OneMetric. × RED PEPPER

MIGRATION

HubSpot → HubSpot

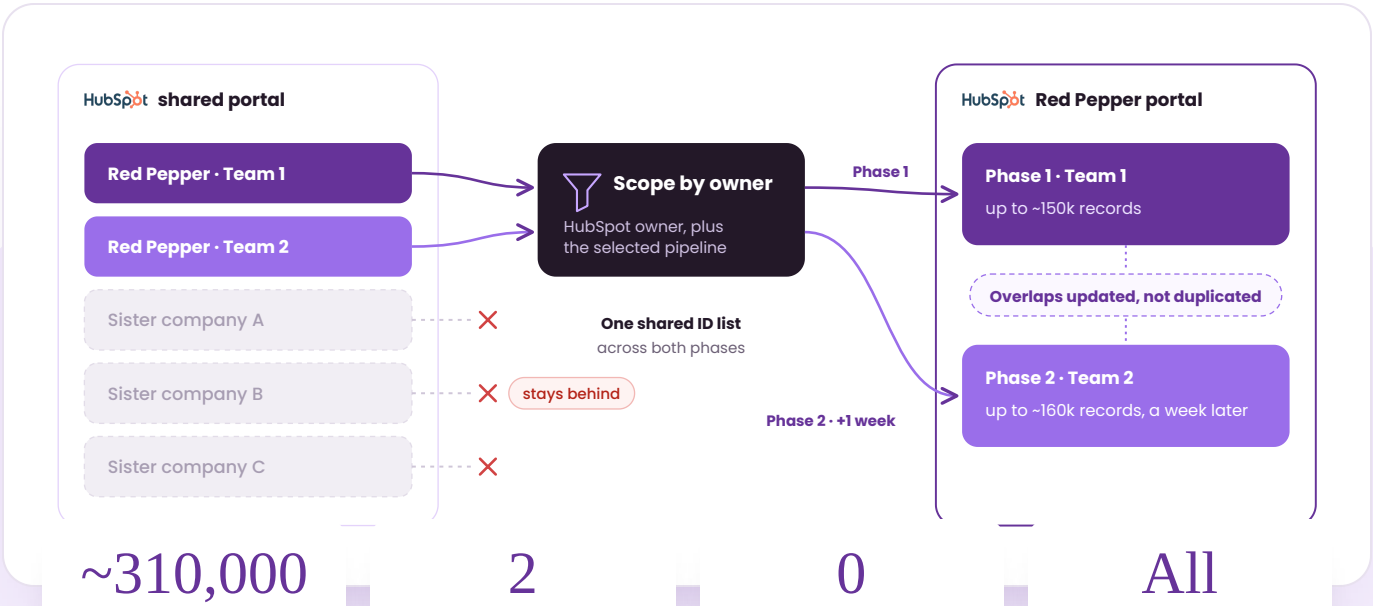
CASE STUDY

Moving out of a shared HubSpot portal without duplicating records

Poor-quality CRM data could cost ~ 20% of annual revenue.

OneMetric executed two-phase migration: 310,000 transferred records for Red Pepper Digital

Retail Tech



~310,000	2	0	All
records migrated	phases, one week apart	duplicates	linked activities retained

Service

HubSpot → HubSpot migration

Accelerators Used

SuprSwitch

Delivery

2 phases, one week apart



THE BRIEF

"Lift and shift, no scope creep, and a team that shouldn't notice they're working in a new portal."

AMIT BHALLA
Chief Commercial Officer, Red Pepper Digital

RED PEPPER

WHY IT MATTERS

Moving 310,000 records sounds straightforward, until four companies share the same HubSpot portal.

The cost of poor CRM data is not just the time spent cleaning it up.

PLAUTI

Plauti's analysis of more than **12 billion** Salesforce records found that **19%** of records added through imports were duplicates.

VALIDITY

In separate research, Validity reported that **44%** of businesses estimated poor-quality CRM data could cost them between **5% and more than 20%** of annual revenue.

Those figures are not specific to Red Pepper, but they show why getting a migration right matters.

> **Red Pepper needed approximately 310,000 records moved into a new portal, without bringing across the other companies' data or creating duplicates.**

The Overview

Red Pepper moved into its own HubSpot portal. No duplicate records were created. OneMetric migrated approximately 310,000 records in two phases, one week apart. The move preserved linked emails, calls, meetings and tasks, kept their original timestamps, and left each migrated record traceable to the source portal.

The Background

Four companies shared one HubSpot portal. Red Pepper needed a separate one.

The existing portal held data for Red Pepper Digital and three sister companies. Red Pepper wanted its own portal, but the other companies' records had to stay where they were.

Red Pepper had two teams. Team 1 was scheduled to move first, with up to approximately 150,000 records. Team 2 would move one week later, with up to approximately 160,000 records. Both teams' data would land in the same new Red Pepper portal.

The scope included contacts, companies and deals in a selected pipeline, plus the activities linked to those records. It was not enough to move the main records: their relationships and history had to come with them.

The Challenge

Only one set of records could move

Red Pepper wasn't starting with a clean HubSpot account. Several companies were using the same portal, and only one set of records needed to move. Getting the selection wrong would mean bringing data belonging to the sister companies into the new account.

Two teams, a week apart

The two teams were also moving a week apart. That created another problem: a contact or company could already exist in the new portal by the time the second team was migrated. Creating it again would leave Red Pepper with duplicate records.

Activities logged by other users

Activities needed a different approach altogether. An email might have been logged by one user but linked to a contact owned by someone else. Using the activity owner's name to decide what to migrate would mean losing parts of the customer's history.

History and traceability had to survive

There was more to the job than copying records, too. Original timestamps and record associations had to survive the move. The old HubSpot IDs also needed to be retained so the team could trace records back to the original portal.

The Solution

How OneMetric handled the two migration phases

OneMetric used SuprSwitch to move the agreed records from the shared HubSpot account into Red Pepper's new portal.

RECORDS

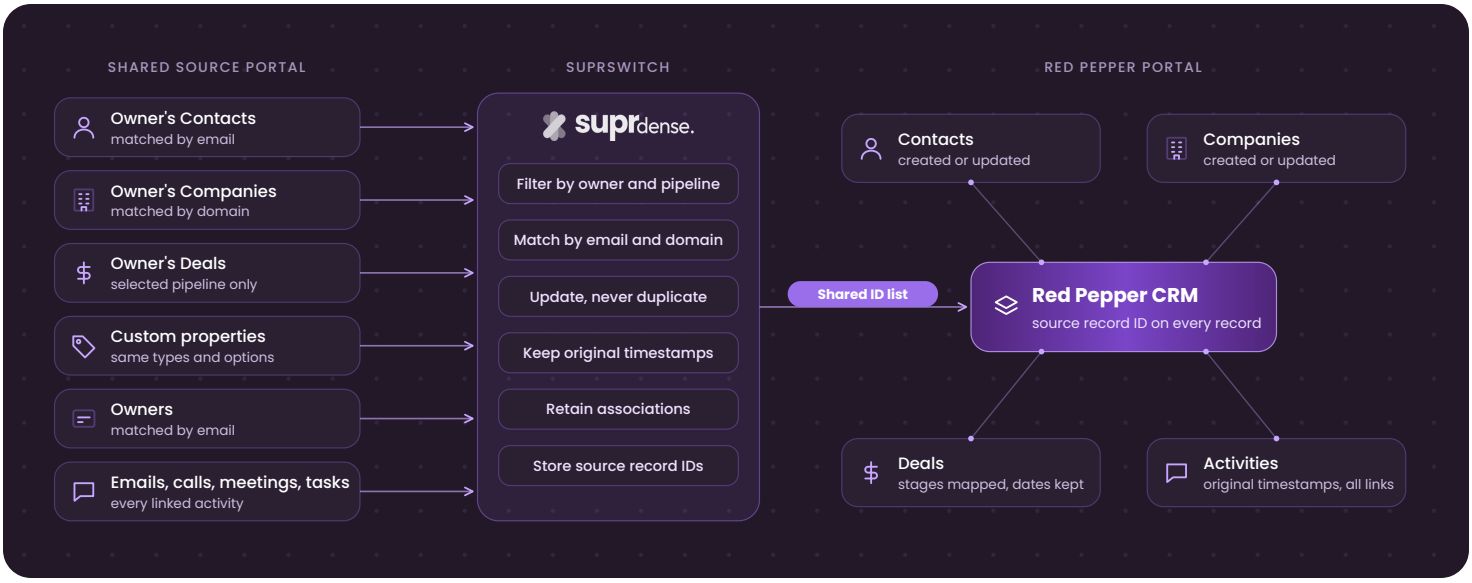
The selection was based on HubSpot ownership. If a contact, company or deal belonged to the agreed owners, it was included. Deals also had to sit within the selected pipeline. Records belonging to the other companies were left behind.

ACTIVITIES

For activities, the team used a different filter. Emails, calls, meetings and tasks were picked up through their links to the selected records, not through the user who had logged them.

SHARED ID LIST

The two phases shared a list of original record IDs. This mattered when the second team moved a week later: if a contact or company had already been transferred, the migration could update it rather than create another record.



How records moved from the shared portal, through SuprSwitch, into Red Pepper's portal

Our **Approach**

1

Getting the new portal ready

Before moving records, OneMetric checked the destination portal's owners, pipelines and custom properties. The required properties were recreated with the same field types and dropdown options. Owners were matched using their email addresses.

2

Moving the records

Contacts were matched using email addresses, while company domains were used to identify existing companies. Records that were already in the new portal were updated; new ones were created. Deal stages were mapped to the corresponding stages in the destination pipeline, with amounts and relevant dates retained.

3

Handling activities

Emails, calls, meetings and tasks were migrated through their associations with the records in scope. It didn't matter who had originally logged an activity. Its link to the contact, company or deal determined whether it moved. Original timestamps and associations were retained.

4

Checking the data

The team checked associations and timestamps against the source portal after migration. Original HubSpot record IDs were also stored in the new portal, giving Red Pepper a way to identify where each record had come from and helping the team recognise records across both phases.

Data transferred

Record type	What was done
Contacts	Selected using HubSpot owner. Existing contacts matched by email and updated; new contacts created.
Companies	Selected using HubSpot owner. Matched by domain to avoid creating another copy.
Deals	Filtered by owner and selected pipeline. Deal stages mapped, with amounts and relevant dates retained.
Custom properties and owners	Required properties recreated with matching types and dropdown options. Owners matched by email.
Activities	Linked emails, calls, meetings and tasks migrated with their original timestamps and associations.
Source IDs	Original HubSpot record IDs retained in the new portal.

The Result

Both Red Pepper teams were moved into their own HubSpot portal, with approximately 310,000 records transferred across the two phases.

No duplicate records were created. Emails, calls, meetings and tasks remained linked to the relevant records, and original timestamps were retained. The original HubSpot IDs were available in the new portal for traceability.

2X faster migrations. 50% lower costs. Zero duplicates. No lost history.

Ready to migrate smarter?

Talk to us

One Metric. suprdense.

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