Accreditation

Solutions Architecture Design

Partner Eligibility
- Organization has three full-time employees
- Delivered a minimum of two solutions architecture design projects within the last 12 months for customers meeting the project requirements
- All work & experience submitted for this accreditation completed by full-time employees of your organization
- Meets the HubSpot Academy certification prerequisites found in the “How It Works” section here
- Platinum, Diamond, or Elite tiered HubSpot solutions partner

Requirements for Projects
1. Option 1: Multi-Hub project, that included Sales or Service Hub Pro/Ent AND Operations Hub Pro or Ent (excluding Data Sync features)
   - Leveraging tools across these Hubs together to solve a business challenge or grow a customer with your solution
2. Option 2: Solution involving at least 3 of the following tools
   - Data modeling connected to sales or service pipelines
   - Workflow automation used for marketing and sales processes (not simply email nurture)
   - Custom Report Builder
   - (Optional, Recommended): Utilizing integration (process begins with, ends with or driven by integration data)
3. Option 3: Solution required customizing the CRM, including one of the following
   - Deploying UI extensibility features (Projects in ‘CRM Development’ tab)
   - Deploying custom CRM cards through an OAuth integrated application
   - Deploying a custom workflow extension that drives a CRM Process

Round 1 Checklist

Onboarding Methodology Showcase
- Executive Summary
- Customer needs/Challenges
- Customer Tech Stack
- Project Context
- High level description of solution
- Methodology
- Client workbooks
- Stakeholder call schedule and notes
- Project Plan
  - Project duration
  - Metrics

Solutions Design Profiles
- Select project that meets the 1 of 3 Solution requirements:
  1. User Solution
  2. Automation Solution
  3. Performance Reporting Solution
- Summary of Client Needs
- Solution Proposal
- Solution Specification

Customer Reference
- Provide reference information for a contact from the Item 1 customer.
- Ensure they are ready to provide feedback on:
  - Strategy, consultation, stakeholder management
  - Outcome-based solutions design
  - Overall technical ability
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Round 2 Checklist

Sales Proposal
- Upload video case study detailing an engagement for the last 12 months (25 min max) that includes:
  - Introduction + Project Summary (~2 min)
  - Customer Context (~5 mins)
  - Requirements Pushback (~5-8 mins)
  - End State (~2-5 mins)

Practicum Exercise
- Find the Practicum Scenario in Submittable and address the following areas:
  - Assumptions and their impact on the solution design
  - Solution design specifications
  - Outstanding questions for the customer

PLEASE NOTE
Judges for Round 1 and Round 2 may be different. When submitting Round 2 materials, make sure to be thorough and assume judges do not have prior context of your Round 1 submission.