HubSpot to Salesforce Marketing Cloud Migration

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Introduction

Today, in this highly competitive world, every organization aims to organize their business around the customers they serve rather than the products they offer. Customer satisfaction has always been one of the key components of these organizations. To serve them better, these organizations need data and the right tools to deliver a great, personalized experience at every touch point. CRM could play a key role by providing a holistic method that businesses may use to manage their relationships with their customers. Below are the key reasons for CRM migration procured in the Market.

Limited number of applications supported

Lack of ability to configure CRM

Limited access to cloud storage capabilities

REASON FOR CRM MIGRATION

Less integration options

Inability to scale up

Cost of CRM licenses

When we talk about the CRM platforms, both HubSpot and Salesforce are advanced CRM platforms and are being used by customers worldwide. Some companies are utilizing both HubSpot and Salesforce to fulfil various business needs and there can be a situation where as part of a strategic business decision, companies decide to move to one of these platforms. Salesforce is one of the companies that is leading the marketing automation sector with its product, Salesforce Marketing Cloud. SFMC allows users to provide the target audiences with relevant and customized journeys and messages across the right channels and devices. The SFMC platform has all the tools and integrations you need for marketing, sales, content management, and customer service. Each product on the platform is powerful alone, but the real magic happens when you use them together. On the other hand, HubSpot, which is among the most user-friendly CRMs, is preferred by enterprises that are in the introductory or growing phase of their business. HubSpot offers secure services and quick functions that do not necessitate the use of a technical team.

HubSpot Vs Salesforce

Inbound marketing involves creating valuable content and aligning it with the customer's need to engage and acquire it for long-term relationships. Experts suggest HubSpot as "the platform to strategize and implement your inbound marketing". As opposed to this, Salesforce Marketing Cloud is described by experts as "a unified marketing tool to know their audience, engage them, and personalize their experience". Email marketing automation ties together interactions from any channel or device. It integrates customer data and behavior to provide messages effectively in real-time.

HubSpot and Salesforce Marketing Cloud are both marketing automation platforms. Both resolve similar kinds of issues and comparing them is like pitting Coca-Cola and Pepsi against each other. Here we will compare them on 6 different parameters.

Parameters	Salesforce	vs	HubSpot
Lead Creation and Prospect Management	Customizable leads are in the systems		Various lead generation marketing options
User Interface / User Experience	Include various customization options		For beginners
Integration & Scalability	Could be integrated with 3400+ apps		could be integrated with over 500+ apps
Cost Analysis	$7,500/month for 50 users		$6,000/month for 50 paid users
Customer Support	Great customer support, Additional benefits according to the plan		Need to purchase separately
Dashboard, Reporting and Analytics	Very comprehensive and advanced reporting system		A separate plan must be purchased

Lead Creation and Prospect Management

- Both platforms can capture leads and make it easy to enter contact information into your system.

- You can use HubSpot, which places a strong focus on inbound and content marketing, to effectively create leads. Additionally, you may publish content items like whitepapers, blog posts, articles, and more that aid in driving more leads into your CRM using HubSpot's Content Management System (CMS).

- In the case of Salesforce, the above activities could be done using separate platforms like Marketo which has to be integrated with your Salesforce UI. To organize every step of your lead nurturing process, you may use Salesforce's customization features to build lead assignment criteria, create security access levels, and many more.

User Interface / User Experience

- All contacts and leads that are connected to customers are handled by both platforms efficiently. Businesses deal with a lot of data regularly, so it is essential to understand each platform's advantages and disadvantages.

- When it comes to customizations, salesforce offers tons of customization choices. Salesforce is the recommended CRM for complex organizations, and you will get a dedicated account manager to help you make the best use of it.

- HubSpot provides the basic version for free. It can be set up quickly and easily without having to go through a tedious implementation process. But the platform does not provide many customization options as Salesforce.

Integration & Scalability

- In today's era, data creates an advantage for any organization to grow and if the data is scattered, it causes a loss of opportunities for that organization. Also, if your tech stack lacks the appropriate capabilities, you are certain to take the wrong turn. Integrations enter the scene in this situation.

- Salesforce provides the app integration option from its AppExchange which supports integration from over 3400 different platforms. HubSpot, however, supports over 500 integrations through HubSpot's App Marketplace.

Cost Analysis

- You may use HubSpot for sales, marketing, and service. HubSpot premium plan starts from $25 per month. You can go for a professional plan which costs $80 per month or an enterprise plan which starts from $120 per user each month. All plans are payable annually.

- Salesforce, on the other hand, is seen as pricey. Their basic plan costs $25 per user each month. However, Salesforce CRM users may end up paying up to $150 per user per month for the Enterprise version to access advanced functions.

- To obtain customized solutions from Salesforce, you must face additional charges linked to Marketing and Service Cloud and other related integrations.

- Salesforce is much more expensive than HubSpot but it provides more customization and functionalities.

Customer Support

- Customers of the Salesforce CRM software are provided with a standard support package that includes the ability to submit support requests, access to customer success committees, and a 2-day response time.

- For customers who have a premium subscription, round-the-clock phone assistance, a promised one-hour issue response time and a dedicated success manager are provided.

- In the case of HubSpot, you get a similar help desk support package, but it costs you extra for the premium edition which includes assistance from a technical support manager.

- The remote onboarding session for HubSpot CRM costs approximately $1500, while the advanced support sessions for customization can cost up to $5,000.

- Even if a user has a free plan, they usually get a reply within a day.

Dashboard, Reporting and Analytics

- The comprehensive and efficient reporting features of Salesforce CRM are well recognized, and they are highly customizable. However, it takes a lot of effort to deploy the changes correctly, and learning the interface requires separate training.

- On the other hand, if we look at HubSpot, it was earlier not a preferred tool for analytics. However, it has significantly improved its reporting and analytics capabilities as a result of recent updates and the introduction of revenue attribution reports.

- While Salesforce is better in reporting and analytics, HubSpot is a better option if you want easier implementation.

Which Platform to choose: HubSpot or Salesforce?

Both platforms serve two very distinct business types. HubSpot is a great option if you are searching for a simple and affordable CRM solution. However, if your company needs robust reporting features, a user base that is always growing, and a complex sales process, Salesforce is the better option.

Salesforce offers a 360° view of your client information and can adapt to your specific industry needs. It allows you to interact on projects and sales prospects through its primary newsfeed and by offering a full-fledged social network via Salesforce Chatter, the platform offers features that boost sales and encourage marketing efforts.

Due to the vast number of capabilities, Salesforce can first be a little bit challenging to directly work on. To get the most out of the software, you may attend Salesforce University for a week of training, provided you are prepared to pay for the privilege. There are tons of customization options which makes Salesforce an excellent option for various kinds of businesses.

Whether you are talking about G Suite, MailChimp, or QuickBooks, Salesforce integrates with some of the top third-party applications. To help your team transfer easily, these connectors work flawlessly with the platform. Several products and integrations are available within the platform through the App Exchange.

Approach: HubSpot to Salesforce Marketing Cloud

The first step for migration from HubSpot to Salesforce marketing cloud is data preparation. Various business-level decisions are necessary for data migration. It is not a job that should be left to the technical staff alone. You must be well-prepared for the migration process and make prior plans. The following things must be kept in mind for the data preparation:
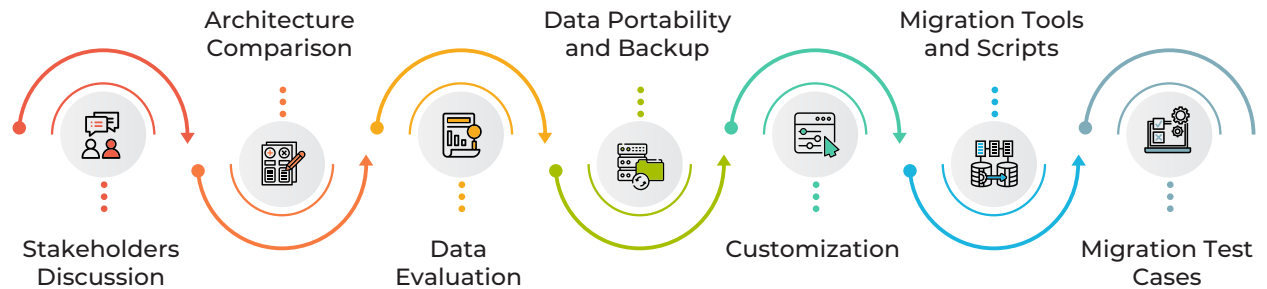
Stakeholders Discussion: Discussion among the major stakeholders about what has to be achieved from this migration. Talk about what needs to be improved, what information must be preserved, and what information can be erased.

Architecture Comparison: Comparing field and data with the target CRM. Check how custom fields would be deployed and analyze whether all its data and field types can be transferred into the new one.

Data Evaluation: The most important step is this one. You must examine the types and formats of the data in your legacy CRM to determine which data you need to migrate. Additionally, this is the time to delete any duplicate data. After completing this, you should make a data map that shows what data goes where.

Data Portability and Backup: There could be chances that you can lose all your data due to computer viruses, hardware failures, file corruption, fire, flood, or theft. This could lead to financial and customer loss. Hence, data backup is essential for migration.

Customization: Ensure that the target CRM is customized according to legacy CRM to migrate to the customized fields. Additionally, you can delete the unused fields.

Migration Tools and Scripts: This is the most technical part of the migration as it could include any code or script which is working in the background and performing a big job for you. Prefer to migrate this via a migration specialist who is an expert.

Migration Test Cases: Try to conduct a test migration as it will ensure that all the planning that you did is correct, and the data is getting matched between both platforms.

Method for CRM Migration

Your requirements and preferences will determine the best method for you to choose. The native Import Wizard in your CRM may be sufficient if you are importing a few modules, such as Accounts and Contacts or Leads. It will be advised to use a third-party solution or a custom migration if your data is more complicated or when the native tool is not accessible.

DIY using the HubSpot and Salesforce provided tools

Migrating with a wizard import tool or an integration tool

Custom migration

Do It Yourself using the HubSpot and Salesforce provided tools

Data is always changing, procedures are modified regularly, and properties or fields may be added, removed, or merged. When you keep this in mind and divide your database in half, adding some data while leaving 60% of it out, time begins to fill in the gaps. Starting from scratch and modifying the fields/data structure is most apparent, especially when switching to a new system. You have made yourself vulnerable to considerable risk and data loss.

It is good to start by drawing a diagram of your company processes, complete with all its components and connections. You will be able to see the big picture, the data entered at each stage and the people who are engaged in them. This will help you in identifying what data must be migrated to the new CRM and what is to be deleted (duplicate data). Never migrate data in chunks; the risk is too big, and the cost of putting your firm behind schedule can be too high. Always prefer to move data as a whole database.

The advantage of this method is that this process is free but on the other hand it will be time taking and can jeopardize the integrity of the data as you will be dealing with lots of data, and it could be possible that you might miss or delete something.

Migrating with a wizard import tool or an integration tool

This solution transfers data between CRMs in a matter of hours. It does not call for technical expertise. This effort led to speedy data migration to a new CRM. Data such as products, leads, deals, events, and other information will seamlessly transfer from HubSpot to Salesforce. You can also utilize the service if you need to move data to systems owned by third parties.

The service handles every step of the data transfer process, including matching individuals between systems, providing a clear understanding of what data to transfer and how, monitoring migration security, and preventing data loss.

This is a robust procedure for importing data without coding skills. Most of the things already get mapped with the help of the tool which makes the process easy. Also, it does not require any software to be installed on the computer.

Custom migration

So, this approach shows "**doing it the correct way**." Although the preceding options are not necessarily bad, doing it this way will free you up to concentrate on Salesforce training and configuration, which is something you should be doing along with your business operations.

Finding a service provider that specializes in data migrations and is intimately familiar with **HubSpot and Salesforce** can ensure a smooth transition and save you countless hours. Data professionals or a partner who specializes in doing this ALL THE TIME are the way to go and something we would strongly advise considering the data is so vast and interconnected. *Only data transfer experts can make your transition as seamless as possible while allowing you to concentrate on the essential elements of your company*.

A project manager or CSM can help you through the entire HubSpot to Salesforce data migration process, giving you time to think about things like fields/properties cleanup, pipeline or process consolidation, automation, etc. Even better, **the project manager or CSM can offer guidance** on turning text fields into dropdown fields, so you can report more accurately on the data points you collect.

This method helps you by providing more custom options like filters, moving objects to different objects, merging data or de-duplicate data. *As the data migration partner will be a data expert, the migration's burden and the data's integrity will remain intact and not be exposed to risk*. But you will pay more for this choice because you are paying for a professional service. Find a partner in data migration who uses the tools to automate a large portion of the migration so that it requires less money and human effort to complete.

A case on the custom migration process

The assessment of existing data assets and the thorough creation of a migration plan is the initial steps in a complex process of data migration. If the data is scattered, it might create issues in compiling and analyzing it. Hence, we require a system in which the flow of data is simple, and data is easy to compile and use.
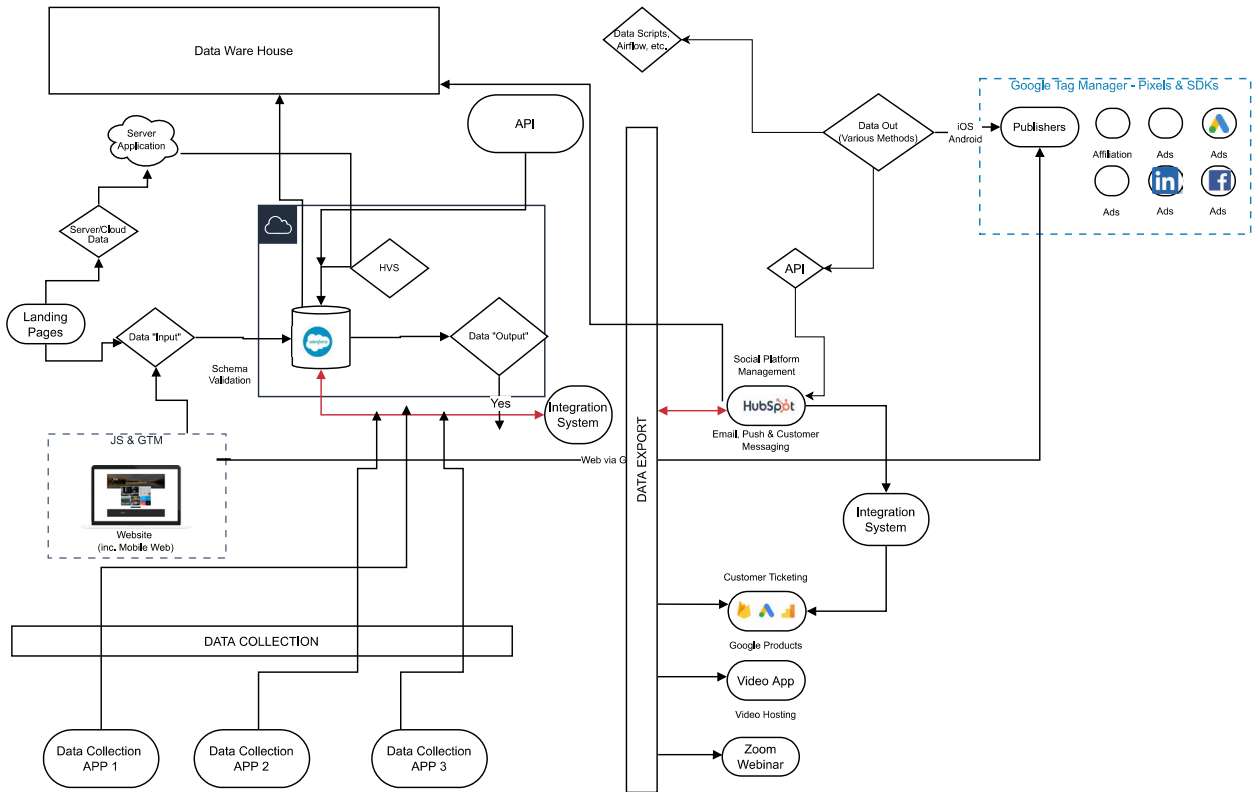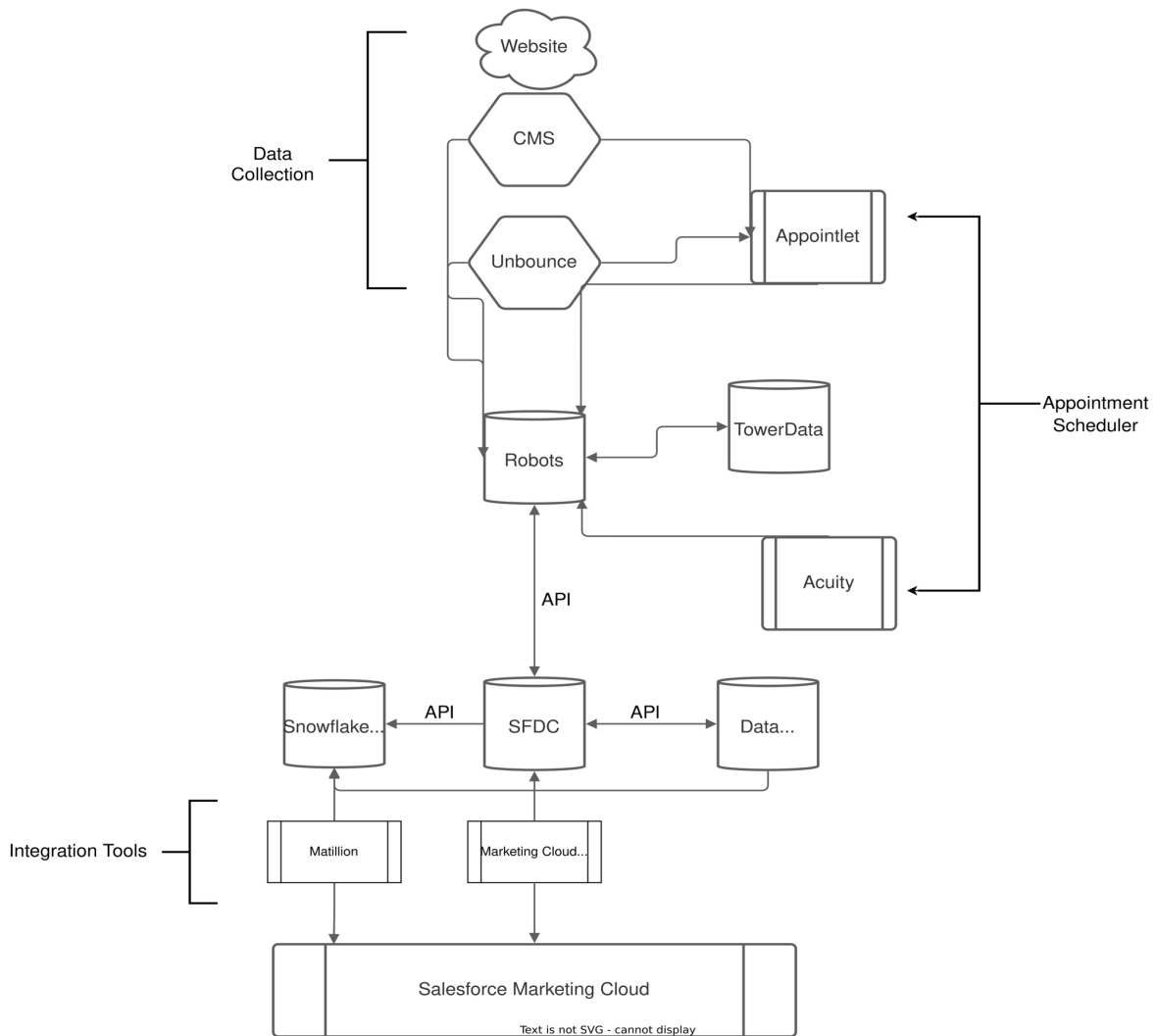

System Architecture with HubSpot

In the diagram of system architecture with HubSpot, we can see that in the case of HubSpot, the data is coming from multiple sources and using various APIs and different tools to collect and compile. Also, HubSpot must be integrated with different platforms (E.g., Video Apps) for running the campaigns.

HubSpot is integrated with Salesforce, which receives data from the data collection centers (including landing pages and websites) and is imported into the sales cloud. To ensure that the data is uniform and unique, the data is exported from both platforms and kept inside a data warehouse. **It helps with data redundancy and integrity**.

But looking at the diagram, we can see it is complex and the data is scattered at various stages. Hence, we require the migration from HubSpot to Salesforce Marketing Cloud to make the architecture simple.

System Architecture with Salesforce Marketing Cloud

After the migration, the architecture becomes simple. The data collection method involves collecting data from various sources. In the flow diagram, the data has been collected from websites and landing pages and some bots capture data when a customer visits the page. These are integrated with various platforms for data integrity and scheduling. For Example, we have TowerData which helps you to rapidly and securely validate email addresses and match the demographic and behavioral data of the customer in real-time, helping you to increase the quality and depth of your data.

Data gets imported into the SFDC which could be integrated with various tools and platforms using APIs. Also, *the Salesforce Marketing Cloud connector creates a hassle-free flow of data which later could be used to create marketing campaigns from the Marketing cloud*. Matillion is one of the integration tools which helps in connect SFMC and Data Warehouse (Snowflake in this case) to transfer data.

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