

HubSpot  ORIGIN 63

Guide to Migrating from Conversations Inbox to Help Desk

Guide



Introduction

Welcome to the Guide to Migrating from Conversations Inbox to Help Desk!

If you've been using HubSpot's Conversations Inbox, you're likely familiar with its ability to centralize team emails, chats, and social media messages in one shared space.



60% of high-growth customer service teams use a help desk.

While it's a useful tool for many businesses, it might not fully meet the needs of teams looking for structured workflows, advanced ticketing options, or better ways to separate customer support tasks from general inquiries.

For teams like yours, Help Desk can be a more fitting solution. This guide is here to make the transition smooth and straightforward. We'll walk you through why migrating to Help Desk could be the right choice, how to prepare for the move and the step-by-step process.

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Understanding the Difference: Conversations Inbox vs. Help Desk

When deciding whether to transition from HubSpot's Conversations Inbox to Help Desk, you should understand each tool's unique purpose.

While they may seem similar at first glance, their functionalities and focus differ significantly, and recognizing these differences can help you make the best decision for your team.

Conversations Inbox vs. Help Desk: A Comparison

Conversations Inbox is designed to centralize team communication — managing emails, chats, and social messages in one place. It's ideal for general inquiries and sales-related conversations, giving teams a shared space to collaborate and respond. However, its capabilities are limited to basic conversation management, with fewer options for automation, reporting, and ticket organization.

Help Desk Workspace, on the other hand, is purpose-built for customer support. It uses tickets as CRM objects, unlocking advanced automation, custom reporting, and AI-powered tools like context-aware replies, automatic summaries, and sentiment analysis. It also introduces spaces, custom views, and granular filtering, helping teams scale efficiently without adding headcount.

Help Desk suits teams that handle recurring issues, need detailed tracking, or rely on robust reporting to measure success.

Here's a comparison to clarify the distinctions:

Feature	Conversations Inbox	Help Desk
Primary Focus	General communication and team inboxes.	Structured ticketing and support workflows.
AI Features	Limited or no access to advanced AI tools.	AI powered ticket summarization, AI reply recommendations, AI generated ticket names, and Breeze Customer Agent
Views	Custom views within each inbox; default views are static.	Has granular view sharing for public, private, or shared at team or user level
Omni-Channel Support	Different UIs for conversations and tickets requiring reps to work across multiple tabs.	Creates tickets across all channels, enabling seamless responses from one unified interface.
Customization	Basic customizations for general use.	Highly customizable, including sidebar modifications and the ability to create custom sidebar cards via UI Extensions.

Support Handling Management	Basic support handling, integrated with Inbox.	Advanced pipelines, statuses, and automation.
Workflow Automation	Limited options for automation.	Comprehensive automation and triggers due to all channels generating Tickets.
Reporting	Standard Conversation volume and response time reporting	In-depth reporting on overall team and individual performance
Team Organization	Multiple inboxes with permission based access	Spaces provide dedicated, team-based working areas with custom views.
Scalability	Best for small teams or less complex needs.	Built to scale for larger teams or detailed operations.
Data Integration	Limited integration with external data sources.	Connects with the full CRM for unified customer data across all touchpoints.

Benefits of Switching from Conversations Inbox to Help Desk



Switching to Help Desk isn't just about gaining new tools—it's about creating a smoother and more effective customer support process. For many teams, the benefits of this transition are clear and impactful.

Streamlined Ticket Management

With streamlined ticket management, your team can create dedicated pipelines for different inquiries or customers. Whether it's sales questions, technical support, or feature requests, tickets can flow through tailored processes, ensuring no detail gets missed.



Complete Customer Context with Smart CRM and Data Hub

Help Desk now works seamlessly with HubSpot's Smart CRM, which means your support team gets the complete picture of every customer. The Smart CRM automatically captures insights from calls, emails, and tickets, so your team always has the context they need.

Data Hub takes this even further by connecting information from external sources like databases, warehouses, and other business apps.

Your team can access unified customer data from all your systems right within Help Desk, eliminating the need to switch between platforms or hunt for information.

AI Teammates That Work Across Your Entire Business



Help Desk now includes Breeze AI, empowering your entire go-to-market team with AI features that use HubSpot credits.

The **Breeze Customer Agent** acts as a 24/7 front-office concierge, handling routine service tickets while also assisting with sales conversations, lead qualification, and customer nurturing. Your AI teammates work alongside humans across all departments.

The **Breeze Data Agent** automatically gathers and enriches customer information from various sources. It finds relevant details about prospects and customers, then adds this context directly to your CRM records.

Your team gets better personalization and deeper insights without spending hours on manual research.

AI Teammates That Work Across Your Entire Business

Through **Breeze Studio**, you can design customized AI agents tailored to your specific business needs. Whether you need an agent that understands your unique product catalog, follows your brand voice, or handles specialized workflows, you can build it yourself.

The **Breeze Marketplace** offers pre-built AI assistants you can install and customize right away. This makes it easy to augment workflows across marketing, sales, and service departments without starting from scratch. Browse agents designed for common tasks, install them, and adjust them to fit your processes.

Smarter AI Features That Learn and Adapt

Help Desk's AI features have become significantly more intelligent. AI-generated ticket summaries give your team instant context the moment they open a ticket.

AI-driven customer insights help identify early signs of churn risk by analyzing sentiment, activity, and support trends so your team can take action before it's too late.

AI-powered reply recommendations now support more languages and content types, helping your global team communicate effectively no matter where your customers are located.

The **Knowledge Base Agent** is particularly valuable. It dynamically updates help content based on incoming support trends. When the system notices customers repeatedly asking about the same topic, it suggests new articles or updates to existing ones.

Your knowledge base stays current without constant manual maintenance, and customers find answers faster.

Seamless Integration for Unified Data Access

All Breeze Agents integrate directly with HubSpot's Smart CRM and Data Hub, creating unified, contextualized customer data that's accessible right from Help Desk.

Your team doesn't need to switch between systems or search through multiple databases. Everything they need to help customers (conversation history, purchase data, browsing behavior, and external information) is right there in the ticket view.

Preparing for Migration



Switching from Conversations Inbox to Help Desk is a chance to refine your processes and give your team the tools they need to work more effectively. Plan ahead to make the change as smooth as possible.

Taking some time to organize, communicate, and train will save headaches later and help everyone adapt quickly.

1. Evaluate Your Current Setup

Start by looking at how your team is currently using Conversations Inbox. Think about how many conversations your team handles every week and what kinds of messages they usually manage.

Are most of them about customer support or general inquiries and sales-related questions? This will help you decide what needs to move to Help Desk and how to set things up.



Pay attention to your active tickets—the ones still being worked on. These will need to be migrated to Help Desk so you can keep them moving. For resolved tickets, you might only need to archive them for reference instead of migrating everything.

Another thing to consider is non-ticket conversations. Conversations not associated to a ticket may not need to move to Help Desk. Start tagging or organizing these now so it's easier to decide what to do with them later.

Here's a checklist for evaluating your current setup for migration:

Questions	Yes	No
Do you handle a high volume of daily or weekly conversations involving complex follow-ups?		
Is your team struggling to differentiate between customer support and general inquiries?		
Are conversations scattered across multiple inboxes, making consistency a challenge?		
Are your workflows overly manual, causing inefficiencies or delays?		
Do team members frequently face issues with ticket ownership or tracking?		
Are there gaps in collaboration, such as difficulty sharing context between team members?		
Do you require detailed reporting and analytics to measure your team's performance?		
Are advanced automation features, like ticket prioritization or escalation, essential?		
Would Service Level Agreements (SLAs) and time tracking improve accountability?		

Is your team expanding, making it harder to manage customer interactions with current tools?		
Are you looking to scale support operations while maintaining or improving response quality?		
Do you need a structured interface to handle tickets and track their statuses effectively?		
Do you need better integration with your CRM data to provide personalized support?		
Would AI-powered features help your team respond faster and more accurately?		

If you answer "Yes" to most of these questions, it's a strong indicator that migrating to Help Desk would benefit your team by solving pain points, improving efficiency, and preparing for growth.

2. Define Goals for Migration

Before starting the migration, consider why you're making this switch and what you want to achieve. Having clear goals helps guide the whole process.

Once you know your goals, decide how you'll measure success. For example, to improve ticket resolution times, keep track of how quickly your team handles tickets after the migration.



Clear goals and measures help you see what's working and where you might need to adjust.

3. Notify Your Team

Your team plays a huge role in making the migration work, so you should keep everyone in the loop. Share why you're making the change, what the migration will involve, and when. A clear plan and timeline help everyone know what to expect.

Since Help Desk has some unique features and workflows, it's a good idea to provide training. Show your team how to use Help Desk's tools and how their daily work might look a little different.

Interactive sessions, like working on test tickets, give everyone hands-on experience and help them feel comfortable with the new system.



Origin 63 emphasizes the importance of adoption and training in successful software migrations. Their approach includes scheduled training sessions, FAQs, and proactive adjustments based on user feedback.

This methodology aligns with the needs of teams migrating to Help Desk—where ongoing training and real-time support during the transition can boost confidence and efficiency. These resources ensure that your team doesn't just adopt the new platform but thrives using it.

Consider leveraging similar principles by setting up regular training touchpoints, providing accessible documentation, and monitoring how well your team adapts to Help Desk.

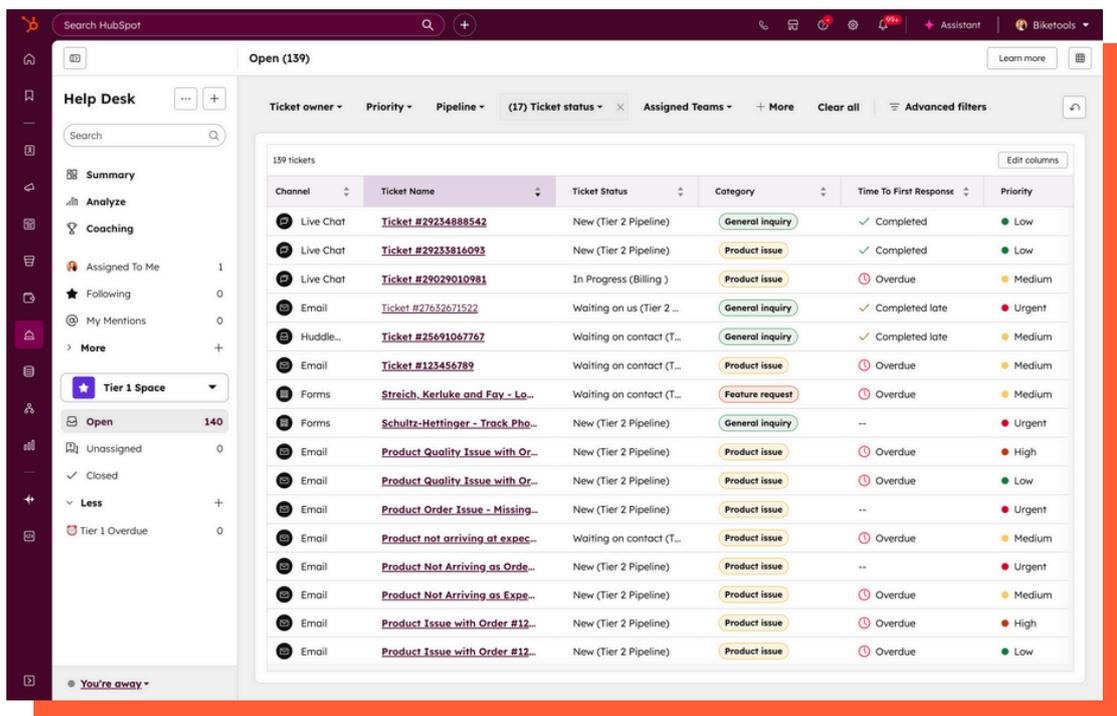
Migrating Tickets to Help Desk



Once you've prepared your team and evaluated your current setup, it's time to move your tickets from Conversations Inbox to Help Desk. The migration process involves a few key steps, and taking it one step at a time ensures everything transfers smoothly.

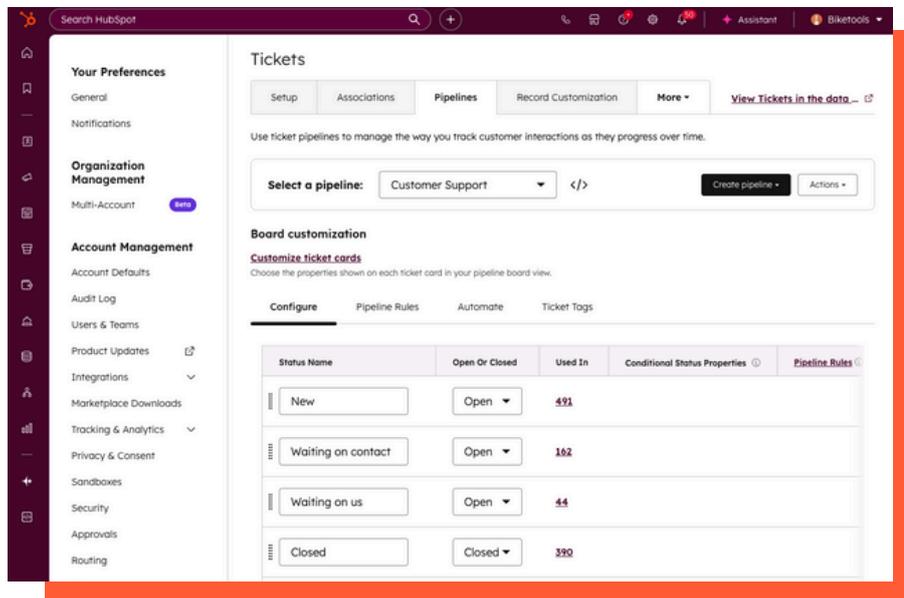
Let's walk through how to make the move without disrupting your workflow.

Step 1: Enable Help Desk



Help Desk is automatically available in Pro+ portals, so there's no need to manually enable it. Simply navigate to the Service tab in your HubSpot account, where you'll find the Help Desk features ready for use.

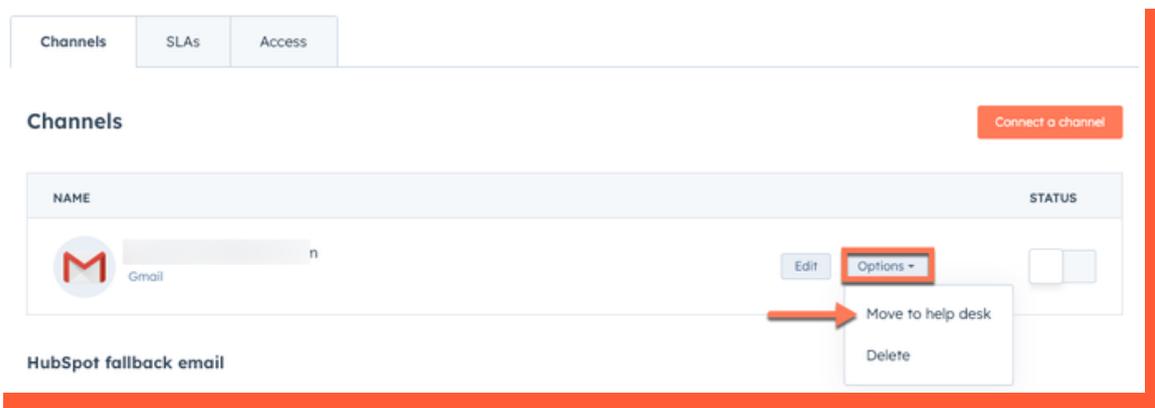
Step 2: Customize Pipelines and Statuses



Take some time to customize your ticket pipelines and statuses. Pipelines are the paths that tickets follow as they're handled, from when they're first created to when they're resolved.

Setting up statuses that match your team's processes—like "Open," "In Progress," or "Closed"—will make it easier to track where each ticket stands.

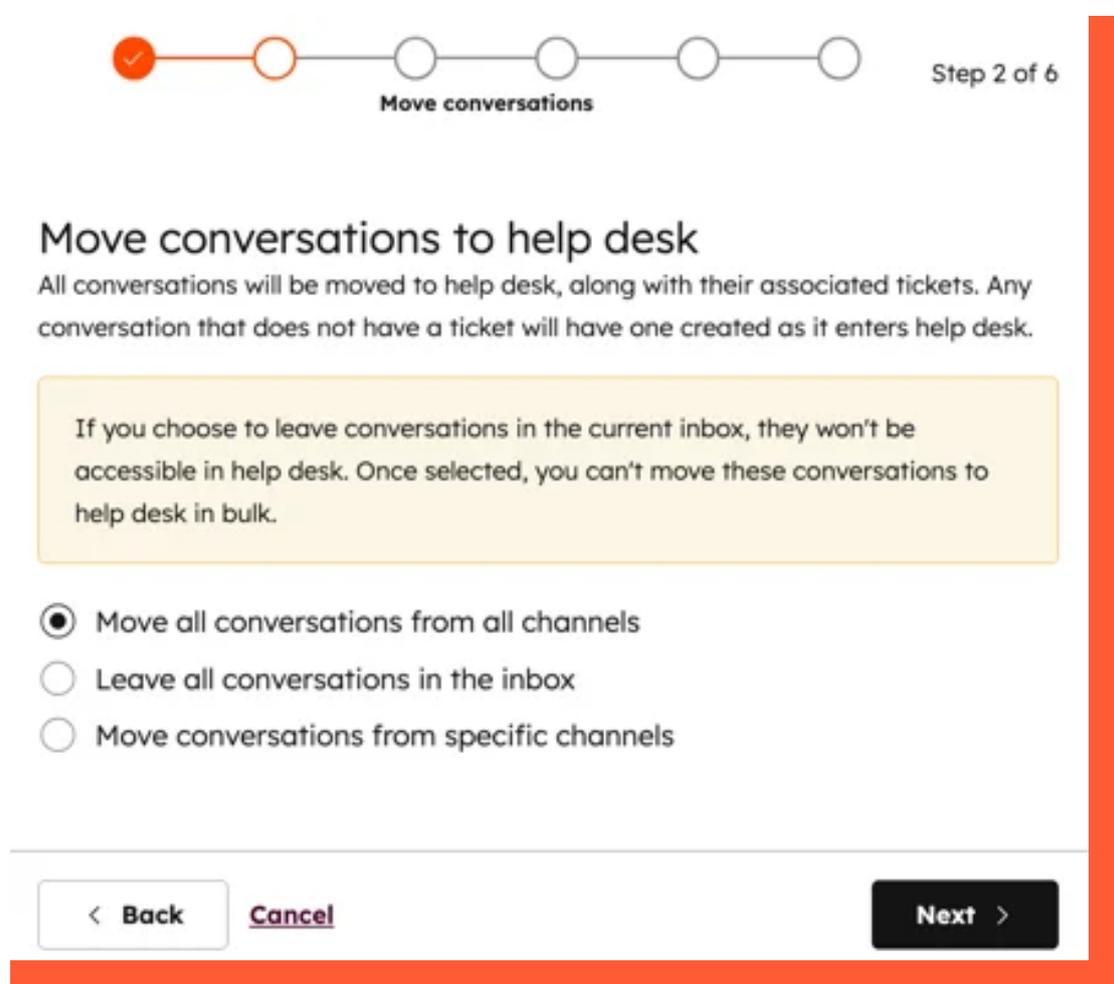
Step 3: Move a Channel to Help Desk



Next, you'll move a channel directly to Help Desk. To move a channel to Help Desk, navigate to Settings, then click Inboxes, and select Channels. From there, choose the channel you want to move to Help Desk.

Confirm the migration process, and your conversations from that inbox will begin transferring. This step ensures that your tickets are now part of the Help Desk system, ready for further organization and management.

Step 4: Move Historical Conversations



The screenshot shows a progress bar at the top with six steps. The first step is completed (orange circle with a checkmark), and the second step is the current one, labeled 'Move conversations' (orange circle). The remaining four steps are not yet started (grey circles). To the right of the progress bar, it says 'Step 2 of 6'.

Move conversations to help desk

All conversations will be moved to help desk, along with their associated tickets. Any conversation that does not have a ticket will have one created as it enters help desk.

If you choose to leave conversations in the current inbox, they won't be accessible in help desk. Once selected, you can't move these conversations to help desk in bulk.

- Move all conversations from all channels
- Leave all conversations in the inbox
- Move conversations from specific channels

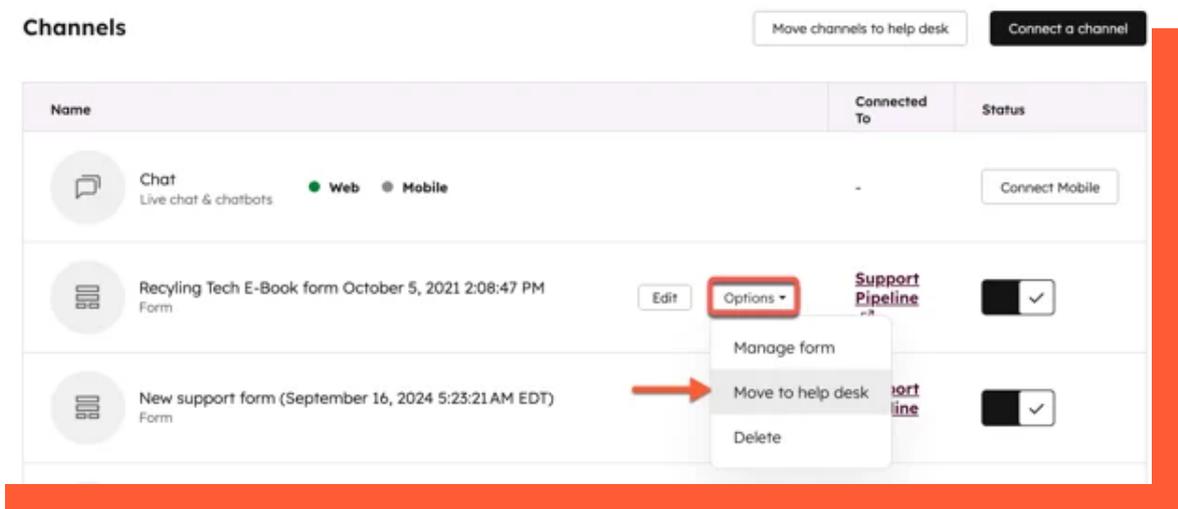
< Back Cancel Next >

After selecting the channel or chatflow to migrate, you can choose to move all existing conversations from the channel to Help Desk. For conversations without tickets, a ticket will be created during the migration, with the following behavior:

- Ticket creation dates will match the conversation start dates.
- Open and closed conversations will map to the appropriate ticket statuses.
- Ticket owners will be assigned based on the current conversation owner, provided they have Help Desk access. Otherwise, tickets will remain unassigned.

Once you've made your selection, click Move Channel to start the migration.

Step 5: What to expect During the Migration



When migrating, existing settings for the channel, such as signatures, routing, and automation, will persist and will not reset to Help Desk default values.

New conversations in the migrating channel will automatically appear in Help Desk with tickets created for them.

Notifications may be triggered for new ticket creation and assignment during the migration. To avoid unnecessary disruptions, you can temporarily disable notifications during this process.

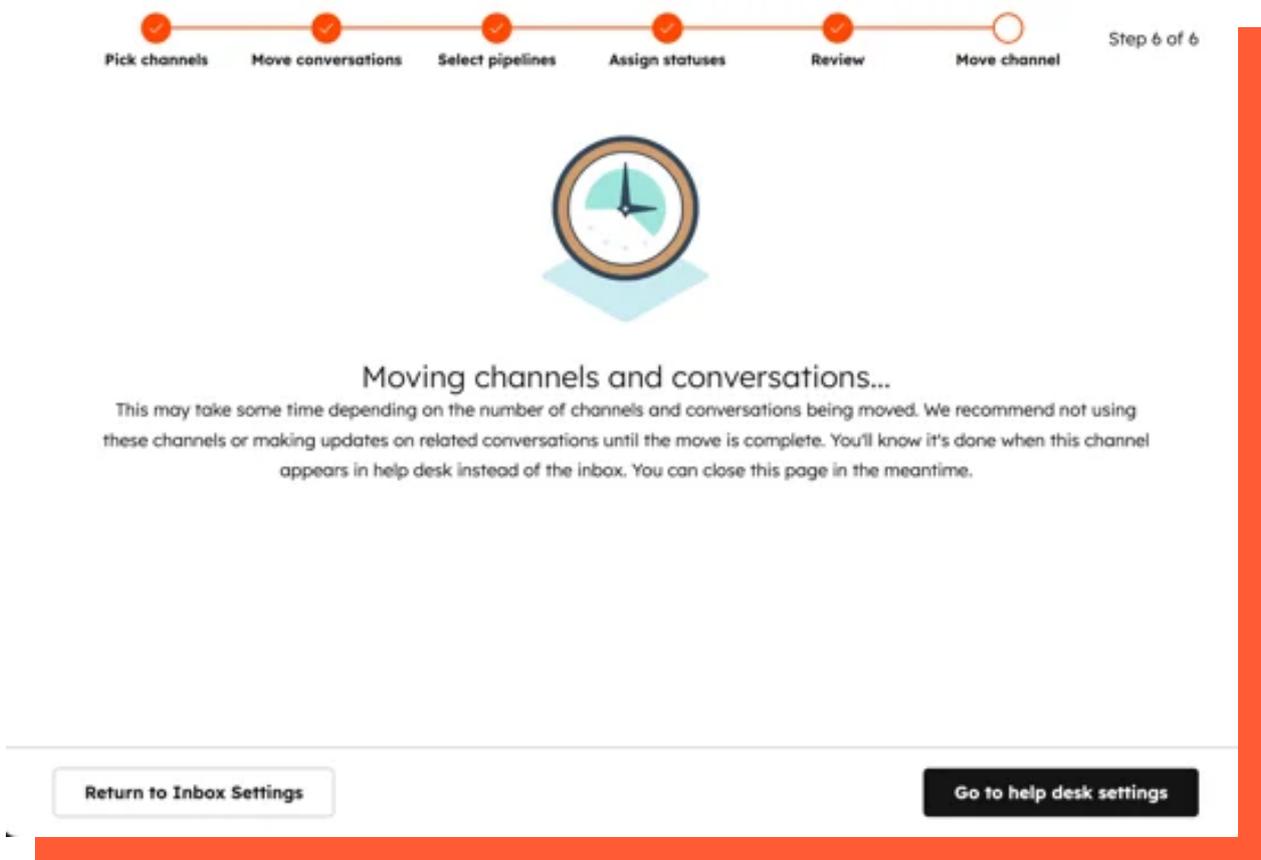
While migrating, HubSpot will also detect and move any new conversations coming into the migrating channel. Once the migration is complete, you'll see the channel or chatflow in the Help Desk workspace instead of Conversations Inbox.

Step 6: Review the Setup

After the migration is complete, review the Help Desk workspace to ensure all conversations and tickets are properly configured and visible.

Look for any missing data, ensure the tickets are organized in the correct pipelines, and test any workflows or automation you've set up.

Then, notify your team about the migration and provide them with an overview of the updated Help Desk processes.



The screenshot shows a progress bar with six steps: 'Pick channels', 'Move conversations', 'Select pipelines', 'Assign statuses', 'Review', and 'Move channel'. The first five steps are marked with orange checkmarks, and the sixth step is marked with an orange circle. To the right of the progress bar, it says 'Step 6 of 6'. Below the progress bar is a clock icon with a blue arrow pointing to the right. Underneath the clock icon is the text 'Moving channels and conversations...' followed by a paragraph: 'This may take some time depending on the number of channels and conversations being moved. We recommend not using these channels or making updates on related conversations until the move is complete. You'll know it's done when this channel appears in help desk instead of the inbox. You can close this page in the meantime.' At the bottom of the screenshot, there are two buttons: 'Return to Inbox Settings' and 'Go to help desk settings'.

Addressing Common Loopholes and Challenges

While migrating from Conversations Inbox to Help Desk is an exciting step forward, it's important to address potential challenges that could arise during the process.

Understanding common loopholes and taking proactive measures helps you avoid disruptions and ensure a seamless transition. Let's look at some of the most common issues and how to handle them.

Data Integrity Risks

One of the most critical aspects of any migration is ensuring the integrity of your data. When moving tickets and conversations, you want to avoid duplication or data loss.

To maintain consistency and avoid issues post-migration, double-check that all ticket properties—such as status, priority, due dates, and assigned team members—are correctly mapped from Conversations Inbox to Help Desk.

This will ensure no important details are missed during the transition, and your tickets retain all necessary information. Specifically, you'll want to:

1. Verify status mapping

Ensure that ticket statuses (e.g., "Open," "In Progress," "Closed") are correctly transferred to Help Desk.

2. Confirm priority settings

Double-check that ticket priorities (e.g., "High," "Medium," "Low") align between Conversations Inbox and Help Desk.

3. Review Due Dates

Ensure that any due dates assigned to tickets are preserved in Help Desk.

4. Check team assignments

Confirm that all tickets are properly assigned to the correct team members within Help Desk.

5. Cross-check custom properties

If custom ticket properties are in use, ensure that these are mapped properly during the migration process.

6. Verify CRM data connections

Help Desk integrates with HubSpot's Smart CRM, which automatically enriches ticket records with conversational insights and customer intent signals. Make sure this connection is working properly so your team has complete context for every ticket.

Additionally, it's a good idea to run tests during the migration. Start by migrating a few sample tickets to confirm that all the ticket properties are transferring correctly. This allows you to identify any inconsistencies early, so you can resolve them before the full migration is complete.



Teams that switch from the Conversations Inbox to the Help Desk workspace **see 22% higher ticket resolution rates.**

Once you move a channel to Help Desk (such as an email or chat flow), certain configurations such as signatures, routing rules, and automation workflows will be carried over automatically to Help Desk without resetting to default values.

Most of the time, if you've set up rules or automation (e.g., routing rules, ticket creation, or automated replies), they

should work similarly in Help Desk without you needing to rebuild them from scratch.

However, in some cases, advanced workflows that work perfectly in the Conversations Inbox might not directly translate to Help Desk. They may need to be adjusted or modified to account for Help Desk's different capabilities and features.

Before beginning your migration, it's important to review and identify which workflows are currently tied to the Conversations Inbox. This includes workflows that manage:



- Automated ticket creation
- Skill-based routing
- Auto-response messages

To ensure a smooth transition, you should compile a list of all active workflows and determine which ones will need to be rebuilt in Help Desk. These are workflows directly impacted by the migration.

Review Workflow

Step 1: Enrollment

Step 2: Timing & Performance

Step 3: Connections

Step 4: Workflow details

Here are step-by-step instructions for replicating workflows:

1. Start by logging into your HubSpot account and navigating to the Automation section.
2. Identify your existing workflows tied to automated actions such as ticket creation, assignment, and responses by going to **Automation > Workflows**. Note the triggers and actions for each workflow.
3. For each identified workflow, consider how it will function in Help Desk. Some workflows may need adjustments or reconfiguration to fit Help Desk's capabilities and new features.

Ticket creation

If you are automating ticket creation, ensure the triggers and actions align with Help Desk's features and ticket pipelines.

Ticket assignment

Review and map out your routing rules so that Help Desk workflows automatically assign tickets to the appropriate agents or teams.

Automated replies

Set up the required automated email or message responses within the workflows for Help Desk.

4. In the Automations > Workflows section, replicate the workflows based on your identified needs. You can either create new workflows or adjust existing ones.

- Select the appropriate triggers (e.g., new ticket creation, status change) and define actions (e.g., assign ticket, send email reply).

5. Once you've recreated the workflows, run tests to ensure they perform correctly. This includes confirming that tickets are created, assigned, and responded to as expected.

6. After successful testing, activate the workflows in Help Desk and monitor them closely after the migration. Be prepared to make any tweaks based on feedback or performance.

7. Consider using Breeze AI features. Help Desk now includes AI-powered automation through Breeze. The Customer Agent can handle routine inquiries automatically, and the Knowledge Base Agent can suggest relevant help articles to customers. These AI features can reduce your team's workload and improve response times.

Learn more about [ticket pipeline automations](#).

User Roles and Permissions

User roles and permissions in Help Desk may differ from what you had in Conversations Inbox. Review and update user access to align with the needs of the Help Desk system.

For example, you may want to permit certain team members to view all tickets or only specific pipelines.



Ensure your team understands their roles and what they can access after the migration. This might involve setting up new permissions for user groups, such as agents, admins, or managers.

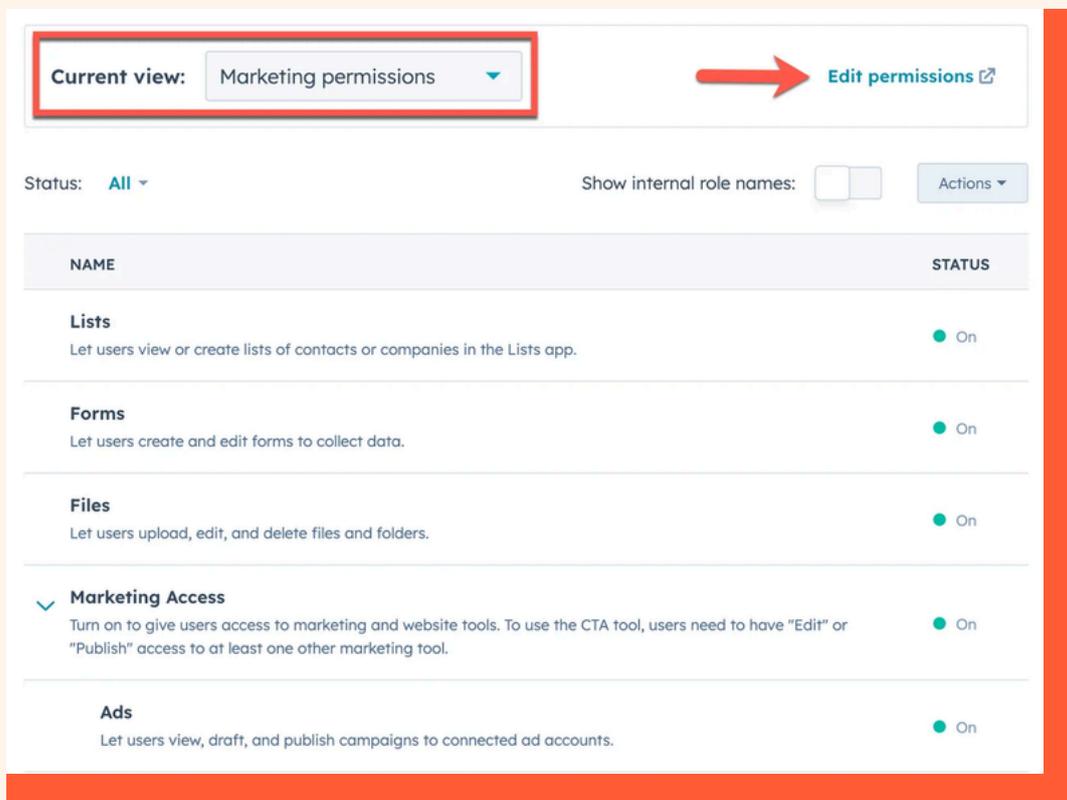
This will ensure that your team can work efficiently without stepping on each other's toes or missing important tasks.

1. Review User Roles

First, consider how you want different team members to interact with Help Desk. Depending on their role, you may want some team members to have access to view all tickets, while others may only need access to specific pipelines.

HubSpot allows you to set customized permissions for various user groups, such as agents, admins, or managers.

2. Editing Permissions in Help Desk



The screenshot shows the HubSpot Help Desk permissions configuration page. At the top, the 'Current view' is set to 'Marketing permissions', which is highlighted with a red box. A red arrow points from this box to the 'Edit permissions' link. Below this, there are filters for 'Status: All' and 'Show internal role names' (unchecked). The main content is a table with columns for 'NAME' and 'STATUS'. The table lists several permissions, all of which are currently turned 'On'.

NAME	STATUS
Lists Let users view or create lists of contacts or companies in the Lists app.	● On
Forms Let users create and edit forms to collect data.	● On
Files Let users upload, edit, and delete files and folders.	● On
✓ Marketing Access Turn on to give users access to marketing and website tools. To use the CTA tool, users need to have "Edit" or "Publish" access to at least one other marketing tool.	● On
Ads Let users view, draft, and publish campaigns to connected ad accounts.	● On

To edit user permissions in Help Desk, follow these steps:

1. Log in to HubSpot and click the Settings icon in the top navigation bar.
2. In the left sidebar, navigate to Users & Teams.
3. In the user table, select the user record you wish to edit, and then click on the Access tab.
4. Under Permissions, click Edit permissions.
 - Use the Current view dropdown to review the user's current permissions.
5. On the Editing access screen, you can expand the sections for Choose how to set access and Choose permissions.
 - Toggle permissions on and off as needed. HubSpot's user permissions guide can help you understand what each permission grants.
 - Once permissions are updated, Save changes.

3. Editing Permissions for Multiple Users at Once

To edit permissions for several users at the same time:

1. In Users & Teams, select the checkboxes next to the users whose permissions you want to update.
2. Click Edit permissions at the top of the table.
3. Modify permissions as needed and Save.

Once you've set up the permissions, ensure that your team can access what they need. You might need to adjust permissions after the migration depending on feedback from agents and managers.

Learn more about [managing_permissions_on_HubSpot](#).

Service Seat Requirement and Routing Limitations

A Service seat is required for full Help Desk access. While non-seated users can still view and respond to tickets, they will miss out on advanced functionality, including automation and reporting features.

Additionally, automatic assignment (routing) and SLAs are only available to service-seated users in Help Desk. This is different from Conversations Inbox, where routing rules could include both sales- and service-seated users.

If your existing Inbox channel assignment rules contain sales-seated users for ticket assignment, you will need to review and adjust these settings post-migration. Failing to do so may result in missed assignments or workflow disruptions.

External Integrations

If you've connected third-party tools or integrations to Conversations Inbox, you should identify and reconfigure them for Help Desk.

For example, if you use tools for CRM, live chat, or email marketing, you'll want to ensure they are correctly integrated into your Help Desk environment.

To begin, make a list of all integrations currently active in Conversations Inbox. Common integrations include tools for CRM, live chat, email marketing, and other third-party apps. Here's how you can identify them:

- Log into HubSpot and navigate to the Settings.
- In the left sidebar, select Integrations to view a list of all connected apps.
- Additionally, check Settings > Inbox > Inboxes to review channels connected to your Conversations Inbox, such as email, chat, or SMS.
- Review the active integrations and take note of those related to CRM, live chat, email marketing, and any custom integrations.
- You may also want to check any automation workflows or ticketing systems that might rely on these integrations.

Once you have identified your existing integrations, follow these steps to reconnect or reconfigure them in Help Desk:

1. Access Help Desk Settings

Navigate to Settings > Inbox & Help Desk > Help Desk in your HubSpot account. Note that integrations are managed primarily in Settings > Integrations, not directly within Help Desk settings.

2. Reauthorize Existing Integrations

For integrations that were previously connected to Conversations Inbox, check if reauthorization is required. Many integrations (e.g., CRM, email marketing tools) require you to log in and authenticate again after migrating to ensure proper syncing with Help Desk.

3. Adjust Settings for Each Integration

Review the settings for each integration and ensure they are configured to work within the Help Desk environment.

For example, you might need to adjust routing or sync settings in your CRM or email marketing tools to ensure tickets or customer interactions sync properly.

4. Test Integrations

After reconnecting the integrations, perform tests to ensure they work as expected. For instance, check if live chat messages are properly routed into Help Desk, or if CRM updates are reflected in tickets.

Pay close attention to any updates that might be needed for features like automated workflows, which may rely on these integrations.

5. Update API Keys or Authentication Credentials

If you are using custom integrations via APIs, make sure API keys or other authentication credentials are updated and correctly configured for Help Desk. This may involve updating credentials in both HubSpot and the third-party app to ensure seamless communication.

6. Check Data Hub compatibility

If you're using HubSpot's new Data Hub to connect external data sources, make sure these connections work properly with Help Desk. Data Hub can bring in information from databases, warehouses, and other apps to give your support team complete context.

Some integrations might require specific settings or permissions to be adjusted in Help Desk. Be sure to read through integration documentation or reach out to the integration provider if you encounter issues.

HubSpot's Integration Guide: HubSpot provides guides and resources for setting up and troubleshooting integrations. If needed, refer to HubSpot's knowledge base for detailed instructions on connecting or troubleshooting integrations in Help Desk.

Special Considerations for Moving an Inbox

Finally, when migrating an inbox, ensure your team understands how historical conversations will be handled. Any past conversations that won't transition to Help Desk should be archived or dealt with separately.

Before you move your conversations, confirm which ones are classified as tickets and which are not. Any unresolved issues that need attention should be converted into tickets before the migration so they don't slip through the cracks.

Situation	Recommended Action
High-priority or complex issues are active in Conversations Inbox.	Migrate these as tickets with detailed notes and assignments to Help Desk immediately.
Some team members are not familiar with Help Desk features.	Provide training on Help Desk tools, ticketing workflows, and SLAs before migration.
New conversations are expected during the migration period.	HubSpot will automatically detect and move any new conversations that come into the migrating channel.
There are no consistent processes for handling customer inquiries.	Develop and document workflows to standardize handling before transitioning.

Training and Change Management

Migrating to Help Desk can feel like a significant shift for your team, mainly if they're used to the Conversations Inbox.

Provide comprehensive training and support throughout the transition to ensure everyone feels confident with the new system and can hit the ground running. Here's how you can guide your team through this change effectively.

Training for Your Team

The first step in successful change management is providing thorough training. One of the best ways to do this is by creating step-by-step guides on how to use the Help Desk workspace

These guides should break down key tasks, such as creating tickets, updating ticket statuses, assigning work, and using Help Desk's reporting features. Providing easy-to-follow documentation will give your team something to refer to whenever they need a refresher.



During the training, highlight any differences in workflows and features between Conversations Inbox and Help Desk.

For example, Help Desk's ticket management system is more structured, so your team should adjust to new processes. It's important to clearly point out these differences so your team can understand and feel comfortable with the new system.

Show your team the AI features. Help Desk includes Breeze AI capabilities that can make their work easier. Demonstrate how the Customer Agent can handle routine questions automatically, how AI can suggest replies, and how

Breeze generates ticket summaries. When your team understands these AI helpers are there to support them, not replace them, they'll be more excited to use them.

Additionally, running live training sessions or webinars can be very effective. These sessions allow your team to ask questions in real-time and demonstrate the features they'll use most.

Consider offering follow-up sessions for any new features or for teams who may need more in-depth training.

Monitoring Adoption

Once your team has received their training, it's essential to monitor how well they adapt to Help Desk. Collect feedback from users throughout the transition process.

Are they comfortable with the new features? Are they encountering any challenges or roadblocks? This feedback is crucial for identifying any pain points or areas where more support may be needed.

Based on the feedback you gather, you may need to adjust workflows or settings in Help Desk. Perhaps a workflow needs fine-tuning, or perhaps certain features are more complex than your team expected.



Being responsive to feedback and willing to make changes will help your team feel supported and make the transition smoother.

Investing time in training and actively monitoring how your team is adjusting to Help Desk will help ensure that they adopt the new system successfully and start using it to its full potential.

Post-Migration Optimization

After the migration to Help Desk is complete, the work isn't over. You'll need to perform regular checks and fine-tune your processes to ensure everything continues running smoothly and that your team is getting the most out of the system.

This step ensures that Help Desk remains aligned with your goals and adapts to any changes or challenges that may come up.

Audit Your New Setup

Now that you're using Help Desk for ticket management, it's important to audit your new setup regularly. Start by reviewing your ticket pipelines and workflows to ensure they're working as expected.

Are tickets flowing smoothly through the various stages? Are there any bottlenecks or areas where tickets seem to get stuck?



Ensure that all data in your system remains accurate and consistent. For example, check that ticket statuses are updated correctly, customer information is correct, and no duplicate tickets have appeared.

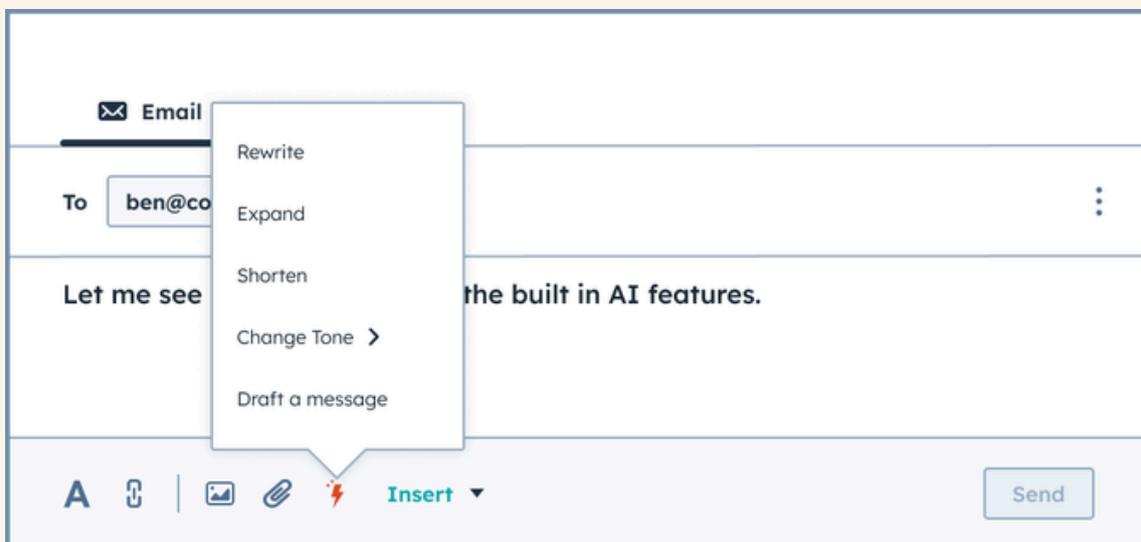
A quick audit every month or so can help you catch any issues early and keep things running efficiently.

Leverage Help Desk Features

One of the best things about Help Desk is its range of features that can improve your support process. For example, reports can give insights into how quickly tickets are being resolved, where your team might need extra support, and which agents or workflows perform best.

Here are a few more features your team can use:

1. AI-powered support



Use AI to help personalize customer interactions, save time, and reduce errors in responses.

2. 360-degree customer insights

Gain a complete view of each customer's journey, ensuring your support reps have the context they need to resolve issues faster.

3. Advanced SLAs and routing

Automate ticket prioritization and assignment based on pre-defined service level agreements and team expertise.

4. Omni-channel support

Manage tickets across multiple channels, including email, chat, and social media, from a unified platform.

5. Skills-based routing

Skill Name	Category	Users With Skill	Rulesets With Skill
APAC	Territory	0	0
Appointments	Product Expertise	0	1
Dansk	Main Language	0	0
Dansk	Secondary Language	0	0
Deutsch	Main Language	1	1
Deutsch	Secondary Language	0	0
EMEA	Territory	0	0
English	Main Language	85	0

Ensure that tickets are directed to the right support rep based on their expertise, improving both speed and customer satisfaction.

6. Customizable reporting tools

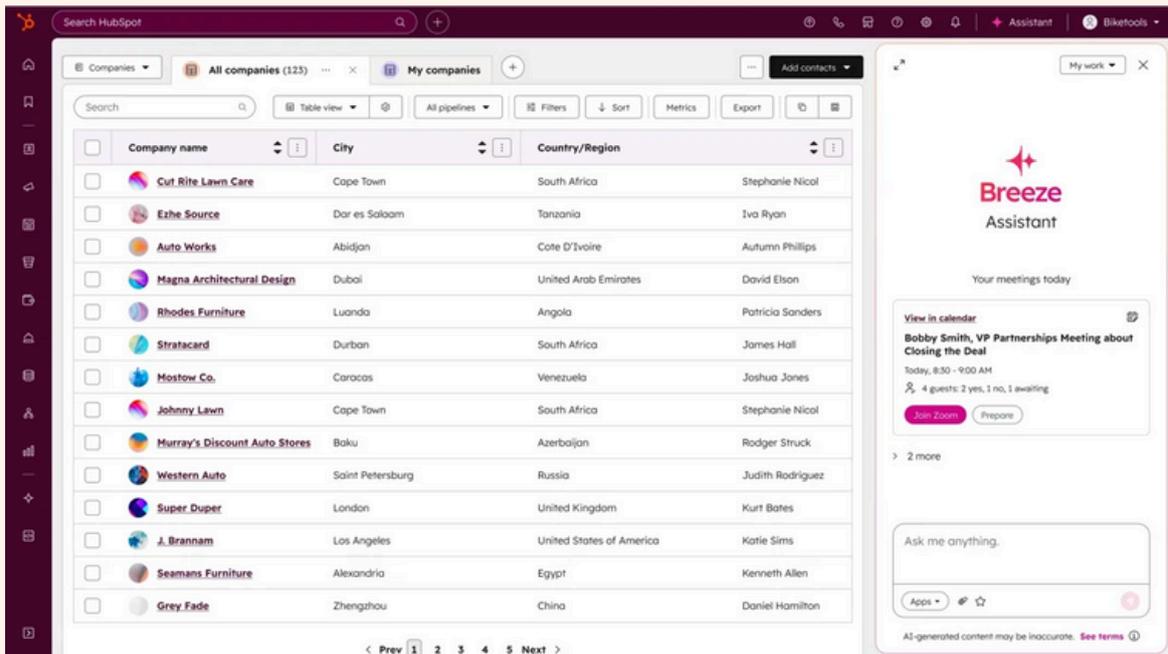
Analyze team performance with detailed reports on resolution times, workload distribution, and agent effectiveness.

7. Smart CRM integration

Help Desk now works with HubSpot's Smart CRM, which automatically captures insights from every customer interaction. Your support team can see what customers said in previous calls and emails, track their website activity, and understand their complete history, all without leaving the ticket view.

8. Breeze Agents for service teams

Consider activating Breeze Agents designed specifically for customer service. The Customer Agent can resolve simple tickets automatically, the Knowledge Base Agent can suggest relevant help articles, and the Customer Health Agent can flag at-risk customers before they churn.



The screenshot displays the HubSpot interface. On the left, a sidebar contains navigation icons. The main area shows a table of companies with columns for Company name, City, Country/Region, and a contact name. The table lists 15 companies, including Cut Rite Lawn Care, Ezhe Source, Auto Works, Magna Architectural Design, Rhodes Furniture, Stratacard, Mostow Co., Johnny Lawn, Murray's Discount Auto Stores, Western Auto, Super Duper, J. Brannam, Seamans Furniture, and Grey Fade. On the right, a Breeze Assistant chat window is open, displaying the Breeze Assistant logo and a meeting notification for Bobby Smith, VP Partnerships Meeting about Closing the Deal, scheduled for today from 8:30 to 9:00 AM. The chat window also includes a search bar and a 'Join Zoom' button.

Company name	City	Country/Region	Contact
Cut Rite Lawn Care	Cape Town	South Africa	Stephanie Nicol
Ezhe Source	Dar es Salaam	Tanzania	Iva Ryan
Auto Works	Abidjan	Cote D'Ivoire	Autumn Phillips
Magna Architectural Design	Dubai	United Arab Emirates	David Elson
Rhodes Furniture	Luanda	Angola	Patricia Sanders
Stratacard	Durban	South Africa	James Hall
Mostow Co.	Caracas	Venezuela	Joshua Jones
Johnny Lawn	Cape Town	South Africa	Stephanie Nicol
Murray's Discount Auto Stores	Baku	Azerbaijan	Rodger Struck
Western Auto	Saint Petersburg	Russia	Judith Rodriguez
Super Duper	London	United Kingdom	Kurt Bates
J. Brannam	Los Angeles	United States of America	Katie Sims
Seamans Furniture	Alexandria	Egypt	Kenneth Allen
Grey Fade	Zhengzhou	China	Daniel Hamilton

These features help your team respond faster, resolve more issues, and keep customers satisfied, all while scaling support operations as your business grows.

Continuous Improvement



Help Desk is a tool that grows with your team, so it's important to keep refining your processes over time. Regularly gather feedback from your team about how the system works for them.

Are there any challenges or features that could be improved? Does your team feel the workflows are streamlined, or are there adjustments that could make their tasks easier?

Your support processes will likely need to evolve as your business evolves. As your needs change, update your workflows, ticket pipelines, or even reporting.



Post-migration optimization is an ongoing process, but with regular reviews and a focus on continuous improvement, your team can get the most out of Help Desk and keep delivering exceptional support.

To add a checklist for performance monitoring and continuous improvement

Task	Yes	No	Notes
Has the team provided feedback on their experience with Help Desk?			Collect insights on challenges or feature requests.
Are there any reported issues with workflows or ticket pipelines?			Address inefficiencies or bottlenecks.
Are your reporting tools set up to track team performance effectively?			Ensure relevant metrics (response time, resolution rate, etc.) are being tracked.
Have you reviewed and updated your workflows based on team feedback?			Modify workflows to better suit evolving needs.

Task	Yes	No	Notes
Is the ticket routing system optimized for skill-based or priority-based assignments?			Adjust settings if needed to ensure efficient routing.
Are there any recurring customer issues that could be addressed proactively?			Use reporting to identify patterns and create proactive solutions.
Are AI-powered features like reply recommendations and automated responses being fully utilized?			Leverage AI to increase team efficiency and reduce response times.
Has your team received adequate training on any new Help Desk features or updates?			Provide ongoing training to ensure full feature adoption.
Do you regularly assess whether your Help Desk setup aligns with changing business needs?			Reevaluate system configuration as business priorities shift.
Has your team received adequate training on any new Help Desk features or updates?			Provide ongoing training to ensure full feature adoption.
Are you taking advantage of Smart CRM enrichment features?			Conversational and intent data can provide valuable customer context.
Have you explored Breeze Agents that could help your service team?			AI agents can handle routine work and free up your team for complex issues.

Wrapping Up

Migrating from **Conversations Inbox** to Help Desk is a significant step toward optimizing your team's support processes.

Throughout this guide, we've walked through the steps, from evaluating your current setup and migrating tickets to handling non-ticket conversations and addressing challenges.

With careful planning and a focus on training, your team is well-positioned to take advantage of Help Desk's powerful features.

Transitioning to **Help Desk** gives you access to streamlined ticket management, better collaboration tools, and a clear separation between tickets and non-ticket conversations.

Plus, with **HubSpot's latest updates**, Help Desk now integrates with the Smart CRM and Data Hub, giving your team complete customer context. AI-powered features through Breeze help your team work faster and smarter, handling routine tasks automatically so humans can focus on the complex work that matters most.

These improvements will lead to more efficient and effective customer support, helping your team provide a superior experience for your clients.



About the Partner

Origin 63 is a HubSpot Elite Solutions Partner focusing on customer success and support operations. As recognized experts in HubSpot Service Hub, they help businesses design scalable onboarding processes, automate workflows, and improve customer retention.

With experience leading large-scale deployments for teams of all sizes, Origin 63 combines strategic insights and technical expertise to empower organizations to get the most out of HubSpot. Their mission is to help teams deliver exceptional customer experiences while driving long-term growth.

Learn more at origin63.com.