

Project Profile

Out with the Old, In with the New: Changing Marketing Automation Platforms

A Salesforce + HubSpot Solution

Overview

A B2B services firm wanted to modernize their marketing automation while reducing technical debt. The company had previously relied on Pardot but decided to transition to HubSpot. The project focused on removing redundant systems, cleaning up legacy Salesforce data, and ensuring HubSpot was properly integrated, while working alongside a HubSpot consultant who implemented HubSpot-specific setup and workflows.

From a Salesforce perspective, this project ensured data integrity, automated lead/contact sync, and a clean CRM environment, laying the foundation for scalable marketing and sales processes.

Challenges

- Salesforce's Pardot (aka Marketing Cloud Account Engagement) contained legacy fields, workflows, and automations that were outdated but still active, increasing complexity.
- HubSpot's data model differed from Pardot, requiring careful mapping for leads, contacts, campaigns, and opportunities/deals.
- Needed to create reports that combined data from both sources without creating inconsistencies and errors.
- Without cleanup, tech debt threatened reporting accuracy, adoption, and scalability of the new system.

Solution

The project focused on **Salesforce's Pardot** removal and **Hubspot** integration support:

Pardot Removal & Salesforce Cleanup

- Conducted a full audit of all Pardot-related objects, fields, workflows, and automations in Salesforce.
- Safely uninstalled Pardot, ensuring no critical records or automations were lost.
- Cleaned up orphaned fields and legacy workflows, reducing system complexity and maintenance burden.

Label	Qualified API Name	Data Type	Length	Is this in Use?
ZoomInfo Last Updated	DOZISF_ZoomInfo_Last_Updated__c	Date/Time	0	Yes
ZoomInfo Non-Matched Reason	DOZISF_ZoomInfo_Non_Matched_Reason	Text(255)	255	Yes
Person LinkedIn URL	Person_ZoomInfo_LinkedIn_URL__c	URL(255)	255	Yes
CBRE Sectors	CBRE_Sectors__c	Picklist (Multi-Select)	4099	Yes
Current Safety Sourcing	Safety_Sourcing__c	Picklist	255	Yes
Current Data Management Tool	Current_Data_Management_Tool__c	Picklist (Multi-Select)	4099	Yes
Lead number	Lead_number__c	Auto Number (External ID)	30	Yes
Round Robin	Round_Robin__c	Formula (Number)	0	Yes
BD Initiative	BD_Initiative__c	Picklist	255	Yes
Lead Qualification Notes	Lead_Qualification_Notes__c	Long Text Area(32768)	32768	Yes
Training Courses Needed	Training_Course__c	Picklist (Multi-Select)	4099	Yes
Other	Other__c	Text(60)	60	Yes
Touches Last 30 Days	Touches_Last_30_Days__c	Number(18, 0)	0	Yes
Qty Touches Last 30 Days	Qty_Touches_Last_30_Days__c	Formula (Number)	0	Yes
Needs Score Synced	pl_Needs_Score_Synced__c	Checkbox	0	No, Pardot related, wont need once we switch to Hubspot
Account Engagement Last Scored At	pl_Pardot_Last_Scored_At__c	Date/Time	0	No, Pardot related, wont need once we switch to Hubspot
Account Engagement Campaign	pl_campaign__c	Text(255)	255	No, Pardot related, wont need once we switch to Hubspot
Account Engagement Comments	pl_comments__c	Long Text Area(32000)	32000	No, Pardot related, wont need once we switch to Hubspot

Example of Data Dictionary Audit

HubSpot Integration Support

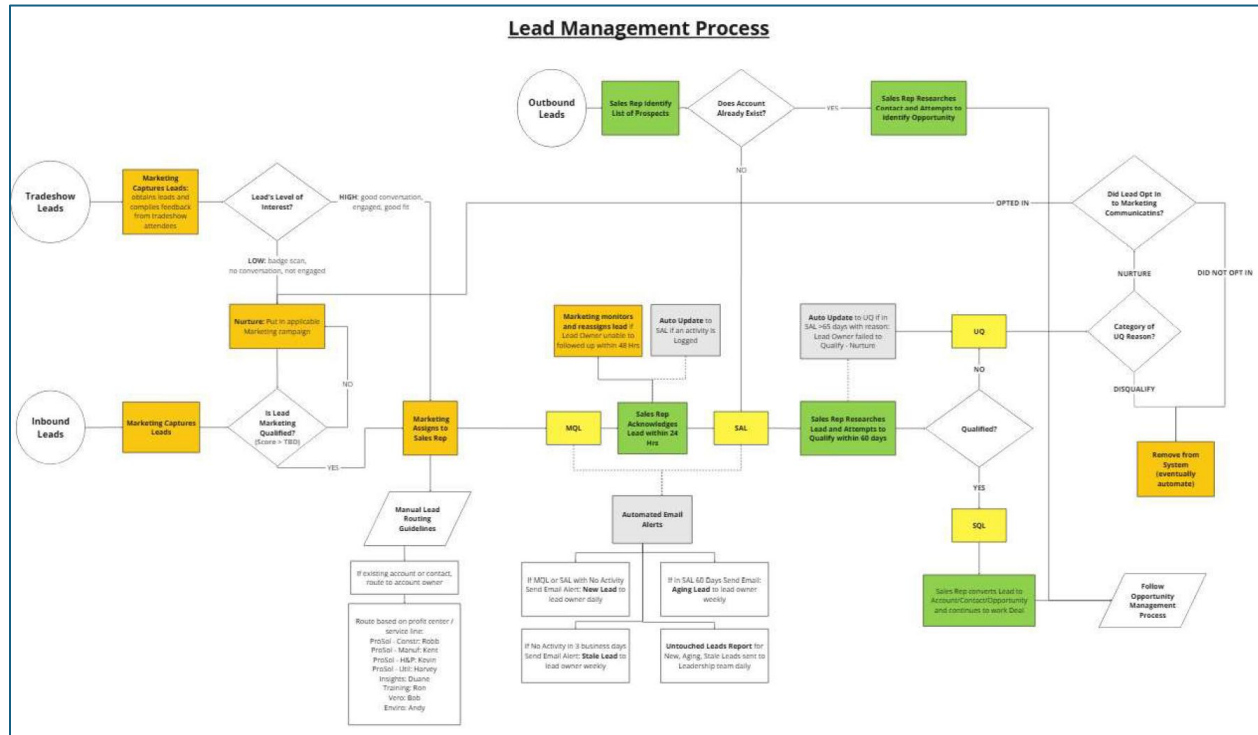
- Worked closely with a HubSpot consultant who implemented HubSpot setup, workflows, and campaign logic.
- Mapped HubSpot data to Salesforce, avoiding duplicates and determining system of record to maintain data integrity
- Ensured bi-directional sync between HubSpot and Salesforce for leads, contacts, accounts, and opportunities.
- Configured field mappings, workflows, and automated alerts within Salesforce to align with the new HubSpot processes.

Hubspot	LC: Subscriber	LC: Lead	LC: MQL	LC: MQL	LC: MQL	LC: SQL	LC: Op	LC: Cust
	Lead Status: New	Lead Status: New	Lead Status: Open	Lead Status: InProg	Lead Status: Unqual	Lead Status: Connected No Deal	Lead Status: Connected Deal Stage: Pipeline	Lead Status: Connected Deal Stage: Won
Salesforce	Lead Status: New		Lead Status: MQL	Lead Status: SAL	Lead Status: Unqual	Lead Status: SQL No Op	Lead Status: SQL Op Stage: Pipeline	Lead Status: SQL Op Stage = Won

Example of Hubspot/Salesforce Data Sync (Leads to Contacts, Ops to Deals)

Process Standardization & Governance

- Documented integration logic, process flows, and CRM best practices to ensure clarity and maintainability.
- Eliminated manual workarounds in Salesforce, allowing marketing and sales teams to rely on automated, standardized processes.
- Provided a foundation for scalable lead management, accurate reporting, and future growth.



Example of Lead Process Map Documentation

Outcomes

- Pardot fully removed, reducing technical debt and simplifying the Salesforce environment.
- HubSpot integrated successfully with Salesforce, with accurate lead, contact, and opportunity sync.
- Clean Salesforce environment with legacy fields and workflows removed, improving adoption and system performance.
- Teams benefited from standardized processes, automated alerts, and reliable reporting, reducing manual effort and errors.
- Leadership gained confidence in CRM data to make faster, data-driven decisions for marketing and sales.

Lessons Learned

- **CRM cleanup is critical before adopting new tools**—legacy fields, workflows, and automations can create hidden inefficiencies.
- **Data model understanding is key**—mapping between HubSpot and Salesforce requires careful planning to avoid errors.
- **Collaboration matters**—working alongside a HubSpot consultant ensured the platform setup aligned with Salesforce requirements.
- **Process discipline and governance** ensure adoption—standardized lead management rules prevent inconsistency.
- **Plan for flexibility**—fast-moving campaigns, special clients, and exceptions require a system that accommodates edge cases without compromising data integrity.