PTI

Managing multiple businesses into one HubSpot account

Case Study

Ui Path™

# About OPTI

✓ Over 15 years of excellence

OPTI Systems was founded in 2005. We have 15 years of experience, hundreds of projects and satisfied clients.

✓ Team of specialists

Our team include analysts, programmers, database and server administrators, project managers and QA engineers.

✓ Based in Bucharest, Romania

Romania is a renowned IT hub. OPTI is ISO 9001 certified and competes for the highest quality standards.
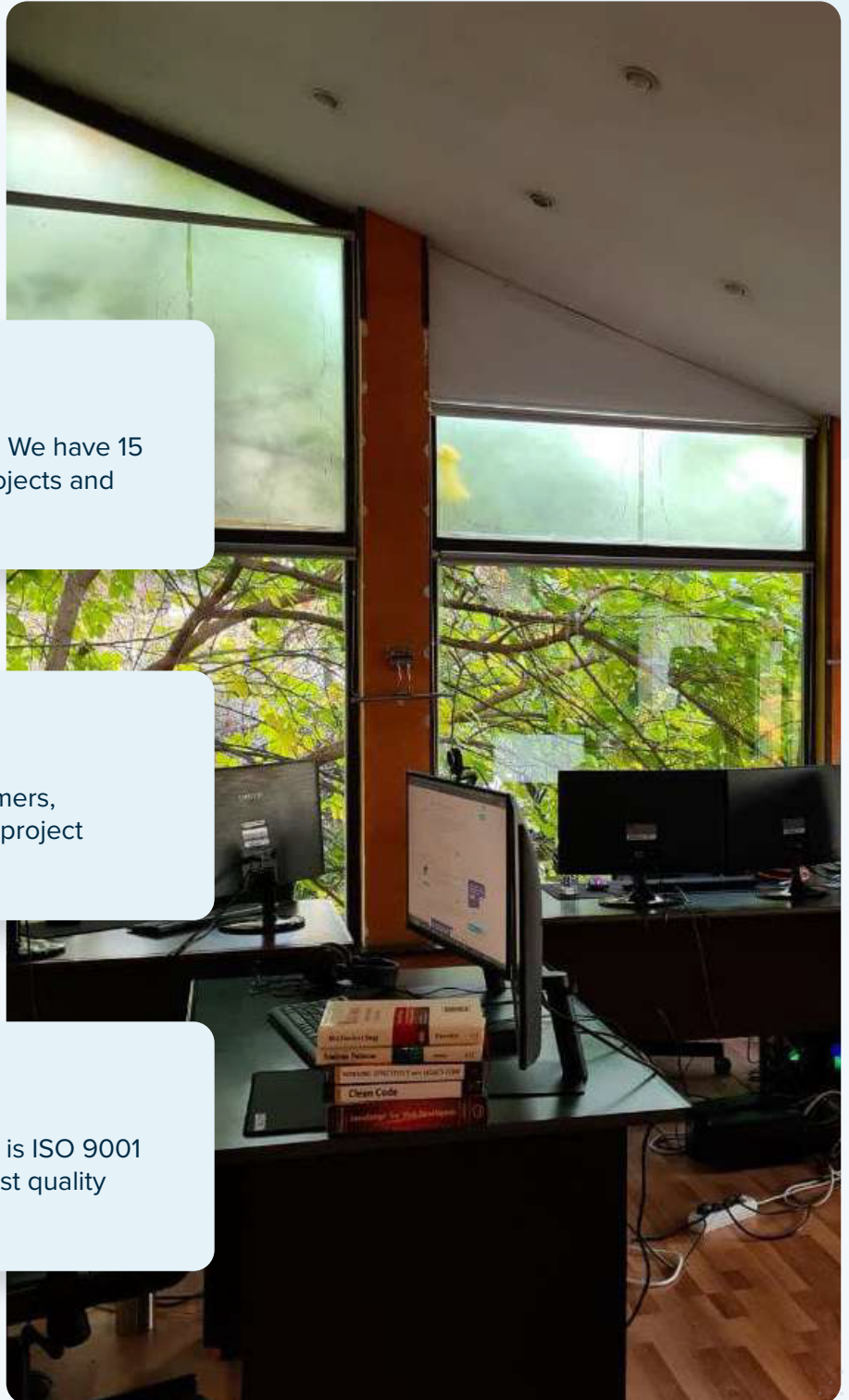
We do software focused on

Digital Transformation

Medical

Educational

Gaming

OPTI

OPTI develops software focused on streamlining business processes

Challenge

One of our clients had been leveraging two separate HubSpot accounts to manage their distinct business units. Managing duplicate accounts created additional fees and took crucial time and resources as their businesses grew. In order to improve efficiency, they opted to combine both HubSpot accounts into one while retaining clear segmentation between their business segments. The challenge lay in seamlessly migrating a wide array of critical components, including contacts, deals, businesses, firms, reports, and their website, all while ensuring uninterrupted business operations.

Solution

✓ **Data migration** – We utilized HubSpot's import plugins to facilitate the migration of contacts, deals, and companies from one account to the one that would become the consolidated account for both firms

✓ **Email migration** – To begin, we created custom reports that included email connections from the first HubSpot account. To verify that everything was correctly imported into the second HubSpot account, the data was subjected to rigorous validation and verification methods

✓ **Website migration** – The whole content of the website, including the pages, photographs, and multimedia components, was manually transferred to HubSpot. The website theme was then tweaked to meet the customer's branding and aesthetic requirements. The blog was imported independently to retain the quality of the content and enhance search engine exposure

✓ **Differentiation** – To set distinct boundaries between the two company segments under the consolidated account, we made use of HubSpot's Business Units tool

HubSpot

Results

Efficient Data Management

All customer-related data, including contacts, deals, businesses, firms, reports, and email exchanges, were successfully transferred into the single HubSpot account thanks to the thorough data migration, validation, and integration processes

Enhanced Business Unit Differentiation

The two company sectors were successfully separated within the consolidated account through the use of HubSpot's Business Units tool. Each unit's customized dashboards and reporting architecture allowed for a clear separation of data while preserving operational effectiveness

Email Connections Integration

Email interactions from the business unit was accurately integrated into the combined HubSpot account thanks to the construction of custom reports and thorough data validation procedures

Cost Reduction

The client significantly reduced costs by combining both HubSpot accounts into a single, unified platform. They did away with the requirement for a single HubSpot subscription, which immediately saved money on subscription costs