



complexity made simple

Streamlining operations by merging two businesses into one HubSpot account

CASE STUDY

Industry: Industrial Automation
Client: Confidential, United States
Year: 2023



In 2023, a client of OPTI managed two separate HubSpot accounts for their distinct business units, an approach which led to inefficiencies and higher costs.

To address these issues, OPTI consolidated these accounts into a single HubSpot account, ensuring smooth operations and clear separation between the business units.





CHALLENGES



The **data** of both business units **needed to be merged**.



A clear **segmentation** between the business units **needed to be retained**.



Data such as contacts, deals, firms, reports and website content **had to be migrated**.



Business activities had to be kept running.



SOLUTION

OPTI **developed and implemented a plan to consolidate the two HubSpot accounts**, focusing on efficient data transfer and clear segmentation.

DATA MIGRATION



HubSpot's import tools were used to bring all necessary data into the new consolidated account.



Custom reports were generated to include email records from the original account, ensuring all data was accurately imported.

WEBSITE MIGRATION

- ✓ **Website content**, including pages, images, and multimedia, **was manually moved to the new account.**
- ✓ **The website theme was adjusted** to match the migrated account branding.
- ✓ **The blog was imported separately** to maintain content quality and SEO.

- ✓ **Emails were treated as native HubSpot messages** and linked to the correct contacts.

SEGMENTATION

- ✓ HubSpot's Business Units tool was used to keep the two company segments separate within the same account.



RESULTS

The new system was launched in 2023, featuring:



Improved data management

All relevant data was successfully transferred to the single HubSpot account.



Integrated email records

Email interactions were correctly integrated into the new account.



Cost savings

Combining the accounts reduced the client's subscription costs.



Clear business unit separation

The use of HubSpot's Business Units tool ensured that data from the two businesses remained distinct.

TECHNOLOGIES

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

TESTIMONIAL

"Their stellar dedication and high-value proposition were impressive."

- Bogdan Jung, Viscri9

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✓ FormAPI, HubDB and HubL programming

CONTACT US

Direct

✉ office@opti-software.com
☎ +(40) 774 453 302
🌐 **www.opti-software.com**

Socials

in opti-software
f optisoftit
g+ opti-software

Str. Dr. Ioan Nanu Muscel 4, Bucharest, Romania

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



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