

CUSTOMER STORY · SAAS

U.S. AI Company

100%
Data Retention

A U.S. based AI technology company needed to migrate its entire CRM from Pipedrive to HubSpot, preserving a complex custom data structure and all historical email and activity records. INSIDEA used HubSpot Operations Hub for custom field mapping and a scoped API-based approach to migrate historical...

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 had built a detailed custom data structure inside Pipedrive, including unique field configurations and historical email threads tied to every contact and deal. Moving to HubSpot was not optional, but moving without losing years of CRM data was a real technical constraint. Native migration tools could not handle the complexity. A custom approach was required.

WHAT INSIDEA BUILT HubSpot CRM Migration

✓ CRM Audit and Field Design

INSIDEA began by auditing the full Pipedrive data structure: every custom field, pipeline, and record type. A field mapping document was created to define the exact...

✓ API-Based Historical Activity Migration

To migrate historical emails, call logs, and activities, which native tools cannot transfer - INSIDEA used a scoped API approach. Each activity type was extracted from...

✓ Custom Field Mapping via Operations Hub

Using HubSpot Operations Hub, INSIDEA recreated all custom properties inside HubSpot with correct field types, validation rules, and object associations. Data sync...

✓ Hub Configuration and Apollo Integration

All three HubSpot Hubs were configured: Marketing Hub for nurture flows, Sales Hub for pipeline management, and Service Hub for support ticketing. Apollo was integrated...

MEASURABLE RESULTS

100%

Data Retention

3

HubSpot Hubs Configured and Live

100%

Historical Activity Records Migrated

4 weeks

Full Migration Timeline

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 →