

## CUSTOMER STORY · FINTECH

## Financial Services Tech Firm

63,017

CRM Records Successfully Migrated

A U.S.-based global financial technology company needed to migrate its entire CRM from Salesforce to HubSpot in under three months, before its Salesforce contract expired. INSIDEA executed a structured migration covering thousands of records, complete object relationship mapping, and full...

## ACCREDITATIONS

Five HubSpot Solutions Partner accreditations

## PARTNER TIER

## Elite Solutions Partner

HubSpot's highest partner tier



HubSpot Onboarding



Platform Enablement



CRM Data Migration



Custom Integration



CRM Implementation

## THE CHALLENGE

The company operated a mature, complex Salesforce CRM environment supporting a global sales organization. With a decision made to transition to HubSpot for greater automation flexibility and scalability, the project immediately presented significant technical challenges. Thousands of records needed to be migrated with full object relationships intact. Historical activity data – including emails, calls, notes...

## WHAT INSIDEA BUILT HubSpot Onboarding and CRM Migration

## ✓ Structured CRM Migration and Object Mapping

INSIDEA mapped all Salesforce objects to their HubSpot equivalents – Leads and Contacts to HubSpot Contacts, Accounts to Companies, and Opportunities to Deals – while...

## ✓ Custom HubSpot Automation and Reporting

Salesforce automation workflows were rebuilt inside HubSpot and enhanced for greater efficiency, covering lead routing, lifecycle stage management, and pipeline updates...

## ✓ One-Way Sync Pipeline During Transition

To prevent data drift and ensure business continuity, INSIDEA implemented a controlled one-way synchronization between Salesforce and HubSpot. This kept both platforms...

## ✓ Strategic CRM Integrations

Two integrations were implemented to elevate the HubSpot environment beyond its Salesforce predecessor. A data enrichment platform was connected via HubSpot private app...

## MEASURABLE RESULTS

63,017

CRM Records Successfully Migrated

100%

Object Relationships Preserved

100%

Emails, Calls, Tasks and Meetings Retained

3

Months from Kickoff to Full Go-Live

## Want results like these in your business?

A 30-minute strategy call to map your systems and goals. Fixed-fee proposal if we are a fit.

Book a Strategy Call →