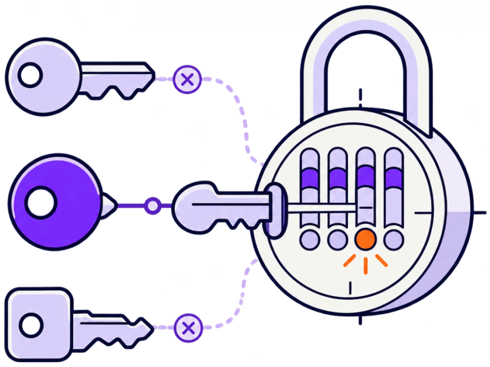
Briefing a HubSpot partner: the questions before you sign

Twelve questions, three clauses, and the warning signs in the answers



Inside:

Why tier is the wrong first question · The four dimensions, part 1 · The four dimensions, part 2 · The question catalogue, questions 1 to 6

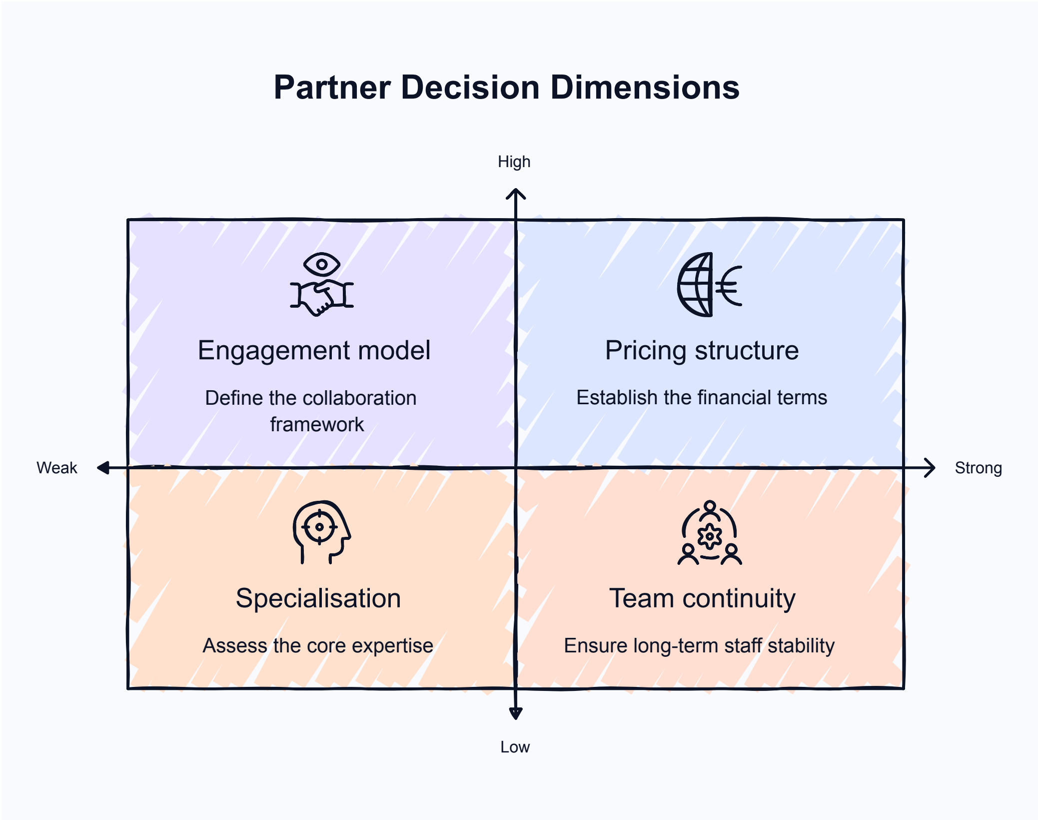
14 PAGES TO PRINT AND FILL IN · 3 DIAGRAMS

AN OPERATING PARTNER FOR REVENUE SYSTEMS · HUBSPOT DIAMOND PARTNER

Free 60-minute Launchpad thesalesplaybook.com/book-a-call

Contents

Every page stands on its own. If you are short on time, jump straight to the step where it is stuck at your end.



SKETCH · FOUR DIMENSIONS

What this is for, and a disclosure first

The disclosure first, because it decides whether this document is worth anything: SalesPlaybook is a HubSpot partner. A selection guide written by someone who is up for selection is only useful if it also names the cases where a different partner is the better choice. Those cases are on page 12, concrete and without hedging.

The catalogue applies to **any** partner, including none of the ones you have heard of. It contains no comparison of named agencies and no recommendation.

What it solves

Most selection conversations circle around references, tier level and price. All three say little about how a project actually runs. What does say something is twelve questions about working method, scope and behaviour when things break, plus the answer patterns that get expensive later.

When it helps

In the phase between two and five conversations, when every provider sounds competent and the decision is about to come down to price.

How to use it

Ask the twelve questions in the conversation. Do not send them in advance in writing. Answered in writing, every answer sounds good. In conversation you can tell whether an answer is prepared or lived, and that is the information.

Time required: the twelve questions take about 30 minutes per provider. They do not replace the technical conversation, they come after it.

And the question that comes before the partner choice. Manuel Hartmann, founder and CEO of SalesPlaybook, writes in his LinkedIn newsletter *Diary Of A CRO* that anyone introducing or switching a CRM should think less in tools and licence costs and more in coverage: marketing, sales, service, ideally with a bridge to finance and product. (Read the issue, in German)

That decides the partner choice too, not only the system choice. A partner who only masters the sales part is the right choice for a sales part and the wrong one for anything beyond it. Settle the scope before the selection meeting, not inside it.

NEXT DECISION

the selection seen from the partner programme

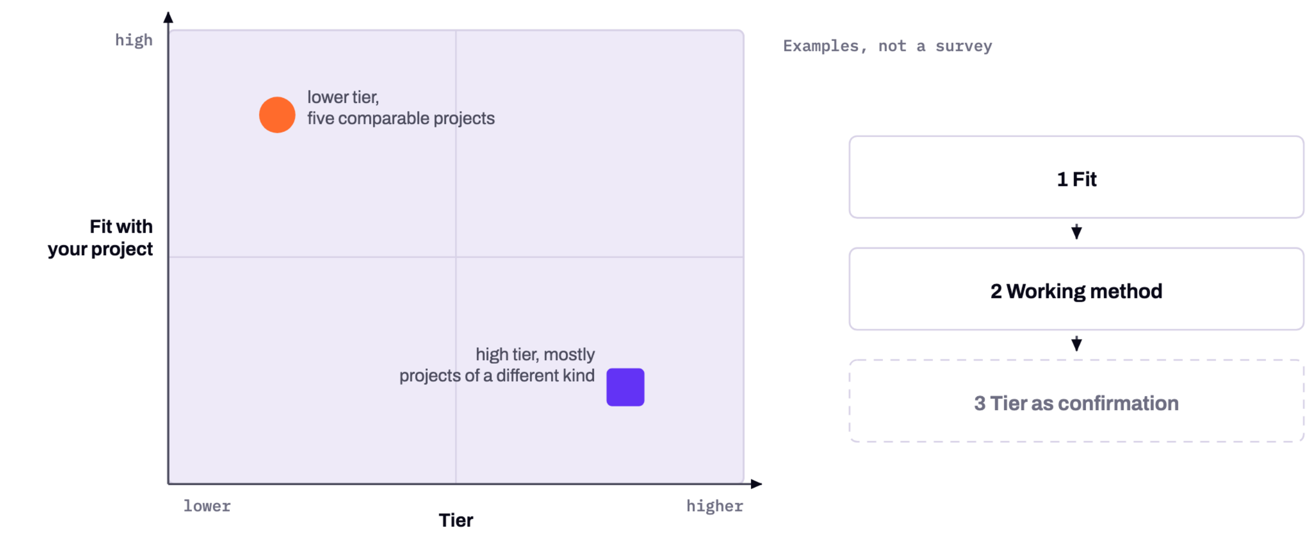
Why tier is the wrong first question

HubSpot's partner tiers essentially measure the volume of business a partner does with HubSpot and the retention behind it. That is a real signal: it shows a partner works in the ecosystem continuously rather than occasionally.

EVIDENCE [what the tier actually means]

What it does not measure is fit with your project.

GRAPHIC G1



WHAT TIER SHOWS	WHAT IT DOES NOT SHOW
Revenue volume with HubSpot	whether that volume comes from projects like yours
Client retention over time	who specifically will work on your account
Certifications in the team	whether the certified person is on your project
Continuous presence in the ecosystem	how the partner behaves when something breaks

A high tier at a partner who mostly does Marketing Hub work for e-commerce says little about a B2B Sales Hub migration. A lower tier at a partner with five comparable migrations says more.

The order that holds: fit first, working method second, tier third as confirmation. Not tier as a filter, because that reduces the field on a dimension unrelated to your project.

And the case where tier genuinely decides: when a project needs access to beta features, direct escalation paths into HubSpot, or specialists for rare modules. Then tier is an access criterion, not a reference.

Source · HubSpot's Solutions Directory · ecosystem.hubspot.com
Source · how the tiers are awarded · ecosystem.hubspot.com

> GO DEEPER
>
> partner comparison in DACH, beyond the tier

The four dimensions, part 1

Four dimensions carry a partner decision. Each has a pattern that separates a strong answer from a weak one.

GRAPHIC G2

The weakest dimension decides. Four mediocre answers are a different situation from three strong ones and one weak one.

Dimension 1 · Engagement model

The question behind it: does the partner work to a defined scope, or on request?

STRONG ANSWER	WEAK ANSWER
Scope is set before kickoff, with named outcomes and a process for changes	"We will take a look and come back with a proposal"
A fixed rhythm with fixed slots	"We are flexible, reach out any time"
Clear what gets handed over at the end and who owns it	Handover treated as self-evident

Why flexibility is a warning sign here rather than a strength: a project without a fixed scope has no point at which it is finished. The invoice grows with the duration, and the duration grows with every good idea.

Dimension 2 · Pricing structure

The question behind it: what is being paid for, and what happens when effort exceeds the estimate?

STRONG ANSWER	WEAK ANSWER
Fixed price for a fixed scope, with a named process for changes	Day rate with no ceiling
Ongoing costs after the project are quantified	"After that you will barely need us"
What is excluded gets stated unprompted	The exclusion appears only in the fine print

The most revealing follow-up in this dimension: *"What is not included?"* A provider who names three concrete items has thought the scope through. A provider who answers "essentially everything relevant is" has not.

The four dimensions, part 2

Dimension 3 · Specialisation

The question behind it: has the partner done your kind of project, or your kind of client?

Those are two different things, and confusing them is expensive. A partner with many clients of your size and sector but no comparable migration learns on your project. A partner with five comparable migrations in other sectors brings the mechanics and only has to learn the context.

The mechanics are the transferable part. Sector knowledge can be built in two conversations. The experience of what a data migration fails on cannot.

STRONG ANSWER	WEAK ANSWER
Names concrete failure modes from comparable projects	Names sectors and logos
Says what went wrong on the last similar project	"It all went smoothly"
Can justify the order of the steps	Lists the steps in the order of the proposal

Dimension 4 · Team continuity

The question behind it: will the people in the selection conversation be the people on the project?

This is the dimension least examined during selection and most painful during delivery. Whoever convinces in the sales meeting is not necessarily whoever does the work.

STRONG ANSWER	WEAK ANSWER
Names people and says who does what	"We will assemble a team"
States what happens if someone leaves or is unavailable	The question has evidently never been asked
The delivery lead is in the selection meeting	Sales only

The question catalogue, questions 1 to 6

The right-hand column is the answer pattern that gets expensive later. It is not a disqualifier, it is the point at which you probe.

#	QUESTION	WARNING SIGN IN THE ANSWER
1	Who specifically works on our project, by name and role?	No names, only roles
2	What comparable project did you run most recently, and what went wrong on it?	"It went smoothly." Every project has a place where it snagged
3	What is not included in the scope?	A general answer instead of three concrete items
4	How does a scope change work, formally?	"We always find a way"
5	Which automations and routing rules from our legacy system will you rebuild, and which not?	The question gets handed back with no process named for settling it
6	Who decides on your side when a detail question comes up?	A group instead of a person

On question 2, because it reveals the most: a provider with no answer to what went wrong has either run few projects or has not reviewed them. The answer does not have to be dramatic. It has to be concrete.

On question 5, because it addresses the most expensive gap: this is the question about process pieces that count as obviously included. Covered in full on page 9.

The question catalogue, questions 7 to 12

#	QUESTION	WARNING SIGN IN THE ANSWER
7	How much internal time do we have to contribute, in person-days?	A number well under ten days, or no number at all
8	What happens after go-live, and what does it cost?	"Then it runs." Every system needs maintenance
9	Who owns the configuration, documentation and data model after the project ends?	The question was not expected
10	How do we hear about a risk before it materialises?	No process, just "we will let you know"
11	What do you do if a process fails after go-live?	The answer starts with the contract
12	What kind of project are you not the right choice for?	"We cover pretty much everything"

Question 7 is the one most often not asked at all. A provider who cannot name a number has not thought the internal effort through, and it turns up anyway, just unplanned. A very low number is equally a signal: it gets corrected during the project, and by then the time is not available.

Question 11 is the most important in the catalogue. It gets a full page on page 11.

Question 12 separates most sharply. A provider who cannot name a limit to their offering either has none, which is implausible, or will not say it. Either way it is information.

The scope question: what counts as obviously included

In migration projects, part of the scope routinely counts as obviously included without being recorded as its own contractual item. Typically automations plus forwarding and routing rules that ran silently before the switch and have to be rebuilt after it.

If exactly that part breaks at go-live, it hits operations immediately: processes that ran by themselves have to be handled manually, often for several weeks.

Why both sides miss it. A working automation is invisible: it has no owner, because it creates no work, and it appears in no process description, because it is not a process but a setting. The client does not mention it because they have forgotten it. The partner does not ask because they cannot see it.

What to do before signing

Build a list, jointly, from four sources:

SOURCE	WHAT IS IN THERE
The automation overview in the legacy system	the active rules, usually more than expected
Mailboxes that receive something automatically	notifications whose sender nobody can identify
Asking your own team: what happens by itself today?	the rules the system does not track as rules
Forwarding at domain or mailbox level	sits outside the CRM and gets forgotten regularly

Then one decision per row, in writing: comes across, gets rebuilt, gets switched off. That list belongs as an annex to the contract, not in a meeting note.

The effort is one to two hours. The effort for the alternative is weeks of manual work, and it lands at the worst possible moment, immediately after the cutover.

Pulling this list on your own is the hardest part.

If you do not know the automations you already run, you cannot negotiate the boundary. In a free 60-minute Launchpad we go through your situation, you get a read on what kind of partner fits, and we tell you when it is not us. Page 12 names four cases where that is the answer.

thesalesplaybook.com/book-a-call · no pitch, an honest assessment

> GO DEEPER
>
> which services are usually in scope

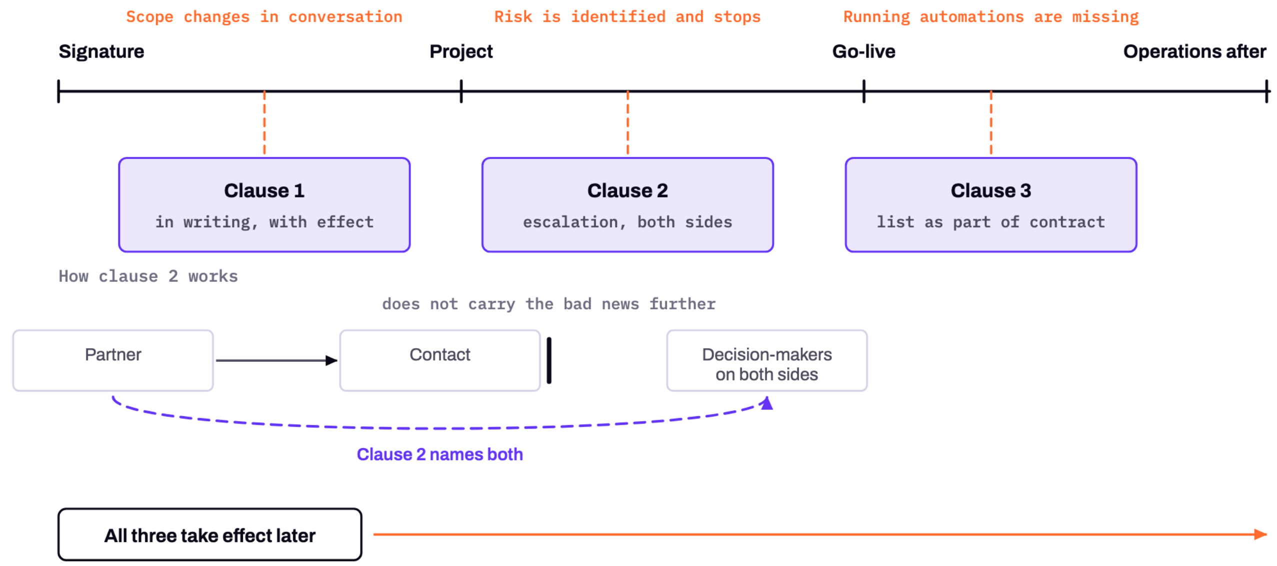
NEXT DECISION

onboarding direct or through a partner

Three clauses that belong in any scope documentation

Internal reviews of these cases on the provider side almost always reach the same finding: not bad faith, but weak project governance. Scope changes discussed verbally and never written down, risks not formally escalated to decision-makers on both sides.

GRAPHIC G3



Clause 1 · Scope changes in writing, with effect

> Any change to scope is recorded in writing, with its effect on timeline, price and effort for both sides. A change discussed only verbally is deemed not agreed.

What it prevents: the situation where both sides remember the same conversation and a different outcome. The last sentence is the operative one. Without it, the clause is a suggestion.

Clause 2 · Risk escalation, both sides, by name

> Where either side identifies a risk to timeline, scope or operations, it is reported within [period] to the named decision-makers on both sides, in writing.

The core is "both sides." In practice the partner escalates to their contact, and it stops there, because the contact does not carry the bad news further. A clause naming both decision-makers routes around that.

Clause 3 · Handover of running automations

> The list of existing automations, forwarding and routing rules forms part of the contract. For each entry it records whether it is carried over, rebuilt or switched off, and who owns it.

This is the clause that closes the case on page 9, and it is the only one of the three that requires concrete preparation. Which is exactly why it is the one most often left out.

On all three: they are not signals of distrust. A partner who refuses them is telling you something about how they work. A partner who proposes them unprompted is telling you something too.

The escalation question

Question 11 in the catalogue: *What do you do if a process fails after go-live?*

EVIDENCE [mistakes that turn six-figure in operation]

It is the most important one, because it tests the only behaviour that cannot be simulated in a selection meeting, and because the case will occur.

The pattern that damages the relationship:

As soon as the problem is visible, the conversation shifts to what was contractually agreed and what was not. To the provider that feels like necessary clarification. To the client it feels like a change of subject, away from the outage and onto a detail question they did not ask.

The sentence that tells you it is happening, in substance, from the client's side: *"I get the feeling we are moving away from the actual problem onto a side issue."*

The order that holds:

> Question one: is the problem understood, and what do we do now? Question two: what was contractually agreed?

Question two is legitimate and it does get asked. It just does not get asked first. If responsibility gets discussed first, the trust damage has usually already happened, regardless of how justified the contractual point actually is.

What a good answer sounds like in the selection meeting: the provider first describes how operations continue, names a response time, and only then says how the cost question gets settled. An answer that starts with the contract is the warning sign.

And the self-check, because this is not one-directional: as the client it is also the faster order. Anyone who talks about fault first after an outage slows the fix down.

When a different partner is the better choice

This page belongs in this document, because without it the whole thing would be a brochure. The cases below are concrete and apply to SalesPlaybook.

A specialist independent consultant is the better choice when the need is a clearly bounded technical item: one integration, one reporting build, migrating a single object type. An agency brings structure to that which raises the cost without improving the outcome.

A larger, internationally staffed agency is the better choice when the project spans several countries with their own legal regimes and language versions, or when it has to serve a group structure with its own procurement and security requirements. Those are capabilities you either have or do not.

An agency focused on Marketing Hub is the better choice when the core of the project is content production, campaign operations or websites. SalesPlaybook's focus is the revenue side: pipeline generation, CRM processes, enablement.

No partner at all is the right choice when it has not yet been settled internally what the sales process should look like. A partner can implement a process and help sharpen it. They cannot define it on the company's behalf, and a project that starts that way gets expensive and gets done twice.

And the case where the answer is "later": when internal readiness is low because data, processes and decision paths are not in place. Then the preparation comes first, and it can happen internally.

NEXT DECISION

[when fractional leadership is the better choice]

Checklist for the selection meeting

- ☐ Fit assessed before looking at tier level
- ☐ Four dimensions rated: engagement model, pricing, specialisation, team continuity
- ☐ Twelve questions asked in conversation, not sent in writing beforehand
- ☐ Question 2 produced a concrete failure mode, not "it went smoothly"
- ☐ Question 3 produced three concrete exclusions
- ☐ Question 7 produced a number in person-days
- ☐ Question 11 produced an answer that did not start with the contract
- ☐ Question 12 produced a genuine limit
- ☐ List of existing automations built jointly
- ☐ Each entry decided: carry over, rebuild, switch off
- ☐ Clause 1 agreed: scope changes in writing, verbal does not count
- ☐ Clause 2 agreed: risk escalation both sides, with period and names
- ☐ Clause 3 agreed: automation list as part of the contract
- ☐ Delivery lead known by name, not just sales
- ☐ Checked whether any case on page 12 applies

If three or more boxes are open, the decision is not prepared. That is not a reason to postpone it, but it is a reason to settle the open points before signing rather than after.

Comparing three providers

Run the list once per provider and note beside it what you actually heard. Not a score, but the sentence that stood out.

	PROVIDER A	PROVIDER B	PROVIDER C
Failure mode on question 2			
Exclusions on question 3			
Person-days on question 7			
First sentence on question 11			
Limit named on question 12			

Why sentences rather than scores: a score cannot be justified two weeks later, a sentence can. And the row on question 11 carries the deciding information of this whole catalogue: does the answer start with operations or with the contract.

What SalesPlaybook does, and does not

What we do: we design, build and operate Pipeline Generation, HubSpot CRM and Revenue Enablement as one connected revenue system, for B2B software and SaaS companies in the DACH region. Scope is agreed before kickoff. Process instead of additional hires.

What we do not do: content production as the main deliverable, multilingual group rollouts across several legal regimes, and projects where the sales process has not been decided. For the first two there are better addresses. For the third, the preparation comes first.

Our tier: SalesPlaybook is a HubSpot Diamond Partner. By the logic of page 3, that is a confirmation rather than a selection criterion. Test us against the twelve questions like anyone else.

The next step

In a **free 60-minute Launchpad** we go through your situation and tell you whether a partner is the right move at all, what kind of partner fits, and what should be settled internally first. Including when the answer is that it is not us.

Free, 60 minutes, no pitch, an honest assessment of whether there is a fit.

WHO YOU WILL MEET IN THE LAUNCHPAD

Erik Steffen

HubSpot GTM Lead · SalesPlaybook

Book your free 60-minute Launchpad → thesalesplaybook.com/book-a-call

Sources quoted

The statements quoted verbatim come from the public LinkedIn newsletter *Diary Of A CRO* by Manuel Hartmann, founder and CEO of SalesPlaybook (https://www.linkedin.com/newsletters/diary-of-a-cro-7463115808336986112/). The issues are in German:

- "Blind bis zum Deal und nach dem Closing: Wieso ein CRM 2026 mehr leisten muss" · https://de.linkedin.com/pulse/blind-bis-zum-deal-und-nach-dem-closing-wieso-ein-crm-manuel-hartmann-zsbhe

Objections quoted verbatim come from our own project conversations and are anonymised: no client name, no industry, no figures.

SalesPlaybook designs, builds and operates Pipeline Generation, HubSpot CRM and Revenue Enablement as one connected revenue system. An operating partner for revenue systems, HubSpot Diamond Partner, working with B2B software and SaaS companies in the DACH region.

A workbook by SalesPlaybook AG Free 60-minute Launchpad: thesalesplaybook.com/book-a-call