Accreditation

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

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

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

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.