HubSpot Academy

HubSpot Data Migration Accreditation

Preparation Guide

This document is meant to offer clarity and context into the HubSpot Data Migration 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, [click here](#).
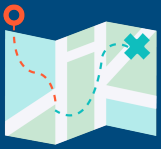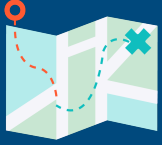
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HOW TO USE THIS PREPARATION GUIDE

This preparation guide is designed to provide clarity and context into the HubSpot Data Migration 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 DATA MIGRATION ACCREDITATION

By acquiring the HubSpot Data Migration Accreditation, your solutions partner organization will be able to demonstrate that you have first-hand experience and expertise in migrating a prospect's and/or customer's data from their legacy CRM platform(s) and system(s) into the HubSpot CRM platform.

In addition to your product-specific knowledge of HubSpot, the expertise this accreditation validates includes elements of data strategy, data architecture, migration API development, and the broad ability to execute a rigorous migration process anchored to a proven methodology.

Solutions partners best-suited for this accreditation have significant experience in delivering data migration for customers who want a solution or service above the scope of typical marketplace apps or native import tools. Within the last 12 months, candidates should have completed at least two separate projects in which they migrated a customer from a leading CRM, marketing automation platform, or helpdesk system into HubSpot. We recommend that you consider pursuing another accreditation option if you haven't yet completed these types of data migration projects.

Note: Prior to applying, ensure that you meet the following requirements:
- Your organization has at least three full-time employees.
- Your organization has completed at least two separate data migration projects within the last 12 months, including the use of marketplace apps, APIs, or other custom solutions.
- Your organization has experience in migrating data to standard HubSpot objects along with additional contextual data. Note: Experience exclusively with HubSpot-native import tools is not sufficient for this accreditation.
- Your organization has experience with other leading CRMs (Dynamics or Salesforce), marketing automation platforms (Pardot, ActiveCampaign, Marketo), or helpdesk systems (Zendesk, Zoho Desk, Intercom).
- Your organization has work and experience to submit for this accreditation that's been completed by full-time employees of your organization.
- 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 Data Migration Accreditation consists of three rounds. It's important to note that not all partners will be invited to complete the final round. A solutions partner's performance in Rounds 1 and 2 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.

- [ ] 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 at the user-level to your specific reviewer.

- [ ] Your documents satisfy the application criteria, 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'll never share these documents externally without the explicit permission of both you and your customer.

Round One

After meeting the prerequisite certifications, you'll submit an application (one application per partner entity) that includes basic information about your organization and a series of real-world, existing business artifacts related to your work with complex data migration projects for clients — including your process for successfully planning, executing, and supporting the migration. 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'll be asked to provide your definition of "complex" as it relates to data migration projects. You'll then be asked to complete a practical deliverable for a fictional customer's data migration project.

Round Three

In this round, you'll be asked to complete a ~30-minute interview and question-and-answer (Q&A) session with a HubSpot subject-matter expert (SME) that will ask you clarifying questions about your migration methodology, case study, and/or business artifact submissions from the previous rounds. Note: This may 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 **one-day SLA**
- The grading of **practicum submissions** includes a **seven-day SLA**

You can get the entire prerequisite list of certifications in the Accreditations Prerequisite Learning Path Playlist 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 three active Marketing Hub Implementation certifications, three active Salesforce Integration certifications, three active HubSpot Reporting 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 channel consultant (CC).

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   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'll 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's one additional certification (listed below) solutions partners must achieve for the HubSpot Data Migration Accreditation specifically. Whereas the accreditation prerequisite certifications require **three** solutions partner employees to achieve and maintain each certification, this additional certification requires only **two** employees to have ACTIVE certifications in good standing.

HubSpot Architecture I: Data Models & APIs

| # of certified solutions partner employees required: 2x

This course contains lessons and resources to help learners understand how data lives and flows through HubSpot, how to map outside data models to HubSpot's structure, what integration tools and limitations are available at each HubSpot edition to level-set with clients, how to leverage HubSpot's API endpoints, and how to create behavioral events.

Estimated Time of Completion: three hours
        Includes practicum submission (with seven-day SLA)

3 ROUND ONE OF THE HUBSPOT DATA MIGRATION ACCREDITATION PROCESS

In this round, you'll select two different migration projects from within the last 12 months to profile and complete the following steps:

1. Upload documents showcasing your migration methodology that was used for an actual migration engagement.
2. Complete a video case study, profiling a different migration project your team completed successfully.
3. Provide contact information for two references—one at each of the customers referenced in this round (Note: While these references are requested in Round One, they are not required for completion until Round Two.)

Please plan to submit documents from actual customer engagements completed by full time employees. Your focus should be
on depth and clarity rather than volume. The best submissions clearly include all referenced requirements from each prompt. Please read the prompts carefully to ensure you're including all required information in your uploads.

Note: If you plan to link to documents that are cloud-shared, such as Google Drive, the content must be viewable to anyone who clicks the link. Because we use a pool of randomized subject-matter experts, there's 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 (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 for this round should profile two separate migration projects.

Prompt 1: Migration Methodology

| Artifact Upload

To ensure consistent quality in data migration engagements, it's essential to make use of a project framework that allows for adequate scoping, strategic planning, and operational recommendations — along with the successful execution of the migration itself.

In this prompt, we seek to understand your organization's overall methodology and approach in delivery for a single data migration project you've completed within the last 12 months.

Please upload the following items, ensuring each contains the requested information:

- **Submission Table of Contents:** Identify where in your submission to find the required elements of the prompt. This acts as a road map for our subject-matter expert reviewers and ensures your submission addresses all required components.

- **Executive project summary:** Provide HubSpot with additional context regarding a solutions partner's work on the submitted project and insight into the strategic planning process, including:
  - Information about the customer's prior CRM — including the name and how long the customer worked in this system.
  - A summary of challenges to be addressed in migration.
  - The state of the data to be migrated (for example, does it require extensive cleaning/manipulation in advance of migration, or is it relatively clean?).
  - The proposed migration method recommendations (for example, an import CSV, APIs, or connectors) and why this method is the best match for the customer.

- **Data migration project plan:** This allows HubSpot to gauge the scope and duration of the migration project and it allows the solutions partner to demonstrate their organization's approach to project management, including:
  - The overall project duration.
  - Individual tasks and milestones, along with task owners and their due dates.
  - Overarching phases and milestones of the project, including the production data load, testing period, source system cutover, and/or end user training and enablement.
  - The quality control and risk management methodology and how it's managed to ensure clean, accurate data.
  - Specifics of post-migration support, including the duration of the maintenance period, the escalation pathway and process, and the types of tasks/requests that fall under the plan.

- **Mapping documentation:** This allows HubSpot to see the technical details of the migration and the solutions partner's plans for how to best action the data in HubSpot, including:
  - Any mapping documents.
  - Relevant context for source data, including an ERD and any additional, clarifying information on the nature of those relationships.
  - Additional information and/or context (as needed) demonstrating how source data relationships are preserved in the course of the migration — including how these relationships exist in both the legacy system and in HubSpot.
  - How the migrated data is leveraged in the HubSpot.

- **Testing protocols:** This allows HubSpot to see the overall approach for testing and how the solutions partner applied that approach to a specific project. Include ALL testing protocols typically employed for your migration project, identifying which ones you did and did not use for this specific project to allow our team better understand your testing methodology.

In addition, solutions partners are asked to provide the following information regarding the project being submitted:
- ☐ Name of prior system(s)
- ☐ Number of source/legacy systems
- ☐ Mechanism for migration (for example, native import tools, marketplace apps, APIs, etc.)
- ☐ Number of total records
- ☐ Number of objects migrated
- ☐ Engagement start date
- ☐ Engagement end date
- ☐ Customer company size
- ☐ Seat count/number of users
- ☐ Names of your staff who contributed to this project
- ☐ Marketing Hub product tier (if part of the migration)
- ☐ Sales Hub product tier (if part of the migration)
- ☐ Service Hub product tier (if part of the migration)

Submissions are reviewed for the following:
- The solutions partner's ability to provide the necessary, contextual information to effectively frame the scope and complexity of the data migration project
- The solutions partner's ability to design and propose a feasible, viable solution
- The solution's partners ability to implement the solution and achieve a successful migration
- The solutions partner's ability to demonstrate their strategies and abilities in both quality control and post-migration support
- The solutions partner's ability to design mapping documents that retain the historical source data relationships

- The solutions partner's ability to structure testing protocols and the means for risk mitigation for the data migration

You may upload a **maximum of four files** for this submission. 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 view-access to your specific reviewer. If this is not possible, we recommend downloading the content as one of our accepted file formats. If you use a third-party software tool for project management and/or change management (i.e. monday.com, Asana, Zoho) you should export the plan in full to ensure your reviewer has access to the complete artifact. The following file formats are accepted: .csv .doc .docx .pdf .gif .jpg .png .ppt .pptx .xls .xlsx .zip

Prompt 2: Video Case Study

Video Upload

This video is an opportunity to speak directly to HubSpot's subject-matter experts and highlight your success in navigating a tricky migration.

Note: This engagement should not be the same one referenced in Item 1.

Select one of your prior migration experiences that meets ALL of the following criteria:
- Multiple sources of truth with conflicting data that needs to be reconciled and cleaned before import (for example, merging two instances of Salesforce and an instance of Zoho into a unified HubSpot system) OR a use-case where a long-time Marketing Hub customer has added Sales and/or Service Hub to their suite (for example, moving a Salesforce instance into Sales Hub for an active Marketing Hub customer).
- A need to maintain complex historical source relationships upon import (for example, many-to-many contact and company hierarchies; many-to-many activities and deal associations to contacts and companies)
- A delta migration or rollback required as a part of the process
- Lack of clarity from the customer about how to improve their existing processes beyond moving to a single platform

Your video should include the following information:
- Business context and background for the current state of the data to be migrated

- How the solutions partner determined the right data to bring into HubSpot and where to store it—including recommendations to the customer for mapping, cleaning, merging, or deleting the source data

- Description of how the solutions partner chose to import the data and why that choice was right for the customer

- An overview of the processes used to extract the data from the original source, including the mechanism used (for example, APIs; native system export tool) and how the data was cleaned in advance of the load—calling out any automations leveraged to support this

- An explanation as to why a delta migration or rollback was necessary in the context of this project and how that impacted the overall approach

- How the migration helped to optimize the customer's existing processes, including any relevant success metrics or performance indicators

In addition, solutions partners are asked to provide the following information regarding the project being submitted:
- ☐ Name of prior system(s)
- ☐ Number of source/legacy systems
- ☐ Mechanism for migration (for example, native import tools, marketplace apps, APIs, etc.)
- ☐ Number of total records
- ☐ Number of objects migrated
- ☐ Engagement start date
- ☐ Engagement end date
- ☐ Customer company size
- ☐ Seat count/number of users
- ☐ Marketing Hub product tier (if part of the migration)
- ☐ Sales Hub product tier (if part of the migration)
- ☐ Service Hub product tier (if part of the migration)

Submissions are reviewed for the following:
- The solutions partner's ability to explain their data evaluation process for handling source data
- The solutions partner's ability to apply their data evaluation to the specific customer provided and how they determined what to load, clean, merge, and/or delete from the source data
- The solutions partner's ability to explain their process for cleaning source data, including if/where automation played a role
- The solutions partner's ability to demonstrate their strategy for delta migrations and/or rollbacks

- The solutions partner's ability to optimize customer business processes through a data migration

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

Prompts 3 & 4: Customer Reference

Customer Contact Upload

Please provide reference information for one point of contact at each of your selected customers in this round of the accreditation. Once contact information has been provided, HubSpot will solicit feedback from the individuals on the following domains:

- Strategy and consultation
- Data mapping and planning
- Migration execution

Note: While solutions partners are required to provide their customer's contact information before the Round One deadline, the customer is only required to submit their feedback form by the Round Two deadline.

It's your responsibility to ensure that your selected reference contacts complete the forms by the Round Two submission deadline. You're able to track the submission status of your references in the Submittable portal, and can also re-send the solicitation at any time by navigating to the Initial Form for this submission. References that remain incomplete by the deadline may result in your removal from the accreditation process.

4 ROUND TWO OF THE HUBSPOT DATA MIGRATION ACCREDITATION PROCESS

This round of the application process contains two distinct submission requests. Solutions partners start by offering their thoughts on "complexity" as it relates to data migration projects. Applicants will then complete a single practicum exercise regarding a fictional customer, Anagram Associates.

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: Written Prompt on "Complexity"

Short Form Written Answer

Solutions partners are asked to submit a written summary of their thoughts, perspective, and interpretation on "complexity" and how it relates to data migration projects and what a "complex" data migration project entails for their organization.

More specifically, for full consideration, solutions partners are asked to provide answers to the following questions within their response:
- How many systems indicate a complex data migration project?
- What volume of records indicates a complex data migration project?
- What types of data associations indicate a complex data migration project?
- What types of engagements are typical of complex data migration projects?
- What record types are typical of complex data migration projects?
- What business use-cases generally indicate a complex data migration project?

Submissions are reviewed for the following:
- The solutions partner's ability to communicate their understanding of complex data migration projects as it relates to the HubSpot CRM platform and HubSpot ecosystem.

Prompt 2: Fictional Customer Exercise

| Practicum Submission

For this exercise, solutions partners are tasked with preparing and submitting a practicum outlining their approach for a data migration project for a fictional customer, Anagram Associates.

After being provided contextual information, business requirements, and the source data set from the fictional project lead at Anagram Associates, the solutions partner is asked to provide the following information in their submission:

- An overview of next steps to migrate the properties/objects from the source data set
- An initial, high-level mapping document
- An itemized list of any outstanding questions regarding their requirements or current system

For each element of the ask from Anagram Associates, solutions partners are asked to provide the following information within the project being submitted:

- **Submission Table of Contents:** Identify where in the case study submission reviewers will find the required elements of the prompt. This acts as a road map for HubSpot's subject-matter expert reviewers and ensures the submission addresses all required components.

- **Overview of next steps:** Demonstrate a clear understanding of the progression of the migration project and that the solutions partner can customize their approach based on the customer's needs, including:
  - The recommended mechanism to facilitate the migration and why you selected this option (for example: via API, via a combination of API and marketplace apps, solely marketplace apps, etc)
  - The sequence of tasks, with named owners, and brief descriptions—including QA steps, information regarding sandboxing/sample migration steps, and information for scheduling/implementation scoped tactics.
  - The expected/estimated completion date(s) for cited tasks.
  - What, if anything, can't be accomplished in the customer's ask — and why.

- **High-Level Mapping Document:** Demonstrate technical competencies in creating and planning for the migration, including:
  - Clearly identified source and target fields indicating how the data will be migrated.
  - Articulation of what, if any, data needs to be cleaned, merged or de-duplicated.
  - Recommendations for how to clean, merge and/ or de-duplicate the data, including any automations or export processes that'll be used to support this recommendation.

- **Outstanding questions regarding requirements or current system:** Demonstrate proactive solutioning and technical competencies, including:
    - The specific list of questions for Anagram Associates.
    - An explanation into what information the solutions partner is looking for through these questions.
    - How the answers back from Anagram Associates would inform the project plan and/or how the partner plans to use this information.

5 ROUND THREE OF THE HUBSPOT DATA MIGRATION 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 with a HubSpot subject-matter expert (SME) who will ask you clarifying questions about your case study submissions. Not every applicant will be interviewed.

Note: Solutions partners should plan for a delivery lead and a technical lead/migration specialist to be in the interview, and it's understood that depending on the partner's organization structure, these two roles may be the same point of contact.

The person(s) in attendance at the interview should be able to discuss the following items fluently:

- The overall migration project strategy and approach, including how delivery may change depending on customer needs, legacy systems, sense of requirements, and more
- The technical competencies related to migration, including the mechanisms employed for migration projects (for example, data migration via API vs. marketplace apps), processes used to clean and reconcile data (including tools, automations, or other items involved), and delta migrations and/or rollbacks that have been performed
- Quality assurance and its operationalization, including the steps taken to ensure data migrations run smoothly, documented escalation pathways, and plans for customer support and/or post-migration rollout

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