Hypha
HUBSPOT DEVELOPMENT

Data Migration Plan

Marketo to HubSpot | 4 Month Migration

(Please note that weekly objectives may vary based on client needs/timelines)

Week 1:

Preparation and Planning

- Add initial users/team to your Hub
- Define objectives and set migration goals
- Begin the inventory of data to be migrated
- Start cleaning and standardizing data
- Identify critical automations in Marketo

Week 2:

Data Mapping and Field Setup

- Create a detailed field mapping document
- Identify and map custom fields or attributes
- Plan how data should be transformed during migration

Week 3-4:

Data Extraction and Automation Review

- Use Marketo's export tools to start extracting data
- Verify data integrity after extraction
- Review Marketo automations (triggers) and categorize them as "to be migrated," "to be rebuilt," or "no longer needed"

Week 5-6:

Data Transformation and Automation Migration

- Convert data formats to match HubSpot requirements
- Begin data enrichment if necessary
- Start rebuilding critical automations in HubSpot
- Continue data validation

Week 7:

Data Import Setup

- Prepare/update custom fields in HubSpot, if required
- Review and map lead scoring data and criteria

Week 8-9:

Data Import and Lead Scoring Migration

- Use HubSpot's data import tools to begin uploading the transformed data
- Verify the initial data imports
- Resolve import errors
- Migrate existing lead scores and lifecycle stages

Week 10:

Testing and Quality Assurance

- Verify data integrity and associations
- Conduct CRM functionality testing
- Test the rebuilt automations
- Address any issues identified during testing

Week 11:

User Training and Adoption

- Train your team on using HubSpot's CRM features
- Provide documentation and resources for users

Week 12:

Data Backup, Go-Live, and Post-Migration

- Go live with the new system
- Validate the data post-migration
- Monitor the system closely for any issues

Week 13–14:

Post-Migration Support and Feedback

- Provide ongoing support to users
- Collect feedback on automations, lead scoring, and routing
- Make necessary optimizations based on feedback

Week 15:

Team Training

- Conduct final team training
- Review all automations/systems

Week 16:

Closure and Evaluation

- Final review/walkthrough of your Hub
- Conclude the migration project officially