CLIENT CASE STUDY
& MIGRATION GUIDE

HUBSPOT PORTAL CONSOLIDATION

Two portals.
One working CRM.

How Symplicity consolidated HubSpot data, marketing assets, and an 87-page website—and eliminated redundant licensing costs.

Symplicity

$9,459
monthly costs eliminated

87
website pages migrated

2 to 1
HubSpot portals

EXECUTIVE SUMMARY

Consolidating HubSpot portals is a business continuity project as much as a data project. Symplicity needed to bring two environments together without leaving behind the website, marketing assets, or record relationships that made those environments useful. RSM combined discovery, cleanup, data reconciliation, purpose-built website migration tooling, and final validation to establish one functioning CRM. [1]

The destination is not a bigger database. It is one place for people, marketing activity, and the website to work together.

For marketing, operations, and finance leaders evaluating duplicate HubSpot environments, redundant subscriptions, or a portal consolidation with live web assets.

01 / THE CLIENT ENGAGEMENT

A portal is more than its records

The financial case was clear. The operational work was broader: bring the second portal into the primary environment while protecting the pieces the business still depended on. [1]

The starting point

Symplicity operated two HubSpot portals with overlapping contacts and companies, disconnected activity tracking, and marketing assets distributed across both environments. The secondary portal held its own forms, landing pages, website content, and other assets. Maintaining both meant duplicate licensing costs and uncertainty about which information to trust.

Decide what belongs before moving it

RSM inventoried the data, associations, properties, forms, workflows, templates, and website content across both portals. That work established the migration boundaries and confirmed the primary portal as the long-term system of record. The team reviewed duplicate fields, overlapping records, and assets still supporting active marketing rather than treating the two portals as interchangeable copies.

Reconcile the data—not just the exports

The cleanup and migration work brought contact and company data into the primary portal with the relationships and context needed for day-to-day use. Records that looked alike were not treated as automatic merges. RSM reviewed overlaps and reconciled the datasets so users would have a coherent source of information, rather than the same ambiguity collected in one larger portal.

Treat website migration as its own workstream

The engagement included an 87-page website. Moving page content alone would not address its templates, redirects, and supporting assets. RSM's internal developer created a purpose-built migration tool to support the transfer and validation of website and online assets, avoiding an approach dependent on rebuilding every page manually.

Why the scope matters

A consolidation estimate based only on contact volume can miss the website and marketing dependencies that determine whether the destination portal will actually work.

02 / VALIDATION & RESULTS

Verify the operation, not only the import

RSM's final review covered migrated data and assets, forms and workflows, website and redirect behavior, and the reporting foundation. The test was whether the combined portal could support daily work. [1]

What the published case documents

Symplicity's consolidation eliminated $9,459 per month in redundant HubSpot costs and moved an 87-page website into the consolidated environment. The case study reports that the work did not lose pages, break forms, or interrupt operations. Those are results from this engagement, not a guaranteed outcome for every migration.

What changed for the team

The delivered result was one functioning HubSpot CRM rather than two overlapping environments. Data cleanup and reconciliation were part of that result, not separate housekeeping left for later. The website and marketing components were included in the transition, keeping the project focused on a usable operating environment.

What a prospective buyer should take from it

CRM reconciliation and website migration worked as one engagement. Custom tooling addressed a specific transfer problem; it did not replace discovery, retention decisions, or testing. A similar project should define both what moves and how each important part will be accepted.

> "Before working with RSM, we had two HubSpot CRM instances and a whole mess of data in both. RSM took the reins and migrated our systems into one, systematically helped us clean and sort the data, and made sense of everything. Now we have a fully functioning CRM!"
>
> V. Grant · Vice President of Marketing, Symplicity
> Excerpt from the published testimonial. [1]

The practical lesson

Make the retirement of the old portal depend on verified destination behavior—not simply a completed migration job.

03 / PLANNING YOUR CONSOLIDATION

Five decisions to make before the move

The following is RSM planning guidance for a prospective consolidation. It is not additional claimed scope from the Symplicity engagement.

1. Choose the surviving system

Confirm the destination portal, required subscriptions, business owner, and access model. Identify which contracts can actually be retired and when; do not assume every current charge disappears at cutover.

2. Set reconciliation rules

Agree how matching records are identified, which values take precedence, and how conflicting information will be reviewed. Include associations and required history in the acceptance criteria, not only record totals.

3. Inventory the live dependencies

List active forms, workflows, pages, templates, redirects, domains, tracking, integrations, and reports. Give each item a decision: retain, rebuild, retire, or investigate. Check available migration methods against the exact asset types in scope.

4. Define the proof of readiness

Select representative user journeys and records for testing. A form test should check the submission and its downstream behavior. A website test should cover the destination page, redirect path, and conversion points—not only visual appearance.

5. Control cutover and retirement

Agree a change window, treatment of records changed during migration, recovery plan, and sign-off owner. Keep the source available until the agreed reconciliation and functional checks support retirement.

Start with the inventory, not a fixed migration date.

Bring a summary of both portals, subscription costs, website scope, and the processes that cannot be interrupted. RSM can help establish the migration boundaries and the evidence needed for a responsible go-live.

Discuss your migration with RSM

[1] RSM Consulting, "How Symplicity Eliminated $9,459/mo in HubSpot Costs." Published client case study, accessed 16 September 2026. Client facts and testimonial in this paper draw from that account. Planning guidance is advisory; scope, fees, timing, and results depend on the engagement.

Read the full published case study →