HubSpot

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.

Table of Contents

Use this checklist to document your progress along the way.

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.

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.

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.

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.

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.

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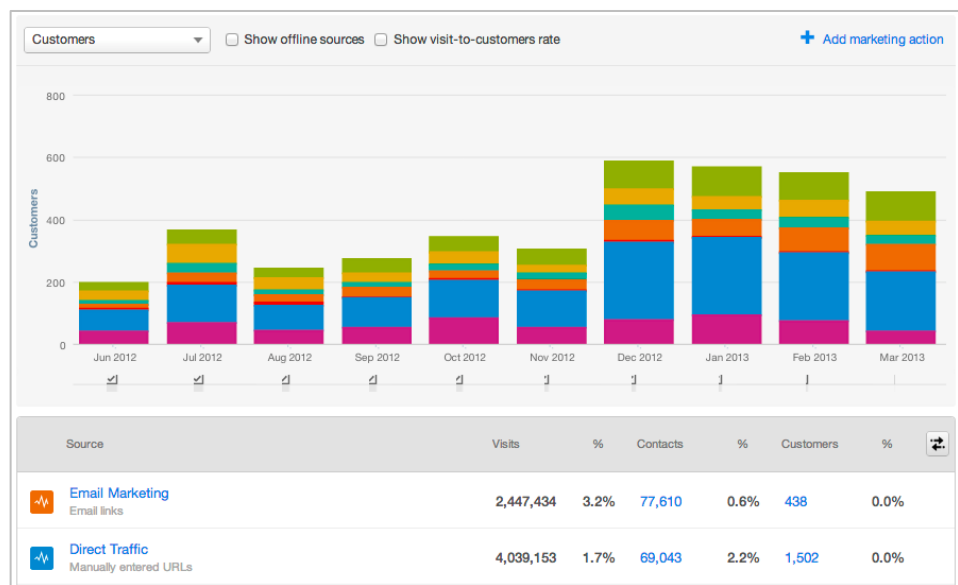
and keyword integration) to tracking how well your content (pages and events) is converting customers, HubSpot's fully integrated analytics tool measures everything needed to be a successful marketer.

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!