

HubSpot to Salesforce: Your Pre-Flight Checklist

Tick it off before the move, during it and after go-live. To Pardot or to Marketing Cloud Next.

BEFORE

Decide and Clean Up

- ☐ Pardot or Marketing Cloud Next: decided (box below).
- ☐ What you really use in HubSpot, listed: emails, forms, workflows, lists, reports.
- ☐ Contacts exported with every opt-in and its date.
- ☐ Only active, relevant contacts make the trip.
- ☐ Naming convention and folders agreed.
- ☐ Go-live date set, and a date after which nobody changes HubSpot.

DURING

Build and Connect

- ☐ Salesforce connected first, so sales sees the right data.
- ☐ Sending domain authenticated, tracker domain set up.
- ☐ Email and landing page templates rebuilt.
- ☐ Workflows rebuilt: Engagement Studio in Pardot, Flow in Marketing Cloud Next.
- ☐ Fields, lists and consent mapped.
- ☐ Everything tested with internal addresses.

AFTER GO-LIVE

Switch and Settle

- ☐ Website forms and tracking code switched over.
- ☐ HubSpot kept read-only until the first reports match.
- ☐ Team trained on its own campaigns, not on a demo.
- ☐ Reports checked on Salesforce campaigns.
- ☐ Scoring reviewed with sales after the first leads.

PARDOT OR MARKETING CLOUD NEXT?

Three Questions

- 1 Marketing Cloud Next included? Pardot Growth to Premium (not -LP) with Sales or Service Cloud Enterprise or higher has it.
- 2 Is your data mostly in Salesforce, or spread over many systems? Many systems point to Marketing Cloud Next with Data 360.
- 3 Do you need more than email? SMS and WhatsApp come with Marketing Cloud Next, as paid add-ons.

WHAT DOESN'T COME WITH YOU

Rebuilt, Not Moved

- Workflows and their logic
- Email and landing page templates
- Smart content rules
- Reports, rebuilt on Salesforce campaigns
- Website forms, reconnected

Plan time for these. They're where moves run late.



Axel's tip

Move fewer contacts than you think. Nobody misses the addresses that bounced years ago.

Rather Hand It Over?

We move teams from HubSpot to Pardot or Marketing Cloud Next.

[Scan for our migration page](#)

