



How OPTI migrated 750,000 Emails from FreshSales to HubSpot

CASE STUDY

Industry: IT

Client: NetNut, Israel

Year: 2023

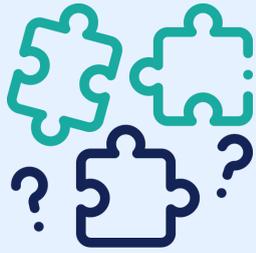


Migrating large datasets between platforms can be a complex and challenging task. In 2023, NetNut approached OPTI to migrate 750,000 email folders from FreshSales to HubSpot.

The objective was to convert the complex folder structure into an organized format, validate and transfer the data, and associate email messages with the correct contacts in HubSpot.

OPTI was responsible to migrate all the emails and maintain the data integrity.





CHALLENGES

The migration project presented several challenges which were very technical.

COMPLEX FOLDER STRUCTURE



The client had 750,000 folders, each containing subfolders with important email data that needed to be meticulously organized.

DATA CONVERSION



The complex structure required conversion into a structured and readable format, such as CSV or JSON, to ensure compatibility with HubSpot.

VARIABLE EMAIL DETAILS



Multiple variable email details, including CC and BCC email addresses, needed to be accurately processed and validated.

CONTACT ASSOCIATION



Email messages had to be correctly associated with the appropriate contacts in HubSpot to enable effective marketing and communication strategies.



Freshsales



HubSpot



SOLUTION

OPTI developed a migration script designed to handle the extensive number of files and efficiently feed them into the HubSpot API, making them appear as native HubSpot emails linked to the correct contacts.

DATA CONVERSION AND EXTRACTION

- ✓ **The script traversed the FreshSales folders**, extracting all relevant email data.
- ✓ **The extracted data underwent rigorous validation** checks to ensure its accuracy.
- ✓ **The validated data was structured** into a CSV format.

BRINGING EMAILS TO HUBSPOT

- ✓ **Each email within the dataset was assigned a unique ID** to maintain organization and prevent duplication.
- ✓ **The email upload process included thorough validation** steps to ensure that the data was transferred correctly.
- ✓ **The script linked multiple recipients' addresses**, such as those in the CC and BCC fields, to their corresponding contacts in HubSpot.
- ✓ **Emails were treated as native HubSpot messages**, associating them with the belonging contact.



RESULTS

The migration was successfully completed in Fall 2023, and since then, it has powered marketing operations within HubSpot. Key outcomes include:



Data validation

Ensured data integrity and correctness through thorough validation checks.



Complex data transformation

Successfully converted complex data structures into a structured CSV format.



Optimized data processing

Data processing was optimized for speed through the use of advanced programming techniques.



Successful migration

750.000 emails were successfully transferred into HubSpot, without any data loss.

TECHNOLOGIES

PHP, MySQL, memcache, SOAP, JSON REST APIs.



TESTIMONIAL

"OPTI is a key partner which allowed us to go to market fast at a moment when our teams were in their infancy. Following attributes describe our collaboration with them: result-oriented, fast, proactive, excellent work ethics."

- PlayWing

WE SERVE HUBSPOT AGENCIES AND USERS AROUND THE WORLD



✓ HubSpot CMS

✓ Integrate HubSpot with any software

✓ Integrate Salesforce, Zoho, Pipedrive

✓ Create HubSpot apps

✓ Publish in HubSpot Marketplace

✓ Customize email and Preference Center

✓ Migrate and merge portals

✓ Lead tracking integrations

✓ FormAPI, HubDB and HubL programming

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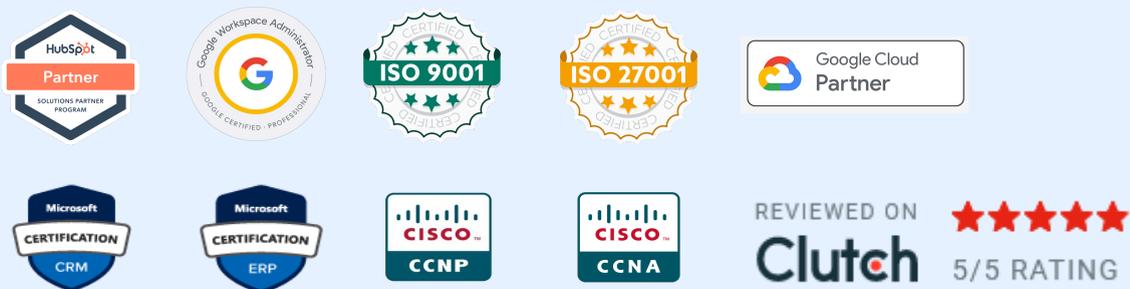
OPTI

PRODUCT DEVELOPMENT, AUTOMATION AND DATA MIGRATION

Software company developing products and cutting costs by automations and data migrations. Founded in 2005, with extensive expertise in retail, medical, publishing, and gaming industries.

The OPTI team includes senior analysts and programmers, is ISO 9001 and ISO 27001 certified, HubSpot Solution Partner, Google Cloud Partner and certified in other technological stacks.

CERTIFICATIONS



KNOW-HOW

