

HubSpot CRM Migration for a 300-Employee Law Firm

Migrating Operational Workflows from Asana & Mailchimp into HubSpot | CRM Structure | Workflow Logic | Make.com Support

Organization size	Source systems	Platform	Role
300 employees	Asana + Mailchimp	HubSpot	Contribution

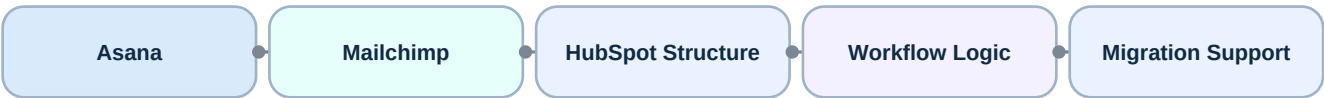
Executive Summary

Supported a large-scale HubSpot CRM migration for a law firm with approximately 300 employees, helping transition operational workflows from Asana and Mailchimp into HubSpot. The broader program involved multiple contributors and focused on redesigning how events, sponsorships, tickets, contact relationships, and communications would live inside HubSpot.

Business Challenge

The client was managing different parts of the business through separate tools, creating fragmentation across operations and making it harder to centralize data and workflows. The migration needed to bring these processes into HubSpot in a way that preserved operational clarity, supported future automation, and created a more unified CRM foundation.

Migration Architecture Flow



My Responsibilities

- Designed the HubSpot structure for the migration
- Mapped external systems into HubSpot
- Helped define how events, sponsorships, tickets, and related records should appear in HubSpot
- Answered Make.com automation questions tied to the migration logic
- Coordinated implementation details with Dylan and Muhammad
- Supported the design of field mapping and workflow behavior for the migrated processes

Key Areas I Worked On

Events Helped define how event data should be represented inside HubSpot.	Sponsorships Helped map sponsorship-related information into the HubSpot structure.	Tickets Helped shape how ticket-related operational data should be handled in the CRM.
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Additional Support Areas

Contact Relationships Supported the migration of relationships between records so the CRM structure could better reflect how the business actually operated.	Automation Logic Helped clarify how Make.com would support parts of the migrated workflow ecosystem.
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Technical Challenges

The main challenge was not simply moving data from one tool to another. The real problem was translating operational processes from disconnected systems into a HubSpot structure that could support long-term use.

Process Translation Existing Asana records had to be modeled in a CRM-friendly way that made sense operationally, not just structurally.	Tool Alignment Mailchimp communication data and Asana workflows had to be understood in the context of the new HubSpot operating model.
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Outcome

The migration work contributed to a more structured HubSpot implementation for the law firm, supporting the broader transition effort and helping shape how operational data would live inside the CRM.

Contribution to the Program

My work helped define the CRM structure, data model, and operational logic for selected areas of the migration.

Enterprise Readiness

The HubSpot foundation was designed to support future automation, clearer data management, and more unified operations.

Key Lessons

CRM migrations are not just data transfers. They are process redesign exercises. When a company moves from tools like Asana and Mailchimp into HubSpot, the real value comes from deciding how operational work should be modeled, governed, and automated after the migration. Even smaller contributions matter when they help define the structure that the broader system depends on.

1. Translation Beats Copying

The goal is not to clone old tools inside a new CRM. The goal is to rebuild the process so it works better in the new system.

2. Structure Matters

A migration only succeeds when the underlying CRM structure can support future operations and automation.

Technology Stack

HubSpot CRM foundation and migration target	Asana Legacy operational task system
Mailchimp Legacy communication platform	Make.com Automation support and integration logic

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