HubSpot Academy

HubSpot CRM Implementation Accreditation

Preparation Guide

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This document is meant to offer clarity and context into the HubSpot CRM Implementation Accreditation process, the expectations and requirements for 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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HOW TO USE THIS PREPARATION GUIDE

This preparation guide is designed to provide clarity and context into the HubSpot CRM Implementation Accreditation process, the expectations and requirements for interested solutions partners, and recommendations for building the strongest, most relevant application possible. This guide is updated for each accreditation application window to reflect any updates to the process or requirements.

It's our recommendation that you review this document closely to ensure your eligibility for this accreditation and that your submission includes all referenced requirements.

1 ABOUT THE HUBSPOT CRM IMPLEMENTATION ACCREDITATION

By acquiring the HubSpot CRM Implementation accreditation, your solutions partner organization will be able to demonstrate that you have first-hand experience in successfully implementing the HubSpot CRM platform with large, global, enterprise-level customers with complex requirements.

In addition to your product-specific knowledge, this includes elements of project/stakeholder management, change management and professionalism throughout the sales and discovery processes. If you have not completed large-scale implementations (Sales Hub and Marketing Hub Enterprise-level customers with at least 300 employees and 50 paid Sales seat users) or you do not work with customers both pre-and-post-sale, we recommend that you consider pursuing one of the other accreditation options.

Your Eligibility

As this accreditation seeks to validate your organization's first-hand experience implementing upmarket customers with complex requirements, the following characteristics should be present in any implementation project you seek to profile:

- Use of Enterprise Sales and Marketing Hubs, and preferably Operations Hub (Operations Hub is not a requirement for this particular accreditation). Note: Single-Hub Enterprise or Pro customers do not meet the complexity standard required for this accreditation.
- Customer's business leverages multiple components that need to be addressed organizationally first, and then solved for in our product, including:
    - Multiple (two or more) legacy CRM platforms from which they're migrating
    - Multiple (two or more) business units, divisions, and/or regions using HubSpot
    - Multiple brands (two or more)
    - Multiple languages (two or more)
    - Multiple stakeholders from two or more departments
- Implementing HubSpot should prove as a catalyst for significant changes in their sales & marketing operating model as part of this project. The ideal implementation profiles a customer that's not just switching CRM vendors or looking for base productivity gains, but one that's looking for functional improvements in their ability to generate revenue and drive down costs. These implementations will transform their business and the implementation plans should accurately reflect that.
- Presence of a custom integration between HubSpot and a third party system of record, such as a financial system, like an ERP platform, or a reporting system, like a

data warehouse. Note: HubSpot is very powerful, but it will not replace these key functions within an organization, so the solution will have to be architected to co-exist with these platforms.

These qualitative requirements are difficult to screen for, so as a result, we ask that your profiled customers meet the following quantitative criteria to ensure the most thorough review:

- Have at least 300 full-time employees
- Have at least 50 sales seats (paid users)
- Uses Sales and Marketing Hub at the Enterprise level
- Teams are distributed nationally or globally

Customer engagements that fall under the “land and expand” category may also meet these requirements, so long as you can provide strong supporting evidence that your team executed the implementations for the additional growth. For example, if you worked with a customer that began as a 100-user Enterprise Hub implementation but grew to a multi-Hub Enterprise customer with over 300 users with 50 paid seats within a year and can indicate you performed the implementation work resultant from that growth, this would be an acceptable example.

In addition, your team must meet the following requirements to be eligible:

- Your organization has at least three full-time employees.
- Your organization has completed two+ implementation projects within the last 12 months that meet the standards described above.
- Your organization has experience implementing complex third-party integration solutions, beyond just a single data migration.
- Your organization meets the HubSpot Academy certification prerequisites as outlined in the section below, Prerequisite Certifications.
- Your organization is a Platinum, Diamond, or Elite tiered HubSpot solutions partner.

The application process for the HubSpot CRM Implementation accreditation consists of three 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 their progression in the application process.

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

The Pre-Submission Checklist

Ahead of submitting your application, please make sure to double-check that your submission fully meets the following criteria and requirements. If an associated document doesn't 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.
- [ ] 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 is 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

After meeting the prerequisite certifications, you will submit an application (one person per partner entity) including basic information about your organization and a series of real-world, existing business artifacts related to your work with clients related to CRM implementation engagements. You'll also be asked to provide contact information for a customer that can provide a reference, so HubSpot can contact them and get feedback about their experience with your organization.

Round Two

In this round, you will be asked to upload a video case study reviewing a first-hand, successful end-to-end experience with a CRM implementation engagement with a HubSpot customer. You will also be asked to complete an interview with a HubSpot subject-matter expert (SME) as it relates to the technical nature of CRM implementations.

Round Three

In this round, you will be asked to complete a 30-minute interview and question-and-answer (Q&A) session in which a HubSpot subject-matter expert (SME) will ask you clarifying questions about your case study and business artifact submissions from the previous rounds. Note: This will not be required for all applicants.

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. **If you have any trouble tracking your team's progress on the necessary prerequisite certifications, reach out to your Partner Development Manager (PDM).**

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: two 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: three 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: two 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: two hours

Includes practicum submission (with seven-day SLA)

Note: In addition to the accreditation prerequisite certifications listed above, there are two additional certifications (listed below) solutions partners must achieve for the HubSpot CRM Implementation Accreditation specifically. Whereas the accreditation prerequisite certifications require **three** solutions partner employees to achieve and maintain each certification, these additional certifications require only **two** employees to have ACTIVE certifications in good standing.

Revenue Operations

# of certified solutions partner employees required: 2x

Revenue Operation (RevOps) is key to helping your company achieve scale. If you're in RevOps, or if you aspire to be, this course will give you a solid foundation to build on. It's full of actionable advice from current RevOps professionals who will teach you what revenue operations is and everything you need to know to excel at it. By the end of this course, you'll know enough to be able to get started and make a real impact at your company.

Estimated Time of Completion: six hours

CMS for Developers

# of certified solutions partner employees required: 2x

This certification course contains lessons and resources to help web developers learn how to build and manage websites on the HubSpot CMS. You'll learn how to use the CMS tools to create a wide variety of assets and how to maximize your effectiveness with these tools to streamline your process and increase your productivity.

Estimated Time of Completion: four hours

3 ROUND ONE OF THE HUBSPOT CRM IMPLEMENTATION ACCREDITATION PROCESS

In this round, HubSpot asks you to submit various 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 four elements:

1. You will upload a Phased Implementation Project Plan for a CRM customer whom you migrated from a major CRM platform to HubSpot.
2. You will provide a Custom Integration Technical Architecture that you produced for a non-technical customer stakeholder to solve a complex integration use case.
3. You will upload a Change Management Plan that describes how you supported a customer from start to finish in implementing HubSpot CRM.
4. You will provide contact information for two contacts from a customer profiled in this round of the accreditation.

The customer selected for this engagement should meet the following criteria:

- Completed within the last 12 months
- Implemented Sales Hub and Marketing Hub, both at the Enterprise Level
- Have at least 300 total customer employees
- Have at least 50 sales users, from at least two different departments
- Teams distributed nationally and/or globally

As a reminder, all selected projects are evaluated against the qualitative criteria outlined in the 'Eligibility' section of this prep guide in addition to the quantitative requirements described above and the document-specific requirements outlined in the prompts below.

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 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.

Prompt 1: Phased CRM Implementation Project Plan

Artifact Upload

Upmarket projects contain a high level of complexity that requires an attention to detail, a thorough timeline, and a clear ownership of next steps, to ensure the implementation is delivered on time and on budget.

In this prompt, we're looking for (1) a complex, phased implementation methodology, (2) your organization's approach to structuring the work into logical activities that lead to an initial go-live within **120 days** from the project start date, and (3) how you document plans to add platform functionality or additional business units beyond the go-live date.. Please ensure you upload a copy of the actual project plan used in the engagement, as an overview or proposal-style document will not be accepted.

Your upload(s) should include the following information:

- Submission Executive Summary
    - Recommended format: text document
    - Information regarding the customer you implemented, including overall company size, locations
    - Summary of goals and objectives for this customer throughout implementation
    - Detail regarding where in your submission to find the points below
- Implementation Project Plan, to include:
    - Clearly defined implementation phases, their timelines for completion, and clear outcomes in each phase
    - At least one phase dedicated to expanding platform functionality OR adding additional business units beyond initial go-live date

    - Tasks and milestones with owners and due dates, identified dependencies

In addition, please provide the following information regarding this customer:

- Engagement start date
- Engagement end date
- Customer company size
- Customer company locations (cities & countries)
- Number of paid Sales seats
- Total number CRM users
- CRM users' departments
- Name of prior CRM
- Marketing Hub Level Implemented: Free, Starter, Professional, Enterprise, N/A
- Sales Hub Level Implemented: Free, Starter, Professional, Enterprise, N/A
- Service Hub Level Implemented (note: experience implementing Service Hub is not required for this accreditation): Free, Starter, Professional, Enterprise, N/A

Prompt 2: Solutions Architecture & Integration Design

Artifact Upload

Throughout the implementation, it's imperative that you can successfully communicate your recommended technical solution designs to executive stakeholders. Your submission for this prompt should showcase a high level of technical skill alongside competence in conveying integration functionality and value proposition.

Provide a technical deliverable that you produced for an executive customer stakeholder, like a CTO or Director of IT, to solve a complex integration use case within the context of an upmarket implementation.

Your selected integration example must be custom-built, multi-object AND bi-directional integration. Ideally, this integration also makes use of custom object(s) within HubSpot and custom action(s) being taken within HubSpot incorporating the integrated data.

One-time data migrations are not sufficient. IPaaS solutions (except Zapier) used to create a custom integration are acceptable for this example.

This submission should include the following information:

- **Executive Project Summary**
    - Summary of customer use case or business objective, with an emphasis on the value proposition of the solution.
    - Information on the customer's tech stack, including system names and their function
    - Details regarding where in your submission to find the points below
- **Description of the Integration Solution to include**:

    - Visual diagram with clearly labeled systems
    - Data flow indicators
- **Data Mapping to include**:
    - Specifics of source data
    - Clear destination descriptions, including HubSpot object and property names
- Full list of APIs used
- Description of data application within HubSpot and how those applications address business challenges (workflows, triggers, reporting, etc.)

Where possible, submit screenshots within HubSpot to illustrate your design.

In addition, please provide the following information regarding this customer:

- Engagement start date
- Engagement end date
- Customer company size
- Number of paid Sales seats
- Total number of CRM users
- Customer company locations (cities & countries)
- CRM users' departments
- Name of prior CRM
- Marketing Hub Level Implemented:
- Sales Hub Level Implemented:
- Service Hub Level Implemented (note: experience implementing Service Hub is not required for this accreditation): N/A, Professional, Enterprise

The customer selected for this engagement should meet following criteria:

- Completed within the last 12 months
- Implemented 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

Prompts 3: Change Management Plan

Artifact Upload

Implementing and adopting a new CRM provides a catalyst for significant organizational change. To successfully guide Enterprise customers through this transition period, it's essential that our partners show competency in change management. Your submission for this prompt should demonstrate that you have the ability to minimize disruption to day-to-day operations through the course of the implementation, proactively anticipate and mitigate potential risks, and facilitate successful user adoption of the new technology and processes resulting from the implementation project.

For this prompt, provide examples of how you successfully drove change management for an Enterprise customer that includes the following:

- Executive Submission Summary
    - Recommended format: Text document
    - Detail regarding where in your submission to find the points below
- Customer Context
    - Outline relevant details from the customer that informed your change management approach (notes on the number of sales teams, existing business processes or challenges, which system(s) they're migrating from or will continue to work in tandem with HubSpot).
- Your Methodologies
    - This section should cover your organization's approach to (1) addressing the customer's challenges, (2) identifying and mitigating potential risks, (3) managing rollout plan, including a pilot, (4) facilitating user adoption and support for at least 3-months post-implementation.
    - Your audience for this segment should be the executive stakeholders at your customer. Your purpose here is to convince them that you have a proven methodology to minimize the risk and disruption to their business and a focused approach to achieve their desired business outcomes. Excerpts from the actual proposal can be used, but are not necessary so long as you provide the required information.
    - The methodology should clearly align with the customer information provided. That is to say, it should be easy to see how the stated challenges, risks or business processes align with the stated action plans in this section
- Results and Impact:
    - This section should include realized metrics to indicate (1) overall business impact/ROI as a result of the implementation, (2) successful user adoption
    - Remember that it's not sufficient to include a hypothetical approach - our review panel should be able to see exactly how your methodologies and rollout had an impact on the business and helped users adopt the CRM.
    - Examples of selected metrics may include:
        - Increased C$R, Reduced churn, MQL to SQL Conversion increases (business impact/ROI)
        - Increase in daily user logins, increase in call logging/rep activity (adoption indicators)

The customer selected for this engagement should meet following criteria:

- Completed within the last 12 months
- Implemented 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

NOTE: This content should be different from your project plan. Though they both address the approach to rollout, the change management approach provides a strategic roadmap, along with key activities to drive user adoption and ensure a seamless transition to new processes and technologies.

Items 4 & 5: Customer References

Customer Contact Uploads

Please provide reference information for two contacts from the customer profiled in this round of the accreditation. The contacts should include an executive stakeholder and a technical lead on the implementation project.

Once contact information has been provided, HubSpot will solicit feedback from the individuals on the following domains:

- The solutions partner's attempts at building relationships.
- The solutions partner's ability to proactively identify risks and/or blockers.
- The solutions partner's role in establishing business metrics.
- The solutions partner's success in leading the HubSpot CRM implementation.

Please note that you are required to provide the customer's contact information before the Round 1 deadline, but the customer is only required to submit their feedback form by the Round 2 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 TWO OF THE HUBSPOT CRM IMPLEMENTATION ACCREDITATION PROCESS

This round of the application process contains three distinct elements, designed to assess your consulting approach and ability to drive business outcomes.

Select a customer engagement wherein you successfully migrated them from a leading competitive CRM to HubSpot and complete the following:

- Upload your sales proposal for the project referenced in your video showcase. This proposal must contain the pricing / fee structure.
- Create and submit a short (max. 15 minute) video case study showcasing the end-to-end of the project with this customer, starting from pre-sale through implementation and closeout.

After HubSpot has reviewed your case study submission and customer reference, you may be asked to complete a 30-minute interview / Q&A session in which a HubSpot subject-matter expert (SME) will ask you clarifying questions about your case study submissions.

The customer selected for this engagement should meet the following criteria:

- Completed within the last 12 months
- Implemented Sales Hub and Marketing Hub, both at the Enterprise Level
- Have at least 300 total customer employees
- Have at least 50 sales users, from at least two different departments
- Teams Distributed nationally or globally

As a reminder, all selected projects are evaluated against the qualitative criteria outlined in the 'Eligibility' section of this prep guide in addition to the quantitative requirements described above and the artifact-specific requirements outlined in the prompts below.

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: Sales Proposal

Artifact Upload

The proposal used during your sales process to give the customer clarity and confidence in your implementation approach, strategy and outcomes. We are looking for the ability to communicate a complex, phased implementation approach, and your approach to organizing the work into logical activities that lead to quick time to value.

More specifically, the proposal should include the following:

- A summary of the customer's challenges and objectives
- An estimate for the ROI / business impact, including quantitative benchmarks and indicator of how the customer realizes these benefits
- A proposed system architecture diagram (technical and business)
- A phased implementation plan and timeline
- A risk mitigation plan
- A change management approach
- A proposed customer journey
- Proposed pricing
- A statement of work

Submissions are reviewed for the following:

- The solutions partner's ability to clearly communicate the customer's business challenges and/or objectives.
- The solutions partner's framing of business impact and use of quantitative measures.
- The solutions partner's ability approach to solutions architecture visualization.
- The solutions partner's ability to structure an implementation plan.
- The solutions partner's ability to communicate risk mitigation plans.
- The solutions partner's communicated strategy for change management.
- The solutions partner's pricing strategy.

In addition, please provide the following information regarding this customer:

- Engagement start date
- Engagement end date
- Customer company size
- Customer company locations (cities & countries)
- Number of paid sales users

- Total number of CRM users
- CRM users' departments
- Name of prior CRM
- Marketing Hub Level Implemented
- Sales Hub Level Implemented
- Service Hub Level Implemented

Prompt 2: Video Case Study

Video Upload

This video is an opportunity for you to speak directly to our subject-matter experts and highlight your success with an upmarket customer. It should not be a copy of any presentation you gave during the pre-sale or sales process to your customer, but rather a narrative that clearly showcases your completed work and addresses the following areas:

- How you convinced the customer that HubSpot was the right solution to address their business needs (pre-sale) and gave them confidence that the implementation / migration wouldn't fail.
- How you helped optimize the customer's current CRM processes as you brought them into HubSpot.
- Summarize the organizational hierarchy, including the main stakeholders, and the communication cadence and model that you followed.
- Outline some of the risks and issues that you encountered during the project and what you did to proactively mitigate them.
- Present an example of the strategic roadmap that you developed for the customer, outlining the path for long term growth with HubSpot and its value to the business.
- Define change management as practiced by your organization and describe, using quantitative indicators to support your summary, how the approach drove user adoption.
- List out the actual business outcomes / KPIs that you helped the customer achieve, both short and long term.

Submissions are reviewed for the following:

- The solutions partner's ability to provide sufficient context and information about the client's current state.
- The solutions partner's process for showcasing their plan to achieve a successful outcome.
- The solutions partner's plan for optimizing the customer's current CRM processes in its transition to HubSpot.
- The solutions partner's ability to proactively mitigate risks.
- The solutions partner's roadmap for the continued evolution and expansion of HubSpot over time.

Video Guidelines

- Submissions longer than 15 minutes and/or greater than 400MB 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

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ROUND THREE OF THE HUBSPOT CRM IMPLEMENTATION ACCREDITATION PROCESS

Depending on the materials provided in Rounds One and Two, you may be required to complete Round Three.

Prompt 1: Subject-Matter Expert (SME) Interview

Scheduled Interview

After HubSpot has reviewed your case study submission and sales proposal, you may be asked to complete a 30-minute interview and question-and-answer (Q&A) session in which a HubSpot subject-matter expert (SME) will ask you clarifying questions about your case study submissions. Not every applicant will be interviewed.

You should plan on at least the delivery lead for the case study to be in the interview. This person should be able to speak to the specifics of what was delivered and how it was delivered within this project. You may include additional team members should you desire, but no more than three people should attend.

Interviews are reviewed for the following:

- The solutions partner's ability to demonstrate a comprehensive understanding of the larger implementation project.
- The solutions partner's ability to explain and advocate for the approach they recommended, the solutions they designed, and the process they followed.

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