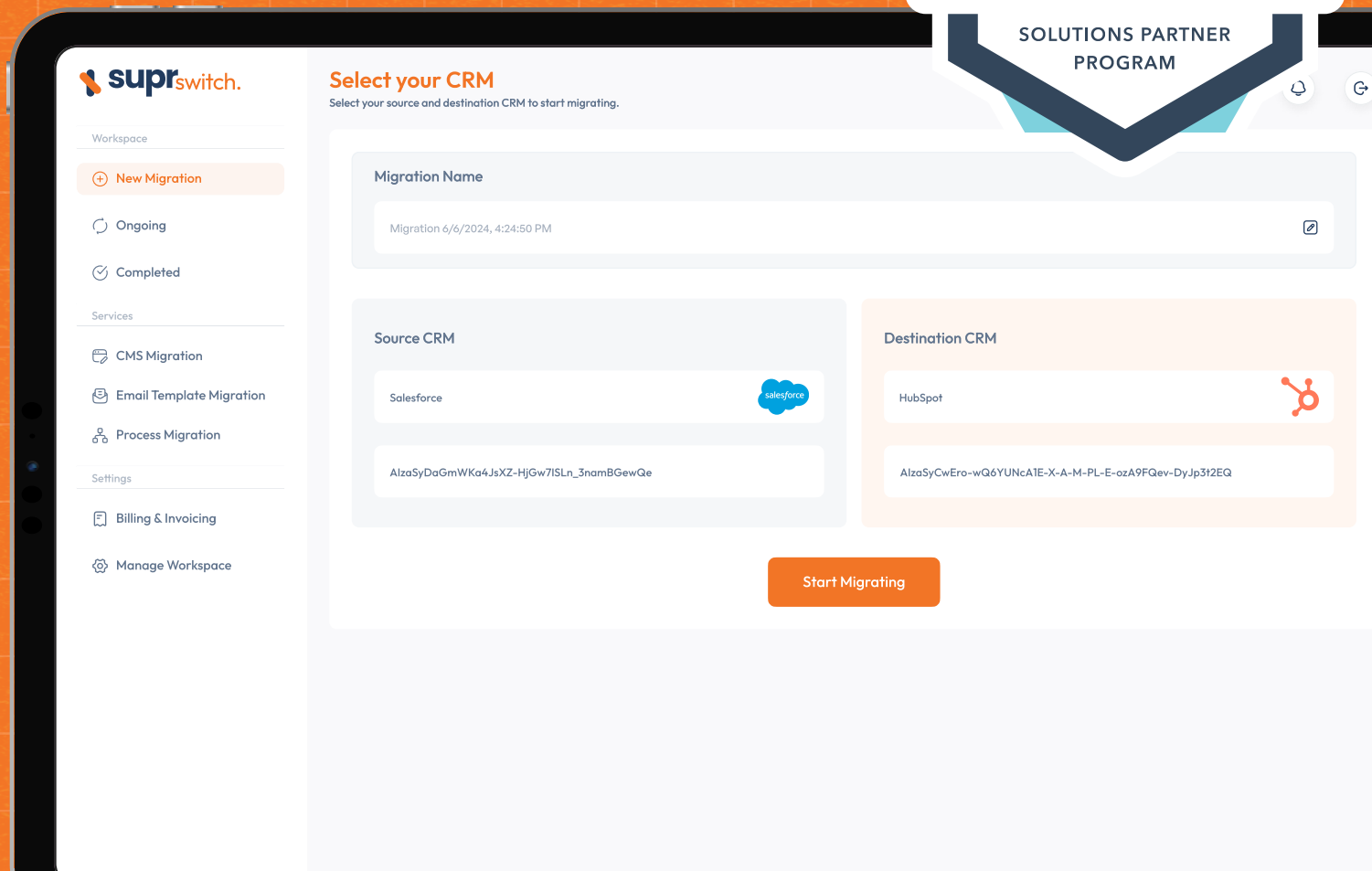


Acquisition-Driven Consolidation of a Salesforce Org and a Legacy HubSpot Portal into a New HubSpot Instance

(All brands, IDs, domains and reference IDs are masked or substituted; record volumes rounded where appropriate for customer privacy.)



The screenshot shows the suprs switch. web application interface for CRM migration. On the left is a sidebar with a 'Workspace' section containing 'New Migration' (highlighted), 'Ongoing', and 'Completed'. Below this is a 'Services' section with 'CMS Migration', 'Email Template Migration', and 'Process Migration'. At the bottom is a 'Settings' section with 'Billing & Invoicing' and 'Manage Workspace'. The main content area is titled 'Select your CRM' with the instruction 'Select your source and destination CRM to start migrating.' It features two columns: 'Source CRM' and 'Destination CRM'. The 'Source CRM' column shows 'Salesforce' selected with its logo and a masked ID 'AlzaSyDaGmWKa4JsXZ-HjGw7ISLn_3namBGewQe'. The 'Destination CRM' column shows 'HubSpot' selected with its logo and a masked ID 'AlzaSyCwEro-wQ6YUNcA1E-X-A-M-PL-E-ozA9FQev-DyJp312EQ'. An orange 'Start Migrating' button is at the bottom right. A HubSpot Elite Solutions Partner Program badge is overlaid on the top right of the interface.

suprswitch.

Workspace

New Migration

Ongoing

Completed

Services

CMS Migration

Email Template Migration

Process Migration

Settings

Billing & Invoicing

Manage Workspace

Select your CRM

Select your source and destination CRM to start migrating.

Migration Name

Migration 6/6/2024, 4:24:50 PM

Source CRM

Salesforce

AlzaSyDaGmWKa4JsXZ-HjGw7ISLn_3namBGewQe

Destination CRM

HubSpot

AlzaSyCwEro-wQ6YUNcA1E-X-A-M-PL-E-ozA9FQev-DyJp312EQ

Start Migrating

Executive Summary

After acquiring a smaller competitor, a global prop-tech scale-up decided to retire its old Salesforce® CRM and the acquired company's ageing HubSpot® portal, replacing both with a **brand-new HubSpot instance**. The transition had to keep ~850 revenue users selling across 5 countries, respect strict company-reference-ID governance, and migrate more than **4 million source records**—all during a 1 week freeze.

Using **Switch by Suprdense**, the partner team completed the migration in **18 h 47 m** of cut-over, delivered a single source of truth on day one, and hit every SLA with zero uncontrolled data creation.

Background & Drivers

Item	Acquirer ("PropTechCo")	Acquiree ("Estates360")
Pre-deal CRM	Salesforce (Enterprise)	HubSpot (21-year legacy)
Users	~282	~57
Unique quirks	Object hierarchy, heavy task volume, strict reference ID policy	
Post-deal goal	One go-to-market platform on HubSpot	

Data Footprint Migrated

#	Objective	KPI / SLA
1	Consolidate both CRMs into one new HubSpot portal	Migrate 2.5 M+ objects & engagements, field error $\leq 0.5\%$
2	Preserve pre-existing selective records imported via .CSV	Append and enrich them with activities, associations, and properties
3	Protect reference ID integrity	0 uncontrolled Company creations
4	De-duplicate deterministically (two-tier reference ID logic)	100 % merges via IDs, never fuzzy names
5	Preserve every historic interaction with correct owner & timestamp	Complete association accuracy
6	Finish within 2 weeks; freeze ≤ 1 week	SLA met

Objectives & Success Metrics

Salesforce → New HubSpot		Legacy HubSpot → New HubSpot	
Object	Records	Object	Records
Accounts already uploaded to HubSpot via .CSV	39,689	Calls	470,046
Activities*	331,476	Companies	77,298
Contacts (some uploaded via .CSV)	75,508	Contacts	260,614
Files	79	Deals	14,939
Notes	51,407	Emails	277,941
Opportunities (open + closed)	23,819	Meetings	30,247
		Notes	80,995
		Tasks	829,361
		Tickets	5,781
Subtotal	39,689	Subtotal	2,047,222

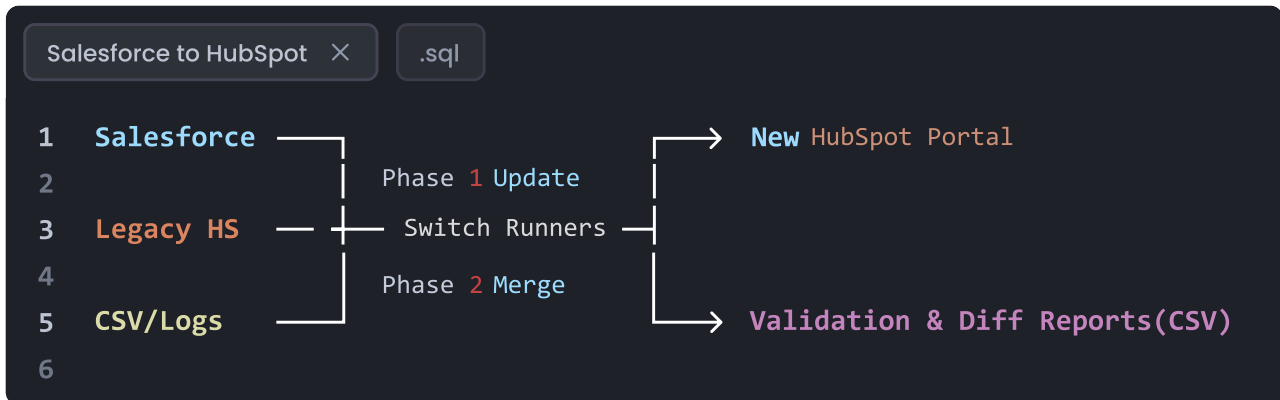
*Tasks + Events bundled under “Activity” in logs.

Grand Total Migrated: 2,569,200 records.

*Raw sums before deduplication.

Switch Implementation Blueprint

Architecture & Runtime



- Multiple parallel Node.js runners, chunking 5 k records per atomic batch.
- Dynamic throttling held utilisation at ~90 % of HubSpot rate limits; exponential back-off starting at 2 seconds.
- Real-time progress surfaced in Switch's dashboard and Slack channel; CSV diff reports archived securely (no external BI / warehousing tools were used), and no CRM was stored for absolute data security.

Switch Implementation Blueprint

Phase Workflows & Counts

Phase	Mechanics & Key Guardrails	Records Processed
Salesforce → New HubSpot	• Update-only 39,689 Companies via sf_company_id. • Enrich 75,508 Contacts; create 23,819 Opportunities (flagged open & 2025+ only). • Insert 331,476 activities, 51,407 notes, 79 files across all objects. • No migration if Company lookup is missing.	521,978
Legacy HubSpot → New HubSpot	• Export 77,298 Companies with company_reference_ID + potential_company_reference_ID. • Two-tier match → merge (New values win, old value fill blanks). • Migrate 470,046 calls, 277,941 emails, 30,247 meetings, 14,939 deals, 5,781 tickets, 80,995 notes, 829,361 tasks. • Skip any record if primary key clash but non-blank conflict in New portal.	2,047,222
Contact Dedup & Enrichment	• Alias resolver collapsed contact emails across both systems. • 132 potential false merges aborted (secondary-email clash rule).	(included in subtotals)
Final Engagement Back-fill	• Delta re-run for any SF activities created during Phase 1 window. • Owners mapped; including inactive reps assigned which carried record ownerships.	(included above)

Quality Assurance

Layer	Method	Outcome
Schema tests	55 automated assertions (non-nulls, enums, dates)	< 0.2 % violations, all corrected
Merge simulator	Side-by-side UI; bulk human approval	Prevented a 600-record chain-merge
Post-load sampling	Random 2% migration manually verified	100% field parity confirmed

Cut-Over a Week (5-Day Freeze)

Time (IST)	Action	Owner
05:00 Mon	Pause automations in both source CRMs	HubSpot Solutions Partner
06:15 Mon	Run Phases 1 & 2 in production	Suprdense SDE
05:10 Wed	Auto-diff counts	Switch QA
05:45 Thu	HubSpot sign-off call	HubSpot Solutions Partner
15:00 Thu	Smoke-test create Company / Deal / Ticket	On-call Dev
08:00 Fri	Freeze lifted; "all clear" on Slack	All teams

Results

Metric	Value	Impact
Uncontrolled Company creations	0	Regulatory IDs preserved
Contact merges (two-tier reference ID)	1,282	Clean list
Field-level error rate	0%	
Engagements migrated with correct links	≈ 2.0 M	Complete history
Post-go-live data tickets (7 days)	6 (config only) 🐛	No data defects, only patches

Key Lessons & Best Practices

Tag record lineage(`legacy_flag` in the `form source record ID`) from day one—BI teams can segment without complex logic.

Deterministic IDs beat fuzzy matching in regulated verticals; names change, reference IDs don't.

Client Testimonial

“Switch by Suprdense migrated 2.5 million-plus source records, merged duplicates deterministically, preserved every historic call, email and task, and delivered a clean, unified HubSpot portal on the first business day—all without third-party warehousing or BI platforms.”

All with Switch by Suprdense.

