIRED

Continue

2. Choose the current CRM and provide the access credentials (URL, username, and password, etc).

Migration to HubSpot CRM

3. Select the future HubSpot CRM and specify your email, password, and hub ID.



Migrate your CRM data to

Target CRM Type
HubSpot

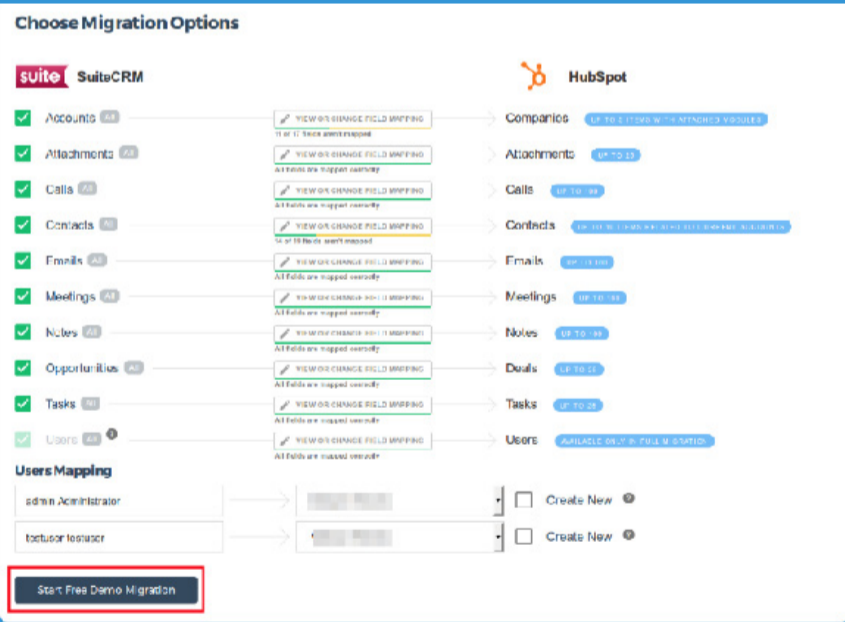
Email [?] **REQUIRED**

Password [?] **REQUIRED**

Hub Id [?] **REQUIRED**

Continue

4. Check the boxes to activate the modules you want to migrate, map the fields and [start a free Demo Migration](#).



Choose Migration Options

SuiteCRM | **HubSpot**

Accounts [X] | VIEW OR CHANGE FIELD MAPPING | Companies [UP TO 50000 WITH ATTACHED VIDEOS]

Attachments [X] | VIEW OR CHANGE FIELD MAPPING | Attachments [UP TO 10]

Calls [X] | VIEW OR CHANGE FIELD MAPPING | Calls [UP TO 100]

Contacts [X] | VIEW OR CHANGE FIELD MAPPING | Contacts [UNLIMITED CONTACTS AND ALL CUSTOMER SEGMENTS]

Emails [X] | VIEW OR CHANGE FIELD MAPPING | Emails [UP TO 100]

Meetings [X] | VIEW OR CHANGE FIELD MAPPING | Meetings [UP TO 100]

Notes [X] | VIEW OR CHANGE FIELD MAPPING | Notes [UP TO 100]

Opportunities [X] | VIEW OR CHANGE FIELD MAPPING | Deals [UP TO 10]

Tasks [X] | VIEW OR CHANGE FIELD MAPPING | Tasks [UP TO 100]

Users [X] | VIEW OR CHANGE FIELD MAPPING | Users [AVAILABLE ON 30-DAY TRIAL]

Users Mapping

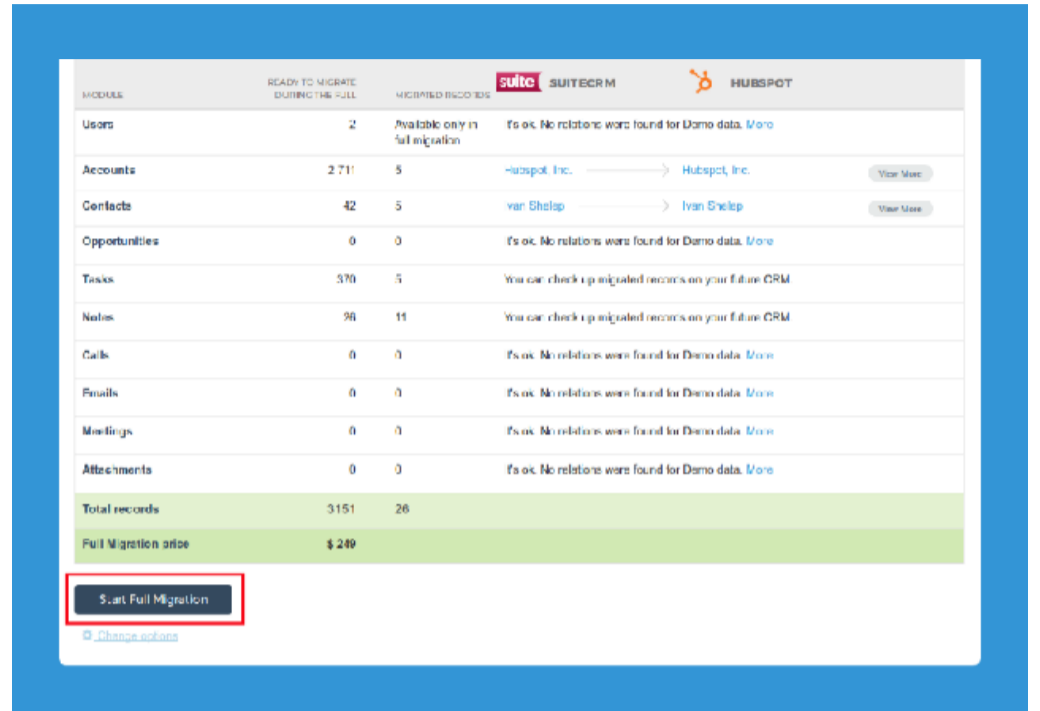
admin Administrator | [] Create New

toctutor toctutor | [] Create New

Start Free Demo Migration

Migration to HubSpot CRM

5. If you are satisfied with Demo results, you can **proceed with the migration to HubSpot CRM** and make a step forward your business success.



MODULE	READY TO MIGRATE DURING THE FULL	MIGRATED RECORDS	
Users	2	Available only in full migration	It's ok. No relations were found for Demo data. More
Accounts	2711	5	Hubspot, Inc. → Hubspot, Inc. View Users
Contacts	42	5	Ivan Chelap → Ivan Chelap View Users
Opportunities	0	0	It's ok. No relations were found for Demo data. More
Tasks	370	5	You can check up migrated records on your future CRM
Notes	96	11	You can check up migrated records on your future CRM
Calls	0	0	It's ok. No relations were found for Demo data. More
Emails	0	0	It's ok. No relations were found for Demo data. More
Meetings	0	0	It's ok. No relations were found for Demo data. More
Attachments	0	0	It's ok. No relations were found for Demo data. More
Total records	3151	26	
Full Migration price	\$ 249		

[Start Full Migration](#)

[Change options](#)

Post Migration Activities

- figure out if all the data is transferred to the right places
- set up the filters for reporting tools
- create the workflow rules
- equip your staff with the required tutorials and training

To Sum Up

The decision of moving to a new platform is critical, as well as requires the time and efforts for preparing your company, team, and budget. So, it is significant to build a workable plan for the migration to HubSpot CRM and set up the clear future objectives. The successful **HubSpot CRM data import** can lead to the efficient benefits related to the business process optimization and revenue enhancement.

Let's talk about how we can work together.

[SCHEDULE A CALL](#)





Data2CRM.Migration

**Reveal new opportunities for your business
growth with Data2CRM.Migration**

www.data2crm.migration.com