HubSpot Partner Tiers Program

Guidelines and FAQs regarding HubSpot's Partner Tiers Program

Last Updated: January 2015

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Then and now...

When we launched the HubSpot Partner tiers program in 2011, our mission was to create a system that recognized and rewarded Partners that grew their own client portfolio by successfully selling the HubSpot software. Since then, we've welcomed over 300 agencies into the tiers program.

2011 Partner Badge

The current (old) tiers model

Up until February 2015, tiers will be measured based on **all-time sold MRR** and **average client CHI** or **average client age in days**. Based on that criteria, tier levels are calculated based on the below thresholds:

Tier Level	All-time Sold MRR	Average Client CHI*	Average Client Age in Days*
Silver	$2,500	80	300
Gold	$4,500	100	500
Platinum	$15,000	120	750
Diamond	$50,000	140	1,200

*Only one of these criteria needs to be fulfilled in order to maintain tier level

Then and now...

Today, we understand that long-term agency success with inbound marketing isn't just about the sheer number of customers you sell. Instead, it's about effectively managing the clients you acquire to help your agency to grow, scale and sell more inbound marketing retainers.

2015 Partner Badge

The new tiers model

Given the aforementioned changes to how we measure lasting HubSpot Partner success, the new tiers model will rely on fulfilling and maintaining two metrics in order to reach your tier level: **managed MRR** and a **trailing 12-month sold MRR** requirement. We'll explain what each metric is and how it's calculated throughout the following pages. Being said, here are the new thresholds for tiers with these two metrics:

Tier Level	Managed MRR	12-month sold MRR
Silver	$2,500	$625
Gold	$4,500	$1,125
Platinum	$15,000	$3,750
Diamond	$40,000	$10,000

What is Managed MRR?

What is managed MRR?

Managed MRR credit is given when a client portal has a ***minimum CHI* level of 120*** and at least ***one actively engaged partner employee user registered in that portal.*** We'll explain what these are on the next two pages.

Engaged User

120 CHI

Managed MRR: What is CHI?

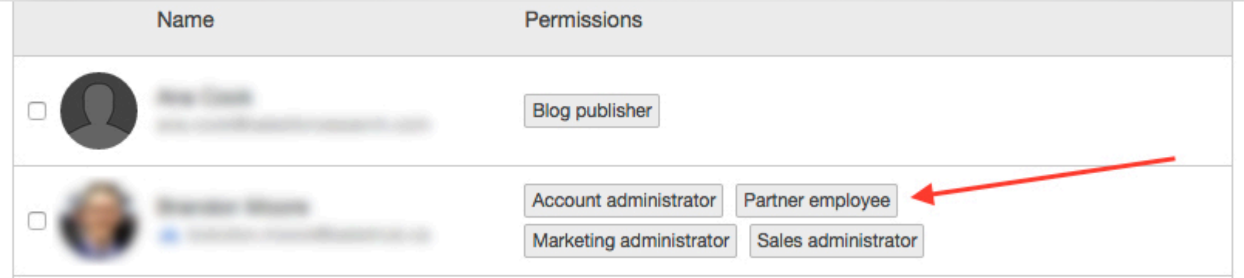
At HubSpot we build marketing and sales tools that support our customers in achieving their business goals. A big part of achieving results involves using the suite of tools regularly. HubSpot passively measures and consolidates product usage behaviors (ex. publishing blog posts, adding contacts, etc) into what we call a customer CHI Score (**Customer Happiness Index**).

HubSpot finds these scores to highly correlated with customer happiness and retention and use them as a directional measure of overall customer success. Use your HubSpot tools regularly, score high CHI, and enjoy the achievement of your marketing and sales goals.

What is an actively engaged partner employee user?

Your employees that are managing your clients' accounts should be correctly registered in both your portal and your clients'. You'll need to:

1. Make sure that your Partner Approved Email Domain matches the email domain of your employees (i.e. www.youragency.com matches bob@youragency.com). Partner Approved Email Domain will appear in the new dashboard launching in February 2015. By default, it's whatever your primary website domain is. If you'd like to know what it is before the new dashboard launches, please contact abiedrzycki@hubspot.com.
2. Make sure the employees that are actively working in client portals are marked as "Partner Employee" on their user profile in your agency's own HubSpot portal Settings (see below):



What is 12-Month Sold MRR?

What is 12-month sold MRR?

In addition to managed MRR, we'll also be using a trailing **12-month sales quota** to calculate tier status. This is simply the amount of MRR your agency has sold within the past 12 months that has not churned.

Where will I see my MRR Data?

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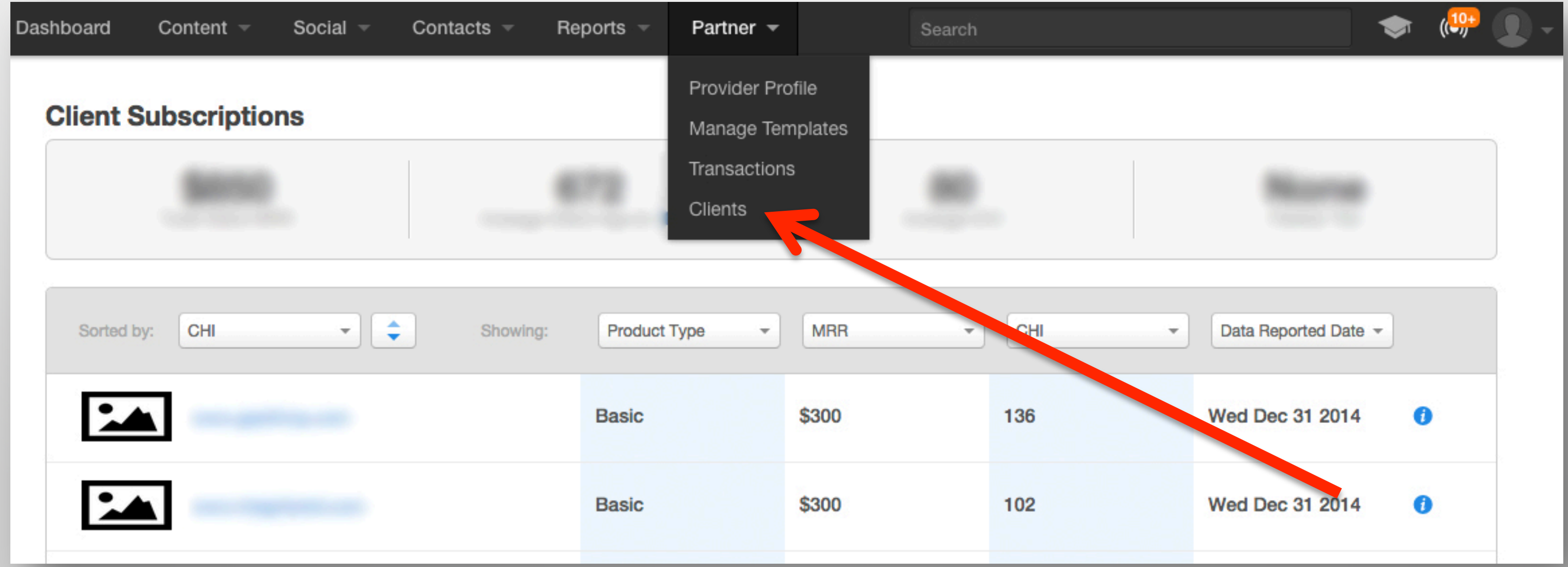
In February 2015, we'll launch a new Partner Client Dashboard in your HubSpot portal, accessed from **Partner >> Clients.**



What the new dashboard will show

Managed MRR:

- Your total managed MRR credit
- The individual MRR credit you’re receiving from each of your clients
- The individual CHI levels of each client account on your Partner Client dashboard
- Your current “Partner Approved Email Domain”

Sold MRR:

- Your total 12-month sold MRR credit
- The individual 12-month sold MRR credit you’re receiving from eligible clients
- All other individual sold portals (old than 12 months)
- Your calculated tier using the new model

Creating an Action Plan

What if I Descend a Tier?

With a new model, there’s bound to be some moving and shaking. If you descend a tier level once the new model rolls out in February 2015 when the new dashboard launches, never fear. Here’s what you need to know:

1. There will be a **6-month grandfathering period** from February 2015 to August 2015.
2. During this time, Partners who are calculated to descend a tier level will retain their existing level and benefits.
3. The August 2015 tiers run will be the first run of the new model that will finalize the official tier status for all HubSpot Partners.

Creating an action plan

If you've descended a tier and need a clear action plan for the grandfathering period, you should first understand which metrics you need to improve on: **Managed MRR** or **12 Month Sold MRR**.

As mentioned, these numbers will appear in your HubSpot Partner Client dashboard when the new interface launches in February 2015. We'll also have an office hours webinar to walk through the new model and dashboard.

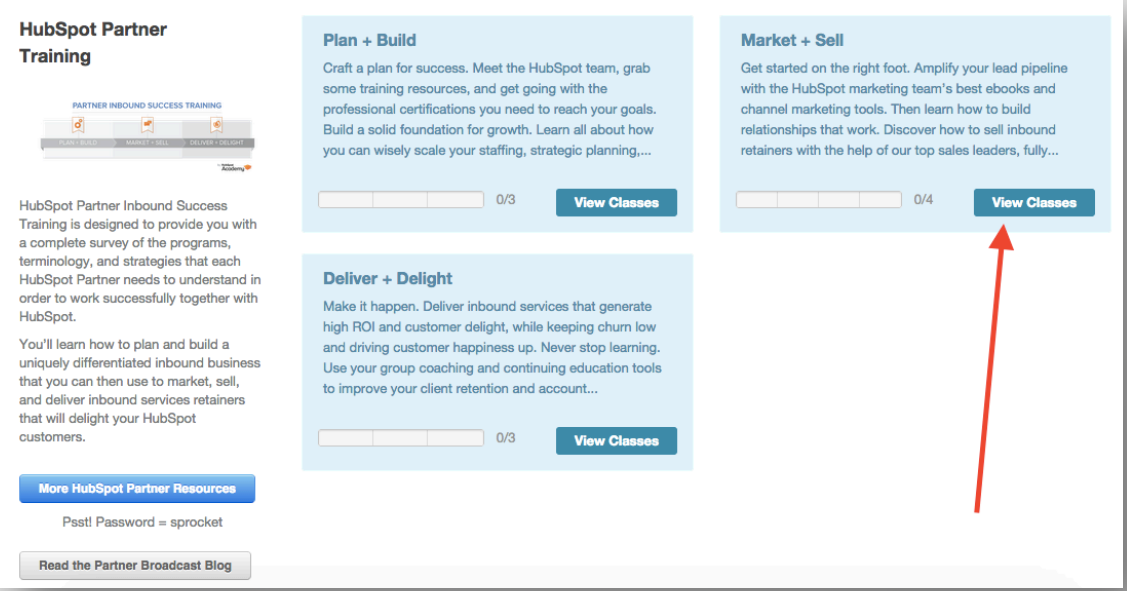
Tips for Improving Your Managed MRR

Here are some tips to ensure you're getting the right credit for managed MRR:

1. Make sure that your Partner Approved Email Domain matches the email domain of your employees (i.e. www.youragency.com matches bob@youragency.com). Partner Approved Email Domain will appear in the new dashboard launching in February 2015. By default, it's whatever your primary website domain is. If you'd like to know what it is before the new dashboard launches, please contact abiedrzycki@hubspot.com.
2. Make sure the employees that are actively working in client portals are marked as "Partner Employee" on their user profile in your own HubSpot portal Settings.
3. Review the individual CHI levels of your client accounts. You won't get credit for managed MRR unless your client's CHI level is at least 120.

Tips for Improving Your Sold MRR

1. Conduct a pipeline review with your HubSpot Channel Account Manager
2. View the three sales training videos in your Partner academy training under the Market and Sell courses:
    1. Research & Connect
    2. Explore & Strategize
    3. Present & Close



FAQs

Q: How often will tiers be run with the new model?

A: Tiers will be run monthly using the new model

Q: How will I know my tier level using the new model?

A: In mid-February, we will be launching a new client dashboard within your HubSpot portal. All the information on tier level and MRR metrics will be visible in this dashboard.

Q: If I descend a tier during the grandfathering period, will I be demoted?

A: No, you cannot lose your tier throughout the grandfathering period.

Q: If I descend a tier after the grandfathering period expires, how will I be demoted?

A: As it has always been, you will have 3 months to regain your tier status before demotion.

Have more questions? Send an email to abiedrzycki@hubspot.com

February Webinar: Tiers Office Hours

Before we launch the new dashboard that displays the new MRR metrics, we'll have an office hours in mid-February that will discuss the new tiers model, how it's calculated and answer any outstanding questions you may have. You'll be receiving an invite for the office hours webinar via email in the coming weeks.