

Data Migration

Partner Eligibility

- Organization has three full-time employees
- Organization has completed at least two separate data migration projects within the last 12 months, including the use of marketplace apps, APIs, or other custom solutions
- Organization has experience in migrating data to standard HubSpot objects along with additional contextual data
- Organization has experience with other leading CRMs (Dynamics or Salesforce), marketing automation platforms (Pardot, ActiveCampaign, Marketo), or helpdesk systems (Zendesk, Zoho Desk, Intercom)
- Organization has work and experience to submit for this accreditation that's been completed by full-time employees of your organization
- Organization meets the HubSpot Academy certification prerequisites as outlined in the "[How It Works](#)" section [found here](#).
- Platinum, Diamond, or Elite tiered HubSpot solutions partner

Requirements for Projects

- Delivered in the last 12 months
- Migrated from leading CRM, Marketing Automation Platform, or Help Desk system
- Experience Migrating data to standard HubSpot Object

Round 1 Checklist

Migration Methodology

- Tables of contents
- Executive project summary
- Data migration project plan
- Mapping Documentation
- Testing protocols

Video Case Study

- Business Context
- How the partner determined the right data bring in and where to store it
- The data import method and justification
- Overview of processes enabled by the required data
- Delta Migration or rollback
- How the migration helped optimize existing processes

Customer Reference

- Provide 2 customer references and ensure they can speak to:
 - Strategy and consultation
 - Data mapping and planning
 - Migration execution

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Round 2 Checklist

Complexity Written Prompt

- How many systems indicate a complex data migration project?
- What volume of records indicates a complex data migration project?
- What types of data associations indicate a complex data migration project?
- What types of engagements are typical of complex data migration projects?
- What record types are typical of complex data migration projects?
- What business use-cases generally indicate a complex data migration project?

Customer Practicum

- Submission table of contents
- Overview of next steps
- High-level mapping document
- Outstanding questions regarding requirements or current systems

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.