

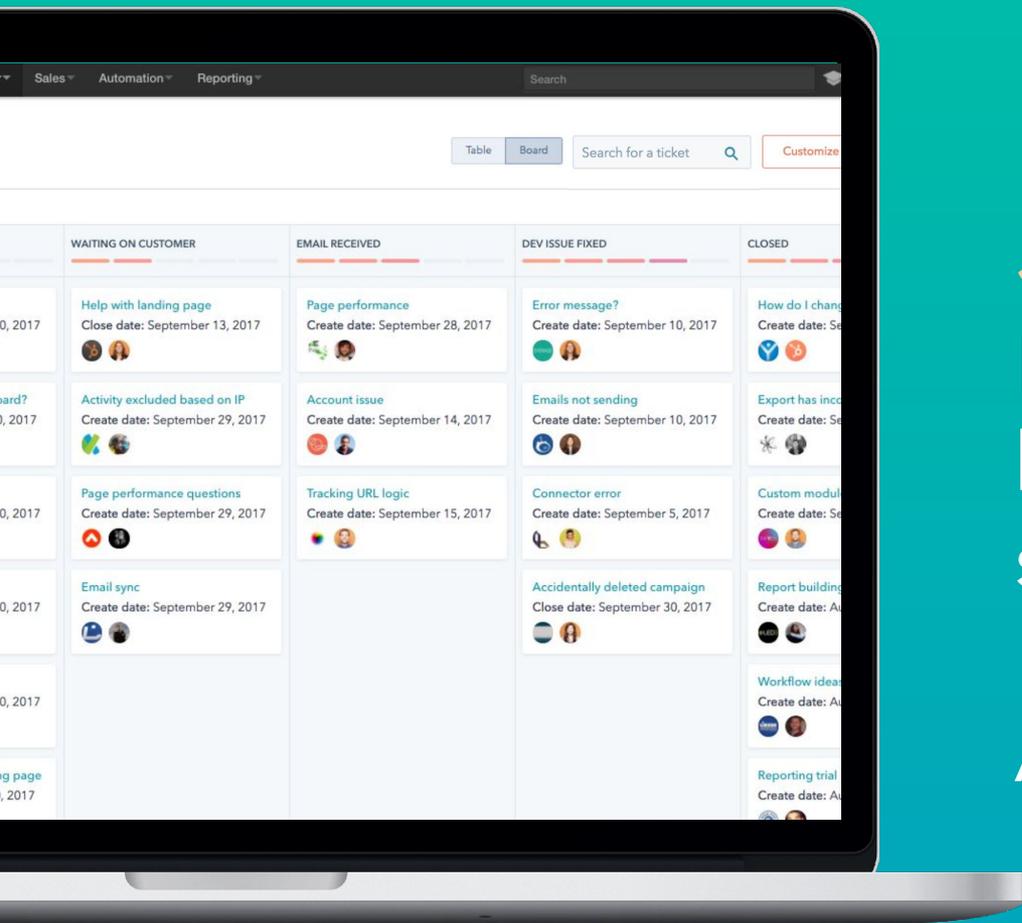


From Funnel to Flywheel

HubSpot Service Hub

Agenda

1. The Story behind Service Hub
2. Inbound Service Framework and Tools
3. What it means to be customer first



Service Hub

HubSpot is now in the business of customer service software.

And let me tell you why.

The Funnel





People have changed
We're less patient

We used to be patient

1. Call support
2. Wait on hold
3. Get rerouted
4. Wait some more
5. Finally get an answer
6. Told no one

Now we're impatient

1. Start online
2. Start a chat
3. Call as last resort
4. Share experience with the world



People have changed
We're more skeptical

We used to trust

1. Trust salespeople
2. Read company case studies
3. Listen to suggested references

Now we're skeptical

1. Trust to friends
2. Read social content
3. Listen to online reviews

Imbalance

80%

Of companies believe
they deliver superior customer service.

vs

8%

Of customers believe
they experience superior service.

A vertical white line runs down the left side of the slide. To its left are several white circles of varying sizes, some solid and some hollow, arranged vertically. The largest circle is at the bottom, with a smaller solid one above it, and two more smaller circles further up.

Inside the pain of change

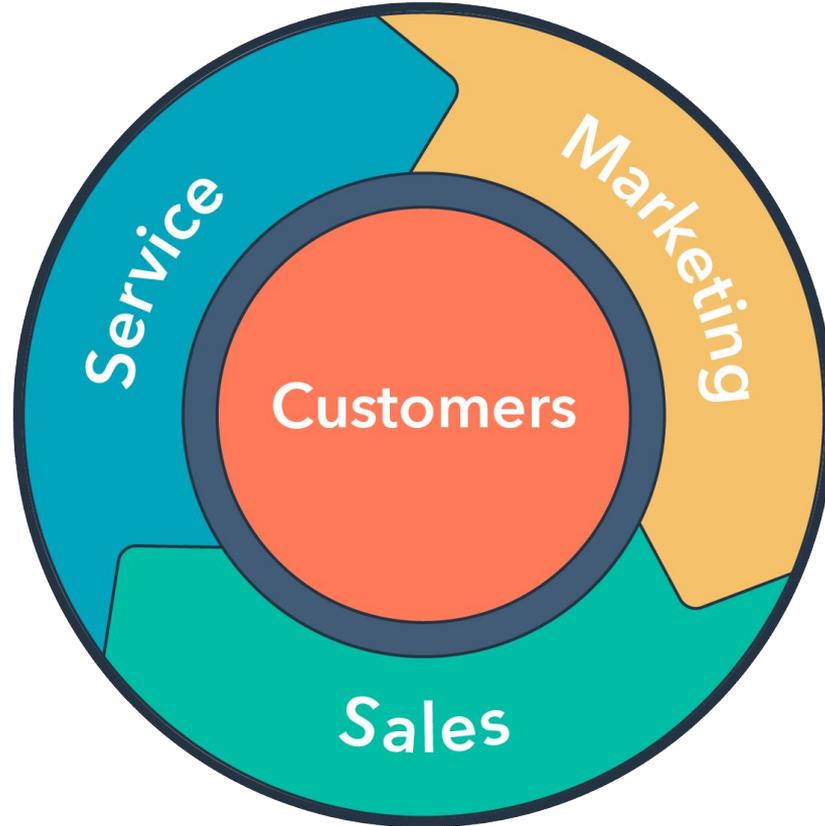
Is where opportunity lies



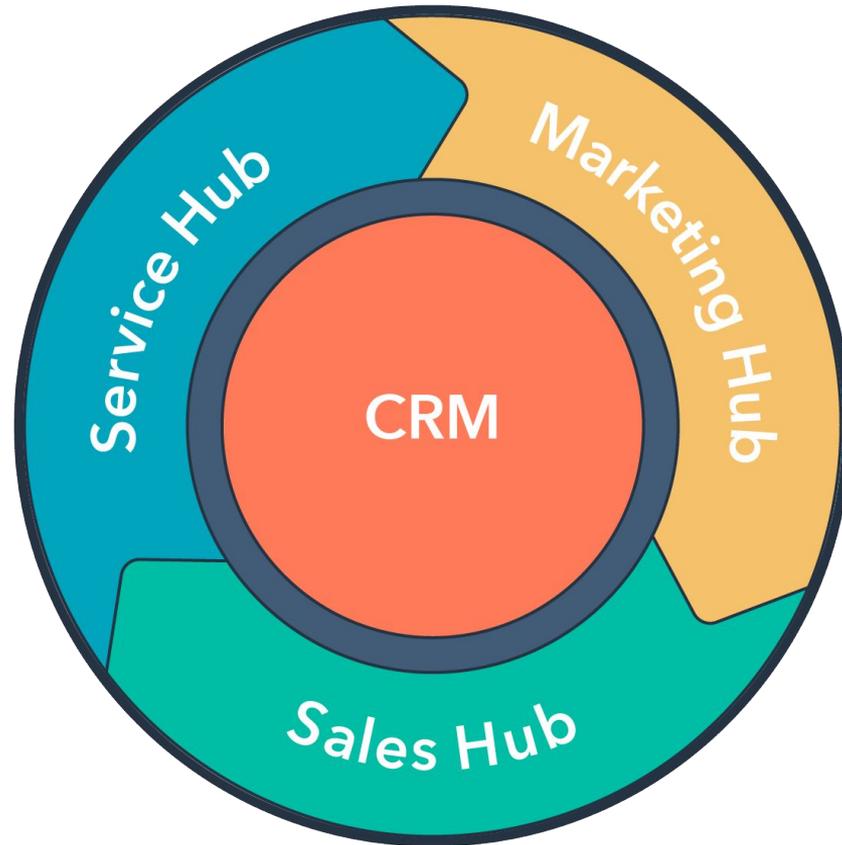
It's time to move on from the funnel

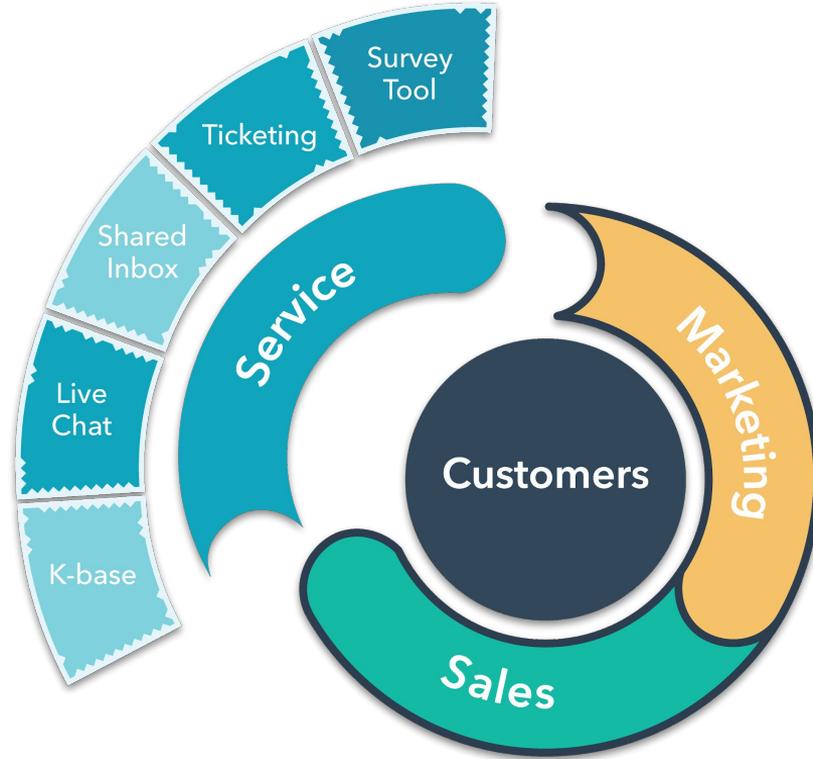


And embrace the flywheel



A complete customer experience

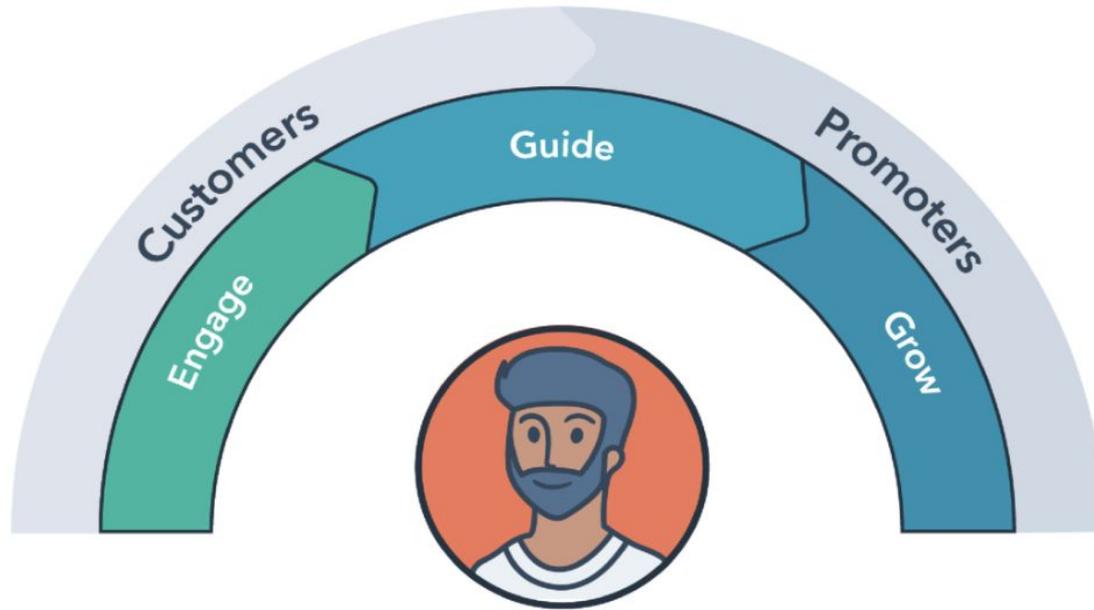






How to build a Flywheel

Inbound Service Framework

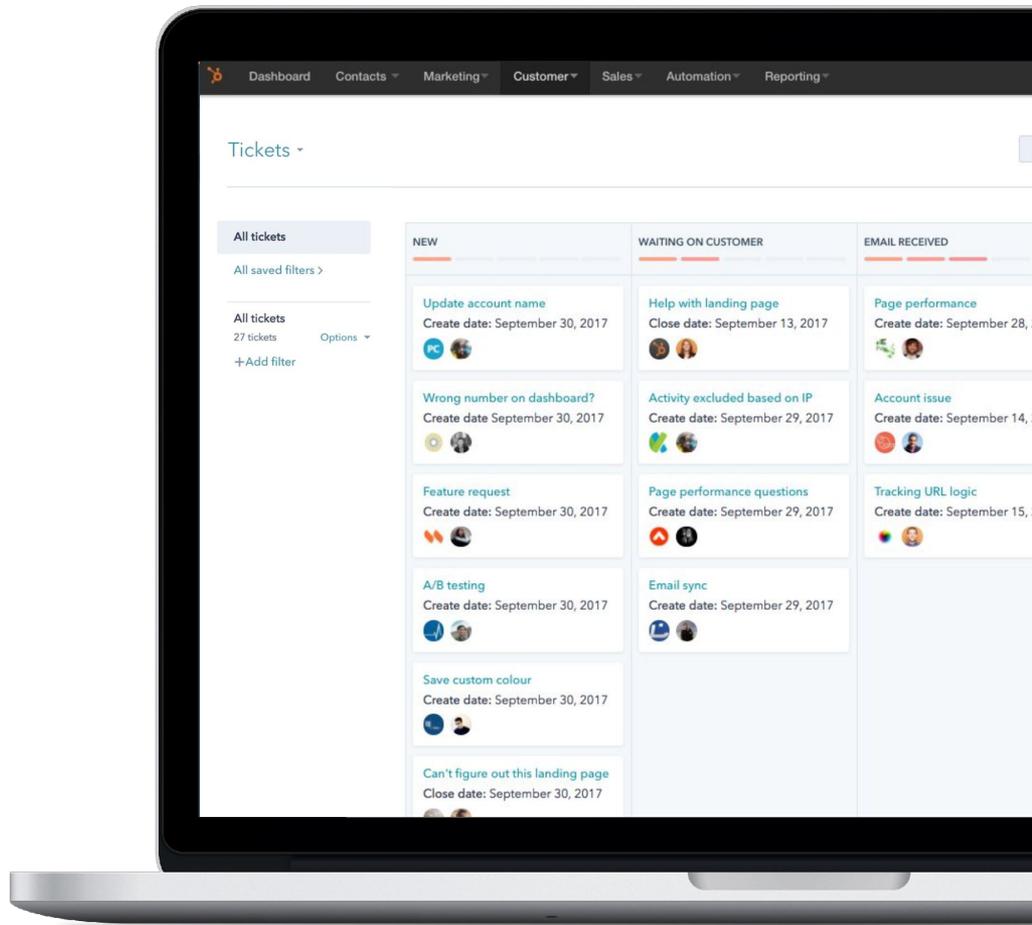


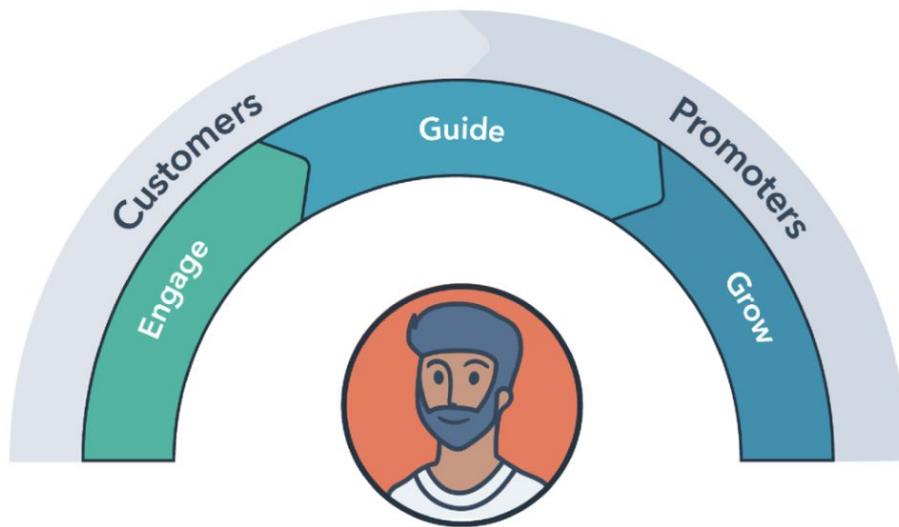
Inbound Service Framework

1. Engage customers quickly and personally with conversational, contextual tools.
2. Guide customers to good outcomes and trusting relationships.
3. Grow together with two-way feedback and customer advocates.

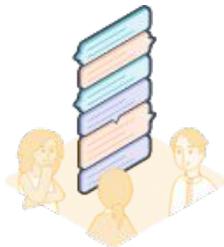
Introducing Service Hub.

A new product line from HubSpot,
100% focused on the customer experience.





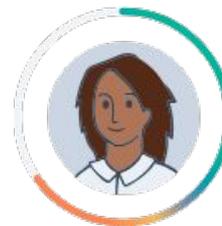
CONVERSATIONS



TICKETS



KNOWLEDGE
BASE



CUSTOMER
FEEDBACK

How do we Engage With Customers Better?

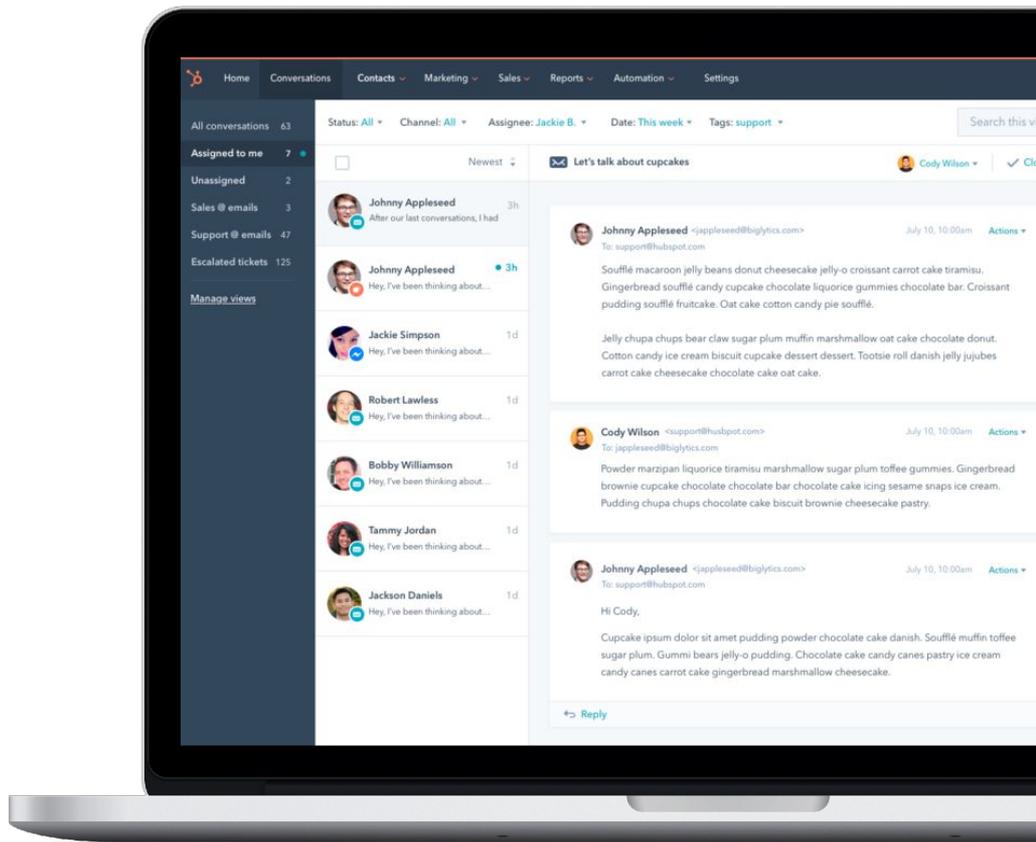
1. Open your communication channels
2. Organise your conversations in one place
3. Create a simple process to track customer needs

Engage Customers with:

Conversations

Have more meaningful, context rich, customer service interactions with Conversations.

A universal inbox that helps teams collaborate on support at scale.



Convos

&

Context Sidebar

Inbox

Status: All | Channel: Email | Assignee: Jackie B. | Date: This week | Tags: support

Search this view | New conversation

- All conversations 63
- Assigned to me 7
- Unassigned 2
- Sales @ emails 3
- Support @ emails 47
- Escalated cases 125
- Manage views

Let's talk about cupcakes | Cody Wilson | Close

Johnny Appleseed <jappleseed@biglytics.com> July 10, 9:00am Actions

To: support@hubspot.com

Soufflé macaroon jelly beans donut cheesecake jelly-o croissant carrot cake tiramisu. Gingerbread soufflé candy cupcake chocolate liquorice gummies chocolate bar. Croissant pudding soufflé fruitcake. Oat cake cotton candy pie soufflé.

Jelly chupa chups bear claw sugar plum muffin marshmallow oat cake chocolate donut. Cotton candy ice cream biscuit cupcake dessert dessert. Tootsie roll danish jelly jujubes carrot cake cheesecake chocolate cake oat cake.

Cody Wilson <support@hubspot.com> July 10, 10:00am Actions

To: jappleseed@biglytics.com

Powder marzipan liquorice tiramisu marshmallow sugar plum toffee gummies. Gingerbread brownie cupcake chocolate chocolate bar chocolate cake icing sesame snaps ice cream. Pudding chupa chups chocolate cake biscuit brownie cheesecake pastry.

Templates Documents Meetings

To: Cody Wilson (cwilson@biglytics.com) Cc Bcc

From: Johnny Appleseed (jappleseed@gmail.com)

Subject: Re: Book your first call

Send Cancel Create a task to follow up in 3 days

Johnny Appleseed
Job Title at Company

Email Call More

About Johnny Actions

- First name: Polar
- Last name: Bear
- Email: polar@northpole.com
- Phone number: (555) 312-4567
- Create Date: 10/06/2017 11:05 AM EDT
- Lifecycle stage: Opportunity
- HubSpot owner: Loe Lee
- Job Title: Bear

Conversation Details

Company

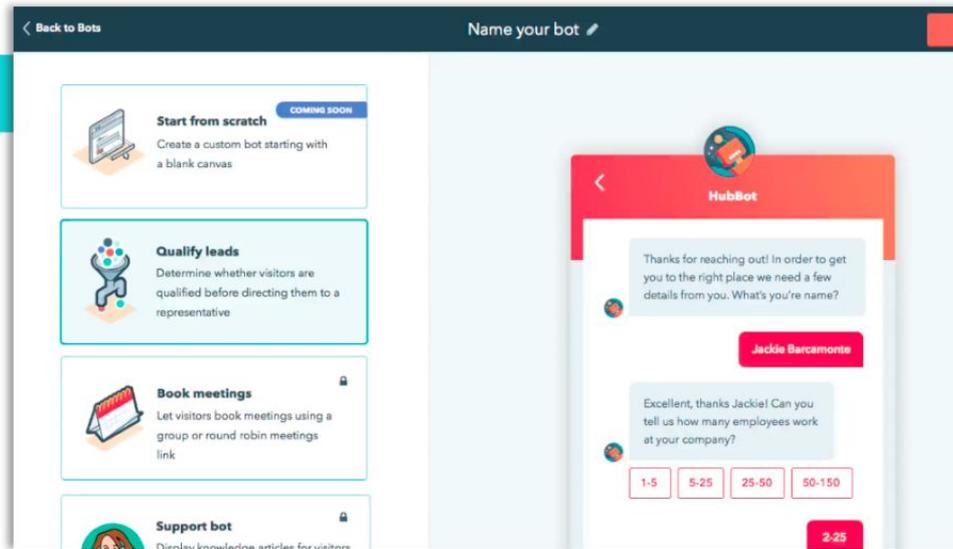
Tickets (1)

Customer wants something
Status: Escalated
Create date: Sept 31, 2017

CONVERSATIONS WITH BOT

BOTS + AUTOMATION

- Efficiently scale 1:1 communication
- Intelligent routing, lead qualification, support & more



Engage Customers with:

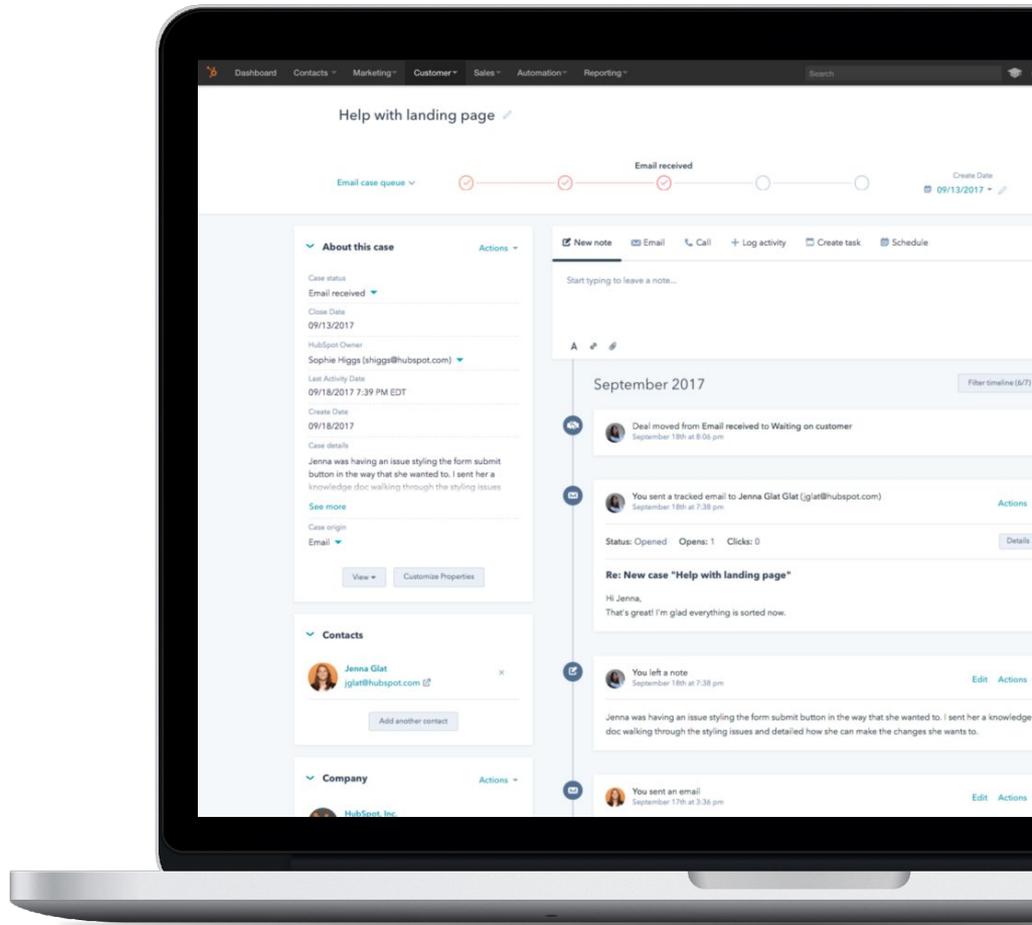
Tickets

Manage demand, meet expectations, and stay organized with Tickets.

Tickets for the backbone of a support team. Add automation and build a customer helpdesk solution.

“90% of consumers believe an immediate response is “important” or “very important” when looking for customer service support.”

**HubSpot research, 2018, research.hubspot.com



Tickets ▾

Table
Board

Customize ▾
Create ticket

All tickets
 All saved filters >

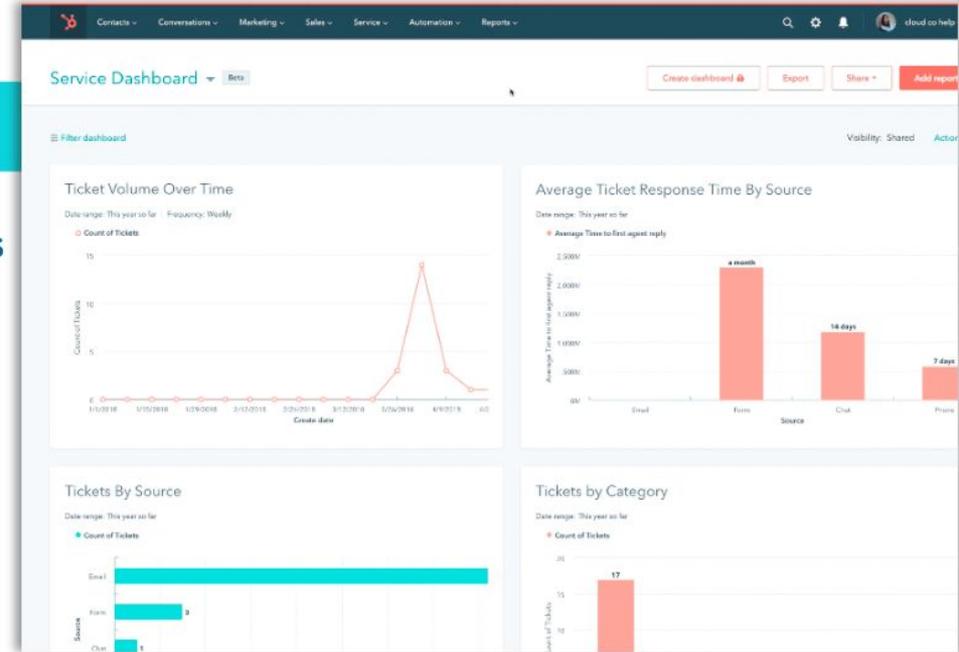
 All tickets
 27 tickets Options ▾
 +Add filter

| NEW | WAITING ON CUSTOMER | EMAIL RECEIVED | DEV ISSUE FIXED | CLOSED |
|---|---|--|--|--|
| <p>Update account name Create date: September 30, 2017</p> | <p>Help with landing page Close date: September 13, 2017</p> | <p>Page performance Create date: September 28, 2017</p> | <p>Error message? Create date: September 10, 2017</p> | <p>How do I change the filter Create date: September 10, 2017</p> |
| <p>Wrong number on dashboard? Create date: September 30, 2017</p> | <p>Activity excluded based on IP Create date: September 29, 2017</p> | <p>Account issue Create date: September 14, 2017</p> | <p>Emails not sending Create date: September 10, 2017</p> | <p>Export has incorrect data Create date: September 1, 2017</p> |
| <p>Feature request Create date: September 30, 2017</p> | <p>Page performance questions Create date: September 29, 2017</p> | <p>Tracking URL logic Create date: September 15, 2017</p> | <p>Connector error Create date: September 5, 2017</p> | <p>Custom module Create date: September 8, 2017</p> |
| <p>A/B testing Create date: September 30, 2017</p> | <p>Email sync Create date: September 29, 2017</p> | | <p>Accidentally deleted campaign Close date: September 30, 2017</p> | <p>Report building Create date: August 28, 2017</p> |
| <p>Save custom colour Create date: September 30, 2017</p> | | | | <p>Workflow ideas Create date: August 10, 2017</p> |
| <p>Can't figure out this landing page Close date: September 30, 2017</p> | | | | <p>Reporting trial Create date: August 30, 2017</p> |

Reporting

HELPDESK : REPORTING

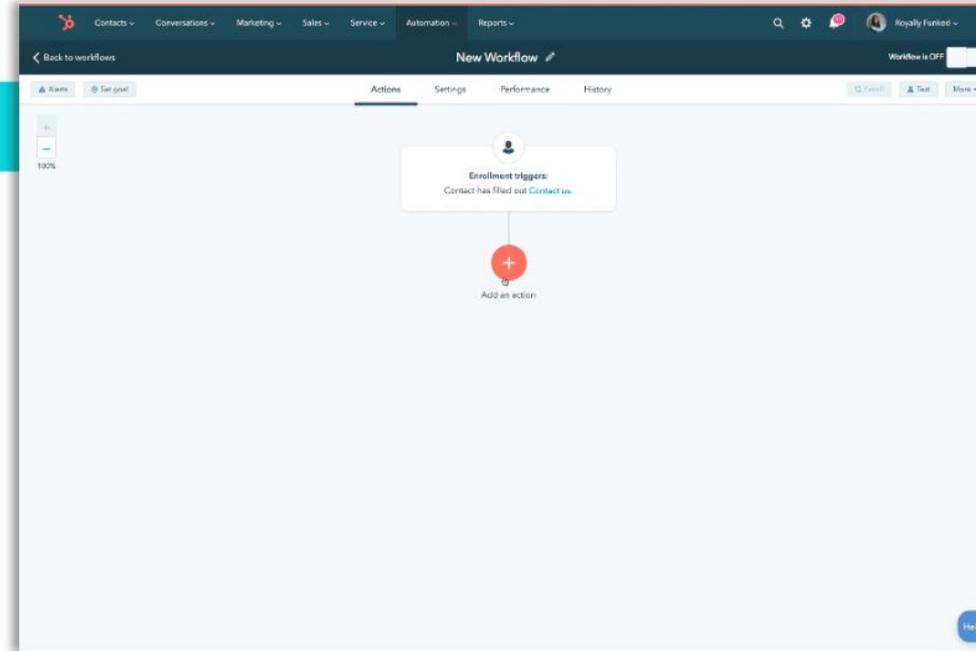
- Integrated reporting on tickets
- See key support stats like ticket volume and source



Automation

HELPDESK : AUTOMATION

- Ticket automation
- Create, manage, and trigger alerts & actions based off tickets



How do we Guide Customers Better?

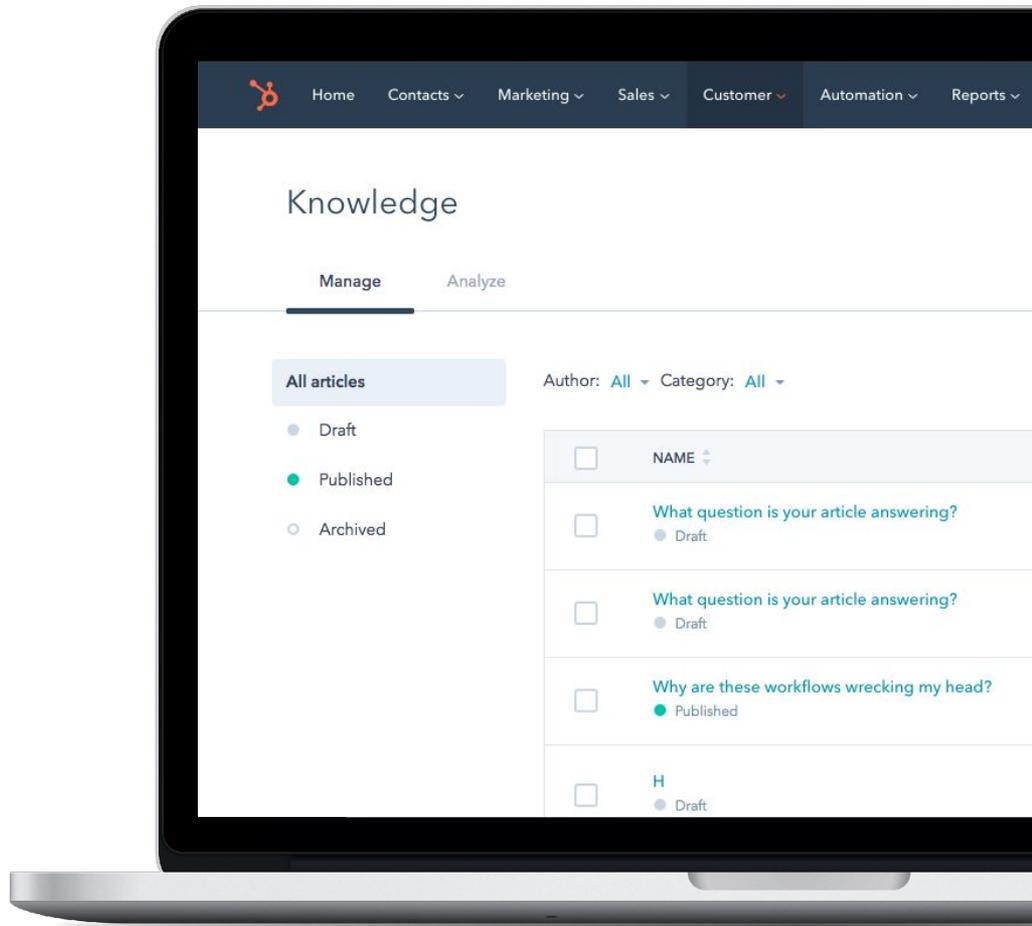
1. Enable customer self-service and reduce customer friction
2. Create content to solve recurring issues and guide customers proactively
3. Deliver guidance at the right time in the customer journey

Guide Customers with:

Knowledge Base

Help customers help themselves with a robust, data driven knowledge base.

Build simple, well structured articles that automatically index on Google search.



Help customers help themselves

Public Knowledge Base

Search for answers

Help Center Home > Launching your survey > Onboard & Exit Surveys

Launching your survey

General

Onboard & Exit Surveys

Claims

Commerce

Getting Started

Integrations

Making Payments

Launching Onboard / Exit Surveys

Unlike attributed surveys, survey responses for onboard / exit surveys are typically sent one at a time as a person enters or leaves an organization.

You can launch Onboard and Exit surveys by hitting the 'Launch Now' button on the 'Launch Plan' page. Unlike attributed surveys, survey responses for onboard / exit surveys are typically sent one at a time as a person enters or leaves an organization. Launching an onboard / exit survey simply activates the survey so that you can now invite employees to participate via the 'Start Onboard' / 'Start Exit' buttons on the Activity dashboard for that survey. Access the Activity dashboard by clicking on the corresponding survey on the Survey Browser page.

| Hooli Surveys | | All Surveys <small>Showing 14 surveys</small> | | | | | |
|---------------|---------------------|---|--------------------------------|---------------|-------------|-------------|-----|
| | Browse | STATUS | NAME | TYPE | CREATED | UPDATED | |
| 📁 | Template Library | 📄 | Worldwide Engagement Survey | Engagement | 22 Jan 2017 | 24 Apr 2017 | ... |
| ⚙️ | Administration | 📄 | Onboard Survey Apr 2017 | Experience | 6 Apr 2017 | 24 Apr 2017 | ... |
| + | Create Board Survey | 📄 | Manager Effectiveness Apr 2017 | Effectiveness | 6 Apr 2017 | 19 May 2017 | ... |
| 🔍 | Filter | 📄 | Local Q1 Engagement Survey | Engagement | 19 May 2017 | 19 May 2017 | ... |

Reminder emails

Reminder emails are sent automatically 7 days after the survey process has been started for a person. You can also push a reminder email manually using the Activity report to look up a person's survey, and clicking send a reminder.

Did this article solve your problem?

Yes

No

Related articles

[Why doesn't my gift card work?](#)

[What's this really small charge on my statement?](#)

How do we Grow Customers Better?

1. Establish listening posts with your customers
2. Improve customer experience and earn customer advocacy
3. Understand customer sentiment across the customer journey

Understanding the Customer Journey

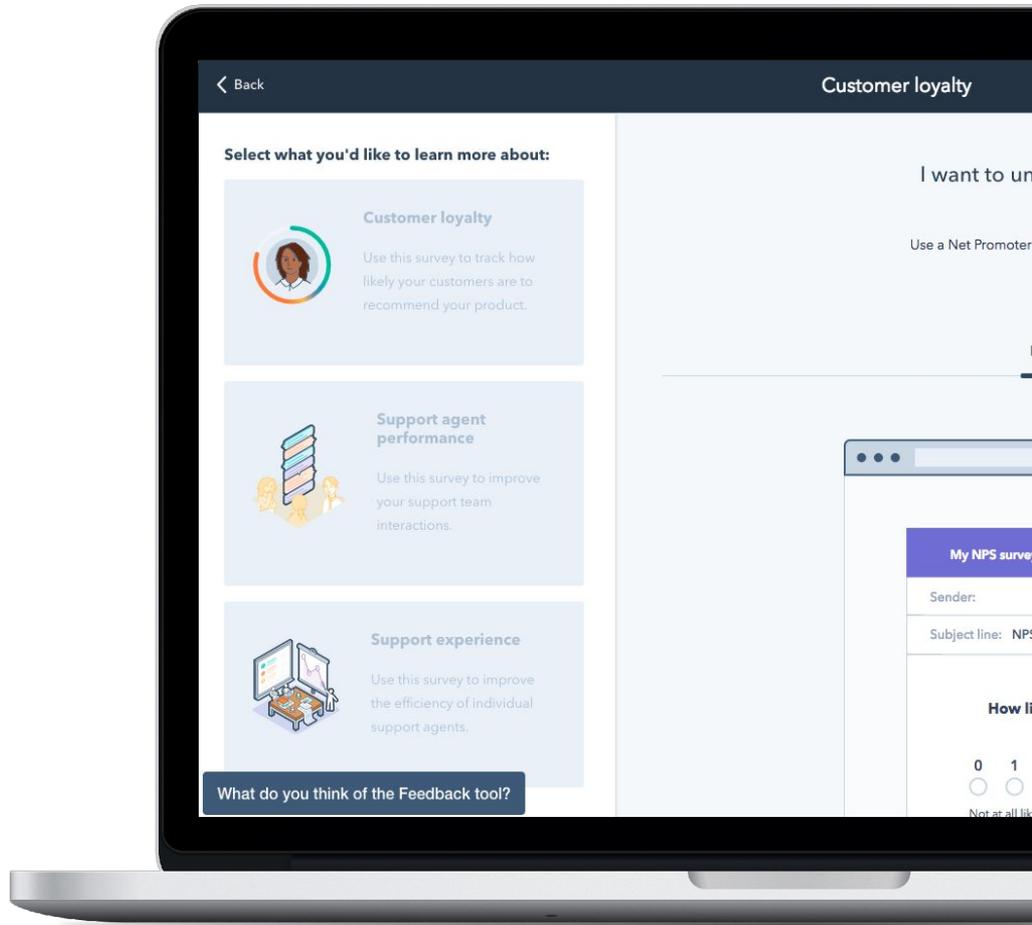


Grow with Customers:

Feedback

Truly understand your customers, their needs, and then take action with Feedback.

Feedback gives you a pulse on customer happiness and a roadmap for how to improve it.



Feedback - Home

Customer Dashboard Contacts Feedback Settings

Customer feedback

Customer Loyalty Support Experience Support agent performance

Trends

All feedback submissions

- Detractors (0)
- Passives (2)
- Promoters (10)
- Archived (0)

Show text only submissions [Export](#)

| USER | RATING | DATE |
|--|-------------|--------------|
|  Sophia Bernazzani I loved getting an in-depth demo of each tool, ... | 9 Promoter | Feb 16, 2018 |
|  Quintin Marcus It was great to come together and get a look a... | 10 Promoter | Feb 16, 2018 |
|  Ros MacDermott Hugely valuable to hear the full story from mar... | 10 Promoter | Feb 16, 2018 |
|  Nicholas Holland | 9 Promoter | Feb 15, 2018 |
|  Anna Perko It was great to hear from everyone on progress... | 8 Passive | Feb 15, 2018 |

Sophia Bernazzani

 Sophia Bernazzani

NPS Health Details

9 Promoter

Can you help us by expanding on your score?

I loved getting an in-depth demo of each tool, as well as seeing everyone's roadmaps of the rest of 2018 bringing Customer Hub to market. I'm not a 10 because it didn't seem like there was as much buy-in during Dave's and Marcus's presentations, which could be a lack of SParketing alignment, but it was a mild concern for me that resources (mostly people) might not be in place when they're ready to press go on their initiatives. Maybe something to discuss in-depth in our next standup.

 sbernazzani@hubspot.com
4 days

[View profile](#)

Feedback - Contact Timeline

The screenshot shows a CRM interface for a contact named Sophia Bernazzani. The top navigation bar includes 'Customer', 'Dashboard', 'Contacts', 'Feedback', and 'Settings'. The contact's profile card on the left shows her name, HubSpot logo, and an 'Actions' button. Below this is an 'About Sophia Bernazzani' section with fields for first name (Sophia), last name (Bernazzani), email (sbernazzani@hubspot.com), phone number, last contacted, lifecycle stage (Lead), and HubSpot owner. The main timeline area has tabs for 'Activity', 'Notes', 'Emails', 'Calls', and 'Tasks'. A 'New note' button is active, and a text input field contains 'Start typing to leave a note...'. Below the tabs, the 'Activity' tab is selected, showing a timeline for February 2018. A specific activity is shown: 'Sophia Bernazzani was shown a Customer loyalty survey' on Feb 16 at 1:03 PM EST. The activity details include a rating of 9 and feedback: 'Yes'. The feedback text reads: 'I loved getting an in-depth demo of each tool, as well as seeing everyone's roadmaps of the rest of 2018 bringing Customer Hub-in during Dave's and Marcus's presentations, which could be a lack of SParketing alignment, but it was a mild concern for me that resources (mostly people) might not be in place when they're ready to press go on their initiatives. Maybe something to discuss in-depth in our next standup.'

Customer Dashboard Contacts Feedback Settings Search Redbord.com Hub ID: 120083

< Contacts

 Sophia Bernazzani
HubSpot

Actions

New note Email Call + Log activity Create task Schedule

Start typing to leave a note...

A [Rich Text Icons]

Activity Notes Emails Calls Tasks

February 2018 Filter activity (17/22)

  Sophia Bernazzani was shown a Customer loyalty survey
Feb 16 at 1:03 PM EST

Rating: 9 Feedback: Yes

I loved getting an in-depth demo of each tool, as well as seeing everyone's roadmaps of the rest of 2018 bringing Customer Hub-in during Dave's and Marcus's presentations, which could be a lack of SParketing alignment, but it was a mild concern for me that resources (mostly people) might not be in place when they're ready to press go on their initiatives. Maybe something to discuss in-depth in our next standup.

Help



SERVICE HUB

Pricing and Packaging

Service Hub Professional

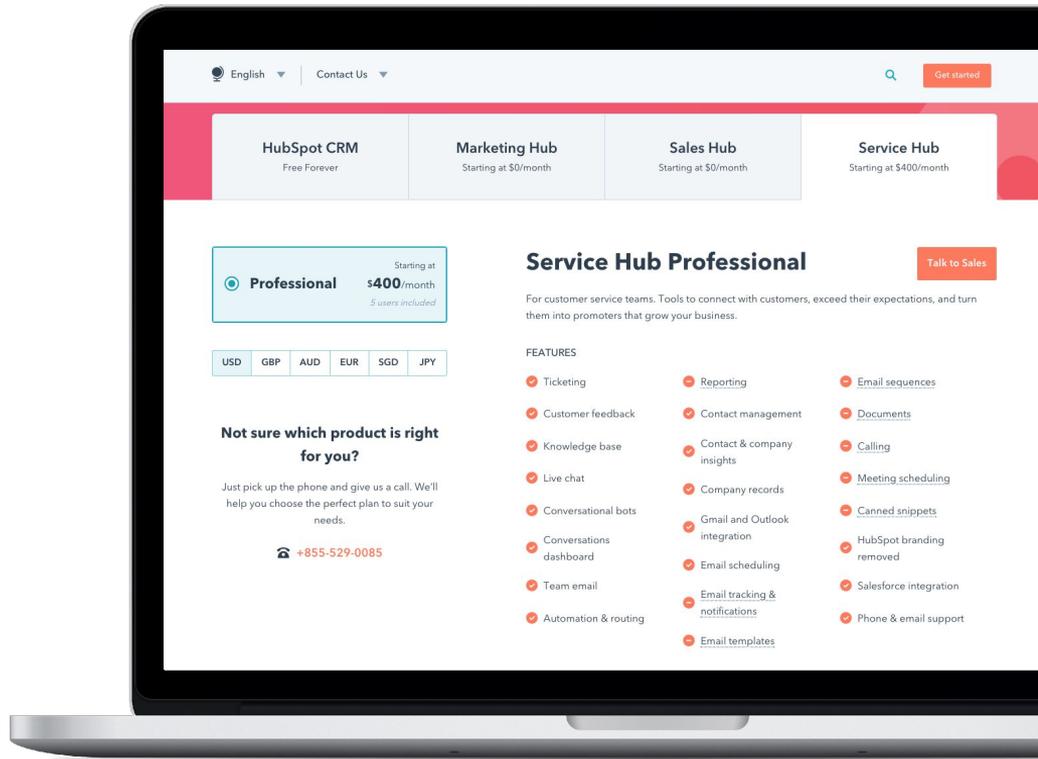
Pricing & Packaging

\$400 month.

Service Hub includes products for *teams* to establish service processes and grow better.

Service Hub also includes 5 seats of 1:1 productivity tools for *individuals* to be efficient and work smarter.

\$80 additional seat.



Portal Features Vs. User Features

| Portal Features | User Features |
|---|---|
| <p data-bbox="218 409 838 445">Every user free or paid has access to:</p> <ul data-bbox="253 543 716 802" style="list-style-type: none"><li data-bbox="253 543 432 576">- Tickets<li data-bbox="253 587 595 620">- Knowledge base<li data-bbox="253 631 654 663">- Customer Feedback<li data-bbox="253 674 552 707">- Conversations<li data-bbox="253 718 716 751">- Automation (Workflows)<li data-bbox="253 762 481 794">- Reporting | <p data-bbox="983 409 1659 489">Paid users only (comes with 5 or \$80 per additional seats):</p> <ul data-bbox="1018 543 1292 885" style="list-style-type: none"><li data-bbox="1018 543 1257 576">- Templates<li data-bbox="1018 587 1263 620">- Sequences<li data-bbox="1018 631 1195 663">- Calling<li data-bbox="1018 674 1238 707">- Meetings<li data-bbox="1018 718 1228 751">- Snippets<li data-bbox="1018 762 1271 794">- Documents<li data-bbox="1018 805 1246 838">- Messages<li data-bbox="1018 849 1292 882">- Notifications |



SERVICE HUB

What it means to be customer first

A woman with her hair in a ponytail, wearing a pink tank top and colorful leggings, is performing a kettlebell exercise in a gym. She is holding two kettlebells with both hands in front of her chest. The gym has large windows in the background, and various pieces of exercise equipment like treadmills and weight machines are visible. The text "WHAT IT MEANS TO BE CUSTOMER FIRST" is overlaid on the right side of the image.

WHAT IT MEANS TO BE
CUSTOMER FIRST

HUBSPOT TRAINING IN SOUTH AFRICA...

Howzit Capetown HUG!



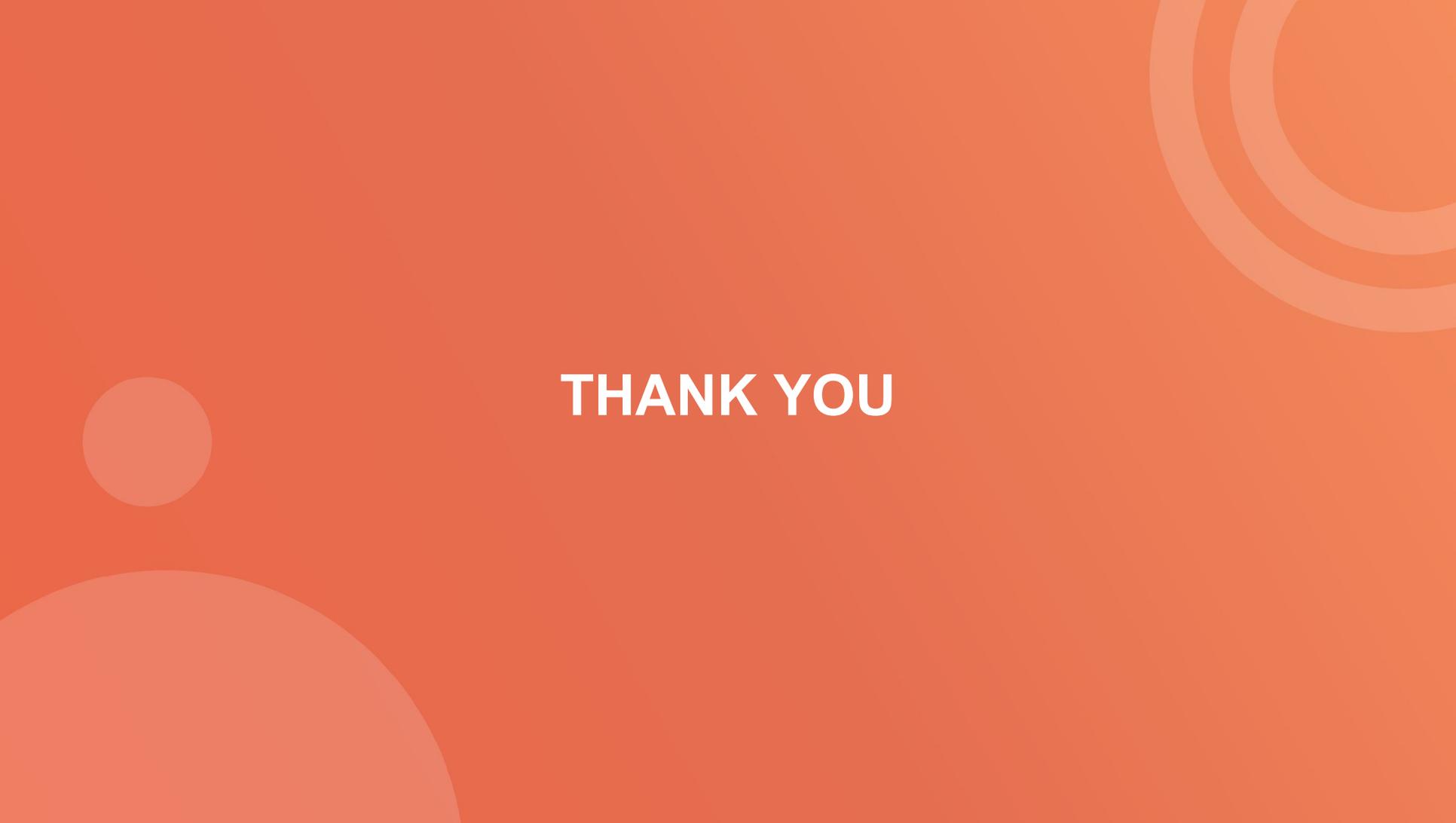
Vourneen Taylor

- ✓ **Upskill** your team & be more effective at generating leads
- ✓ Learn from an expert how to **get the most out of Hubspot**
- ✓ Meet industry peers & share ideas
- ✓ Get the **latest tips & tricks** on Inbound best practices
- ✓ **Share the cost of training** with others!!

[Aboutinbound.com/capetown](https://aboutinbound.com/capetown)

Don't be shy, say hi - [linkedin.com/in/vourneentaylor](https://www.linkedin.com/in/vourneentaylor)





THANK YOU