

HubSpot Migration Checklist

24 checks for auditing, mapping, validating and cutting over CRM data.

01 Scope and audit

Suggested owner: Migration lead + source owner

Project / owner

Due

☐ 01 Define scope and success criteria

List objects, properties, associations, activities, attachments and history in scope. Record what will remain in an archive.

Evidence / initials

☐ 02 Name owners and the cutover window

Assign business approval, extraction, mapping, imports and validation. Agree the freeze window and who can call a rollback.

Evidence / initials

☐ 03 Export and retain a source snapshot

Keep an untouched export with extraction time, filters, object counts and file checksums. Verify the archive can be opened.

Evidence / initials

☐ 04 Audit data and identifier quality

Count missing keys, duplicate keys, orphan associations and invalid dates. Decide which records need correction or exclusion.

Evidence / initials

☐ 05 Inventory integrations and automation

List systems that write to either CRM, active workflows and user edits. Plan when to pause each writer and avoid duplicated communications.

Evidence / initials

☐ 06 Confirm historical data feasibility

Test how the chosen migration route handles emails, attachments, timestamps and owner attribution. Record unsupported data before committing.

Evidence / initials

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02 Mapping and preparation

Suggested owner: Data owner + CRM admin

Project / owner

Due

☐ 07 Create the object and field map

For each field record source, target object, target internal name, type, transformation, default, owner and example value.

Evidence / initials

☐ 08 Define matching and upsert rules

Use stable source IDs and an existing-record match map. Preserve HubSpot Record IDs when updating existing records through an import.

Evidence / initials

☐ 09 Clean and deduplicate in a working copy

Standardise controlled fields and review ambiguous matches. Keep a merge log showing survivor IDs and the rule used for each decision.

Evidence / initials

☐ 10 Prepare pipeline and owner mappings

Map old stages to approved new stages. Resolve inactive owners, currencies and time zones without changing commercial meaning.

Evidence / initials

☐ 11 Preserve preferences and exclusions

Carry email subscription evidence, unsubscribe and bounce status through the supported route. Never infer consent from a record existing.

Evidence / initials

☐ 12 Prepare association and activity files

Keep parent-child and deal-contact links with stable identifiers. Choose import order based on the association keys the route requires.

Evidence / initials

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03 Pilot and reconciliation

Suggested owner: QA owner + business reviewers

Project / owner

Due

☐ 13 Build a representative pilot

Include existing and new records, duplicate names, missing domains, subsidiaries, won/lost deals and multi-contact associations.

Evidence / initials

☐ 14 Run the pilot with sends disabled

Validate mapping and matching before processing the full dataset. Keep the migration batch identifier and all import error files.

Evidence / initials

☐ 15 Reconcile record counts

Compare source-in-scope, excluded, expected-created, expected-updated and actual results by object. Explain every difference.

Evidence / initials

☐ 16 Reconcile values and relationships

Compare deal value by currency and stage, owner counts and expected association pairs. Review missing dates and required properties.

Evidence / initials

☐ 17 Test histories and connected systems

Inspect activity ordering and attachments where migrated. Verify sync direction and that updates do not create new duplicates.

Evidence / initials

☐ 18 Approve the cutover rehearsal

Have marketing, sales and service test actual tasks. Resolve blocking defects and record accepted limitations with business approval.

Evidence / initials

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04 Cutover and aftercare

Suggested owner: Migration lead + portal owner

Project / owner

Due

☐ 19 Freeze writers and take a final snapshot

Pause agreed source changes, integrations and automatic sends. Extract the final delta and record the cutoff timestamp.

Evidence / initials

☐ 20 Run the approved import order

Apply the final mappings. Keep a batch log of files, timestamps, created/updated counts, association results and rejected rows.

Evidence / initials

☐ 21 Reconcile before switching users

Repeat count, value and relationship checks. Sample customer, prospect and excluded records. Require sign-off before activation.

Evidence / initials

☐ 22 Activate users and integrations in stages

Enable each writer with monitoring, verify a controlled update, then resume workflows and communications only after audience checks.

Evidence / initials

☐ 23 Review defects and rollback decisions

Stop affected writes if agreed thresholds fail. Use the snapshot and change log for recovery. Deleting imported records is not a full rollback.

Evidence / initials

☐ 24 Close aftercare and preserve the archive

Review errors daily during the agreed support window. Retire the old CRM only after retention, access and unresolved issues have owners.

Evidence / initials