HubSpot

A Hands-On Guide:

Migrating from Zendesk to HubSpot Service Hub

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HubSpot

Introduction

With 88% of customer service professionals agreeing that customers currently have higher expectation than in the past, creating a great customer experience is essential. Customers who experience uncoordinated handoffs between out-of-sync teams and generic resolutions lose their faith and brand loyalty.

This guide is aimed at HubSpot Service Hub champions and walks you through your migration from Zendesk to HubSpot, with no service desk down-time or disruption to your customers' experience. While both solutions have similar customer service tools, including a service help, knowledge base, live chat and automation features, the experience you can deliver to your customers improves vastly when you migrate to HubSpot. HubSpot unites your front-office with service in one connected platform giving your team access to key engagement data to provide proactive and connected experiences. By accessing marketing, sales and support data in one system, your service team can deliver efficient and centralised support, helping customers resolve issues faster.

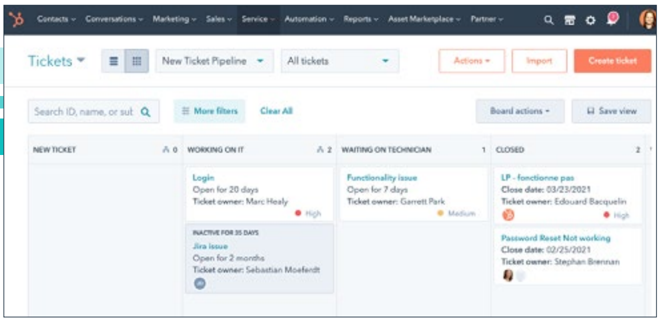
> In 2022, **90% of customers** rate an immediate response **(10 minutes or less)** as important or very important.
>
> **- HubSpot Annual State of Service Report**

Prioritize customer experience with an easy-to-use and connected platform that delivers authentic service when your customers need you most by migrating to HubSpot Service Hub.

The differences between HubSpot and Zendesk

To effectively plan your migration, you need to understand the key differences between HubSpot and Zendesk.

Both solutions can be used to set up multiple intake channels that create tickets. The service desk in Zendesk is an inbox with tickets displayed in a list view, whereas HubSpot not only has an inbox, but also a customisable ticketing pipeline, where you can visualise the status of your tickets.



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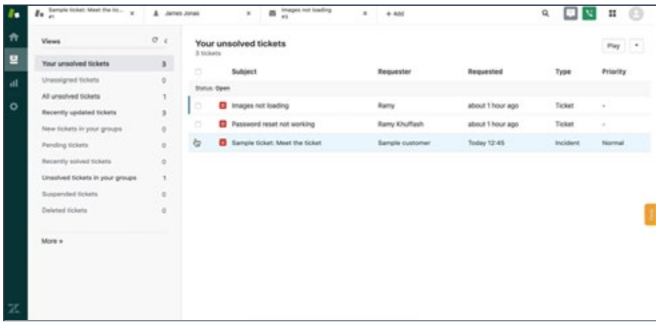


Zendesk

Both have automation capabilities for routing tickets, service level agreements (SLAs) and website chat widgets.

In addition, HubSpot offers multiple types of customer feedback surveys allowing you to consolidate your feedback data into your service platform. Within Zendesk, you’re limited to Customer Satisfaction (CSAT) surveys, but HubSpot offers Customer Satisfaction (CSAT), Net Promoter Score (NPS), Customer Effort Score (CES) and custom surveys. A holistic understanding of a customer’s previous experience and current relationship with you, will not only help your company identify areas for improving your service offering, but will also frame incoming conversations for your service team in light of previous feedback from a customer. HubSpot also offers a customer portal, where your customers can log in and view the status of logged tickets and review resolutions to closed tickets.

Giving your marketing, sales, delivery and leadership teams access to key customer data is essential in today's connected world. Zendesk offers light access licenses that fulfil this purpose, but you are limited in the number of licenses included (depending on the plan purchased) and these users cannot communicate with customers from within the Zendesk platform. When adding additional full-access users to your Zendesk account, you pay for each additional user you add.

You are unlimited in the number of users you can add to HubSpot, and these free users can even respond to conversations and use key service tools.
If a user requires assignment of tickets via rotation, increased access to sales productivity tools (like canned responses or automated messaging) or HubSpot calling, a service seat can be assigned to the user. As part of your HubSpot plan, a certain number of service seats are included (2 on Starter, 5 on Pro and 10 on Enterprise) and billing only increases if you need to assign service seats to more users.

Perhaps the biggest difference between HubSpot and Zendesk is the cross-team functionality offered in a central solution. Scaling your business is hard enough as it is, but having data stored in disparate systems can make it even more difficult.

> 36% of companies report excellent ROI from an all-on-one solution compared to only 13% who report excellent ROI on a mostly integrated tech stack and 12% on a mostly or entirely unintegrated tech stack.
>
> **- Better Value Survey 2022**

With HubSpot, not only will your service team be able to view a complete history of engagements with a customer and use these insights to improve the experience, but you can also start considering inter-team efforts to delight your customers. With your marketing, sales and service teams working on the same platform, you can trigger marketing upsell and cross-sell actions based on service tickets logged, knowledge base articles read or feedback on surveys.

If customers talk to your service teams about a specific problem they are facing, your sales teams can easily identify upsell opportunities. Understanding what marketing assets customers are accessing, can help your service team proactively reach out to customers or present a unique solution to issues without asking too many questions.

> **Almost 40%** of customer service leaders say that their company views customer service as an expense instead of a driver for growth, an increase of almost **25% in one year alone**
>
> HubSpot Annual State of Service Report

But don't just take our word for it! HubSpot drinks it's own champagne and it shows. HubSpot consistently beats Zendesk on "Quality of Support" and "Good Partner in doing business" measurements on the review site, G2.com.

As of September 2022, HubSpot scored 8.9/10 for "Quality of Support" and 8.8/10 for "Good Partner in doing business" whereas Zendesk scored 8.4/10 and 8.5/10 respectively.

With that in mind, let's take a look at how to migrate from Zendesk to HubSpot in 4 easy stages.

Pre-migration planning

Planning is essential for a smooth migration with no down time.

1. Create a timeline
2. Plan your service desk migration
3. Plan your self-service offerings
4. Plan customer feedback surveys
5. Plan your reporting and analytics
6. Plan your data migration
7. Plan your integrations

Configuration, testing and data migration

Customise your new portal and take it for a spin.

1. Configure Service Hub
2. Set up your self-service offerings
3. Configure your feedback surveys
4. Set up reports and dashboards
5. Perform your data migration
6. Integrate your apps
7. Run a pilot

Go-live

The exciting part, where you finally get to see your planning and hard work pay off!

1. Set up your users
2. Train your team
3. Perform a delta migration
4. Go live!

Post migration monitoring and optimisation

Your service hub roll-out is never done. Remember to keep optimising and adapting as you scale.

1. Monitor and optimize

Pre-migration planning

Create a migration and cutover timeline

Work with your HubSpot onboarding manager to create a realistic timeline of the migration. This timeline will not only keep your team's expectations aligned, but will also keep you on point to effectively and efficiently roll out HubSpot.

We recommend considering the below elements, but your timeline will also be influenced by seasonal and internal factors. Don't migrate during your busiest season and talk to your leadership team about any other software rollouts happening in the company. It's important to not overwhelm your service team, as causing inconvenience and frustration could hinder your team's adoption of new tools. You also need to plan when you will cancel your Zendesk subscription. We recommend keeping one license for a month after your migration, to access data if necessary.

Planning your help desk migration

One of the biggest benefits of a service desk migration is the opportunity to optimize your process. Don't simply migrate your existing processes, but review and improve them. A new solution gives you the opportunity to find new ways of optimizing and automating key activities.

Plan your service desk migration by documenting the proposed configuration and consulting people in your company. Share this documentation with your users as part of their onboarding onto HubSpot.

1. Intake channels

You can start with mapping your intake channels. The intake channels that are available in HubSpot are:

- Team emails like info@yourcompany.com or support@yourcompany.com
- Facebook Messenger
- Form submissions
- Live chat and chatflows

Process mapping and planning your HubSpot configuration: 2 to 4 weeks

This will be influenced by the number of people within your company you need to consult. Talk to trusted members of your service team to get their input and buy-in, as well as other departments who would have a role to play in solving for your customers.

Data migration: 2 to 4 weeks

Data hygiene will make your wins clearly visible to the team. Your data cleanup and migration can run in tandem with your planning and configuration, but starting this process as soon as possible is key.

Configuration: 1 to 2 weeks

To maximize HubSpot's offering, you need to understand HubSpot – make use of your onboarding resources, the HubSpot Academy and Knowledge Base to help you configure your portal.

Pilot: 2 weeks

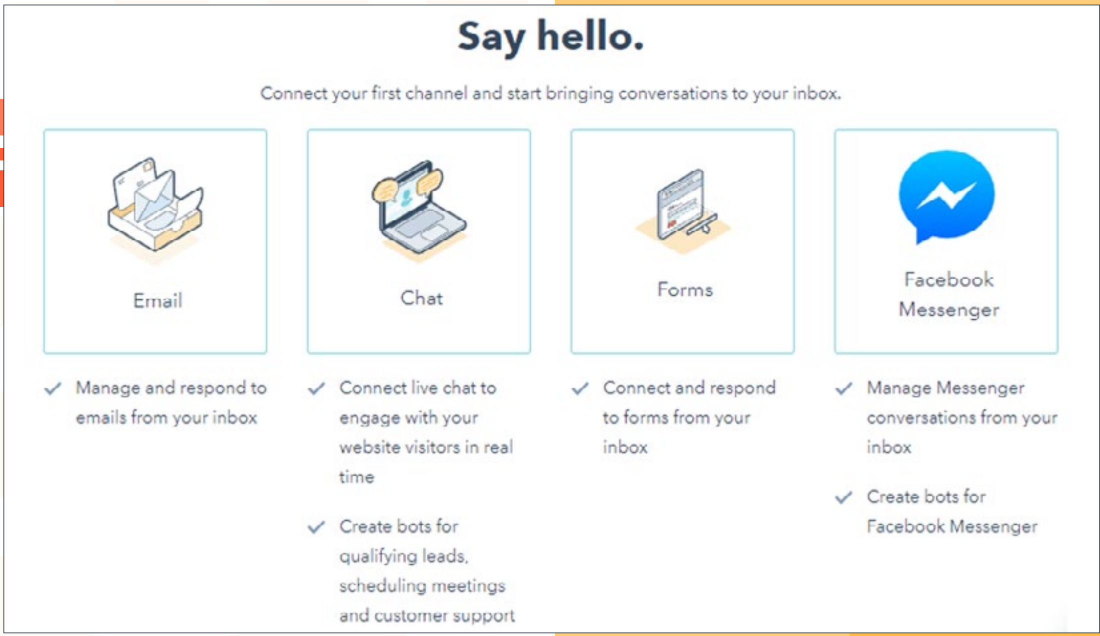
If you're going to be running a pilot with a portion of your team, they will need two weeks of using the platform to collect valuable feedback.

Training your team: 1 to 2 weeks

This will largely depend on how much time your team can spend on training sessions and practice. We recommend taking small groups at a time and ensuring they grasp the key concepts before moving to the next group. This will ensure your service desk is manned and your customers are still getting the attention they deserve.

Go-live

Set a date for your go-live and mark it in your calendar with a smile!



HubSpot

Consider the following:

- Which intake channels will you be using?
- Will your team be available 24/7/365? If not, will you hide certain intake channels during offline hours?
- Will your team manage incoming conversations in the inbox or within the ticket pipeline? Your intake channels will feed into the conversations inbox and are called Conversations. The conversations inbox is a great place for screening, as it allows your team to quickly answer and resolve basic questions. You can push these into the ticketing pipeline should they require a more in-depth investigation or another member of your team taking a look (which is called Tickets). Alternatively, you can automatically create tickets in the pipeline for emails and form submissions and manage your live chats and Facebook Messenger conversations from within the inbox.
- Who has access to these intake channels?

2. Plan your chat widget

HubSpot gives you the ability to set up a live or automated chat widget for your website and a chatflow for Facebook Messenger to connect with your customers where they are comfortable. You need to decide:

- Will you use a chat widget on your website, Facebook Messenger or both?

Once this decision is made, you should consider the following for Facebook Messenger:

- What is your instant reply message?
- Who will incoming conversations be routed to?

You need to consider the following for website chat widgets:

- Will you offer live chat, bots or a combination? With live chat you can send an instant response and assign a member of your team to pick up the conversation. With an automated bot, you can set conversation rules, book meetings or even display knowledge base articles. If that does not solve a customer query, you can offer the customer the option to talk to a service team member.
- What are your messaging rules and actions?
- When will your bot appear? You can decide when the bot will display on your website pages. You can display a bot when a visitor is on a specific page URL, or based on known information about your visitors. You can also combine the targeting options to create a tailored, personalized experience for visitors to your site. Learn more about the different targeting options and targeting rules you can use with your chatflows.
- Will your chat be offered in multiple languages? If so, which languages?

3. Ticket and conversation routing

The automatic assignment of tickets ensures tickets are picked up quickly. You need to consider:

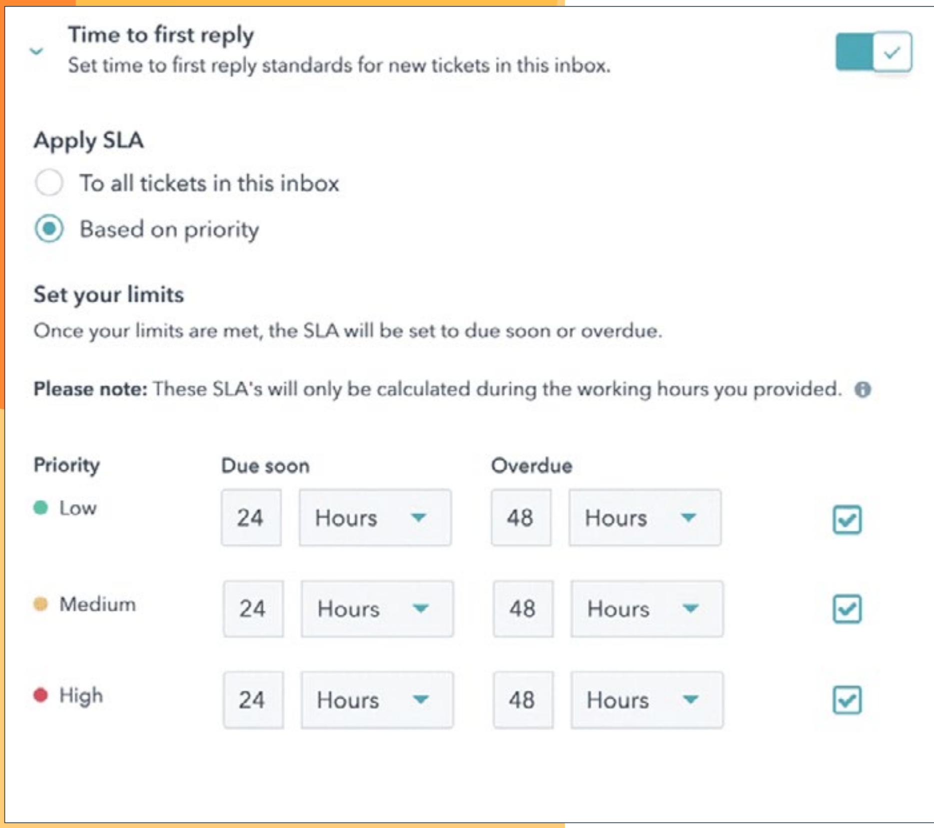
- How will routing be done?
  - Routing can be set up based on region, intake channel, urgency or any other filter stored in HubSpot.
- How will live chats be routed to prevent unanswered conversations?
  - Consider who will be picking up live chats and what to do if all team members are unavailable.

4. Service Level Agreements (SLAs)

What are the SLAs agreed with your customers? HubSpot has the capability of setting a due soon and overdue SLA for:

- Time to first response
  - Low priority tickets
  - Medium priority tickets
  - High priority tickets
- Time to close
  - Low priority tickets
  - Medium priority tickets
  - High priority tickets

You're able to set working hours for your team and SLAs will pause counting outside of these working hours.



HubSpot

5. Ticket pipelines and statuses

You can add multiple ticket pipelines and your ticket statuses within pipelines are customisable. We recommend keeping the number of pipelines and statuses within a pipeline to a minimum for ease-of-use. Consider:

- How many pipelines will you have and what is the purpose of each?
- What statuses will each pipeline have and what are the requirements for moving a ticket to each status? Consider whether your team should be able to escalate to other teams outside of service or support, for e.g. your developer team or sales teams. If your team can escalate, consider adding a ticket status of "Escalated".
- Who will have access to each pipeline?

6. Ticket properties and data surfacing

In addition to being able to view tickets on different pipelines or statuses separately, you can segment views based on any properties you are tracking. HubSpot creates default ticket properties when you set up your portal, but adding custom properties to track tickets will assist your team in prioritising tickets and ease your reporting configuration. When planning your ticket properties, consider:

- What data needs to be tracked? Consider what data you need to report on, what your reps are measured against and what your rep's KPIs are? Are there other teams involved in your support process to who tickets can be escalated? What metrics are they measured against? You'll need to create properties for each of these to collect data to be used in reporting.

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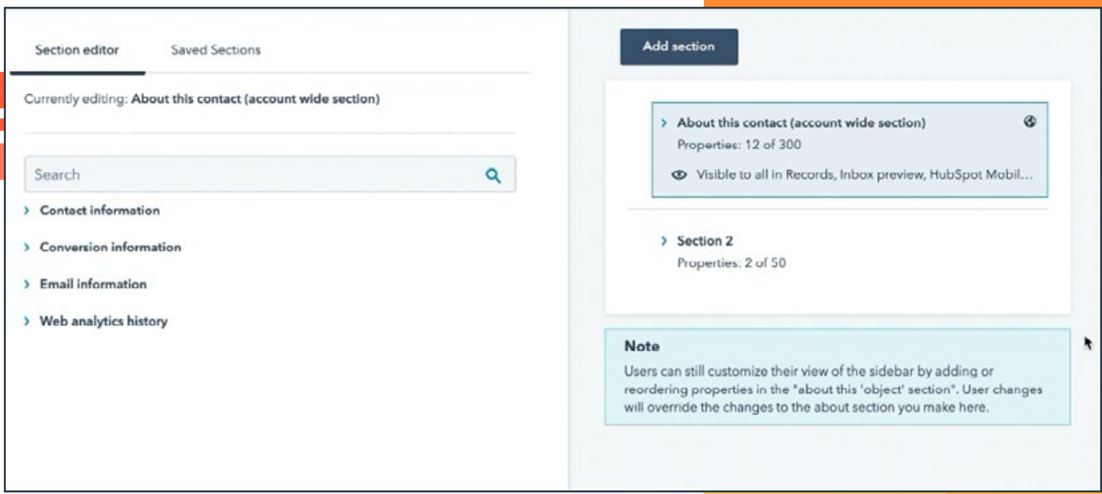
- What field types will you use for these custom properties? While a single line text gives your team the freedom to add extensive feedback, pre-setting options on a drop-down list for your properties will save your team time with submitting data and will improve your reporting.

- What are the required properties when creating a new ticket manually?

- Are there properties that are required when moving a ticket to a specific status?

- Where should this data be available? HubSpot allows you to configure the properties displayed in your ticket sidebar and in your ticket pipeline, customising your view. Your sidebar can be set up as an account-wide view or you can create different views based on teams or conditional logic.



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7. Automation

When planning your automation, consider the administrative tasks your team spends the most time on. Out-of-the box automation includes the ability to update a ticket status when:

An email is sent to a customer: the ticket status will change when a user sends an email to a contact from the ticket record. Emails sent from the contact record will not trigger a ticket status change.

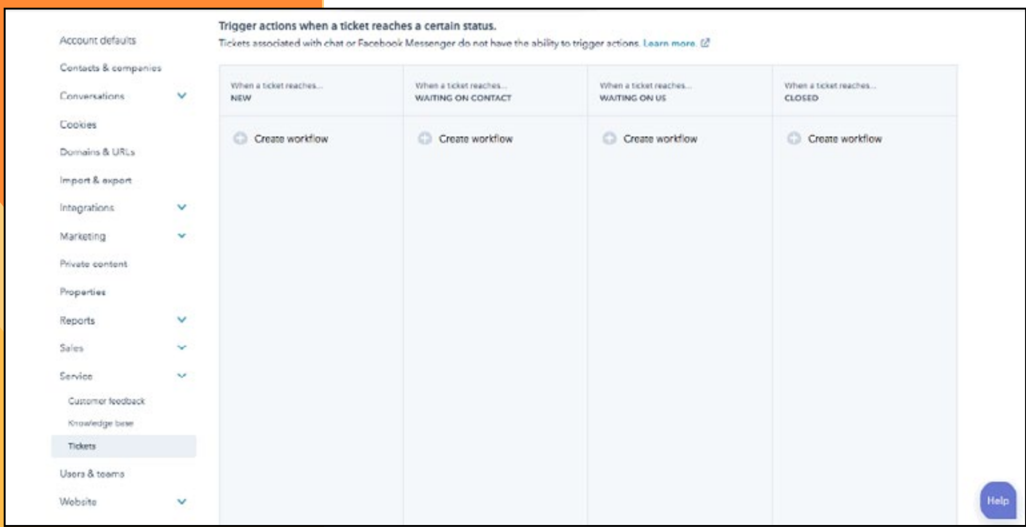
A customer replies to an email: the ticket status will change when a customer replies to the same thread the ticket was created on. If the ticket was closed and then reopened, any new threads on the ticket will also update the ticket status.

You can also automate ticket actions within a specific pipeline or status. For example, you can send an automated email when a ticket is received or closed, or send an internal notification (email, in-app or connected chat like Slack or Teams) to a team member when a ticket status changes.

Also consider:

- Are there custom properties that can automatically be set?
- Do you want to add date stamped custom property to track your ticket through different stages?

Automation for tickets can be set up within the Workflows tool or as part of Ticket Pipeline automation. The Ticket Pipeline automation allows for an consolidated, visual and simple automation setup experience.



Zendesk

8. Canned responses

Creating canned responses that your team can use to answer frequently asked questions (FAQ) can be done in HubSpot via Snippets and Templates. The key difference between Snippets and Templates is the word count.

Snippets are designed to be used in live chat, notes and emails and your character count should be 500 or less. Templates can only be used in emails, which are generally longer and you can include subject lines and complete email responses.

Both snippets and templates will save time, but they can also personalise your outreach. Add personalisation tokens like first name, company name or job title into your snippet or template, to automatically populate these personal values into your responses.

Consult with your team and identify any FAQs or messages your team types out (or more likely: copy and paste) frequently.
Craft these messages into re-usable canned responses.

9. Playbooks

As your services teams grow, coaching your team members requires more time and effort. With the playbooks tool, you can provide guidance with interactive content cards displayed in contact, company, deal, and ticket records for your team members to reference and create standardized notes when speaking to prospects and customers.
Consider:

- Which type of calls will you be creating playbooks for?
- What information will you include in the playbook?
- What information does your team need to capture in the playbook during the call?

Planning your self-service offerings

Customers increasingly prefer to own their service experience. With 70% of customers using self-service channels in their resolution journey (Gartner), customer portals compliment knowledge bases as channels for self-service and visibility into queries.

1. Plan your customer portal

The HubSpot customer portal allows you to easily create a space for your customers to log new tickets and view the status and feedback on open tickets. They are also able to review previously resolved tickets and the solutions to their queries. Giving customers this ability will minimize repetitive tasks for your team and increase customer trust. Consider the following:

- What domain will your customer portal be hosted on? If your website is built on the HubSpot CMS and is live, you would already have your domain connected in HubSpot and you can use your website domain with a URL path, for example: www.yourcompany.com/customer-portal. If your website is not built on the HubSpot CMS, then you can connect a subdomain, for example: portal.yourcompany.com.
- What login and authentication will you require? Your customers must login to access their customer portal. You can either require member registration to access the portal or provision access using single sign-on (SSO).
- Which tickets will appear in the customer portal? Using filters, you can customize which tickets appear in the customer portal. Only the tickets that meet the filter criteria selected here will appear in the customer portal. For example, if you only want the tickets created in your support pipeline to appear, you can set up a filtering rule to only include tickets in a specific pipeline.

2. Plan your knowledge base

In your knowledge base, you can create articles that answer questions visitors may have about your business, helping them solve questions before reaching out to your team. Consider the following:

- What domain will your knowledge base be hosted on? If your website is built on the HubSpot CMS and is live, you would already have your domain connected in HubSpot and you can use your website domain with a URL path, for example: www.yourcompany.com/knowledge-base. If your website is not built on the HubSpot CMS, then you can connect a subdomain, for example: knowledge.yourcompany.com.
- If you have an existing knowledge base, will you migrate these articles to your new knowledge base or are you planning to start from scratch?
- How will you structure your knowledge base? You can organize articles into categories and subcategories, as well as tag them with relevant search terms. Plan your categories and sub-categories.

- Will your knowledge base articles be offered in multiple languages? If so, which languages?
- Who will have access to your knowledge base? Each article can be configured to be accessible publicly or privately. Consider whether your articles should be restricted to your customer base or whether anyone can view these articles.
- Will your knowledge base be accessible to search engines? You can allow or block search engines from displaying your articles in search results.

Planning your customer feedback channels

According to the HubSpot State of Service Report for 2022, customer satisfaction (CSAT) remains the most important KPI for almost 75% of customer service leaders, with only 33% of companies leveraging these insights with a customer advocacy programme. Listening and understanding customers' needs, preferences and sentiments is essential in making sure your customers feel heard and valued. Within HubSpot, you can set up and send Customer Satisfaction (CSAT) surveys, Customer Loyalty (NPS) surveys, Customer Effort Score (CES) surveys and create custom surveys. Your first decision will be based on which of these surveys you will be sending. For each survey type you send, you need to consider:

- How frequently will you send the survey?
- When will you send the survey – at regular intervals or with certain triggers?
- Who will receive the survey?

- What will you do with feedback? You can set up automation to notify your team members with responses, or send an automated email to your survey respondents.
- How will the survey be delivered to your customers, via email or when they visit a web page?

Planning your reporting and analytics

More than 20% of service leaders in high-growth companies rate "Reporting to Upper Management" as one of their biggest challenges (HubSpot Annual State of Service Report 2022). Planning what reporting metrics you need, will help you configure your portal to track these metrics and enable you to easily report on performance.

Measure post-support survey scores, average ticket response time, and overall support volume in the service analytics tool to track your customer service team's success. Review the available reports to help you determine what additional metrics need to be tracked and which custom reports you need to create. You need to consider:

- Which metrics do you need to report on?
- What are your service team's goals? Goals allow you to manage user- or team-specific quotas. You can set goals for average ticket resolution time, average ticket response time, revenue and tickets closed.
- Who will have access to view your reports?

Planning your data migration

Migrating your data is perhaps the most essential step in your migration. HubSpot enables your team to deliver a connected and seamless experience, but your team will struggle to do that if historical data is not available.

Use this opportunity to clean your data, and migrate the useful data instead of messy and incomplete data. Your first consideration here will be to determine which data you want to migrate.

- Map out your properties and decide whether they will live on the contact, company or ticket records. Use drop-down select property types as far as possible to ease reporting challenges. To identify which of your properties exist as standard properties within HubSpot and which you'd need to create, review this helpful property mapping.
- Do you need to create custom objects to store data? Custom objects can be created within HubSpot if you have an Enterprise tier of any hub. Custom objects allow you to create a data structure to organise your data based on your unique business requirements, beyond just standard objects. Standard objects include contacts, companies, deals and tickets.
- Associations will exist between your object records?
- What associations will exist between object records? Creating associations between records within HubSpot manually is very simple, but it gets more complex if you're looking to import data and create associations in bulk. You can create associations by importing multiple objects' data in one file or in multiple files by using HubSpot-generated object IDs to identify records that should be associated. You can also turn on a setting to automatically create and associate companies with contacts based on email domains of your contacts.

- Will your records have one-to-one associations or do you need to create association labels? For e.g. will your contacts only be associated to one company, or could multiple companies be associated to a contact based on whether the company is a “Primary” company, “Partner” company, “Reseller” company etc? If there are varying types of associations that can exist between any two object records, consider setting up Association Labels.
- Are you migrating activity data like emails sent to or from your customers, tasks assigned to your team and calls and meetings that have been tracked in Zendesk? This will drastically influence your migration route. If you are migrating properties, HubSpot’s import tool allows you to easily do just that. You can also use the import tool to migrate notes. However, if you are looking to migrate tasks, emails, calls and meetings as well, you need to consider a data migration partner, as these activities can only be imported via an API connector. If you have developer assistance, an API can be built out for you, however there are pre-built connectors you can make use of. Discuss your options with your onboarding manager to make the best decision. Some tools that have a pre-built connector between Zendesk and HubSpot, includes:

    - **Trujay**
    - **Help Desk Migration**
    - **Import2**

Whilst there is a Zendesk to HubSpot Integration in the HubSpot Marketplace, we do not recommend using this integration for data migrations. This integration syncs Zendesk tickets as timeline events against contacts and not as HubSpot tickets.

For existing HubSpot users:

If your company is already using and has data stored within HubSpot, take the following into consideration before migrating any data, to prevent data loss by overwriting live data:

- Do contacts exist in HubSpot and Zendesk that need to be deduplicated? Do they have the same email address in both systems? If they do, then HubSpot will automatically deduplicate your data using email address. If the same contact has different email addresses in the two systems, you will need to update one of the systems in order to prevent two contact records being created.

- Do contacts exist in HubSpot and Zendesk that need to be deduplicated? Do they have the same email address in both systems? If they do, then HubSpot will automatically deduplicate your data using email address. If the same contact has different email addresses in the two systems, you will need to update one of the systems in order to prevent two contact records being created.

- How much data cleanup is needed? This can include converting existing open-text fields to drop-down values, cleaning up formatting such as capitalization or trailing white spaces and removing text or spam records. As your importing data into a live environment, it's recommended to perform this cleanup before you migrate data, instead of within HubSpot after your migration.

- Which system should be your source of truth for each property? If a contact exists in both HubSpot and Zendesk, which system is more likely to have accurate and up-to-date data? If it is Zendesk, you'll import the data as you would normally, but if it is HubSpot, you can use the "Don't Override" function in the import tool, for each property. This means data in your import will only write to a property if that property is empty. If a value already exists for that property, it will keep the existing value and not override it with your new data.

- Are workflows live and will your import trigger email sends? Review the properties you are planning to import data to and identify active workflows through the "Used In" tab in property settings. Review the impact these workflows will have on new data imports and consider turning them off until after the data has been imported. Turn them on again after your data has been migrated ans use the option to not enroll existing records, to prevent workflows from triggering emails or other automation at the wrong time.

Once these factors have been considered and your migration route and data decided upon, we recommend doing a sample migration of about 10% of records. Review this data against your Zendesk data and make adjustments to the mappings and sample migration as needed. Follow the steps outlined in this HubSpot Academy lesson to perform an import, or work with your chosen migration tool to initiate a sample migration.

Planning your integrations

HubSpot has an extensive inetgrations marketplace, called the App Marketplace. The marketplace can connect your existing tools to HubSpot or help you find the right apps to grow your business. Explore the marketplace to identify which apps you need to integrate with HubSpot.

Configuration, testing and migration

Using your planning documentation, you can configure your HubSpot portal for success. The following HubSpot Academy and Knowledge Base resources will guide you on how to configure your service hub.

Configuring your service desk

Complete your service desk configuration by following the steps outlined in these resources.

1. Configuring your intake channels
2. Configure your chat widgets
    a. Live chat
    b. Chatbots
3. Configure your ticket routing
4. Set up SLAs
5. Set up tickets
6. Configure your properties
7. Automate your customer service
8. Set up templates
9. Set up snippets
10. Set up playbooks

Configuring your self-service offerings

Complete your self-service options configuration by following the steps outlined in these resources. Migrating your existing knowledge base articles will be done by exporting your Zendesk articles to a CSV and importing them into the HubSpot Knowledge Base.

1. Configure your customer portal
2. Configure your knowledge base
3. Migrate your existing knowledge base

Configuring your customer feedback surveys

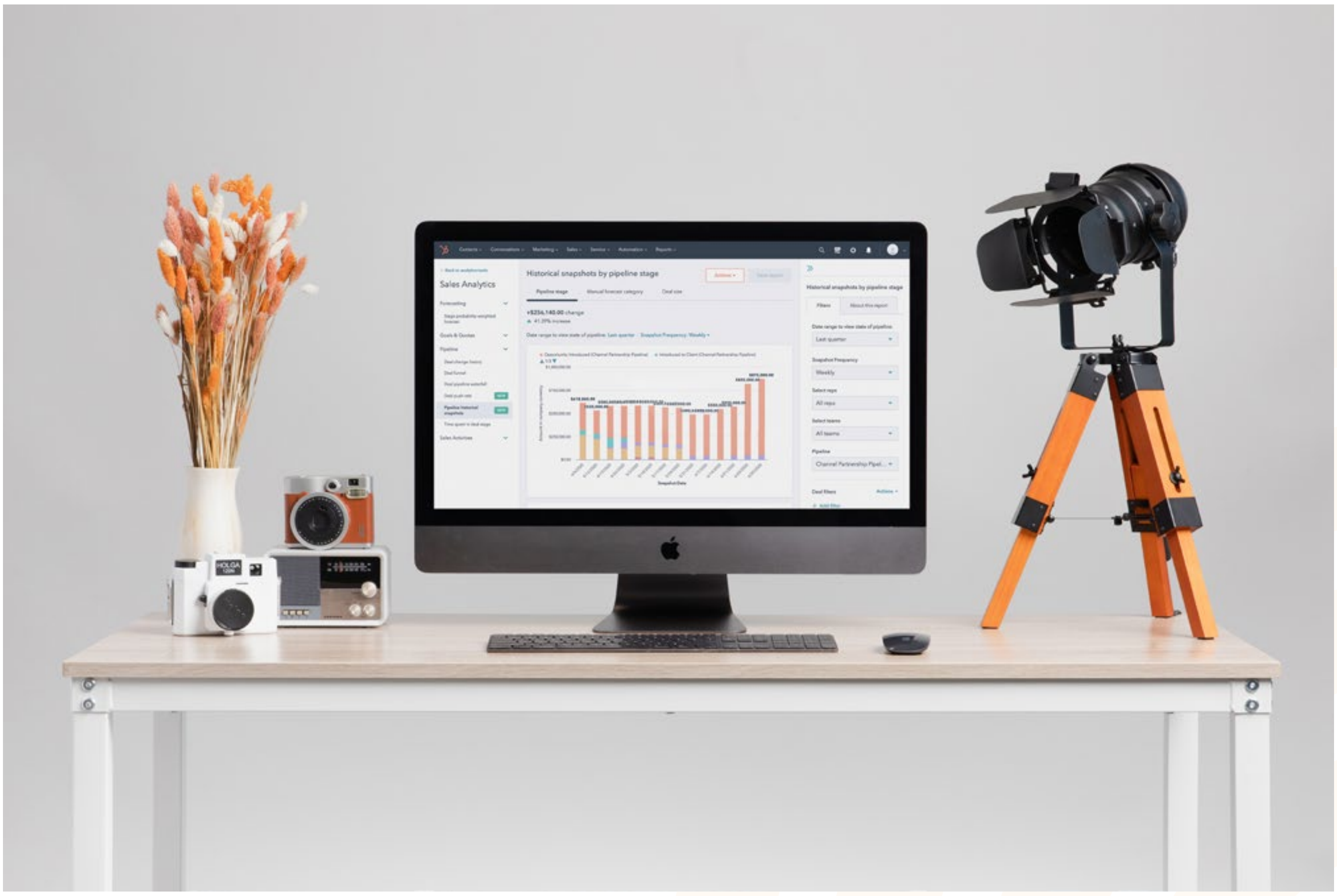
Set up your feedback surveys with this step-by-step resource.

1. Configure your surveys

Configuring your reporting and analytics

Create dashboards and reports following the instructions in this resource.

1. Set up dashboards and reports



Perform a data migration

Once your HubSpot Service Hub has been configured, you'll be ready to do a full data migration. Follow the steps outlined in this HubSpot Academy lesson to perform an import, or work with your chosen migration tool to initiate a full migration. Review your data in HubSpot against your data in Zendesk and adjust as needed.

Integrate your apps

Set up your identified integrations through the App Maketplace and configure your integration settings accordingly.

Testing your configuration

Going live without testing your configuration and setup can cause down-time and a bad experience for your customers. Testing should be done by your service team, and we recommend running a pilot, gathering their feedback, and making adjustments as needed. Be sure to turn off any automation before completing your migration, as the data coming in could trigger automated messaging or changes to data.

Select a small group of your service team to run a pilot on HubSpot. If your service team is region-based, we recommend selecting a region with lower volumes of tickets. Train these members on using HubSpot and spend time with them while they test it during the pilot. We recommend a two week pilot, to give the team enough time to adjust to the changes and start using HubSpot effectively.

After two weeks, gather their feedback and review their performance metrics. Make adjustments to your process and configuration and update your documentation to reflect these changes.

Go-live

With your HubSpot portal configured and tested, you're almost ready to roll out your Service Hub! Your next step will be to give your service team access to HubSpot.

1. **Configure Roles:** Roles enable you to create and save permission sets for your users. Once you've created a role and specified certain permissions for it, you can then assign new and existing users the role to grant them the same permissions.
2. **Set up Teams:** Teams allow you to organize your users into groups for organizational and reporting purposes. You can also create a team hierarchy by setting up oversight relationships between your teams.
3. **Create notification profiles:** You can set up account default notifications for all users or based on their permission set. Review each notification option carefully, as missed notifications can lead to unhappy customers.
4. **Add your users**

Once your team has access to HubSpot, they need to set up and manage their profile and preferences. Each user should:

1. Add a profile image and username
2. Set their language and date & number format preference
3. Add their phone number
4. Set a default home page
5. Connect their personal email accounts and add their personal email signatures
6. Connect their calendar

Once the basic configuration is complete for your users, you can start training them on how to use HubSpot within your defined processes. We recommend working with small separate groups of your team at a time, to ensure your service desk is manned during training sessions. Work with your onboarding manager to determine the best training method. Your training options are:

1. **Train your team yourself:** Plan your training sessions and work closely with your team to answer any questions they have.
2. **Make use of the HubSpot Academy to train your team:** Give them specific certifications to complete. Academy courses end with an exam and, if passed, awards a certification. This is a great way to test their knowledge and track engagement from your team.
3. **HubSpot training and professional services:** We offer training on using HubSpot, as well as other professional services to increase your HubSpot value. You can review the options available here.
4. **Training by HubSpot's Partners:** HubSpot has an extensive partner network, with many partners offering training services. View the Solutions Partners Directory to find your partner.

Your last step before going live will be to perform a delta data migration. Since you completed your full migration, time will have elapsed and data in Zendesk will be updated. That means your full migration will be outdated. A delta migration looks to update your migrated data. In many cases, this could include re-doing your full migration, but we recommend supplementing your full migration with updated data. Follow the steps outlined in this HubSpot Academy lesson to perform an import, or work with your chosen migration tool to initiate a full migration. Review your data in HubSpot against your data in Zendesk and adjust as needed.

Your delta migration should be performed as close as possible to your go-live date, preferably the evening before you cutover.

On the day of your go-live, take your customer communication automations, surveys, knowledge base, customer portal and chat widgets live. Check in with your service team and work closely with them to avoid any dissatisfied customers. Coach them through their day and be available for any questions or assistance they might need.

Ensure they have access to you to ask for support and to provide feedback to you for the first week. At the end of the first week, you can turn off your team's Zendesk licenses! We recommend keeping one license in your Zendesk account for another month after turning off access for all users. This will allow you to cross-reference data if required.

Post-migration monitoring and optimisation

Congratulations on successfully migrating from Zendesk to HubSpot! You did it!

Your HubSpot Service Hub rollout does not stop there. Monitor your team's performance and adoption of the Service Hub tools and make configuration adjustments and continue with training your team. Again, you have options for training. Asking your team members to present training sessions to each other on best practices or unique ways of using the HubSpot tools to other members of your team, is an effective way to improve engagement.

Also ensure that you're available to your team for regular check-ins to get their feedback.

These additional adjustment and configuration changes need to continue to be documented. A change management process will help to keep your Service Hub configuration uniform and prevent unnecessary disruptions to your team. We'd also recommend data management documentation that outlines where and how properties are used. This is essential if you have multiple integrations between HubSpot and other tools.

Conclusion

According to HBR, it is 5 to 25 times more expensive to acquire a new customer than it is to retain an existing one. Yet, only 50% of businesses have enabled their service teams with the most basic service features a CRM can provide: a help desk, knowledge base, and shared email capabilities (HubSpot Annual State of Service Report, 2022).

Investing in a connected customer service solution today means better customer experiences and improved retention for your business. Start putting your customer first with an easy and connected platform that delivers authentic service.

Learn more about HubSpot Service Hub

Read more here

Grow Better