TOP IDEAS DIGITAL
CASE STUDY

AUTOMATED CRM DATA MIGRATION FROM HIGHRISE TO HUBSPOT

TOP ideas

TRUJAY

PROLOGUE
WHY THIS USE CASE IS IMPORTANT

A customer success story shows how a company fixed a problem for a client through its expertise and technical skills. Typically, the problem in question is extremely complex and difficult to solve to better showcase the company's full array of abilities, at length.

But what about the little guys, the smaller problems?

Describing a simple issue isn't to minimize the problem or a company's function. In fact, demonstrating that a product or service can solve common issues (and quickly) helps readers know that **it's not all about the big projects.**

Trujay can solve customer relationship management (CRM) data migration issues to the most complex degree, with tens of thousands of records.

But this isn't that kind of story.

This story aims to de-intimidate smaller data issues and let it be known that **Trujay** caters to data problems of all sizes. We care, and we're here to help.

We know there are people out there who need **fast results with a quick turnaround.** That's why we're excited to showcase these results from our automated system, which can automatically migrate CRM data from your current to your desired platform.

This segues into how it provided excellent results and tremendous client satisfaction for **Top Ideas Digital**.

This success story is the very first time we showcase our Self-Service Tool, a way to automatically migrate data without hassle, and with a dedicated support team.

TOP IDEAS DIGITAL:
COMPANY BACKGROUND

Top Ideas Digital is a marketing agency in Vienna, Austria. Serving its customers for over 12 years, the company offers a range of services, from digital strategy to marketing automation and sales optimization.

Top Ideas Digital is known for its holistic digital marketing methods. They automate and connect data, channels, processes, assets, and people to achieve their clients' results.

Known for their go-to-market strategies, Top Ideas Digital promotes product launches, consults on driving community engagement, and creates sales opportunities. Their client base includes Fortune 500 companies and small to midsize businesses across the globe, including corporations like Dell and DigiStore24.

THE PROBLEM

A prospect came to Top Ideas Digital, dismayed with their current CRM system. Originally using Highrise CRM, the client found they needed a more modern solution.

Highrise was working relatively fine in terms of technicalities; however, the client wanted more in-depth analytical tools to predict consumer patterns and behaviors. They needed a robust software that could provide more valuable information about their customer base and improve their marketing and sales strategies.

Highrise is a great CRM solution, but like everything in the technology sector, upgrades, updates, and evolvement is constant. The client felt that their previous CRM didn't have enough functionality and flexibility for their unique needs.

With all of that in mind, Top Ideas Digital recommended HubSpot CRM as the client's new system. It contains all the features and the right user experience the client was looking for, combined with excellent customer support, up-to-date features, and in-depth analytics to best interpret marketing and sales strategies.

After a few Google searches, Top Ideas Digital found **Trujay**, a Diamond-Tier HubSpot Certified Solutions Partner, and used their **Self-Service Migration Tool.** The automatic data migration worked, but one big issue occurred: **their client's email records were missing.**

Top Ideas Digital contacted Trujay to help them recover the data loss, which **Trujay** responded to immediately.

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"After completing the full [Self-Service] migration, we realized there was some more work to be done and that some aspects were missing, although they should not have. This is when we started working with [Trujay] directly and we are extremely satisfied by the hard work and kind responsiveness that we were given."

- Hristo Yankov, Digital Marketing and Sales Specialist, Top Ideas Digital

THE CHALLENGE

Customer and client contact information is integral to any business model. The email object in the CRM's contact records is typically the primary source for communication between client and customer.

Trujay had to breakdown the data in Highrise and indeed discovered an excess amount of undetectable emails to migrate.

Although this was the only issue, the **Trujay** team needed to brainstorm a quick and easy way to resolve this.

The issue was partially caused by Highrise's outdated API documentation, which required the technical team to debug its API without having enough information.

Without getting overly into the technical jargon, the **Trujay** experts put their heads together to fill in the missing pieces of Highrise's API puzzle, debug it, and recover the missing emails.

THE SOLUTION

Trujay devised a plan and started the investigation with its web development team. **Trujay's** developers discovered a solution to debug Highrise's API.

So, how exactly did **Trujay** fix this problem? Once the bug was discovered, the team was able to recover the missing email records by adjusting their code.

Because of **Trujay's** high level of expertise on the technological backend, the API was debugged, even when there wasn't enough data in the API's documentation. Even with Highrise's outdated system, **Trujay** delved into all possible areas of where (and why) this bug existed for the client.

As soon as the code was adjusted, the missing emails were detected, cleansed, confirmed for accuracy, and imported to HubSpot, the client's target CRM.

"Together, we managed to succeed and reach our goal which makes our clients happy and therefore, us happy as well."

- Hristo Yankov, Digital Marketing and Sales Specialist, Top Ideas Digital

"When we received the first contact from Trujay, we were very happy and highly appreciated the kindness and professionalism of all the members of your team that we spoke to. All the questions that had risen during our project were thoroughly answered and we were provided with all the assistance needed."

- Hristo Yankov, Digital Marketing and Sales Specialist, Top Ideas Digital

THE RESULTS

Let's do a recap.

Top Ideas Digital migrated CRM data for their client using **Trujay's Self-Service Tool.** Due to a bug found in Highrise's API, Top Ideas Digital was unable migrate their clients' customer email information, as they were missing emails in their contact records.

Top Ideas Digital reached out to **Trujay** directly and quickly realized it was the perfect solution to help complete the migration.

Trujay went on to discover the API bug and the undetected emails. They found a solution and altered the code, which allowed for the emails to be recovered and migrated into the clients' target CRM.

Although this issue wasn't the most complex data problem in the world, it was one of the most important pieces of contact information that was missing. **Trujay's Self-Service Tool** worked in all possible ways automatically, but the original API needed human intervention. Trujay's team response to Top Ideas Digital proves not only its dedication to customer service, but overall expertise in all levels of data problems.

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"We are more than thankful to Trujay for helping us in this task which was very particular and challenging to complete. Not only the initial goal was reached, but also, we saw your team to run the extra mile in order to help us out and ensure great customer satisfaction. Once again, Thank you for the professionalism and dedication. We are looking forward to working together again."

- Hristo Yankov, Digital Marketing and Sales Specialist, Top Ideas Digital

SIGNIFICANCE & APPLICATION
CRM DATA MIGRATION DONE ON YOUR OWN, AUTOMATICALLY

Some people fear the thought of conducting a CRM data migration on their own. We understand that fear.

There are so many factors that could make or break a migration. Whether you have thousands of records and hundreds of objects, or you're missing email records, there are plenty of things that can go wrong if you don't have the right guidance.

But here's the proof: you can perform data migration on your own if that's what you want to do! **We created a system that gives you the confidence to conduct your own data import, and if you get stuck, we'll jump in at any point in time and help you achieve your goals**.

Trujay is committed to user-independence, but we also understand wanting to get things right the first time. If you feel like an automatic, DIY data migration is suitable for your use case, our Self-Service Migration Tool will get you there. (And, if you're still feeling worried, you can talk to us at any time, and we'll help you through the Self-Service process.)

We can even do the entire Self-Service Migration for you, **but that's a story for later.**

We hope this success story gave you enough insight and confidence in our Self-Service Migration Tool. You can do it! And don't hesitate to reach out. We'll be right here.

START SELF-SERVICE   **CONTACT US**

Trujay is the leading CRM data-expert company, providing migration and integration services. 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's integration services are now IntegrateHQ, 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.