



## Secure And Intuitive Customer Support Data Migration



E-Learning & HealthCare

SMBs help desk migration

HubSpot migration

# Freshdesk to HubSpot Service Hub Migration Guide



Follow this step-by-step process for a secure & fast [Freshdesk to HubSpot Service Hub migration](#).

## Freshdesk to HubSpot Service Hub Migration Guide

Cidi Labs:  
Migration Case Study

Compliance Group:  
Migration Case Study

Key Takeaways

Next step: Run a Free  
Demo Migration

01

### Connect the source and target accounts

Connect your Freshdesk and Hubspot accounts through our automated Wizard. Data is transferred safely via official APIs.

02

### Configure field and data mapping

Choose the records to migrate: You can transfer tickets, contacts, agents, shared teams, attachments, ticket private and public notes. Your historical data lands in HubSpot with full context.

03

### Choose built-in migration options

Skip attachments, migrate inline images, add tags, move only recent records, and include associated data – all with a single click. Our built-in features make the migration smooth and error-free.

The image shows two overlapping screenshots of a ticket. The left screenshot, labeled 'SOURCE PLATFORM', is from Freshdesk. It shows a ticket titled 'Email integration not syncing...' with a status of 'In Progress' and 'High' priority. The ticket ID is #HD-2024-001247. The contact is Sarah Martinez (sarah.martinez@acme.com) from Acme Corporation Ltd. The ticket was created on Jan 15, 11:30 AM. The comments show Sarah Martinez reporting the issue and David Chen responding to thank her for reporting it.

The right screenshot, labeled 'TARGET PLATFORM', is from HubSpot. It shows the same ticket migrated to HubSpot. The ticket ID is #HD-2024-001247. It features 'AI Insights' with an 'Urgency' of 85%, 'Similar Issues' (3 found), and 'ETA' (3 found). The ticket is assigned to Sarah Martinez (Agent) and David Chen (Agent). The 'Recent Activity' shows Sarah Martinez's initial report and David Chen's response.

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04

### **Run a Free Demo Migration**

Try a Free Demo Migration to preview how your Freshdesk data will appear in [HubSpot Service Hub](#). Adjust field mappings or filters before running the full migration.

05

### **Validate results**

Start the full migration from Freshdesk to HubSpot Service Hub. Your team can keep working while the data transfers in the background. Review the post-migration report, and use Delta Migration to sync any new or updated records created during the process.

06

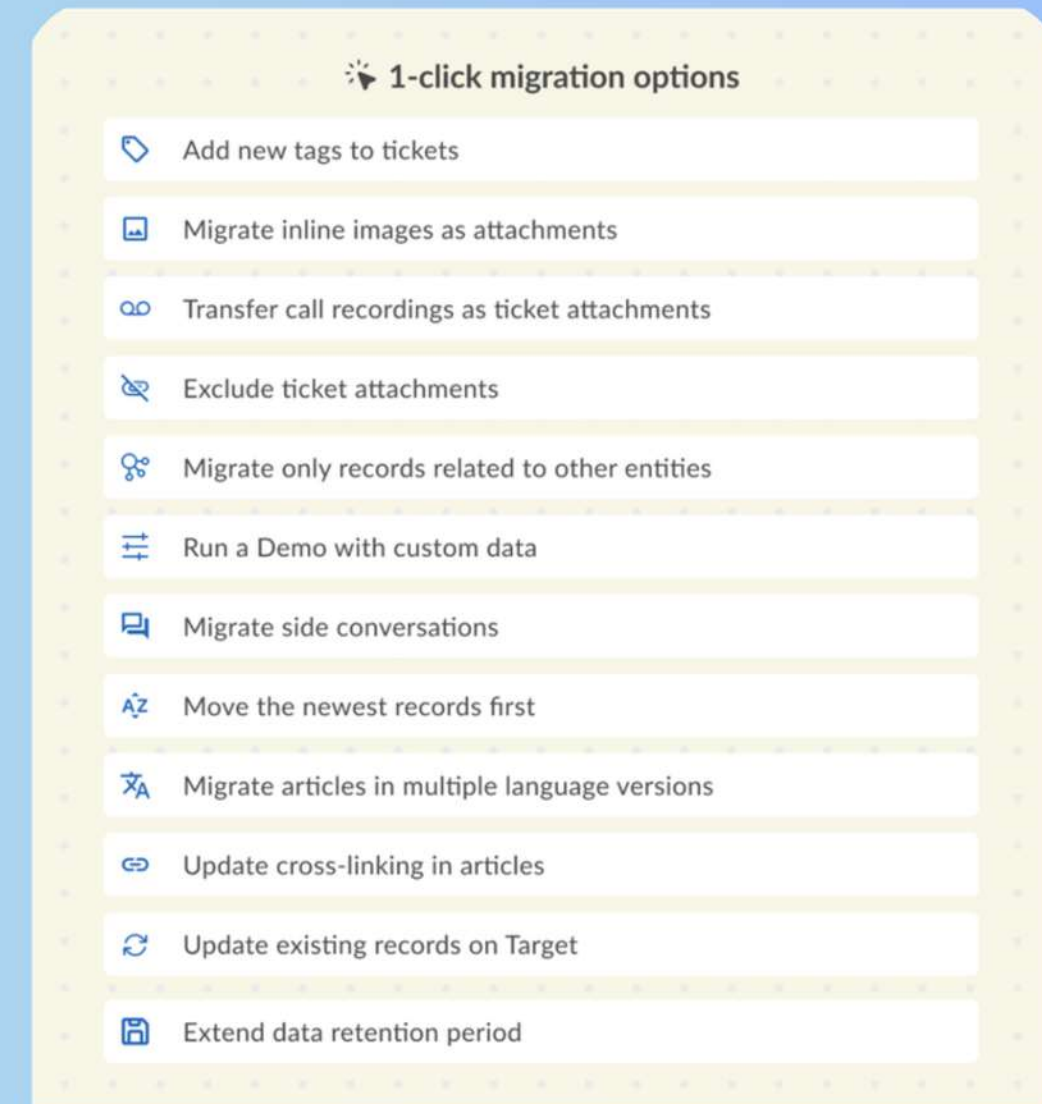
### **Run Full Migration**

Run your full HubSpot Service Hub migration during a planned maintenance window to ensure a seamless, predictable cutover using the demo setup.

07

### **Post-migration QA & verification**

Prepare a final HubSpot Service Hub migration QA to ensure everything is complete. Verify that agents can access historical data and confirm all automated workflows function correctly before giving final approval.





# Real Customer Case Studies





# Help Desk Migration +



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Cidi Labs is a Utah-based educational technology SMB company providing SaaS-based instructional design tools for the Canvas LMS, aimed at enhancing course design, accessibility, and efficiency. They wanted to keep uninterrupted customer service while keeping all historical data in one place by moving from Freshdesk to HubSpot Service Hub with Help Desk Migration

### About the company

**CiDI Labs** provides innovative plug-in tools that enhance the Canvas LMS experience, helping educators and instructional designers create engaging, accessible, and well-organized courses. Its solutions improve productivity, simplify course lifecycle management, and provide meaningful insights through reporting, enabling institutions to deliver consistent, high-quality learning experiences at scale.

With tools like DesignPLUS for building visually appealing courses, UDOIT Advantage for improving accessibility, TidyUP for removing outdated content, ReadyGO for managing course lifecycles, Cidiscap for reporting insights, and ObserveEd for secure student monitoring, Cidi Labs helps teams work more efficiently while maintaining high standards of digital learning.



Julian Ridden  
Director of Customer Experience at Cidi Labs



### Feedback

*The service cost compared to the cost of doing it ourselves is significantly less. Time is indeed money, and in this case, they saved us hundreds.*



**Cidi Labs**



**E-Learning Provider**



**Utah, US**

### Data Migrated:

- Tickets
- Users
- Attachments
- Internal notes
- Knowledge Base
- Custom fields/tags.

### Migration Options Chosen:

- Agent matching
- Customized field mapping
- Migration filtering



# Help Desk Migration +



## Migration Overview

Freshdesk to HubSpot  
Service Hub Migration  
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### Key Challenges

- **Preserve ticket history:** Ensure all tickets, conversations, and attachments transfer accurately without data loss.
- **Maintain workflows:** Keep automated processes and custom field mappings intact during the migration.
- **Minimize downtime:** Complete the Freshdesk to HubSpot migration smoothly to avoid disrupting support operations.

### Help Desk Migration Solutions

- **Demo Migration:** Tested a sample of data to preview ticket layouts, attachments, and field mappings before the full transfer.
- **Full Migration:** Executed the complete Freshdesk to HubSpot migration with automated workflows, attachments, and custom fields transferred accurately.
- **QA & Validation:** Prepare a thorough HubSpot migration QA to verify ticket history, verify automated processes, and confirm that agents have access to all historical data.

### Outcome & Result

1. **Seamless Migration:** All Freshdesk data was moved successfully to HubSpot Service Hub with zero data loss.
2. **Workflow Continuity:** Automated processes and custom workflows were preserved throughout the migration.
3. **Zero Downtime:** Support operations remained uninterrupted, ensuring a smooth, efficient transition.

# **Compliancy Group** + **Help Desk Migration**

Compliancy Group brings 20 years of healthcare compliance expertise wanted to consolidate their support systems by migrating over 65,000 Freshdesk tickets into HubSpot Service Hub, ensuring all customer data is unified in one accessible platform.

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### About the company

Compliancy Group with over 20 years of experience in healthcare compliance has become a leading provider of compliance management solutions. Recognized by G2 as a leader in healthcare compliance software. Compliancy Group also has the support of leading medical associations, instilling confidence in organizations regarding the reliability and effectiveness of its platform.

The company offers a comprehensive approach to compliance management, helping organizations effectively track, manage, and report on regulatory requirements. The platform supports key areas such as policy management, employee training, vendor oversight, contract management, and incident tracking, ensuring organizations' compliance and audit readiness.



Erik Harris  
Director of Onboarding & Support  
at The Compliancy Group



### Feedback

*The team was very friendly and helpful throughout. We got everything we needed out of the migration process in a simple and quick process.*



**Compliancy Group**



**Healthcare**



**New York, US**

### Data Migrated

- 61K tickets
- 25K Contacts
- 6K Companies
- Agents
- Internal notes
- Knowledge Base
- Custom fields/tags.

### Migration Options Chosen

- Migrating inline images as attachments
- Mapping groups to pipelines,
- Mapping companies by Customer ID and Signature plan.



# Help Desk Migration

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### Key Challenges

- **Consolidate multiple support systems:** Merge all support channels into a single HubSpot Service Hub platform.
- **Preserve ticket history:** Ensure over 65,000 Freshdesk tickets, including conversations and attachments, transfer accurately.
- **Maintain workflows:** Keep group assignments, Customer IDs, and Signature plans correctly mapped during migration.

### Help Desk Migration Solutions

- **Demo Migration:** Tested a sample of data to preview ticket layouts, attachments, and field mappings before the full transfer.
- **Full Migration with Customization:** Migrated inline images as attachments, mapped groups to pipelines, and matched companies by Customer ID and Signature plan.
- **QA & Validation:** Verified ticket history, attachment integrity, and accurate field mappings to ensure seamless access for agents.

### Outcome & Result

1. **Successful Migration:** All Freshdesk tickets were moved to HubSpot Service Hub without data loss.
2. **Improved Efficiency:** Streamlined support operations with preserved workflows and mapped pipelines.
3. **360° Customer View:** Gained a complete view of the customer journey, enhancing service and reporting.

# Key Takeaways

Both Cidi Labs and Compliancy Group successfully migrated large volumes of Freshdesk data, including tickets, contacts, attachments, knowledge base articles, and custom fields, into HubSpot Service Hub without any data loss.

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- Preservation of Workflows and Customizations:**  
Automated processes, custom field mappings, group assignments, and pipelines were maintained throughout the migration, ensuring business continuity and no disruption to support operations.
- Effective Use of Demo Migrations:**  
Testing a small data sample before the full migration allowed both companies to preview ticket layouts, verify attachments, and validate field mappings, reducing the risk of errors during the complete transfer.
- Support for Large-Scale and Complex Migrations:**  
Help Desk Migration handled complex requirements, including consolidating multiple support systems, migrating volumes of tickets, mapping companies by Customer ID, and transferring inline images as attachments.
- Operational Efficiency and Enhanced Customer Insight:**  
The migrations simplified support workflows & provided a unified view of the customer journey, enabling better reporting, faster response times, and improved overall service efficiency.



# Start Your Free Demo Today

Join thousands of companies that have ditched manual scripts for effortless automation.

[START FREE DEMO MIGRATION](#)

Have unique enterprise requirements? Our team is available 24/7 to help you build a custom migration roadmap tailored to your specific HubSpot configuration.

[Talk to a Migration Expert](#)

[Check a Security Policy](#)

