Preparing Your Data for Hubspot Import

To ensure a smooth import of your spreadsheet data into Hubspot, use this checklist to prepare your data efficiently and minimize the risk of errors or inconsistencies.

1. Confirm that your data is in a Hubspot-compatible format like .xlsx or csv format.
2. For multiple spreadsheets, each record should have a unique identifier (e.g., Customer Number) to link related records, such as contacts and companies.
3. Eliminate any duplicate rows or columns in your spreadsheet.
4. Match all column headers to existing Hubspot properties/fields, or add them to your 'Custom Properties' worksheet.
5. Check for complete and accurate data, ensuring there are no missing or invalid entries.
6. Remove special characters, extra spaces, or non-alphanumeric elements from column headers and data.
7. Standardize date or time values in a consistent format, like YYYY-MM-DD or HH:MM:SS.
8. Look for data inconsistencies, such as varying capitalization, spelling, or naming conventions.
9. Clear any formulas, formatting, or non-data elements from the spreadsheet.

**Note: Additional support in data strategy, cleaning, or manipulation before import may incur an extra fee.

Next Steps After Preparation
1. Upload your prepared data to the shared Google Drive folder.
2. Inform your INSIDEA Account Manager that the data is ready for inspection.
3. Await our review and any necessary feedback or modifications before importing.
4. During implementation, we will import your data and inform you upon completion for your review. If there are any issues, we will provide an error report.