HubSpot Academy

HubSpot Onboarding Accreditation

Preparation Guide

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This document is meant to offer clarity and context into the HubSpot Onboarding accreditation process, the expectations and requirements from interested solutions partners, and recommendations for building the strongest, most relevant application possible.

For information about HubSpot accreditations and what it means for a solutions partner to become accredited, head here.

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1 ABOUT THE HUBSPOT ONBOARDING ACCREDITATION

The purpose of the HubSpot Onboarding accreditation is to demonstrate that you have first-hand experience in successfully onboarding new HubSpot customers onto the platform. In addition to applying the necessary product-specific knowledge, an accredited solutions partner should be leveraging HubSpot's onboarding methodology, "Objectives-Based Onboarding", for their customers. If you have not completed onboarding projects for customers with Marketing Hub Pro or Enterprise AND Sales Hub Pro or Enterprise, nor applied the objectives-based onboarding methodology, we recommend that you consider pursuing one of the other accreditation options.

Note: Prior to applying, ensure that you meet the following requirements:

- Your organization has at least 3 full-time employees.
- Your organization has onboarded a customer with Marketing Hub and Sales Hub, both at the Professional subscription level (or higher) within the last 12 months.
- Your organization has experience with the objectives-based onboarding methodology.
- Your organization has experience configuring the Salesforce connector and other marketplace connectors or iPaaS solutions.
- Your organization meets the HubSpot Academy certification prerequisites as outlined in the section below (see: Prerequisite Certifications)
- Your organization is a Platinum, Diamond, or Elite tiered HubSpot solutions partner.

The application process for the HubSpot Onboarding accreditation consists of **two** rounds. It's important to note that not all partners will be accepted to complete every round. A solutions partner's performance in each individual round will dictate progression forward in the application process.

Note: The requirements listed above are in reference to both (1) your eligibility to apply for the accreditation and (2) the criteria for all submitted examples and documents.

Prerequisite Certifications

Solutions partners interested in applying for an accreditation must **first** complete the list of prerequisite certifications and maintain their **active** status. Obtained certifications that have expired at time of application will not qualify.

Solutions partners are expected to have the full list of prerequisite certifications in active, good standing held by the primary point of contact and up to four other team members. In other words, between five total members at a solutions partner's organization, there must be 3x active Marketing Hub Implementation certifications, 3x active Salesforce Integration certifications, 3x active HubSpot Reporting Certifications, and so forth for the full list of prerequisite certifications.

You can review the entire prerequisite list of certifications in the **Accreditations Prerequisite Learning Path** — or review them here:

- Marketing Hub Implementation
- Sales Hub Implementation
- Marketing Hub Software
- Sales Hub Software
- Service Hub Software
- Platform Consulting
- Data Integrations
- Salesforce Integration
- Objectives-Based Onboarding
- Reporting

The Pre-Submission Checklist

Ahead of submitting your application, please make sure to double-check your submission fully meets the following criteria & requirements. If an associated document does **not** meet these requirements, your application is at risk of being declined.

- [ ] All prerequisite certifications are complete and active at the time of your submission—including those that require practical exercise and/or practicum submission grading. Solutions partners are expected to have the full list of prerequisite certifications held by the primary point of contact and up to four other team members.
- [ ] Your submission, and all associated documents, are in English, Spanish, or French.
- [ ] All cloud-shared documents (i.e, Google Drive, Dropbox, Miro, or other hosting platforms) are viewable and accessible by anyone with the provided link. Because we use a pool of randomized subject-matter experts, there's no way to provide view-access to your specific reviewer.
- [ ] Your documents satisfy the application criteria, they are correct, and are the real-world documents used in the client engagement. Executive summaries of your work do not suffice. If you use a third-party software tool for project management and/or change management (i.e, Asana, ClickUp, Zoho, or others), you should export the plan in full.
- [ ] You have received permission from your client(s) to share these documents with HubSpot. These documents are only shared internally with a small panel of HubSpot subject-matter experts and Accreditations team members. We will never share these documents externally without the explicit permission of both you and your customer.

Round One

In this round, partners submit an application (one per partner entity) including basic information about themselves and will also be asked to upload some existing artifacts related to their work with clients in Onboarding. Partners will also provide contact information for a referenceable client and Hubspot will reach out to that client to solicit feedback about their experience with the partner applying for accreditation.

Round Two

In this round, partners will be asked to upload a video reviewing in English their first-hand experience with a particular facet of customer onboarding, and to complete a call audit exercise.

Accreditation: HubSpot Onboarding	
Onboarding Experience: My organization has previously completed customer onboarding projects and has access to the documents, proposals, project plans, and resources leveraged.	☐
Hub Requirements: My organization has experience with onboarding customers to the Professional or Enterprise editions of HubSpot Marketing Hub and Sales Hub.	☐
Objectives-Based Onboarding: My organization has applied the objectives-based onboarding methodology to at least one onboarding engagement.	☐
Prerequisite Certifications: My organization meets the HubSpot Academy certification prerequisites as outlined in the section to the right.	☐
Tier: My organization is a Platinum, Diamond, or Elite tiered HubSpot solutions partner.	☐

Prerequisite Certification	# Certs Required	Employee 1	Employee 2	Employee 3	Employee 4	Employee 5
Marketing Hub Implementation	3x	☐	☐	☐	☐	☐
Sales Hub Implementation	3x	☐	☐	☐	☐	☐
Marketing Hub Software	3x	☐	☐	☐	☐	☐
Sales Hub Software	3x	☐	☐	☐	☐	☐
Service Hub Software	3x	☐	☐	☐	☐	☐
Platform Consulting	3x	☐	☐	☐	☐	☐
Data Integrations	3x	☐	☐	☐	☐	☐
Salesforce Integration	3x	☐	☐	☐	☐	☐
Objectives-Based Onboarding	3x	☐	☐	☐	☐	☐
HubSpot Reporting	3x	☐	☐	☐	☐	☐

2 ACCREDITATION PREREQUISITE CERTIFICATIONS

The list of accreditation prerequisite certifications represents the standard list of certifications a solutions partner must achieve if they wish to apply for an accreditation. These certifications validate the baseline knowledge and foundational skills solutions partners need to own in order to be qualified candidates for the accreditation process.

Solutions partners interested in applying for an accreditation must have the complete list of prerequisite certifications as **ACTIVE**. Obtained certifications that have expired at time of application will not qualify.

Because some of the prerequisite certifications incorporate practical exercises and/or practicum submissions in order to pass, it's recommended to not wait until the application deadline to obtain your certifications.

- The grading of **practical exercises** includes a **1-day SLA**
- The grading of **practicum submissions** includes a **7-day SLA**

You can review the entire prerequisite list of certifications in the **Accreditations Prerequisite Learning Path** here.

Note: Solutions partners are expected to have the full list of prerequisite certifications in active, good standing held by the primary point of contact and up to four other team members. In other words, between five total members at a solutions partner's organization, there must be 3x active Marketing Hub Implementation certifications, 3x active Salesforce Integration certifications, 3x active Revenue Operations Certifications, and so forth for the full list of prerequisite certifications.

Compare your team's active certifications to the Accreditations Prerequisite Certification list before applying.

Marketing Hub Implementation

# of certified solutions partner employees required: 3x

Sell, project manage, and enable long-term growth for your clients by implementing Marketing Hub.

Estimated Time of Completion: 2 hours

Sales Hub Implementation

# of certified solutions partner employees required: 3x

Learn how to run a successful implementation of Sales Hub for your clients.

Estimated Time of Completion: 3 hours

Marketing Hub Software

# of certified solutions partner employees required: 3x

To do inbound marketing well, you need to start your journey with the marketing software the right way. It's a big platform with a lot of tools, and to get the most value out of them, you need a foundation of knowledge and an understanding of how they all work together. This certification course will equip you with the fundamental understanding you need to do marketing well using HubSpot.

Estimated Time of Completion: five hours

Includes practical exercises (with one-day SLA)
Includes practicum submission (with seven-day SLA)

Sales Hub Software

# of certified solutions partner employees required: 3x

When you're prospecting, there's a whole bunch of behind-the-scenes work you have to do to figure out who you should be reaching out to. In this lesson, you'll learn how to filter, organize, and view the contacts in your account. You'll also learn about the HubSpot tools that will help you add new leads to your account.

Estimated Time of Completion: two hours

Includes practical exercises (with one-day SLA)

Service Hub Software

# of certified solutions partner employees required: 3x

The Service Hub Software Certification verifies your ability to execute an inbound service strategy using Service Hub. This certification course consists of lessons that discuss HubSpot tools such as help desk, knowledge base, customer portal, customer feedback, and reporting.

Estimated Time of Completion: two hours

Includes practical exercises (with one-day SLA)

Platform Consulting

# of certified solutions partner employees required: 3x

Platform consulting, or tech stack auditing, refers to providing guidance, expertise, and solutions to clients that seek to maximize their platform's utility and success. In this certification, you will learn how to conduct platform discovery conversations with your client, how to identify platform need gaps, how to drive business process change, and how to create a go-to-market strategy for platform consulting as a service.

Estimated Time of Completion: two hours

Data Integrations

# of certified solutions partner employees required: 3x

HubSpot is more than just software; it is a central source-of-truth for your data. Integrating other tools with HubSpot is necessary for clients to understand company performance and align teams. But integrations aren't just about linking two apps. The goal is to connect and map data flowing between the apps. This certification prepares you to identify use cases and use a step-by-step evaluation process to choose the right integration for your clients.

Estimated Time of Completion: three hours

Salesforce Integration

# of certified solutions partner employees required: 3x

In this certification, you'll learn how to implement the Salesforce integration for clients by reviewing the types of use cases this integration serves, how the integration works, and the key differences between HubSpot and Salesforce. You'll learn best practices for planning and scoping the integration in advance of implementation, and you'll gain experience in the integration by completing tasks, like setting up inclusion lists and syncing custom objects. You'll also learn the types of information you need to gather from a client to troubleshoot an error, and you'll be able to identify and resolve several common integration issues. Finally, you'll learn about regular maintenance activities a client must perform to keep the integration working smoothly.

Estimated Time of Completion: three hours

Includes practical exercises (with one-day SLA)

Objectives-Based Onboarding

# of certified solutions partner employees required: 3x

This certification offers a deep dive into becoming a strategic advisor, project manager and growth planner when executing the Objectives-Based Onboarding methodology for HubSpot solutions partners. Learn how to onboard your customer as HubSpot does by making your customer's priorities the same as your priorities during onboarding, so that you can both accomplish your goals faster.

Estimated Time of Completion: two hours

HubSpot Reporting

# of certified solutions partner employees required: 3x

Learn how to incorporate data driven decision making at your organization with the use of the HubSpot reporting tools. This certification course consists of eight lessons that discuss data literacy, and HubSpot reporting tools across the CRM, Marketing Hub, CMS Hub, Sales Hub, and Service Hub. To showcase your knowledge, you'll be assessed with quizzes and worksheets at the end of each lesson.

Estimated Time of Completion: four hours

Includes practicum submission (with seven-day SLA)

3 ROUND ONE OF THE HUBSPOT ONBOARDING ACCREDITATION PROCESS

In this round, we ask you to submit documents you've used in actual customer engagements. Your focus should be on depth and clarity rather than volume; that is to say you should treat this process as if you were communicating with customer stakeholders. Please read the prompts carefully to ensure you are including all required information in your uploads.

You do not need to include details regarding the customer or your organization outside of what the prompt requires. Your submission must address all three prompts in this round with 1-3 customer engagements. You may use a single engagement for all three prompts should you wish, but it is not a requirement.

This round of the application process contains three elements:

1. You will upload a project plan and associated HubSpot Portal ID for a customer that you successfully onboarded using the Objectives-Based Onboarding methodology.
2. You will upload a document that describes how you have successfully solved a customer's integration challenges leveraging the HubSpot to SFDC connector and one additional use case employing either a marketplace connector or an iPaaS solution.
3. You will provide contact information for a reference at your customer.

When considering which onboarding engagement is the best fit for the prompts, use the following guidelines to inform your selection:

- Are they a Pro-level customer with both Marketing and Sales Hub?
- Have you held a successful kickoff call with this customer?
- Have you helped this customer identify, set and prioritize objectives?
- Can you explain the HubSpot solution you recommended for the customer and how it met the customer's unique business objectives?
- Can you summarize some of the challenges (product/technical challenges and account management/communication challenges) that you faced during the onboarding and how did you resolve them?
- Did you keep the customer on track and able to achieve their goals on time?
- Can you describe how you handled scope creep in the engagement?
- Did you set the customer up with a plan for continued success post onboarding?
- Did you create and keep thorough project documentation, including technical solutioning and recommendations for optimization?

Prompt 1: Objectives-Based Onboarding (OBO) Project Plan and HubSpot Portal ID

Artifact Upload

Upload a project plan and HubSpot Portal ID* for a customer that you successfully onboarded using the Objectives-Based Onboarding methodology. The best submissions will demonstrate that the customer can meet their goals incrementally and realize value within 90 days of kickoff, rather than waiting for the conclusion onboarding to understand the impact and return on their investment in HubSpot.

Note: You will revisit this customer engagement if you advance to Round Two of the accreditation process so it is in your interest to select the engagement that best represents your approach to HubSpot onboarding.

If you do reference any engagements from Round One of the accreditation in Round Two you should not assume the reviewer has any prior exposure to your work with this customer. Please proceed as if this is the first time profiling this customer engagement.

Your plan should include the following information:

- The engagement start and end dates, list of Hubs, and subscription levels
- The customer's overall goals are clearly identified and articulated
- There are 3-5 goals identified for "Phase 1" with clear start and end dates.
- There are clear steps and activities outlined for the customer to complete in HubSpot, that correspond with each of the customer's stated goals.

The customer selected for this engagement must have both Marketing Hub and Sales Hub at the Professional level or higher. Engagements referencing a Starter plan will not be considered.

*You can find a customer's HubSpot Portal ID in the URL of their HubSpot account: https://app.hubspot.com/reports-dashboard/XXXXXX

Submissions are reviewed for the following:

- Customer's goals are clearly & concretely identified, documented, and articulated in your project plan.
- Your scheduled work is anchored to the customer's goals and is scheduled within a 90 day onboarding period (as evidenced by the project plan).

In addition to including the above information please include the following in your submission:

- Engagement start date
- Engagement end date
- Customer company size
- Number of users onboarded
- Marketing Hub Level Implemented: Free, Starter, Professional, Enterprise, N/A
- Sales Hub Level Implemented: Free, Starter, Professional, Enterprise, N/A
- Service Hub Level Implemented: Free, Starter, Professional, Enterprise, N/A

If you plan to link to documents that are cloud-shared (e.g. Google Drive) the content must be viewable to anyone who clicks the link. Because we use a pool of randomized subject-matter experts, there is no way to grant view-access to your specific reviewers. If this is not possible, we recommend downloading the content as one of our accepted file formats and uploading it directly to the application. Additionally, if you use a software tool for project management and/or change management (i.e. monday.com, Asana, Zoho), please export the plan in full to ensure your reviewer has access to the full artifact.

You may upload a maximum of three files for this submission. If you anticipate having more than three separate files, you should combine where possible to consolidate. The following file formats are accepted:

- .csv
- .doc
- .docx
- .pdf
- .gif
- .jpg
- .png
- .ppt
- .pptx
- .xls
- .xlsx
- .zip

Prompt 2: Integration Documentation

Artifact Upload

An essential component of HubSpot onboarding is to help customers center HubSpot within their organization's tech stack—which often requires integrations with the existing platforms or systems in use at the customer organization. We are looking for solutions partners who understand integration fundamentals and can use the app connector ecosystem to address customers' integration needs.

Upload a document that describes how you have successfully solved a customer's integration challenges. The use case must include usage of the HubSpot-to-SFDC connector **and** one additional use case leveraging either one of the connectors in our app marketplace or an iPaaS solution. Your use case should not include a scenario in which you simply had to enable or turn on a connector, however one-time data migrations making use of the SFDC connector are sufficient.

This submission should include the following information:

- The engagement start and end dates, list of Hubs, and subscription levels
- Clear articulation of the business use case for the integration
- Explanation of how the referenced connectors function
- Data flow diagram, complete with relevant components of the data model
- Explanation of the solution you designed
- Explanation of how the data was used in HubSpot

This document does **not** need to communicate developer-level understanding of integrations, but should cogently address the points outlined above.

Submissions are reviewed for the following:

- The solutions partner provides a clear and thorough articulation of the business use case for the connected integrations that also highlights any addressed customer concerns.
- The solutions partner offers an explanation of how the SFDC connector functioned for the customer.
- The solutions partner offers an explanation of how the specific App Marketplace or IPaaS connectors functioned for the customer.
- The solutions partner shares a data flow diagram, complete with relevant components of the data model, that clearly visualizes the customer's data model around HubSpot; this diagram should also pair with a clear explanation and articulation of the solution proposed.
- The solutions partner offers an explanation of how the data was used in HubSpot.

Note: This upload should contain two separate integration use cases, one of which includes the SFDC connector. Uploads missing one of these elements will not be considered.

If you plan to link to documents that are cloud-shared (e.g. Google Drive) the content must be viewable to anyone who clicks the link. Because we use a pool of randomized subject-matter experts, there is no way to grant view-access to your specific reviewers. If this is not possible, we recommend downloading the content as one of our accepted file formats and uploading it directly to the application. Additionally, if you use a software tool for project management and/or change management (e.g. monday.com, Asana, Zoho), please export the plan in full to ensure your reviewer has access to the full artifact.

You may upload a maximum of three files for this submission. If you anticipate having more than three separate files, you should combine where possible to consolidate.The following file formats are accepted:

- .csv
- .doc
- .docx
- .pdf
- .gif
- .jpg
- .png
- .ppt
- .pptx
- .xls
- .xlsx
- .zip

Prompt 3: Customer Reference

Customer Contact Uploads

Please provide reference information for a stakeholder contact from the customer specified in your Project Plan.

Once contact information has been provided, the system will send a brief form to complete that will solicit feedback from the individuals on the following domains:

- Identifying goals and addressing business needs
- Effective communication
- Time to value within the onboarding engagement

Please note that you are required to provide the customer's contact information before the Round One deadline, but the customer is only required to submit their feedback form by the Round Two deadline. It is your responsibility to ensure that your selected reference contacts complete the forms by the Round Two submission deadline. You are able to track the submission status of your references in the Submittable portal, and can also re-send the solicitation at any time. References that remain incomplete may result in your removal from the accreditation process.

4 ROUND 2 OF THE HUBSPOT ONBOARDING ACCREDITATION PROCESS

This round of the application process contains two elements, designed to assess your competencies in onboarding and consulting.

- You will upload a video case study providing a deep dive into an onboarding engagement.
- You will complete a listening exercise, wherein you'll be asked to analyze a call.

Please note if you do reference any engagements from Round One of the accreditation you should not assume the reviewer has any prior exposure to your work with this customer. Please proceed as if this is the first time profiling this customer engagement.

Prompt 1: Video Case Study

Video Upload

For this case study, please create and submit a (maximum) 15 minute video elaborating on the onboarding engagement that corresponds to the project plan you provided in **Round One**. This video should focus on specific aspects of the engagement that are crucial to your customers' success but might not easily be articulated through documentation alone.

In your submission, you should address the following scenarios:

- Describe the approach you used on the initial kick off call and the actions that resulted from that call.
- How did you handle times when the customer had more goals/objectives that could reasonably be met within "Phase 1"?
- Which HubSpot solution(s) did you recommend for the customer and how did those recommendations meet the customer's unique business objectives?
- Share some of the challenges (both product/technical challenges and account management/communication challenges) that you faced during the onboarding and how you resolved them.
- How did you keep the customer on track and able to achieve their goals on time? How did you keep the project moving when the customer didn't engage or didn't complete their assigned tasks on time?
- Scope: Describe how you handled scope creep in terms of:
    - The customer wanting to accomplish additional objectives in the same amount of time
    - The customer providing "bad" requirements that you had to push back on and recommend a different approach
    - The customer requesting requirements that are not included in their subscription level
- How did you set the customer up with a plan for continued success post onboarding?
- Report on the measurable results that the customer realized as a result of your onboarding.

If you are not able to identify a single customer engagement that covers all of the recommended scenarios, start with a customer that allows you to address the majority of the requirements and then use additional customer examples for outstanding items. Use your time wisely, as you are limited to the single video

Prompt 2: Video Case Study Continued

Submissions are reviewed for the following:

- The solutions partner articulates the approach they used on the initial kick off call and the actions items that resulted from that call.
- The solutions partner thoroughly explains both the context and their approach to handling scope creep—specifically, customer goals and objectives that could reasonably be met within “Phase 1”, customer requirements that were poor or misaligned, and customer requirements that were outside of their purchased subscription of HubSpot.
- The solutions partner clearly states their recommended solutions and links those solutions to specific unique business objectives.
- The solutions partner thoroughly outlines both the technical and account management challenges that arose and their approach for finding resolution.
- The solutions partner provides specifics around their strategies for keeping the project on schedule OR techniques for keeping stakeholders engaged—depending on the example offered in the video submission.
- The solutions partner shares their approach in developing customized plans for post-onboarding success.
- The solutions partner describes clear quantitative customer outcomes and success as a result of their onboarding project.

Video Guidelines:

Submissions longer than 15 minutes will not be accepted

You may use any slides and/or visual aids to present this content should you wish

You should not include:

- Information/pitch about your company
- Introductions to team members

If you plan to link to a file that is cloud-shared (e.g. Google Drive) the content must be viewable to anyone who clicks the link. Because we randomly assign reviewers from a pool of subject-matter experts, there is no way to grant view-access to your specific reviewers.

If this is not possible, we recommend downloading the content as one of our accepted file formats and uploading it directly to the application. The following file formats are accepted: .avi .mov .mp4 .zip

Prompt 2: Call Listening Exercise

Call Audit

Partners will be provided an audio recording (along with a text transcript) of an onboarding call between a customer and solutions partner entity wherein the customer is expressing concerns about (1) the pace of onboarding and (2) their team's capacity. The customer is also confused about expectations and ownership within the onboarding engagement.

Submissions are reviewed for the following:

- The solutions partner's ability to diagnose the customer's primary concerns.
- The solutions partner's ability to both highlight the example partner's successes and the example partner's areas of improvement on the call.
- The solutions partner's ability to develop an action plan and specific next steps for both the example partner and the example customer following the call.

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