REVBLACK

SALESFORCE TO HUBSPOT MIGRATION CHECKLIST

Work the ten steps in order, with an owner for each one and a signed gate after the test and after go-live.

WHO IT'S FOR

RevOps leads and admins moving their CRM from Salesforce to HubSpot

WHAT YOU NEED

Admin access to both systems, a named migration lead and HubSpot admin, and HubSpot Enterprise if you want sandbox testing

FULL GUIDE

revblack.com/guides/salesforce-to-hubspot-migration-steps

START HERE

HOW TO USE THIS CHECKLIST

Work through it in order. Each step opens with what you'll have when it's done. Tick each box as you go and write your decisions straight onto the page.

Most go-lives take about 8 to 14 weeks from kickoff. Two steps end in a signed gate, marked in mint below: the test sign-off in Step 6 and the go-live checklist in Step 9. Nothing moves forward until each one is signed.

0 **Before you start**
Confirm buy-in, licensing and who owns what.

1 **Take inventory**
Document everything in Salesforce and flag every gap.

2 **Audit and clean the data**
Resolve duplicates and decide which records move.

3 **Plan the HubSpot architecture**
Map objects, fields, pipelines and automations.

4 **Build in sandbox**
Rebuild and validate the architecture.

5 **Reconnect integrations**
Connect and verify every third-party tool.

6 **Import sample data and sign off the test**
Test on real records, then sign the first gate.

7 **Deploy the setup to production**
Move the validated configuration live.

8 **Train and enable the team**
Role-based training before go-live.

9 **Go live and sign the checklist**
Full import, delta sync, checklist, second gate.

10 **Monitor after go-live**
Daily checks, then weekly, with two formal reviews.

BEFORE STEP 1

WHAT HAS TO BE TRUE FIRST

Five conditions belong in place before anyone builds anything.

> **When this step is done, you'll have** confirmed buy-in, scoped your licensing, and named the people who own the project.

- [ ] Buy-in is confirmed across marketing, sales, and customer success.
- [ ] Vendor negotiation is exhausted. If cost is the only reason to move, renegotiate with Salesforce first.
- [ ] Licensing is scoped: seats, hubs, and the expected timeline are confirmed before you buy.
- [ ] A HubSpot admin is named, in-house or contracted.
- [ ] An executive sponsor is named, someone who can remove blockers and communicate the change company-wide.

YOUR HUBSPOT TIER DECIDES WHERE STEPS 4 AND 6 HAPPEN

- [ ] **HubSpot Enterprise.** You have a sandbox, so you build and test there and nothing touches live data.
- [ ] **HubSpot Starter or Professional.** There is no sandbox, so you build and validate directly in your live portal under a controlled process.

WHO OWNS WHAT

Migration lead _____

Executive sponsor _____

Incoming HubSpot admin _____

Outgoing Salesforce admin _____

IT and integrations owner _____

Marketing stakeholder _____

Sales stakeholder _____

Customer success stakeholder _____

DATES

Kickoff date _____

Target go-live date _____

Set sign-off owners and dates at kickoff so reviews are booked before you need them.

STEP 1 OF 10

TAKE INVENTORY

Moving the records is the easy part. Tools can transfer data quickly, but they won't carry over your workflows or the process behind them, so the inventory has to capture those.

> **When this step is done, you'll have** every object, pipeline, automation, validation rule, formula, piece of code-based logic, integration, user role, and report documented, and every automation without a direct HubSpot equivalent flagged.

- [ ] Document every object you actively use (contacts, accounts, opportunities, leads, custom objects, junction objects) and how they relate to each other.
- [ ] Document your full pipeline, from marketing through customer success.
- [ ] Document all active automations, validation rules, formulas, and code-based logic.
- [ ] List every connected third-party tool.
- [ ] List your users, roles, and ownership rules.
- [ ] List the reports and dashboards your teams depend on.
- [ ] Get your outgoing Salesforce admin in the room. They know why the system was built the way it was.
- [ ] Flag every automation that has no direct HubSpot equivalent.

AUTOMATIONS WITH NO DIRECT HUBSPOT EQUIVALENT

Automation	What it does	Agreed workaround

Where the inventory lives _____

You're done when nothing in Salesforce runs that isn't on this list.

STEP 2 OF 10

AUDIT AND CLEAN THE DATA

Clean the data before it moves. Dirty data that lands in HubSpot has to be cleaned inside HubSpot anyway, and carrying records you don't need has a direct cost. This step runs in parallel with Step 1.

> **When this step is done, you'll have** duplicates resolved and the record list finalized before anything is exported.

- [ ] Resolve duplicates and correct errors.
- [ ] Fill or remove records where the fields your deduplication tool matches on are empty. A tool can't find duplicates it can't match.
- [ ] Decide which records come over and which stay behind.
- [ ] Decide deliberately which contacts you mark as marketing contacts, because they affect your HubSpot licensing cost.
- [ ] Set a maximum number of marketing contacts under **Account & Billing** before the import runs. Super Admins and users with Modify Billing permission can do this.
- [ ] Remember that imported contacts are non-marketing by default. The **Set these contacts as marketing contacts** checkbox in the **Details** step of the import overrides that, and it works only for a single-file contacts import.

YOUR DECISIONS

Maximum marketing contacts _____

Records excluded from the move _____

Duplicate tool and matching fields _____

NOTES

STEP 3 OF 10

PLAN THE HUBSPOT ARCHITECTURE

Working from the inventory, decide how each object, pipeline, automation, and association (the link between two records, like a contact and the company they work for) will be replicated in HubSpot.

> **When this step is done, you'll have** every object, pipeline, and automation mapped to its HubSpot equivalent, every gap flagged with an agreed workaround, and your hubs and licenses confirmed before anyone builds.

MOST OF THE MAPPING STARTS HERE

In Salesforce	In HubSpot	Notes
Accounts	Companies	
Opportunities	Deals	
Leads and contacts	Contacts	
Profiles and roles	Permission sets and teams	
Automations	Workflows	

- [ ] Map each Salesforce field you're keeping to a HubSpot property.
- [ ] Decide what happens to custom fields and picklist values that don't have an equivalent.
- [ ] Define how record ownership carries over.
- [ ] For every automation without a direct equivalent, write down the closest alternative and the workaround you've agreed.
- [ ] If any workaround needs custom code in a workflow, price Data Hub (formerly Operations Hub) Professional or Enterprise, and build the code on Node.js 24.
- [ ] Confirm the hubs and licenses you need before building starts.
- [ ] Book a working session with each department in week one.

Hubs and licenses confirmed _____

Department sessions booked for _____

STEP 4 OF 10

BUILD IN SANDBOX

A sandbox is a separate HubSpot account for building and testing, so nothing you do touches your live data. On Starter and Professional portals there is no sandbox, so this step happens in your live portal.

> **When this step is done, you'll have** the full architecture validated in a sandbox and every gap and workaround documented.

- [ ] Recreate the full architecture: custom objects, pipelines, properties, workflows, sequences, segmentation, subscription types, email templates, forms, landing pages, dashboards, and reports.
- [ ] Write down every gap and every agreed workaround as you hit them.
- [ ] Keep a second list of anything that won't deploy. Step 7 rebuilds those by hand.

What carries over

- New supported assets
- Workflows, but they deploy set to Off
- New forms and new automated marketing emails, but their settings don't copy

What you redo or rebuild

- Edits to assets copied from production
- Regular marketing emails
- Custom property access, sensitive data settings, segment settings, and workflow organizational settings
- Integrations (they won't connect to the sandbox on their own)

Contact, company, deal, ticket, and custom object IDs differ between sandbox and production.

THINGS THAT WON'T DEPLOY, TO REBUILD IN STEP 7

Asset or setting	Where it lives

STEP 5 OF 10

RECONNECT INTEGRATIONS

Integrations in production won't connect automatically to the sandbox, so plan this as its own workstream. Your IT and integrations owner holds the credentials and runs the tests.

> **When this step is done, you'll have** every third-party tool connected to the sandbox or a test configuration, field mappings verified, and nothing writing bad data back into the new system.

Tool	Owner	Data flows the right way	Field mappings correct	No bad data written back
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐

Tick all three columns before a tool counts as done.

STEP 6 OF 10

IMPORT SAMPLE DATA AND SIGN OFF THE TEST

Export a representative set of records from Salesforce, import them into the sandbox, and test against that sample.

> **When this step is done, you'll have** representative records imported, the automations tested, and the test sign-off documented and signed by your stakeholders before you move to Step 7.

- [ ] Export a representative set of records from Salesforce and import them into the sandbox.
- [ ] Records behave as expected through the pipeline.
- [ ] Enrollments (records entering a workflow) trigger correctly.
- [ ] Associations are intact and ownership is preserved.
- [ ] Validation rules and formulas behave as designed.
- [ ] Permissions and pipelines behave as designed.

These checks move to Step 9 because they need production data to mean anything: email automation behavior, full record counts, the report comparison against Salesforce, and the production integration smoke tests.

GATE 1: TEST SIGNED OFF

Name	Area	Signature and date
	Marketing	
	Sales	
	Customer success	

Don't begin Step 7 until this is documented and signed.

STEP 7 OF 10

DEPLOY THE SETUP TO PRODUCTION

Deploying moves your configuration. Your records come over in Step 9.

> **When this step is done, you'll have** the validated sandbox setup live in your production portal and your integrations pointing at production.

- [ ] Deploy the validated sandbox setup to production.
- [ ] Rebuild by hand anything the deployment doesn't support, working from the list you kept in Step 4.
- [ ] Switch your integrations to the production environment and reconnect them.
- [ ] Decide, for each workflow, whether to enroll records that already meet its trigger or only records that meet it from then on. Workflows arrive switched Off, and HubSpot asks this question when you switch one on.

WORKFLOWS TO SWITCH ON

Workflow	Enroll existing records	Only new records	Switched on
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐

STEP 8 OF 10

TRAIN AND ENABLE THE TEAM

The HubSpot interface, its objects, and the daily workflows are different from Salesforce. Build each session around the processes that team actually runs.

> **When this step is done, you'll have** every team trained by role and your incoming HubSpot admin ready to own the platform.

- [ ] Plan training by role, and build each session around the processes that team runs.
- [ ] Start training before go-live and overlap it with cutover week, so nobody's first day in HubSpot is also their first look at it.
- [ ] Enable your incoming HubSpot admin to own the platform going forward.

TRAINING SCHEDULE

Team	Trainer	Date	Done
			☐
			☐
			☐
			☐
			☐
			☐

STEP 9 OF 10, PART 1

GO LIVE AND SIGN THE CHECKLIST

This is the step where your team starts working in HubSpot for real. Salesforce stays intact and untouched until validation passes, so you are never left without a working CRM.

> **When this step is done, you'll have** the full data import complete, the go-live checklist signed, and Salesforce set to read-only.

- [ ] Schedule a change freeze in Salesforce in advance, with no new automations and no structural changes.
- [ ] Agree your go/no-go criteria (the specific checks that decide whether you go ahead) before the window opens.
- [ ] Run the full data import into your production portal.
- [ ] Run the delta sync, a second and smaller transfer of anything created or changed in Salesforce since the test import.

Change freeze starts _____

Go/no-go decision made by _____

GO/NO-GO CRITERIA

Then work the go-live checklist on the next page with your stakeholders.

STEP 9 OF 10, PART 2

GO-LIVE CHECKLIST

Work each line against concrete criteria, with your stakeholders.

- [ ] Record counts by object match between source and destination, accounting for records you intentionally excluded during cleanup.
- [ ] Associations are intact on a random sample: contacts linked to the right companies, deals to the right contacts, activities to the right records.
- [ ] Every migrated automation has been triggered at least once in testing and behaved as designed.
- [ ] Every flagged gap has a documented, agreed workaround.
- [ ] Email automation behavior is verified.
- [ ] Pipelines and stages match your real sales process, confirmed by the sales stakeholders who use them daily.
- [ ] Key reports produce numbers consistent with Salesforce for the same period, including MQLs, SQLs, deals created, and revenue by stage.
- [ ] Record ownership is preserved.
- [ ] User permissions match the agreed access design.
- [ ] Subscription and consent statuses transferred accurately.
- [ ] Email sending is authenticated on your domain.
- [ ] Each reconnected integration has passed a smoke test in production, a quick end-to-end check that data flows and nothing errors.
- [ ] Stakeholders from marketing, sales, and customer success have each signed off on their area.

GATE 2: CHECKLIST SIGNED

Name	Area	Signature and date
	Marketing	
	Sales	
	Customer success	

- [ ] Once the checklist is signed, set Salesforce to read-only for an agreed archive period. Keep read access for that whole period, and don't terminate the instance immediately.

Archive period ends _____

Email sending is its own piece of work. When you move it to HubSpot, plan for domain authentication and a gradual sending ramp-up so deliverability and sender reputation are protected.

STEP 10 OF 10

MONITOR AFTER GO-LIVE

In the first weeks, run daily checks. As the team settles in, monitoring shifts from daily to weekly.

> **When this step is done, you'll have** the monitoring cadence running and a formal review on the calendar.

- [ ] Run daily checks on automation enrollments to catch records falling through the cracks.
- [ ] Monitor data ingestion quality and watch pipeline accuracy.
- [ ] Compare key metrics against your Salesforce baseline so an unexpected drop shows up as a number.
- [ ] Shift from daily to weekly checks as the team settles in.
- [ ] Book formal reviews at the one-month and three-month marks. Each asks whether automations need adding or adjusting, whether the data governance rules are working, and whether reporting is accurate and genuinely used.
- [ ] Plan follow-up enablement sessions once your team has been on the platform a few weeks.
- [ ] Watch for teams working around the system. A workaround is a symptom of a gap that still needs addressing.

METRICS AGAINST YOUR SALESFORCE BASELINE

Metric	Salesforce baseline	HubSpot, week 1	HubSpot, week 4
MQLs			
SQLs			
Deals created			
Contacts added			

One-month review date _____

Three-month review date _____

Want RevBlack to run the inventory, the architecture map, and the go-live checklist with you? Talk to us at revblack.com/contact-us.