

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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PLEASE NOTE

Judges for Round 1 and Round 2 may be different. When submitting Round 2 materials, make sure to be thorough and assume judges do not have prior context of your Round 1 submission.

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