CRM Implementation

Partner Eligibility
- Have at least 3 full-time employees at your organization
- Completed 2+ implementation projects within the last 12 months with customers
- Experience implementing complex third-party integration solutions, beyond just a single data migration
- Employees have met the prerequisite certification criteria found in the "How It Works" section here.

Requirements for Projects
- Use Sales Hub and Marketing Hub, both at the Enterprise Level
- At least 300 total customer employees
- At least 50 sales users from at least two different departments
- Teams distributed nationally and/or globally

Round 1 Checklist

Phased Implementation Plan
- Ensure example meets Project Requirements
- Executive Summary
- Details of clearly defined implementation phases: including start and end date for each outcome
- Details of a phase to expand platform functionality OR Additional business units
- Tasks and milestones with clearly defined owners, due dates and dependencies

Custom Integration Technical Architecture
- Ensure example meets Project Requirements
- Executive Summary
- Information on the customers tech stack
- Description of integration solution with visual diagram and data flow indicators
- Data mapping with specific data sources, destinations, and HS objects
- Full list of APIs used
- Written and visual descriptions of the application of the data in HubSpot

Change Management Approach
- Ensure example meets Project Requirements
- Executive Summary
- Customer Context
- Your Methodologies
- Results and Business impact
- Metrics and KPIs used to measure performance
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Round 2 Checklist

Sales Proposal
- Upload a Sales proposal for the Video Case Study:
  - Customer’s challenges and objectives
  - ROI / business impact
  - System architecture diagram
  - Phased implementation plan and timeline
  - Risk mitigation plan
  - Change management approach
  - Customer journey
  - Pricing
  - Statement of work

Video Case Study
- Upload a video case study (15 Minutes Max) highlighting a successful implementation with an upmarket customer which includes:
  - Why HubSpot
  - Optimize current CRM processes
  - Organizational hierarchy and communication cadence
  - Risk Mitigation Strategy
  - Strategic Roadmap
  - Change Management
  - Business Outcomes / KPIs