

Onboarding

Partner Eligibility

- Have at least 3 full-time employees at your organization
- Experience with objectives-based onboarding methodology
- Employees have met the prerequisite certification criteria found in the ["How It Works" section here.](#)
- Platinum, Diamond or Elite Partner

Requirements for Projects

- Item 1: Onboarding that involved Marketing Hub Pro or Enterprise AND Sales Hub Pro or Enterprise
- Item 2: Item 1 requirements, plus, experience configuring the salesforce connector AND one other marketplace connector or iPaaS solution

Round 1 Checklist

Project Plan

- Ensure example meets project requirements
- Includes engagement start and end dates, company size, number of users onboarded, list of Hubs, and levels onboarded
- States customers overall goals
- Identifies 3-5 specific goals for phase 1 (first 90 days) with start and end dates for each goal
- Includes clearly defined steps/activities the customer can take to achieve stated goals

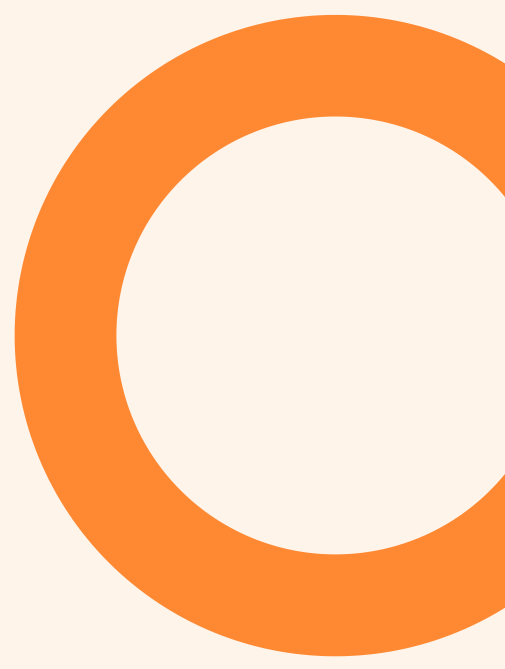
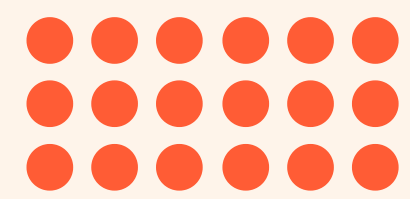
Integrations Artifact

- Describes integration challenge using the SFDC Connector AND one additional marketplace connector*
- Ensure example(s) meet project requirements
- Explain the business use case
- Includes engagement start and end dates, company size, number of users onboarded, list of Hubs, and levels onboarded
- Explains how connectors function
- Include data flow diagrams
- Explanation of designed solution
- Shows how data was used in HubSpot

*This can be 2 different customers, however, both have to meet the project requirements: Marketing Hub Pro+ AND Sales Hub Pro+

Customer Reference

- Provide reference information for a contact from the Item 1 customer.
- Ensure they are ready to provide feedback on:
 - Identifying goals and business needs
 - Effective Communication
 - Time to value from onboarding



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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

Video Case Study

- Upload video case study detailing the project plan from round one (15 min max) that:
 - Describes your approach used and takeaways from kickoff call
 - Answers how you handled goal prioritization and scope creep in the first 90 days
 - Describes recommended Hubspot solution(s) and how they met the customers goals
 - Describes roadblocks and resolutions faced during onboarding
 - Describes how you held the customer accountable
 - Describes how you set the customer up for success post onboarding
 - Describes how you reported on success using measurable results

Call Listening

- Listen to the provided example and answer the following questions:
 - What are the customers main concerns?
 - Where did the onboarding specialist excel in this call?
 - What are the areas of improvement for the onboarding specialist?
 - What were the post call action items for the onboarding specialist and customer.