

FREE CHECKLIST

CRM Migration Checklist

Every step of a move to HubSpot from Insightly, Mailchimp, spreadsheets or another CRM. From export to go-live, in order.

conleymarketing.com.au • reece@conleymarketing.com.au • Wollongong NSW



How to use this checklist

Work through it top to bottom. Each section has to be finished before the next one starts. If you're paying someone to run your migration, use it to check their plan. Most failed migrations skip section 2 or section 4.

The golden rule. Clean the data before it moves, not after. Importing a mess into HubSpot just moves the mess somewhere more expensive.

1. Plan before you export

- ☐ **Agree what moves and what stays behind**
Old leads with no activity in years, test records and junk rarely earn a place. Decide the rules up front.
- ☐ **Name one owner for the migration**
One person signs off the field mapping, the test import and the go-live date.
- ☐ **List every source of customer data**
The old CRM, the email tool, spreadsheets, shared inboxes, Access databases and the sales team's own lists.
- ☐ **Pick a go-live date and a freeze date**
Choose a quiet week. Agree the day the old system stops taking new data.
- ☐ **Check your HubSpot tier fits the plan**
Custom objects, some associations and sandboxes need higher tiers. Check before you design around them.

2. Clean the source data

- ☐ **Export everything and keep a raw backup**
Keep an untouched, dated copy of every export. You will need it.
- ☐ **Dedupe contacts and companies**
Match contacts on email and companies on website domain. Merge before import, not after.
- ☐ **Standardise dropdown values**
NSW, N.S.W and New South Wales become one value. Same for industry, source and region.
- ☐ **Map every old user to an owner**
Each record needs a HubSpot owner, or a named catch-all owner for leavers.
- ☐ **Flag unsubscribes, bounces and complaints**
These must come across marked as unsubscribed. Emailing people who opted out breaches the Spam Act.

3. Map it on paper first

Item	What to decide	Done
Objects	Which records become contacts, companies, deals, tickets, products and line items.	
Properties	Every field you're keeping, its HubSpot property and field type. Create custom properties before the import.	
Associations	Contact to company, deal to contact and company, ticket to contact. Decide the primary company.	
Pipelines and stages	Old stages mapped to new ones, with the probability and required fields for each.	
Lifecycle and lead status	A rule for every imported record: subscriber, lead, opportunity, customer.	
History	Notes, emails, calls and meetings, with original dates and owners kept.	

4. Test before go-live

- ☐ **Run a test import of 50 to 100 records**
Pick the awkward ones: long histories, odd characters, multiple companies, closed deals.
- ☐ **Check the test records by hand**
Associations, dates, owners, dropdown values and timeline history.
- ☐ **Count records per object**
Source totals against HubSpot totals. Explain every gap before you go further.
- ☐ **Get sign-off from the people who use it**
One person from sales and one from marketing open the test records and agree they look right.

5. Go-live

- ☐ **Freeze the old system**
No new records after the freeze date. Tell the team the day before.
- ☐ **Import in order**
Companies, then contacts, then deals and tickets, then activity history.
- ☐ **Switch workflows on after the import**
Otherwise every imported record can trigger emails, tasks and assignments.
- ☐ **Spot-check 20 records end to end**
Pick them at random. Check each one against the old system.

- ☐ **Keep the old system read-only for 30 to 90 days**
Someone will need to look something up. Then cancel it.

6. The first 30 days

- ☐ **Train people on the new pipelines and views**
Short sessions built around their own records, not a generic demo.
- ☐ **Watch for new duplicates**
Forms and integrations are the usual cause. Fix the source, not just the records.
- ☐ **Check reports against the old numbers**
Pipeline value, customer counts and last month's revenue should line up.
- ☐ **Retire the old tools**
Cancel the subscriptions and remove the old logins.

Want it done for you?

A HubSpot migration from Conley Marketing Co. starts from \$7,500, with a fixed quote once I've seen your data. It covers mapping, clean-up, a test import your team checks, cut-over and training. Not sure where to start? A 90-minute Problem-Solving Session (\$650) maps your sources and gives you a plan.

conleymarketing.com.au/contact · reece@conleymarketing.com.au



HubSpot is a registered trademark of HubSpot, Inc. Conley Marketing Co. is independent and is not authorised by, endorsed by, sponsored by or affiliated with HubSpot, Inc.