



Everything you need to know about...

Switching to HubSpot

It's easy to switch to HubSpot from your current marketing software solution.

This guide will explain all of the different components you'll want to consider when transitioning to HubSpot. Once you've reviewed all of the necessary steps, migrating to HubSpot is easy with the right resources. And you'll have lots of help along the way.

Once you sign on as a HubSpot customer, as a Professional or Enterprise customer you'll be partnered with an Inbound Marketing Consultant who will help you begin the transition. You'll also have unlimited use of our support team. They're available to answer your questions at any time by email, or by phone Monday through Friday, 8 am to 8 pm ET.

So read through this document and let us know if you have any questions. Some of the sections might not apply to you. If that's the case, just move on to the next section.

Let's begin.

The screenshot displays the HubSpot dashboard for a user named Ryan Ghoda. The main section is titled "Visits & Leads" and compares this month's performance to the last month. It features two line charts: one for Visits (946,337 total, +1.5% increase) and one for Leads (41,671 total, -12.6% decrease). Below these are sections for "Landing Pages" (a table of page performance), "Blog Posts" (a table of recent posts), "To Do List" (showing no outstanding tasks), and "Community" (with links to support articles and recent blog posts). A right-hand sidebar contains navigation links for Academy, Content, and Contacts. The footer includes copyright information for HubSpot, Inc. and the product version: Enterprise 99.

Metric	Value	Change vs. Last Month
Visits	946,337	+1.5%
Leads	41,671	-12.6%

Name	Visits	Submissions	Conversion Rate
An Introductory Guide to Facebook for Business Comarketing	242,902	40,699	17%
Website Redesign Planning & Progress Kit	52,904	36,954	70%
27 Pre-Designed Calls-to-Action for Your Customization [PowerPoint Template]	46,049	34,589	75%
54 Examples of Brilliant Homepage Design	69,034	33,633	49%
How to Engage Fans on Facebook	50,125	33,599	67%

Name	Published	Views	Comments	Inbound Links
7 Things Marketers Muck Up When Communicating...	3/21/2013	156	0	1
The HubSpot Culture Code: Creating a Company We...	3/20/2013	20	9	0
The HubSpot Culture Code: Creating a Company We...	3/20/2013	3,398	9	6
HubSpot Partner Agency Element Three Doubles...	3/20/2013	95	0	2
Why I Hired the Fake Steve Jobs	3/20/2013	1,061	11	10

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Email

Email marketing is an essential component of every successful marketing campaign. The HubSpot email platform seamlessly integrates with our entire range of tools and products. Our email dashboard provides you with a birds-eye view of all of your email campaigns and the real-time performance of those campaigns. HubSpot's email marketing tool is synced with your central marketing database, so you won't have to manage multiple lists and reports.



Did you know?

You can personalize your emails with *any* contact property. Anything that's in your database is a potential field of customization to help you further engage your contacts.

Inventory Email Content

Take a complete inventory of all of your current emails. Include anything you currently send to your leads, prospects, and customers. This can be as simple as copying and pasting the content of each of the emails you want to migrate over into a Word document. Once your HubSpot account is set up, you'll be able to easily cut-and-paste the contents of your existing emails into HubSpot.

The screenshot displays the HubSpot email editor interface. On the left, there are several configuration sections: 'From Email Address' with a dropdown to 'Select an email address...' and an 'Add new...' button; 'Campaign' with a dropdown to 'No campaign' and an 'Add new...' button; 'Email Type' with a dropdown to 'Select an email type...' and a 'Manage...' button. Below these is the 'Main Content' section, including 'Message Subject' with a text input and a 'Subject Line Personaliza...' dropdown, and 'Main Body Text' with a rich text editor toolbar. On the right, a preview of the email content is shown, featuring the HubSpot logo, a placeholder for an image with dimensions 'h: 600px w: 100px', a rich text column placeholder, and sample text including 'Hi there,' a paragraph of placeholder text, a list of bullet points, a link to a landing page, and a closing signature.

Save Email Templates

Save a copy of an email with your favorite template design. You'll be able to recreate the look and feel of your templates in HubSpot using our drag-and-drop template builder and WYSIWYG editor. HubSpot also offers dozens of free templates that have been hand designed to look great on any screen or device. We also have hundreds of pre-designed templates at the [HubSpot Marketplace](#).

Automation

Workflows is HubSpot's answer to lead nurturing and marketing automation. Workflows can be used to send emails and nurturing campaigns, automate marketing tasks, trigger notifications to your sales team, and much more.

Other marketing automation tools only go as far as letting you personalize your emails. HubSpot makes it easy to personalize what people see across your website, depending on which stage of the buying cycle they're in at the moment. So the content they see meets them where they are and helps usher them into the next phase of commitment. Automatically.

The screenshot shows the HubSpot Workflow Builder interface for a workflow titled "Nurture Tire Lead from Twitter". The interface is divided into several sections:

- Workflow details:** Includes "View all workflows", "Edit workflow", "Performance", and "History".
- Workflow settings:** A gear icon for configuring the workflow.
- Test:** A section for testing the workflow, showing "Begin this workflow when..." with a list of triggers: "A smart list updates", "First workflow step" (Increment property), and "Second workflow step" (Send email). A "Save workflow" button is at the bottom.
- Enrollment:** "When activated, this workflow will enroll..." with a toggle for "Workflow is Not Live". Triggers include "New contacts in list" and "Download DIY Tire Repair from Twitter". It shows "Enroll the list's existing contacts" for 905001 contacts.
- Unenrollment:** "Unenroll contacts from workflow when contact meets the criteria of..." with a dropdown for "Marketing Qualified Leads".
- Steps:** Two steps are defined:
 - Step 1:** "First workflow step" with a delay of 0 Days, 0 Hours, 0 Minutes. Action: "Increment a numeric pr..." with a dropdown for "Lead score" and a value of 5.
 - Step 2:** "Second workflow step" with a delay of 0 Days, 0 Hours, 0 Minutes. Action: "Send an email" with a dropdown for "Nurture Intro DIY Twitter Focus".

Document Workflows

Document all of the steps, triggers, and actions in your current marketing automation process. This can include items like setting a contact property, sending an email internally or externally, adding or removing a contact from a list, and even more advanced functionality like triggering a webhook. We'll give you the training and education to create effective workflows to move your leads down your sales funnel.

Also, be sure to save all the emails that are sent by your automation steps. You probably already did this when you inventoried your emails in step one, but it doesn't hurt to be sure.



Tip

Think about what kinds of workflows you might want to create. See our free eBook *Going Beyond Email: How to Use Workflows for Better Lead Nurturing* for more information.

Contacts

The Contacts application is at the very heart of your HubSpot. It's your centralized marketing database where all of your marketing contacts are stored. Contacts is deeply integrated with the rest of HubSpot. It collects, organizes, and helps make sense out of every interaction with your contacts, whether it's through email, a landing page, social media, your website or blog, and even offline interactions like a tradeshow. Contacts is fully customizable and integrates seamlessly with Salesforce. With an additional amount of development, Contacts can connect with virtually any type of outside service or CRM system.

Export Contacts

If you have a contacts database with your existing marketing software provider, it will be very important to get all of this information exported and backed up. Exporting your contacts to the CSV (Comma-Separated Values) file format will ensure that you'll be able to upload them easily into your HubSpot later.

The screenshot displays the HubSpot interface for a contact named Andrew Pitre. At the top, there's a navigation bar with 'HubSpot' and various menu items like 'Dashboard', 'Content', 'Contacts', 'Reports', 'Marketplace', and 'Academy'. Below this, the contact's name 'Andrew Pitre' is shown with a profile picture. To the right, key metrics are displayed: 'First Touch' (2 Years Ago via Facebook), 'Last Touch' (20 Days Ago via Clicked Email), and 'Lifecycle Stage' (Marketing Qualified Lead, since Nov 2, 2012). A central timeline shows a sequence of events: 'Completed workflow MK-Topic-of-Recent-Conversion' (Wed Nov 28, 2012 at 7:17pm), 'MK-Topic-of-Recent-Conversion-Social-Media set topic_of_recent_conversion_event to "social media"' (Wed Nov 28, 2012 at 7:17pm), 'A Guide to Pinterest's New Business Accounts' (Sat Nov 17, 2012 at 1:24pm) with a 'Landing Page' label and 'Page Type' sub-label, 'A Step-by-Step Guide to LinkedIn's Company Pages' (Thu Nov 8, 2012 at 11:03am) with a 'Clicked' label, 'Converted as a Lead' (Thu Nov 8, 2012 at 11:03am), and 'LinkedIn's New Company Pages Ebook' (Thu Nov 8, 2012 at 11:02am) with a '10' and 'Unlisted Properties' label. On the left side, there's a sidebar with 'Return to All Contacts' and various menu items like 'Contact Details', 'Overview', 'Properties', 'Account', 'Lists', 'Workflows', 'Property History', 'Workflow Enrollments', 'Contact Research', and 'Search in Google'.

Most marketing software solutions will offer you ways to export your hard bounce list and unsubscribe list. It's critically important that you import these into your HubSpot as well because these can include old, deactivated emails (bounced) or contacts who have explicitly asked to not receive further emails (unsubscribed). We'll give you the training and education to make sure all of this information also makes it into your HubSpot seamlessly.



Tip

This is a good time to think about cleaning up your database. Separate your active leads from inactive leads. Typically, newer leads hold more value for your company than years-old leads that have never converted.

Document Your Lead Scoring

If you're using lead scoring now, you already know what your criteria is for scoring leads. There could be many steps in this process, so we recommend saving a small document with all of your criteria so that you can work with your Inbound Marketing Consultant to determine an effective lead scoring strategy.

Connect To Your Salesforce

With HubSpot, you can do everything inside of the HubSpot platform. There's no need to keep lots of other windows open, to log into and out of Salesforce all day, and to remember lots of different passwords. It's all inside your HubSpot. And connecting your HubSpot with your company's Salesforce is easy with the HubSpot Salesforce Connector Wizard.

Lists

HubSpot makes it easy to collect data about your leads and nurture them over time through personalized communication. HubSpot's list segmentation tool allows you to pull granular segments from your database based on any or all contact properties: forms your leads have submitted, specific attributes you've learned about them, your leads' origin, even behavioral data like what pages they've

viewed on your site or that elements on your website they've interacted with (available in HubSpot Enterprise).

Document your List Segmentation Rules

Record the names of your lists and the rules of what properties are used to segment them. If your lists use any contact properties that are stored exclusively in your old marketing software, be sure that they are exported in your contacts CSV export so that HubSpot can access the same data.

Landing Pages

Landing pages drive and qualify leads for your business. Landing page software was originally designed to make things easier for marketers who were frustrated with having to ask someone else to make simple updates to their website pages. This put full control of web design in marketers' hands at last. And so it's no surprise that landing pages have become a major cornerstone of most marketing campaigns. HubSpot's Landing Page builder is a powerful way to create highly customizable landing pages individually tailored for each of your channels.

Many marketing software solutions don't give you the option of creating your own landing pages, so you can safely skip this section if you've never used your existing software solution to build a landing page for your business.

The screenshot shows a configuration window for creating a list. It is divided into several sections:

- What's the name of this list?**: A text input field containing "PR Mavens".
- What type of list do you want?**: Two radio button options: "Smart list - add contacts continuously according to rules you set" (selected) and "Static list - add contacts manually".
- Which contacts should be in this list?**: A section titled "Include contacts who meet all of these requirements:". It contains a rule: "Property Value" (dropdown), "Industry" (dropdown), "is any of" (dropdown), and a list of values: "Communications" and "Entertainment".
- Also, include contacts who meet all of these requirements:**: A section with two additional rules:
 - Rule 1: "Form Submission" (dropdown), "Contact" (dropdown), "has filled out" (dropdown), "5 Deep Dive PR Agency Tips" (dropdown). Includes a "Refine" link and "On any date" text.
 - Rule 2: "Page View" (dropdown), "Contact" (dropdown), "has visited (exact URL)" (dropdown), "acme.com/pricing" (text input). Includes a "Refine" link and "On any date" text.
- + Add another rule**: A button to add more requirements.
- Save list**: A blue button at the bottom.



Tip

If you're hosting your landing pages with another software solution, they might get lost when your contract expires. To mitigate this issue, follow the suggestions below.

Inventory Your Landing Page Content

The content of your landing pages is the key to your conversion rate and success. Be sure to copy and paste this content or take screenshots of your landing pages and save them someplace safe. When setting up your HubSpot account, you will be able to recreate the look and feel of your landing pages with ease.

The screenshot displays the HubSpot landing page creation interface. It is divided into several sections:

- Step 1: Give your landing page a name...** A text input field contains "My Awesome Landing Page".
- Step 2: Select a template...** A grid of template thumbnails is shown, including "1 Column No Form", "2 Column Form Left Cl...", "2 Column Form R Layo...", "2 Column Form Right ...", and "2 Column Form Right ...".
- Landing Page Preview:** A preview window shows a sample landing page with a HubSpot logo, a "Page Title", placeholder text, and a form with fields for "First Name", "Last Name", "Company", and "Email". A "Get Free Widget" button is also visible.
- Step 3: Create landing page and add content...** A prominent blue "Create Landing Page" button is located at the bottom.

Record Your URLs for Redirects

Your existing landing pages are likely to have many internal and external links to them all over the web. Be sure to record all of the URLs that your landing pages currently reside on. We'll give you the training and education to set up the proper redirects for these URLs so that visitors will be seamlessly redirected to your new HubSpot landing pages.

Download Your Collateral Behind Landing Pages

Many landing pages offer “bonus” content to entice visitors to fill out a form. At HubSpot, we create all sorts of materials for this purpose, including eBooks, free

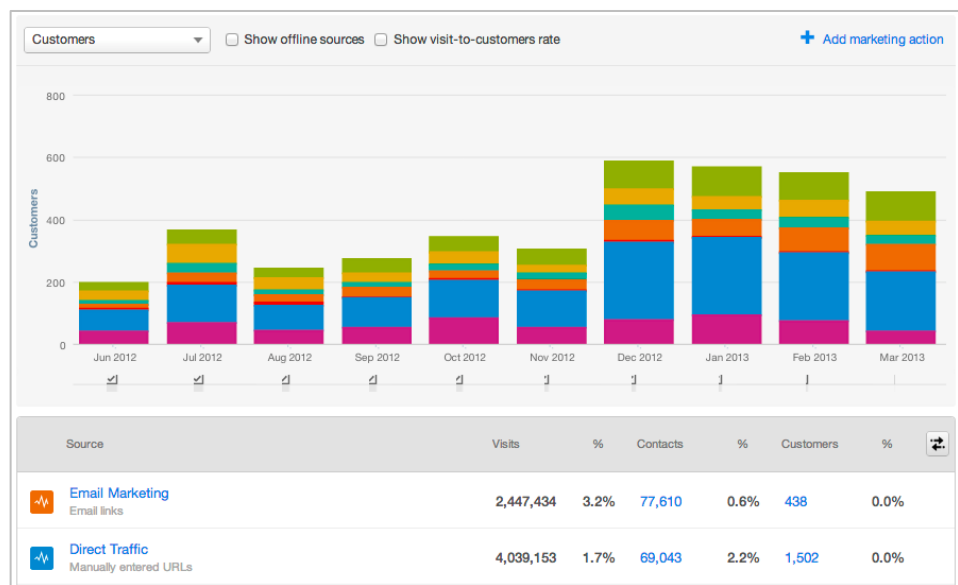
resources, and templates. Be sure to save all of these files if they are hosted on your current marketing software's servers. With the HubSpot file manager, you'll be able to import all of these files into our software in one easy step.

Inventory Your Flows To And From Landing Pages

Record the flow of how visitors land on your landing pages, as well as where they are sent to after. For example, after filling out a landing page on your site, should your visitor be sent to a thank you page? To a different section of the website? After recording these flows, your Inbound Marketing Consultant can help you recreate these paths easily in your HubSpot.

Analytics

HubSpot's Analytics gives users rich, granular information to track every step your contacts take from finding you to becoming delighted, loyal customers. From understanding where and how you're finding visitors (sources



and keyword integration) to tracking how well your content (pages and events) is converting customers, HubSpot's fully integrated analytics tool measures everything needed to be a successful marketer.

Add Your Tracking Code

Adding HubSpot's analytics tracking code to your website will allow the deep data and visitor insights to be gathered from your website. If your existing marketing software solution placed tracking code on your website, you'll want to remove it and replace it with HubSpot's tracking code.

Export Reports and Data

Be sure to export all of your historical data, analytics, and reports as far back as they go. You won't necessarily need to import all of this data into your HubSpot, but having it on hand will allow you to refer back and compare with future marketing reports and analytics.

Summary

And that's it. Those are the six key component areas you should carefully inventory before moving from your current marketing software provider:

- ❑ **Emails**
- ❑ **Automation**
- ❑ **Contacts**
- ❑ **Lists**
- ❑ **Landing Pages**
- ❑ **Analytics**

Once you've followed the steps outlined above, you'll be ready to start using HubSpot. Once you discover how easy and powerful marketing software can be, you won't ever look back. Welcome to the HubSpot family!

