



# System Migrations

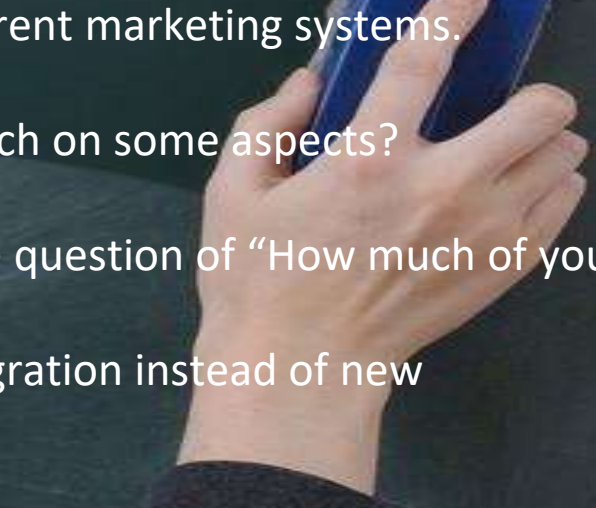
# Discussion

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What questions current do you ask to evaluate current systems?

# Time for a clean slate?

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- Check in with them around the health of their current marketing systems.
  - Time to do a data 'cleanse' or just start from scratch on some aspects?
  - Establish the migration timeframe and answer the question of "How much of your onboarding time do we want to devote to this migration instead of new campaigns?"
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- A hand holding a blue eraser is visible on the right side of the image, positioned as if about to erase something from the chalkboard. The hand is wearing a dark-colored sleeve.

# Marketing System Migration

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Rebuild in HubSpot completely.

- Contact and List segmentation
- Email content and templates

# Marketing System Migration

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## Items to document

- Email Automation rules
- Lead Scoring Criteria

These systems are probably much different than what they are using, or will be harder to migrate directly.

# Landing Page Migration: Templates

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QUIZ TIME:

What are options for migrating landing pages?

What are some pros and cons?

# Landing Page Migration: Templates

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**Template Setup:** Consistent branding, header and footer. Limited features, and you're waiting 2 weeks to start.

**Marketplace:** More features and advanced design. Time and money involved in selecting options and branding inconsistent and unable to use header and footer without CSS knowledge.

**Custom HTML:** Most flexibility around maintaining existing look. Requires designer / dev on their end who knows HTML / CSS and is willing to learn HubL.

# Landing Page Migration: Subdomain

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Chances are, they already have a subdomain setup for their existing landing pages.

- Build on staging domain and move existing subdomain over when done.
- Build on new subdomain name and redirect existing when done

Quiz time: What are some things that can come up that would lead you to recommend one vs the other?

# Lead Scoring

## EXPLICIT

Attribution	Value	Score
<b>Critical (10-15 Points)</b>		
Role	VP, Sales	+12
Industry	Technology	+10
Biggest Challenge	Lead Gen	+15
Employees	200-1000	+13
<b>Important (5-9 points)</b>		
Location	US	+9
Employees	50-199	+8
Role	Manager	+5
Timeline	6 months	+5
<b>Influencing (1-4 points)</b>		
Location	Non-US, English speaking	+4
Timeline	12 months	+2
Employees	10-49	+1
<b>Negative</b>		
Role	Student	-15
Company	Unemployed	-15
Location	Asia	-10
Employees	1 or less	-13

## IMPLICIT

Attribution	Score
<b>Critical (10-15 Points)</b>	
Downloads free trial	+15
Visit & clicked on pricing page	+14
Downloads RFP	+11
Watches online demo	+10
<b>Important (5-9 points)</b>	
Downloadse MOFU offer	+9
Searches for "HubSpot"	+8
Visits 3+ product pages	+5
Heavy website activity	+5
<b>Influencing (1-4 points)</b>	
Watches webinar	+4
Downloads ebook	+2
Recent event date < 30 days	+4
<b>Negative</b>	
Recent event date > 30 days	-5
Recent event date > 60 days	-15
Visits careers page	-10
Email unsubscribes	-5

# CRM import might change

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Much is going to change in the coming months around importing, so keep an eye on product notification emails.

- Tickets and products
- Static list creation
- Associations between deals and other object. (at some point)

# CRM imports

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## Options for getting CRM data into HubSpot

- CSV import for Contacts, Companies, and Deals.
- Third-Party Systems: Trujay, Import2
- HubSpot Technical Consultant.
- API Endpoints
- Salesforce to HubSpot record import

# CRM imports

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Practice soundbite with a partner in 1 minute or less:

"Ok, you're planning on migrating from SugarCRM. Well, you have a few options..."

# Moving From Salesforce into HubSpot

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## Expectations:

- Leads, Contacts, Accounts, Opps, Tasks all need to be associated with a Salesforce Lead or Contact who have an email address.
- Only past year worth of Tasks.
- Check if other assets (ie. Email Templates, Custom Objects, Integrations, Attachments) need to come over. They will need to recreate these themselves or use API / Partner to get them into HubSpot.
- Bad habits from Salesforce pull into to HubSpot / syncing bad data (purchased lists)

# Check In

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- What are some questions to ask a customer when they tell you they've got a lot of systems to migrate?
- What are some recommendations we can make when their existing systems are a mess?
- What are some project management strategies for handling system migrations?