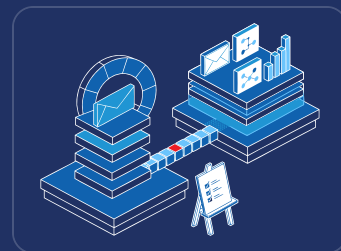


ADD-ON · MIGRATION

Account Engagement to Marketing Hub Switch



Pardot (Marketing Cloud Account Engagement) replaced by HubSpot Marketing Hub in 5 to 6 weeks: prospects and opt-outs moved, core assets and 2 programs rebuilt, the Salesforce connector set up, and your team trained by role.

PRICE
\$9,500
TIMELINE
5-6 weeks
SIZED FOR
Up to 3 marketers and 25,000 prospects
WHAT'S INCLUDED

- 1 discovery workshop (2 hours) and an inventory of your Account Engagement assets and automation
- Marketing Hub account defaults, users and teams (up to 3 marketers, plus read-only access for advisors or sales)
- Email sending domain authentication and tracking code install guidance
- Subscription types and consent (CAN-SPAM, GDPR), with every Pardot opt-out and unsubscribe loaded before the first send
- Up to 25,000 prospects migrated as contacts with up to 25 custom fields mapped
- Up to 10 static lists migrated and dynamic lists rebuilt as active lists
- Up to 5 forms or form handlers rebuilt as HubSpot forms
- Up to 5 email templates rebuilt on your existing theme
- Scoring and grading rebuilt as HubSpot lead scoring, with the old score kept as a reference property
- Up to 2 Engagement Studio programs rebuilt as workflows
- HubSpot to Salesforce connector installed with standard field mapping and sync rules (when Salesforce stays as your CRM)
- 1 dashboard for email and form performance
- Parallel run and cutover plan, so Pardot can be switched off on your timeline
- 3 recorded trainings by role (admin, marketer, advisor or sales view) and a training guide for each
- 2 office-hour calls during the 30 days of hypercare

NOT INCLUDED

- More than 2 Engagement Studio programs (quoted, or delivered from a block of hours)
- Historical engagement (opens, clicks, visits); it does not load into HubSpot natively, and we export it for your records
- Email archiving setup (Smash, Global Relay or similar)
- Copywriting, design, custom themes or modules
- Landing page and website rebuilds
- Custom objects, custom-coded integrations and Salesforce Apex changes
- Moving the CRM itself from Salesforce to HubSpot (see Salesforce to HubSpot Migration)
- Data cleansing beyond de-duplication on email address

You provide

- Admin access to Account Engagement and Salesforce for the inventory and export
- HubSpot Marketing Hub Professional or above, licensed by kickoff
- DNS access for domain authentication
- A decision on which programs and assets to keep, retire or rebuild
- Copy and images for any new content
- Compliance review of email content and disclosures

Assumptions

- Account Engagement stays live until cutover; you choose the switch-off date
- Salesforce stays as the CRM, or there is no CRM to connect
- Volumes stay within the caps above; anything larger is quoted in writing before work starts
- Remaining programs and assets can move later from a HubSpot block of hours, valid 12 months

Done means: Opt-outs loaded and verified before the first send; test sends pass authentication; the 2 rebuilt workflows run end to end; connector sync checked on 25 sample records; trainings delivered and recorded.

Standard on every package. Every Launch package includes a named senior consultant from kickoff to go-live, a written project plan, weekly status, build and test in a sandbox where the platform has one, one UAT cycle, admin documentation, recorded training and 30 days of hypercare. Never included: software licenses, custom code unless listed, integrations not named, content beyond the numbers listed, legal or compliance approval, on-site work and travel. **Pairs with:** Block of Hours for the remaining programs after cutover.



Talk to a senior consultant

vantagepoint.io/packages/account-engagement-to-marketing-hub

Book a 45-minute review: vantagepoint.io/get-started · Full scope, FAQs and the latest price are on the package page.