



CASE STUDY:

How Sol Systems Migrated from Salesforce to HubSpot

From Fragmented Systems
to a Unified Revenue Platform



INDUSTRY

Renewable Energy



COMPANY PROFILE

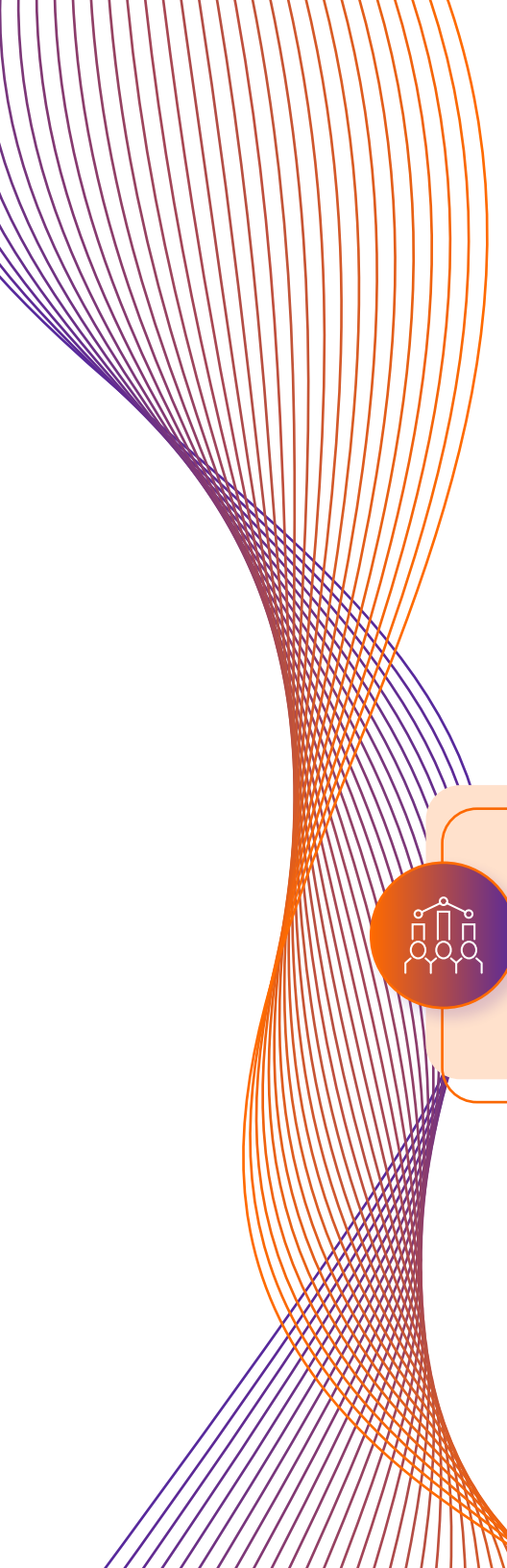
Sol Systems develops, finances, and operates solar projects while managing environmental commodity portfolios for corporate and institutional clients across the United States. Its business spans renewable energy development, energy credit trading, and retail solar solutions, creating a data-intensive operating environment with multiple revenue lines and distinct customer workflows.

Sol Systems, a national renewable energy company, needed to move from a fragmented and costly Salesforce environment to a unified HubSpot platform without interrupting active sales and service operations. The transition involved far more than transferring CRM records. It required consolidating systems, redesigning workflows, preserving customer communication history, and validating a complex data model containing more than 1,300 fields.

Vonazon led the migration as a business-critical revenue operations transformation. The team consolidated sales, service, and marketing capabilities in HubSpot, migrated more than 250,000

service tickets and associated historical records, rebuilt service processes for scale, and introduced integrations, automation, reporting, and training to support adoption from day one.

The result was a simpler and more maintainable technology stack, a high-confidence data transition, and a unified operating platform designed to support long-term growth. Sol Systems reduced its CRM license footprint from approximately 75 Salesforce licenses to approximately 30 HubSpot licenses, a reduction of about 45 licenses, or roughly 60 percent, while improving visibility across revenue and service operations.



The Business Context

As Sol Systems grew, Salesforce became deeply embedded across sales and service operations. Over time, supporting tools and processes accumulated around the platform, creating a multi-system architecture that limited visibility, increased operating costs, and made cross-functional coordination more difficult.

Leadership determined that incremental improvements would not address the underlying problem.



The organization needed a deliberate Salesforce-to-HubSpot consolidation strategy that could unify systems, simplify operations, and create a more reliable foundation for decision-making across sales, service, and marketing.

THE CHALLENGE

Sol Systems needed to exit Salesforce on a fixed timeline tied to contract constraints while continuing to run the business in the legacy platform. The migration had to preserve critical records, communication history, and service context, with no loss of confidence in the data at go-live.

This was not a standard CRM migration. It was a high-risk operational transformation involving a complex data model, active business processes, and competing stakeholder priorities. Service teams required complete visibility into customer communications, while leadership prioritized data integrity, platform performance, and long-term scalability.

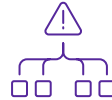
Sol Systems Faced:



Disconnected systems and data silos across sales, service, and marketing



A **highly complex data model**, including over 1,300 fields, introducing migration risk and inefficiency



Gaps in native integration capabilities, particularly around email-to-ticket associations



The need to migrate and validate **250,000+ service tickets and historical records**



Ongoing business operations within Salesforce during the transition



“We’re not going to flip the switch until we all feel confident that all of the data is in HubSpot.”

– Director of Revenue Operations

VONAZON'S APPROACH

Vonazon treated the engagement as a strategic platform transformation rather than a simple technical migration. The work was organized around five priorities: establishing HubSpot as the system of record, executing a high-integrity data migration, designing a resilient integration architecture, rebuilding service operations, and enabling adoption through automation, reporting, and training.

01

Establishing a
Unified System of
Record

03

Designing a
Resilient Integration
Architecture

05

Enabling Visibility,
Automation, and
Adoption

02

Executing a High-
Integrity Data
Migration

04

Rebuilding Service
Operations for
Scale



01

Establishing a Unified System of Record

Vonazon re-architected the environment so HubSpot could serve as the centralized system of record across revenue operations. Sales, service, and marketing capabilities were consolidated into HubSpot Sales Hub and Service Hub, reducing dependence on redundant tools and creating shared visibility across teams.

Pipelines, properties, and data structures were redesigned around current business workflows rather than copied directly from the legacy environment. **This ensured the new platform reflected how Sol Systems actually operated and could support future growth without carrying forward unnecessary complexity.**

02

Executing a High-Integrity Data Migration

Data migration was managed as a primary risk area. **Vonazon preserved and validated accounts, contacts, deals, tickets, activity history, enterprise sales data, commodity trading data, customer service records, and interaction history.**

A parallel testing environment allowed stakeholders to inspect migrated records and confirm system readiness before cutover. At the same time, the team rationalized the data model, refining field mappings and excluding redundant or low-value fields instead of transferring every legacy element into HubSpot.

Special migration methods were developed where native tooling could not fully preserve email-to-ticket relationships. This protected the communication context service teams relied on to understand customer history and respond effectively.

03

Designing a Resilient Integration Architecture

Vonazon followed a native-first integration strategy to improve stability and maintainability. Outlook was integrated for communication synchronization, while RingCentral was connected for call tracking and activity logging. The architecture also established a foundation for future connections with NetSuite ERP and Jira.

Where native capabilities were insufficient, the team designed targeted alternatives rather than recreating the entire legacy integration landscape. This reduced technical debt while preserving the operational information teams needed.

04

Rebuilding Service Operations for Scale

Rather than duplicating fragmented service processes, Vonazon redesigned them in HubSpot. Structured ticketing pipelines were aligned to real operational workflows, and case intake was automated across email and voicemail channels.

Automated routing and SLA-based prioritization helped direct work to the right teams and improve responsiveness. AI-driven chatbots were implemented to reduce routine support demand and provide customers with faster access to assistance. Together, these changes moved service operations from reactive ticket handling toward a more consistent, system-driven model.

05

Enabling Visibility, Automation, and Adoption

Centralized dashboards gave leadership and operating teams a shared view of pipeline activity, service performance, and customer interactions. Workflow automation supported task management, follow-ups, lifecycle progression, routing, and bulk operations, reducing manual effort across the organization.

Comprehensive training prepared users to work effectively in HubSpot from day one. This emphasis on adoption helped reduce transition risk and ensured the new platform could deliver operational value immediately after go-live.

THE RESULTS:

The **Salesforce-to-HubSpot transformation delivered measurable improvements** in cost structure, data confidence, service execution, and organizational visibility. The project also created a more flexible platform for future automation, integrations, and AI-enabled optimization.



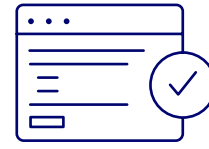
250,000+

Service tickets migrated



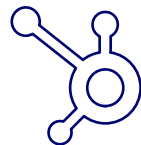
75 → 30

Consolidated 75 CRM licenses
to 30 HubSpot licenses



1,300+

Fields rationalized



**Sales + Service
+ Marketing**

Unified in HubSpot



**Near
Complete**

Data sync before go-live

THE RESULTS:

Lower Cost and Complexity

Sol Systems consolidated its CRM footprint from approximately 75 Salesforce licenses to approximately 30 HubSpot licenses. That represents about 45 fewer licenses, or roughly a 60 percent reduction in license count. Redundant systems and dependencies were also eliminated, creating a simpler technology stack that is easier to maintain.

High-confidence Migration

High-confidence migration More than 250,000 service tickets and critical historical records were migrated. Parallel validation and refined field mapping enabled issues to be identified and resolved before go-live, supporting near-complete data synchronization and greater trust in the new system.

Modernized Service Operations

Fragmented ticket handling was replaced with structured pipelines, automated case intake, routing, SLA-based prioritization, and AI-driven chatbots. Service teams gained stronger visibility into customer interactions and historical context, while automation supported faster and more consistent response management.

Improved Visibility and Decisions

Centralized dashboards brought pipeline performance, service metrics, customer activity, and operational trends into a shared reporting environment. Leadership could monitor performance with greater confidence and teams could work from a more consistent view of the customer.

Scalable Revenue Infrastructure

HubSpot became the unified platform for sales, service, and marketing operations. The new architecture supports continued automation, additional integrations with systems such as NetSuite and Jira, and future AI-driven improvements without recreating the complexity of the previous environment.

LOOKING AHEAD

With the core platform in place, Sol Systems can focus on continuous optimization rather than foundational system repair. Planned initiatives include extending integrations across ERP and project management systems, expanding workflow automation, and applying AI to improve customer experience and operational efficiency.

What began as a necessary migration away from Salesforce has become a broader shift toward a more agile, scalable, and data-driven operating model. HubSpot now provides the shared infrastructure Sol Systems needs to evolve revenue and service operations over time.



Planning a Salesforce-to-HubSpot Migration?

Vonazon helps organizations consolidate complex CRM environments, preserve business-critical data, and redesign revenue operations around scalable HubSpot architecture.



Let's map it together.



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