



HubSpot Academy

HubSpot Custom Integration Accreditation

Preparation Guide

Last Update: February 8, 2024

This document is meant to offer clarity and context into the HubSpot Custom Integration Accreditation, 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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ABOUT THE HUBSPOT CUSTOM INTEGRATION ACCREDITATION

By acquiring the HubSpot Custom Integration Accreditation, your solutions partner organization will be able to demonstrate that you have first-hand experience in scoping, developing, and deploying complex, custom integrations to solve for unique client needs and requirements in the HubSpot CRM platform.

In addition to your product-specific knowledge of HubSpot's developer tools and API endpoints, the expertise this accreditation validates includes elements of data modeling, customer relationship management, and needs-assessment-powered solutioning. If you have not completed complex, custom integrations into our CRM platform to date, we recommend that you consider pursuing another accreditation option.

NOTE

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

- Your organization must have designed and deployed a multi-object and/or bidirectional HubSpot integration project within the last 12 months, built using custom development or a custom integration built in an iPaaS solution (not including Zapier). Examples making use of pre-built marketplace connectors or native solutions will not be accepted.
- Your organization must have all work & experience submitted for this accreditation completed by full-time employees of your organization.
- 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 Custom Integration Accreditation consists of **two** rounds. It's important to note that not all partners will be accepted to complete both rounds. A solutions partner's performance in the first 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 Playlist](#) –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 HubSpot CRM Implementation accreditation also requires a **one additional** prerequisite certifications:

- CMS for Developers

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.
- 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 custom integration development for clients—including your process for integration planning, documentation, and a successfully deployed integration. You will also be asked to provide contact information for a referenceable customer for HubSpot to contact to solicit feedback about their experience with your organization.

Round Two

In this round, you will be asked to upload a video case study demonstrating your applied technical expertise and your ability to prepare customers to use the integration submitted in Round One.

Let's Get Started!

Accreditation: HubSpot Custom Integration

Recency: My organization has designed and deployed a multi-object and/or bidirectional HubSpot integration project within the last 12 months, built using custom development or a custom integration built in an iPaaS solution (not including Zapier).	<input type="checkbox"/>
In-house Expertise: My organization had all of the work and experience submitted for this accreditation completed by full-time employees of my organization.	<input type="checkbox"/>
Prerequisite Certifications: My organization meets the HubSpot Academy certification prerequisites as outlined in the section to the right.	<input type="checkbox"/>
Tier: My organization is a Platinum, Diamond, or Elite tiered HubSpot solutions partner.	<input type="checkbox"/>

Prerequisite Certification	# Certs Required	Employee 1	Employee 2	Employee 3	Employee 4	Employee 5
Marketing Hub Implementation	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Hub Implementation	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Hub Software	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Hub Software	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Hub Software	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Platform Consulting	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Integrations	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce Integration	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Objectives-Based Onboarding	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HubSpot Reporting	3x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CMS for Developers*	2x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Prerequisite is specific to this accreditation.

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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
 - Practical Exercises (with 1-day SLA)
 - Practicum Submission (with 7-day SLA)

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
 - Practical Exercises (with 1-day SLA)
 - Practicum Submission (with 7-day SLA)

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:** 5 hours
 - Practical Exercises (with 1-day SLA)
 - Practicum Submission (with 7-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:** 2 hours
 - Practical Exercises (with 1-day SLA)**
 - Practicum Submission (with 7-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:** 2 hours
 - Practical Exercises (with 1-day SLA)**
 - Practicum Submission (with 7-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:** 2 hours
 - Practical Exercises (with 1-day SLA)**
 - Practicum Submission (with 7-day SLA)**

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:** 3 hours
 - Practical Exercises (with 1-day SLA)**
 - Practicum Submission (with 7-day SLA)**

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:** 3 hours
 - Practical Exercises (with 1-day SLA)**
 - Practicum Submission (with 7-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:** 2 hours
 - Practical Exercises (with 1-day SLA)**
 - Practicum Submission (with 7-day SLA)**

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:** 4 hours
 - Practical Exercises (with 1-day SLA)
 - Practicum Submission (with 7-day SLA)

NOTE:

In addition to the accreditation prerequisite certifications listed above, there are two additional certifications solutions partners must achieve for the HubSpot CRM Implementation accreditation specifically. Whereas the accreditation prerequisite certifications require **3x** solutions partner employees to achieve and maintain each certification, these additional certifications require **2x** employees to have **ACTIVE** certifications in good standing.

CMS for Developers

of certified solutions partner employees required: 2x

This 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:** 2 hours
 - Practical Exercises (with 1-day SLA)
 - Practicum Submission (with 7-day SLA)

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ROUND 1 OF THE HUBSPOT CUSTOM INTEGRATION 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 or information about the customer from the engagement outside of what the prompt requires. The best submissions use artifacts from multiple integration deployment engagements to demonstrate a greater breadth of work, but applicants will still be considered if they reference content from a single engagement—as long as all examples provided are representative of custom integration development.

This round of the application process contains three elements:

1. You will upload a Documented Integration Plan/Process that outlines an integration designed to solve a customer's request.
2. You will submit a diagram of a multi-object bidirectional integration you have designed and deployed that is currently active in a customer portal.
3. You will provide contact information for two references from a customer profiled in this round of the accreditation.

Prompt 1: Documented Integration Plan

Artifact Upload

Upload a document that outlines an integration designed to solve a customer's request. This integration does not currently need to be active, but the integration should be more in-depth than just a one-time migration of properties & data. Examples making use of pre-built marketplace connectors, or native solutions will not be accepted. However iPaaS solutions (*except Zapier*) used to create a custom integration are acceptable.

The document should include the following items:

- A summary of customer needs, including current challenges, pain points, systems requiring integration with HubSpot, and the systems leveraged in integration work (ETL tools, etc).
- A high-level outline of the proposed solution to address customer needs that defines data sources and targets, a visual diagram illustrating the tools and data flow of the solution.
- A description of the integration solution, including the roles and functions of any additional system built into the integration, the endpoints leveraged, and the step-by-step logic for each component in the system.
- An explanation as to why this integration mechanism was the best option for this use case (why the decision was made between custom built vs. native integration options vs. marketplace apps vs. iPaaS).
- A deployment and/or rollout plan, including the total timeline, testing plan, deployment schedule, and post-deployment maintenance plan.
- A description of the error handling/logging process.

Submissions are reviewed for the following:

- The solutions partner's ability to clearly state the customer's primary concerns and/or requirements and how they drove the solution that was designed.
- The integrated solution's ability to completely solve the customer's concerns and/or requirements.
- The solutions partner's ability to justify the integration option chosen.
- The solutions partner's ability to identify the key properties and components of the integration.
- The solutions partner's ability to build and communicate a rollout and deployment plan, including timeline, testing process, post-rollout maintenance, and error logging process.

Prompt 2: Integration Diagram and HubSpot Portal

Artifact Upload

Submit a diagram of a multi-object, bidirectional integration you have designed and deployed that is currently active in a customer portal. The example you select here must be different from the example referenced in the first prompt. If you do not have an integration that leverages multiple objects and is bidirectional, you can use an integration that is *either* bidirectional OR references multiple objects. Examples making use of marketplace connectors or native solutions will not be accepted. However IPaaS solutions (except Zapier) used to create a custom integration are acceptable. One-time data migrations are also not sufficient for this example.

This diagram should include and show the following key components of the architecture:

- The connection between the original source(s) of data and HubSpot
- All relevant webhooks and API endpoints leveraged
- All custom objects used in the integration solution
- The type of Authentication method that is being used in this integration (ie. OAuth, Private App token)

In addition, you should provide a HubSpot portal ID* wherein this solution is currently deployed. For OAuth authenticated applications, the APP ID will be used to track performance and functionality of the architecture described. For Private App authenticated integrations, the app name will be used for the same purpose.

*You can find a customer's HubSpot Portal ID in the URL of their HubSpot account:

<https://app.hubspot.com/reports-dashboard/XXXXXX>

Submitted diagrams are reviewed for the following:

- The solutions partner's ability to illustrate a multi-object, bidirectional integration and the associations between objects.
- The solutions partner's ability to illustrate the origin of each data source and its target system.
- The solutions partner's ability to illustrate all relevant API endpoints and components of the infrastructure.
- The solutions partner's ability to explain the purpose of each HubSpot object used in the solution (including standard objects, custom objects, and related entities such as Engagements, Files, Owners, etc).
- The solutions partner's ability to demonstrate the means of authentication.

Submitted Portal IDs and Apps will be reviewed for the following:

- The solutions partner's ability to develop and deploy an app that performs as designed via the associated diagram.

Prompt 3 & 4: 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 ability to deploy a custom solution that solved the communicated problem and/or met the communicated requirements.
- The solutions partner's ability to explain the approach they took to their integration solution tailored to the technical level of their audience.
- The solutions partner's selected communication styles and formats for explaining the intricate details of the integration solution.
- The solutions partner's ability to provide remarkable customer service.

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.

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ROUND 2 OF THE HUBSPOT CUSTOM INTEGRATION ACCREDITATION PROCESS

This round of the application process contains two distinct elements—a video case study and a customer reference—designed to assess your ability to plan, communicate, and deploy a custom integration through both the developer-lens and a customer-lens.

Prompt 1: Video Case Study

Video Upload

For this case study, please create and submit a short (maximum 15 minute) video addressing a custom, multi-object, bidirectional integration you have designed and deployed that is currently active in a customer portal. This integration must show evidence of a read or write association between the objects and must be different from the two examples you leveraged in Round One.

Examples making use of pre-built marketplace connectors or native solutions will not be accepted. However, iPaaS solutions (except Zapier) used to create a custom integration are acceptable. One-time data migrations are also not sufficient for this example. This video should provide a clear narrative in English related to critical components of a successful integration project.

Your goal is to communicate a developer-level understanding of the integration, alongside a holistic view of the project, including the following:

- Solution scoping – describe your approach for discovery and scoping the solution for the customer, including specifying the type of platform(s) leveraged in the integration with HubSpot (i.e. E-commerce, ERP, SQL Database, CRM, etc).
- Solution design and optimization– describe how your solution addressed customer requirements and allowed them to optimize both platforms to serve their needs.
- Technical expertise – include a walkthrough of the key elements to the integration’s success, including APIs used, high-level code review, error logging and handling processes, and authentication methods.

Submissions are reviewed for the following:

- The solutions partner’s ability to identify customer concerns in discovery and scope a solution that adequately addresses them.
- The solutions partner’s ability to explain the key components of the integration solution.
- The solutions partner’s ability to design a process for error logging and handling.
- The solutions partner’s ability to identify and use the appropriate HubSpot APIs in the architecture design.



HubSpot Custom Integration Accreditation Process

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