



The Lewer Agency

DATA MIGRATION FROM
HUBSPOT CRM TO SALESFORCE



THE LEWER AGENCY

COMPANY BACKGROUND & USE CASE

The Lewer Agency is an insurance and financial consulting firm in Overland Park, Kansas. A family company of three generations, the agency dedicates itself to helping business owners and students through navigating insurance solutions and comprehensive financial planning.

Within **The Lewer Agency** are its sub-companies, each with a different function. **LewerMark** focuses on international student health insurance. **Lewer Benefits Group** helps business owners tackle employee benefits through consultation and speciality program design. Finally, **Lewer Financial Advisors** consults on retirement planning, social security, tax strategy, and wealth management.

The agency has the trifecta of services: health insurance, employee benefits, and financial planning for retirement. **The Lewer Agency** was using Microsoft Dynamics *and* HubSpot as their customer relationship management [CRM] solutions so that their client information could be stored in a way that was customized, organized and process-oriented.

Having to use two CRMs for one company is undoubtedly complicated. An established company that has been around for over 60 years deserves a CRM that is more than adequate and works to fit the unique needs of its infrastructure.

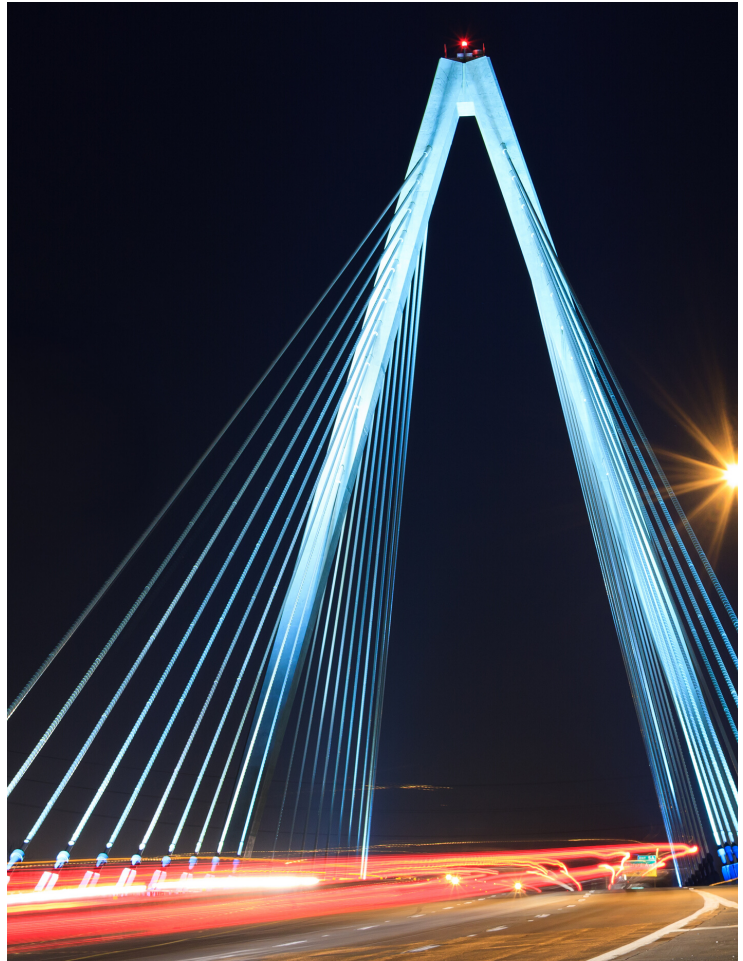
Lo and behold, **The Lewer Agency** was ready to move on to a CRM that had additional capabilities more closely aligned with their business model. In this case study, we discuss **The Lewer Agency's** move from HubSpot to Salesforce CRM, their experience with [Trujay](#), and how [Trujay](#) was able to solve the major complexities in this project.



THE PROBLEM

The biggest problems **The Lower Agency** faced in their CRM solutions were lack of customization and formal processes. According to James Paul, the agency's Director of IT and Internal Systems, the data was totally unorganized for CRM purposes.

Having Salesforce as their target CRM and with James' expertise as a programmer, he tried using APIs to get the data out of HubSpot. However, due to the limitations found, the agency's IT director did not have the time for endless meetings with the transition team to perform the programming.



"Trujay's solution was perfect because we could not only get a full migration of the critical data, but we could also get a great team to help us get it done."

- James Paul, Director of IT

THE CHALLENGE

Trujay's primary drivers to solve the problem was **The Lower Agency's** need for customizability, support, and familiarity with the target platform.

As the target CRM was Salesforce, there are validation policies set up that prevent the importation of data if the records are not copacetic. There are also rules for deduplicating accounts in Salesforce. Meaning, if an account coincided with an existing deduplication policy, Salesforce automatically matched it to the existing account and therefore HubSpot data could not be migrated.

The biggest challenge was the functionality differences between HubSpot and Salesforce. For example, relations to parent records were not required in HubSpot if they had no value, while the same relations in Salesforce were required.

The client needed Trujay to split HubSpot 'companies' and 'deals' objects into three different record-types to match the objects in Salesforce. This was found challenging, as deal ownership was dependent upon HubSpot team ownership for each deal.

When Trujay finished the initial migration, the process was complete but objects such as deals and activities failed to migrate properly due to the enablement of validation rules. Trujay recommended the disablement of both validation and deduplication rules and re-imported the data. This second trial solved the problem completely.

Trujay normally does not migrate or even match HubSpot 'teams' because it's not possible to obtain HubSpot team names through API access, only through email identification. After much troubleshooting, Trujay's tech team parsed the deals from HubSpot's user interface where both the HubSpot team name and ID could be seen. That portion of code was used for custom matching.



THE SOLUTION: ULTIMATE CUSTOMIZATION

Trujay managed to not only provide a level of service that had no precedent, but also kept it within the original and agreed upon scope for the project. Scope-time was saved due to the client's initiative to mark fields in HubSpot that didn't need attention, saving both Trujay and the client an immense amount of time.

The biggest indicator of Trujay's abilities, apart from staying within the scope, was that this massive and unforeseen request didn't result in additional costs for the client.



"I'm a PMP [project management professional], and I was very impressed by the efficiency with which the project was conducted. Dates were met, and budgets were kept. [Our account manager] Lucy Hlushchuck was a fantastic partner in this process. She kept me informed through calls, emails, and PM software.

She showed great patience with me when I requested a literally last-minute change to the migration plan. She accommodated my request and saved my team and me a great deal of work.

I had some issues on my end, getting folks to sign off on the final data migration and implementation, but that was fear on their part. Lucy was able to satisfactorily answer all of my data questions and we moved on. 5 stars for Lucy and her team!"

- James Paul, Director of IT

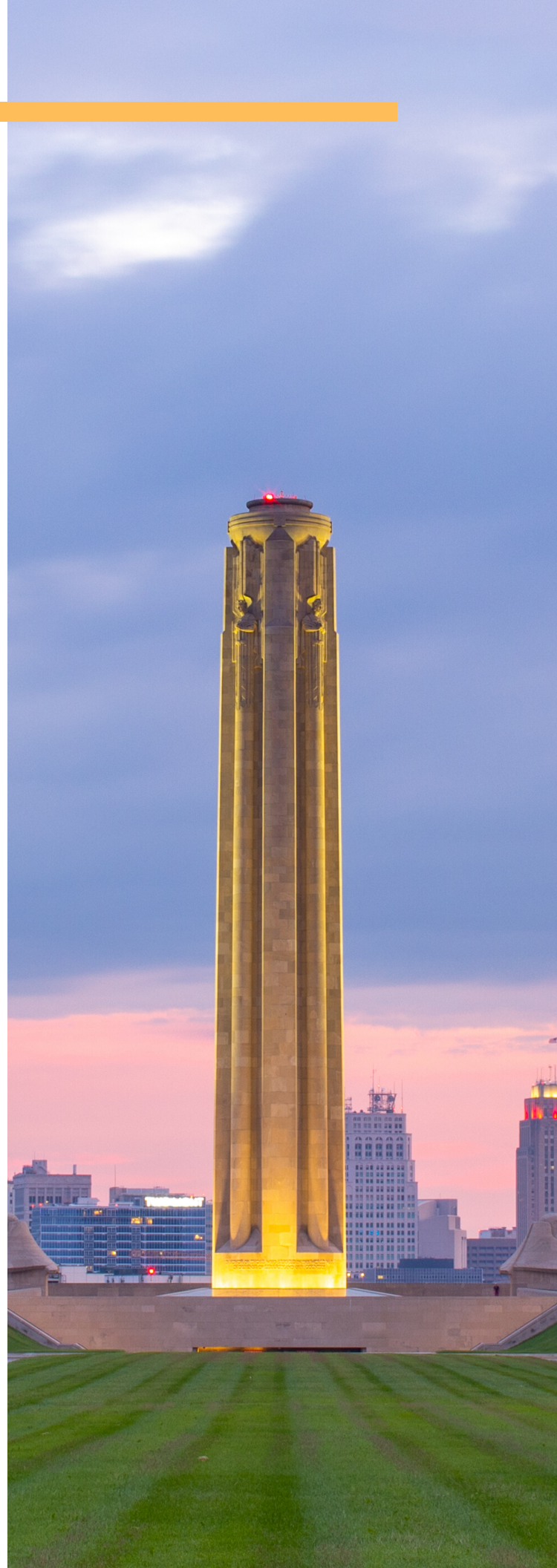
THE RESULTS

"I'm very satisfied with how the data was migrated. Details like emails, tasks, meetings, etc. came across as promised.

*My favorite part was the initial call. I was a bit worried as **this is the biggest, or one of the biggest, projects of the year at my company and it was important that this part of the project go well and be cost-effective.***

My first call [with [Trujay](#)] settled all those issues in my mind that we could do a full migration with customizations successfully."

- James Paul, Director of IT, Internal Systems at **The Lower Agency**





[Trujay](#) is the leading CRM data-expert company. We connect marketing and sales automation systems quickly and securely by delivering superior technical savviness and expertise.

Founded in 2018, [Trujay](#) applies the best software practices for sales and marketing management. [Trujay's](#) consultative approach is custom to each client's unique environment and knows that one size does not fit all.

[Trujay](#) also offers [IntegrateHQ](#), is the first middleware built to connect any data or system to HubSpot directly, something no other company has ever done before. [IntegrateHQ](#) fits every kind of user, as it adapts to all levels of technical experience. Having years of experience with multiple middleware solutions, [Trujay](#) has the ultimate HubSpot success factor with [IntegrateHQ](#).

Headquartered in Austin, Texas with offices in the US, Europe, and APAC, [Trujay](#) is a global organization serving customers around the world.