



Charter Global™
Strategy • Technology • Solutions

Seamless CRM Migration: Transitioning to HubSpot for a Smarter, More Connected Experience

Why Move to HubSpot

While SugarCRM has served you well, HubSpot offers a more powerful and integrated platform—especially in marketing automation, sales enablement, and advanced reporting. These features are essential for an organization like **The Conference Board**, focused on delivering high-value insights and fostering strong member relationships.

Leverage the Full Potential of HubSpot with Charter Global



Enhance Member Engagement

Automate personalized communication with AI-driven segmentation, targeted content, and behavior-based marketing to nurture relationships effectively.



Gain Actionable Insights

Leverage real-time analytics, predictive reporting, and a 360-degree view of member interactions to make data-driven decisions that improve retention and revenue.



Scale with Confidence

Adapt and grow with customizable workflows, seamless third-party integrations, and AI-powered innovations, ensuring HubSpot evolves with your organization's needs.



Streamline Sales Operations

Optimize deal tracking, automate lead management, and equip teams with tools for seamless sponsorship and research service sales, reducing manual effort and improving efficiency.



Improve Team Collaboration

Unify marketing, sales, and member services on a single platform with shared workflows, integrated communication tools, and smart task automation for better coordination.



Why Charter Global

Charter Global is the ideal partner to ensure a smooth, efficient transition from SugarCRM to HubSpot. Here's what sets us apart:

- **Proven CRM Migration Expertise**

With a track record of successful CRM migrations—including SugarCRM to HubSpot—we handle data migration with precision, ensuring minimal disruption and maximum efficiency.

- **Certified HubSpot Specialists**

As a certified HubSpot partner, our experts bring deep platform knowledge to configure and optimize HubSpot to align with your specific business needs.

- **Tailored to Your Needs**

We take the time to understand your CRM challenges and goals—whether it's improving member engagement, streamlining sales processes, or enhancing data insights—so that HubSpot delivers tangible value.

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Our Structured Migration Process

We follow a meticulous, step-by-step approach to ensure a seamless migration:



Strategic Assessment & Planning

- Comprehensive analysis of your current SugarCRM setup, data structure, and workflows.
- Identification of key data points, custom fields, and necessary reconfigurations.



Data Cleansing & Standardization

- Cleaning and structuring data for accuracy, consistency, and optimal HubSpot performance.



Customized HubSpot Configuration

- Tailoring sales pipelines, marketing workflows, service hubs, custom properties, and user roles.



Secure & Efficient Data Migration

- Using best practices and specialized tools to migrate data while ensuring integrity and minimal downtime.



Comprehensive Training & Support

- Hands-on training to equip your team with HubSpot expertise.
- Ongoing support to ensure smooth adoption and long-term success.



Seamless System Integration

- Connecting HubSpot with existing marketing platforms, email providers, and membership management systems.



Post-Migration Optimization

- Performance monitoring, continuous refinement, and process enhancements for maximum ROI.

Seamless CRM Migration, Measurable Impact

We understand that migrating a CRM is a big decision, but with Charter Global, it becomes a strategic advantage.

Upgrade to HubSpot with confidence—let's make it happen!



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