

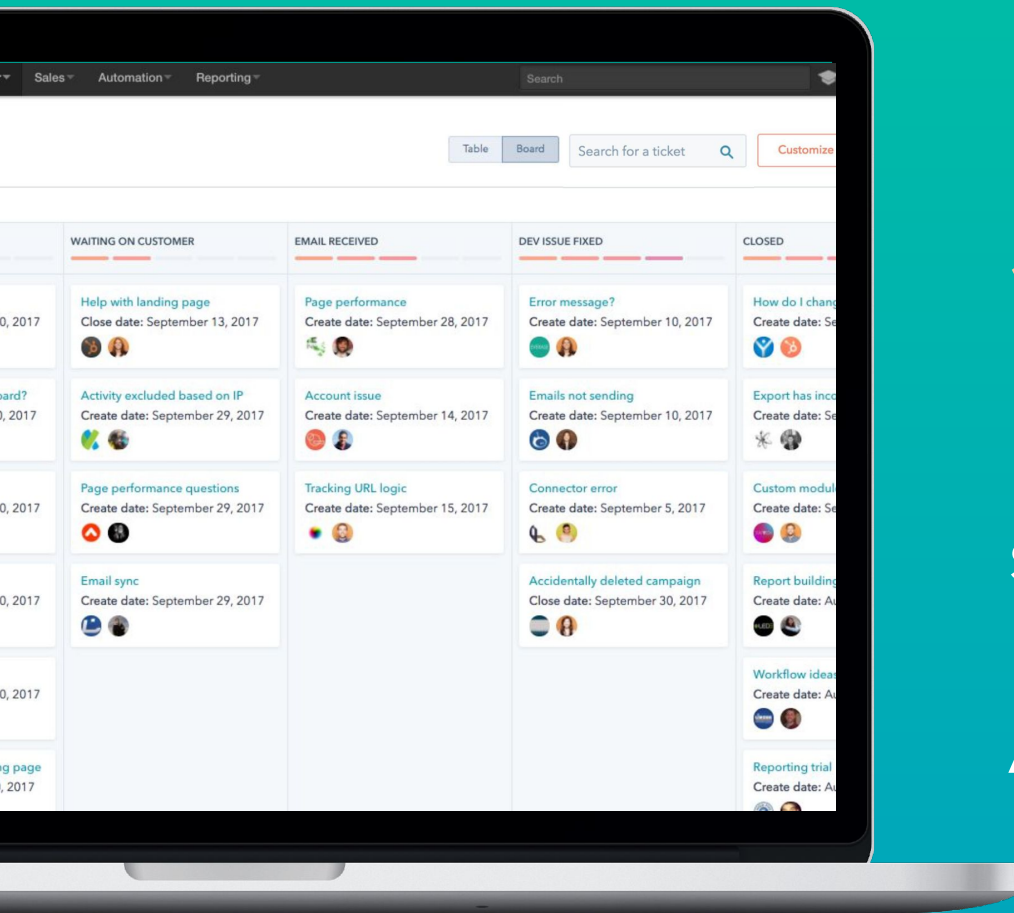


From Funnel to Flywheel

# 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 line with several circles of varying sizes and colors (white, light orange, and dark orange) positioned to its left.

*Inside the pain of change*

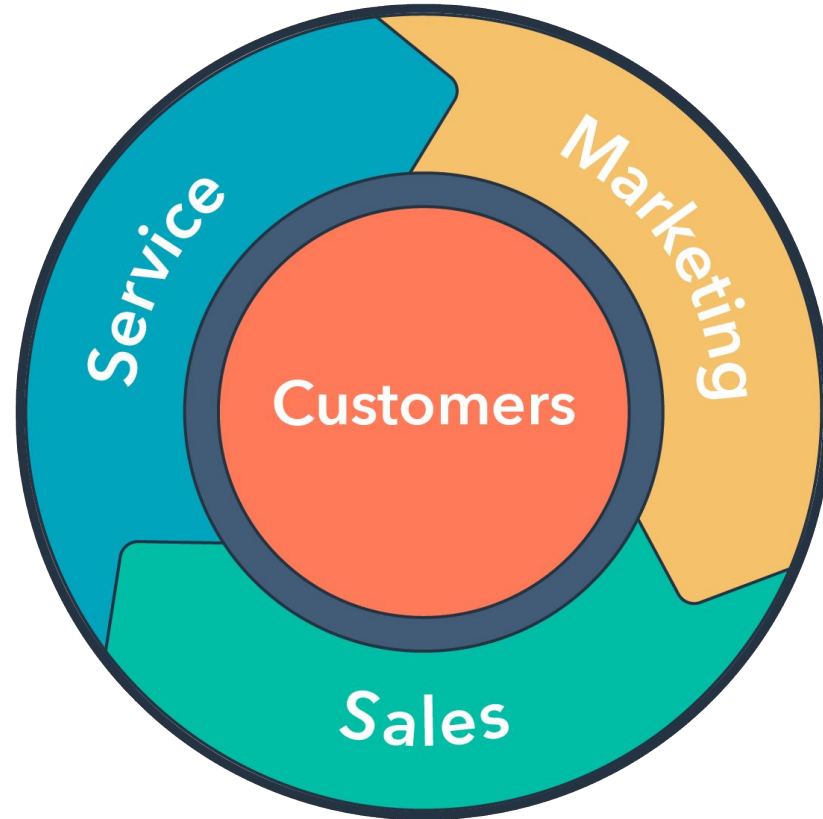
Is where opportunity lies



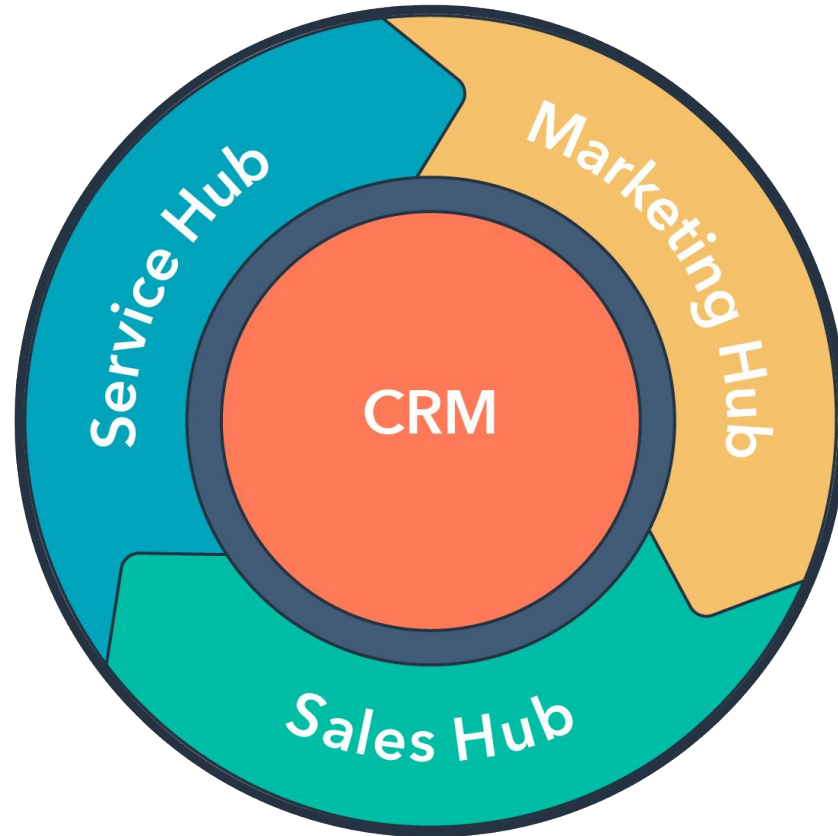
*It's time to move on from the funnel*

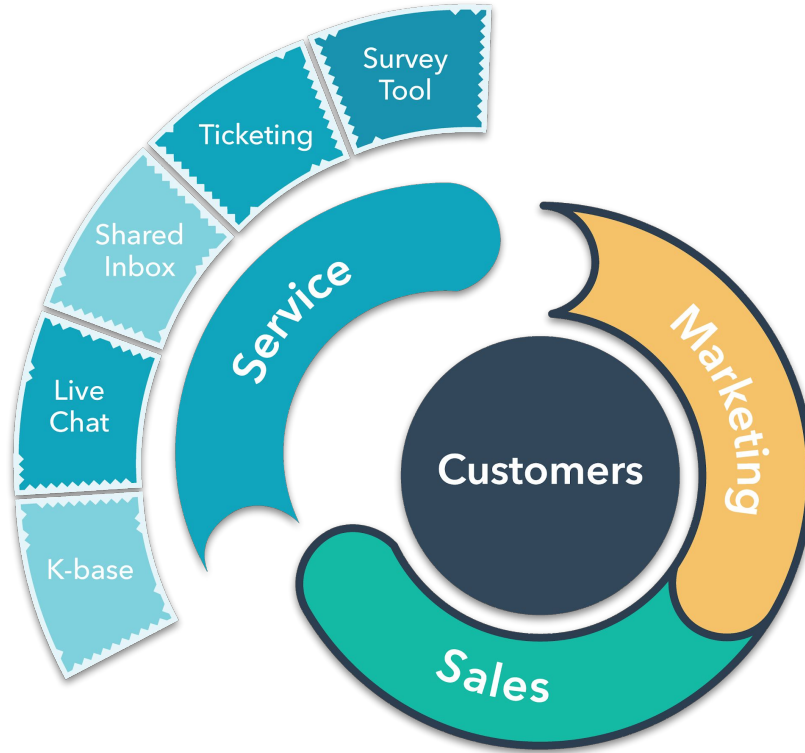


*And embrace the flywheel*



# *A complete customer experience*

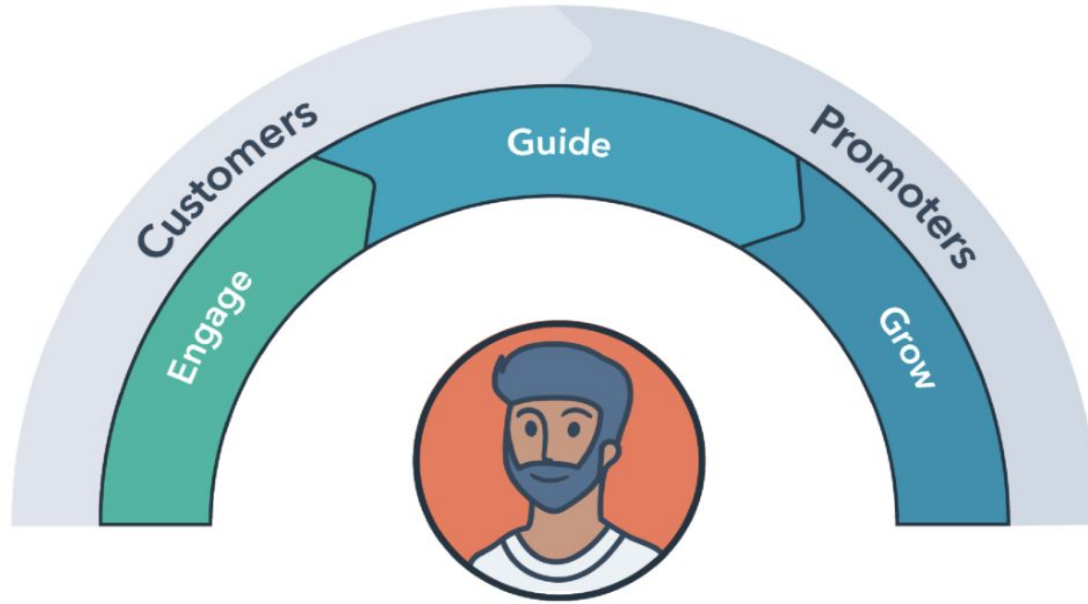






# How to build a Flywheel

# Inbound Service Framework



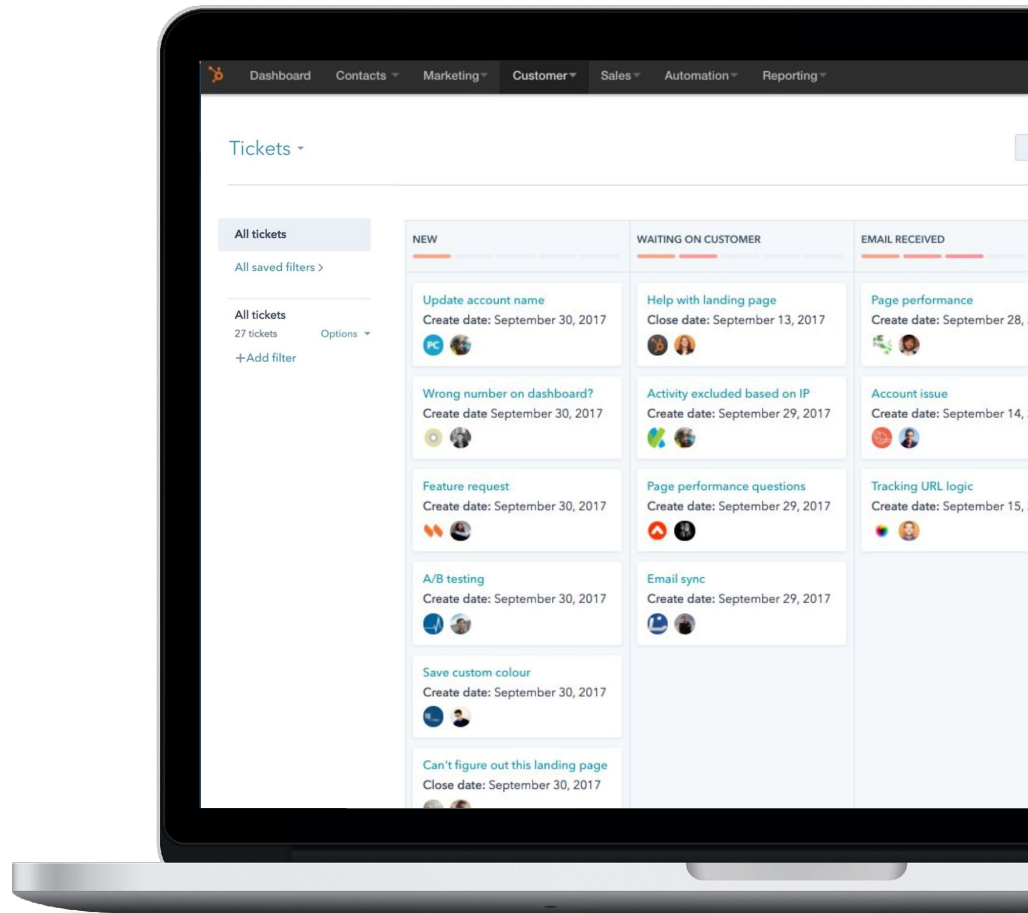


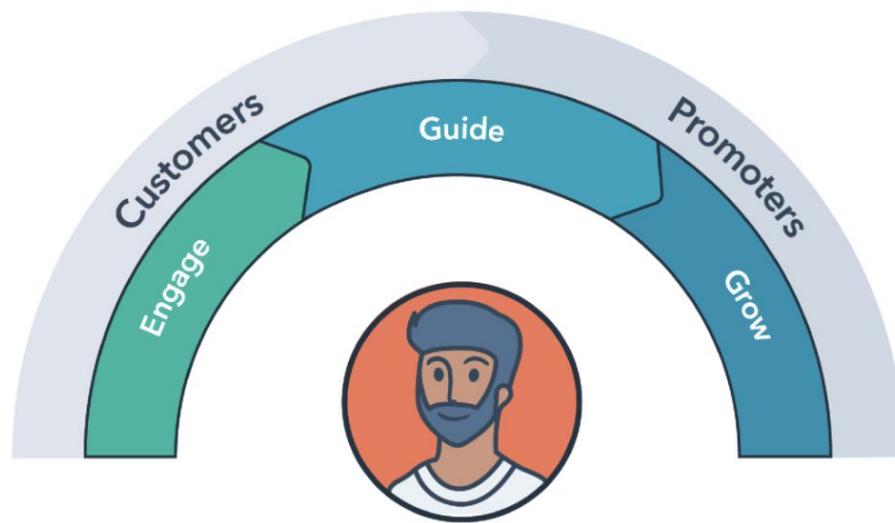
# Inbound Service Framework

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.

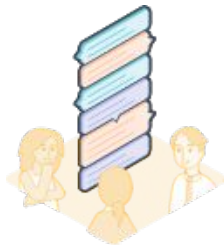
# Introducing Service Hub.

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?

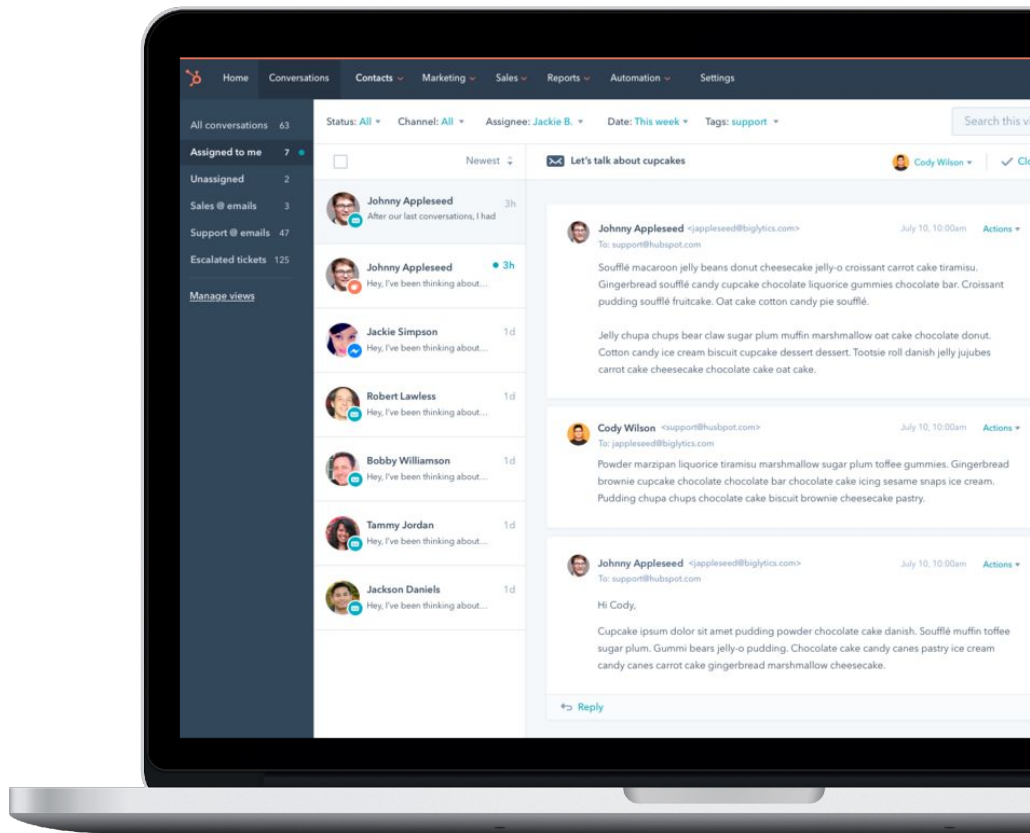
1. Open your communication channels
2. Organise your conversations in one place
3. Create a simple process to track customer needs

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.



## & Context Sidebar

Inbox

All conversations 63

Assigned to me 7

Unassigned 2

Sales @ emails 3

Support @ emails 47

Escalated cases 125

Manage views

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

Search this view New conversation

Newest

Let's talk about cupcakes

Cody Wilson Close

Johnny Appleseed 3h

After our last conversations, I had

Johnny Appleseed 3h

Hey, I've been thinking about...

Jackie Simpson 1d

Hey, I've been thinking about...

Robert Lawless 1d

Hey, I've been thinking about...

Bobby Williamson 1d

Hey, I've been thinking about...

Tammy Jordan 1d

Hey, I've been thinking about...

Jackson Daniels 1d

Hey, I've been thinking about...

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

A [icon] [icon] [icon]

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

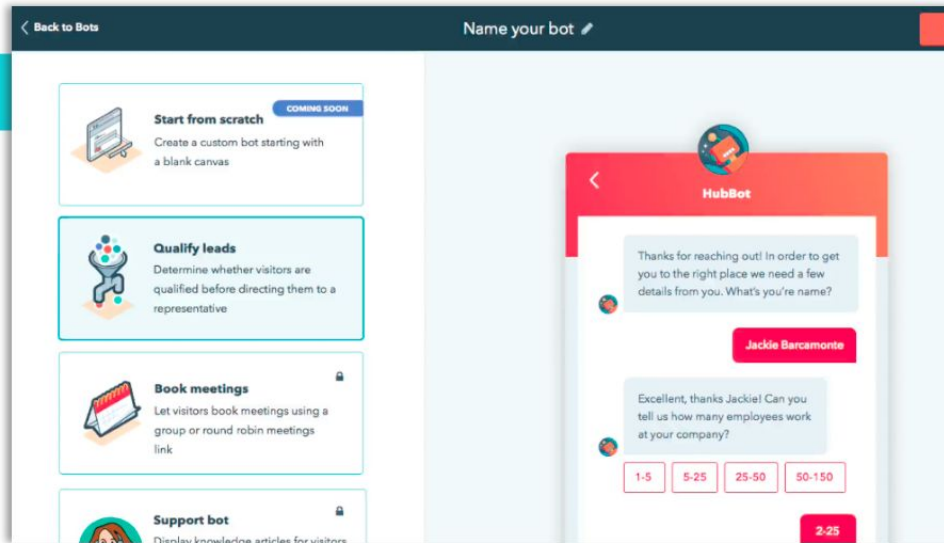
Status: Escalated

Create date: Sept 31, 2017

# CONVERSATIONS WITH BOT

## BOTS + AUTOMATION

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



Engage Customers with:

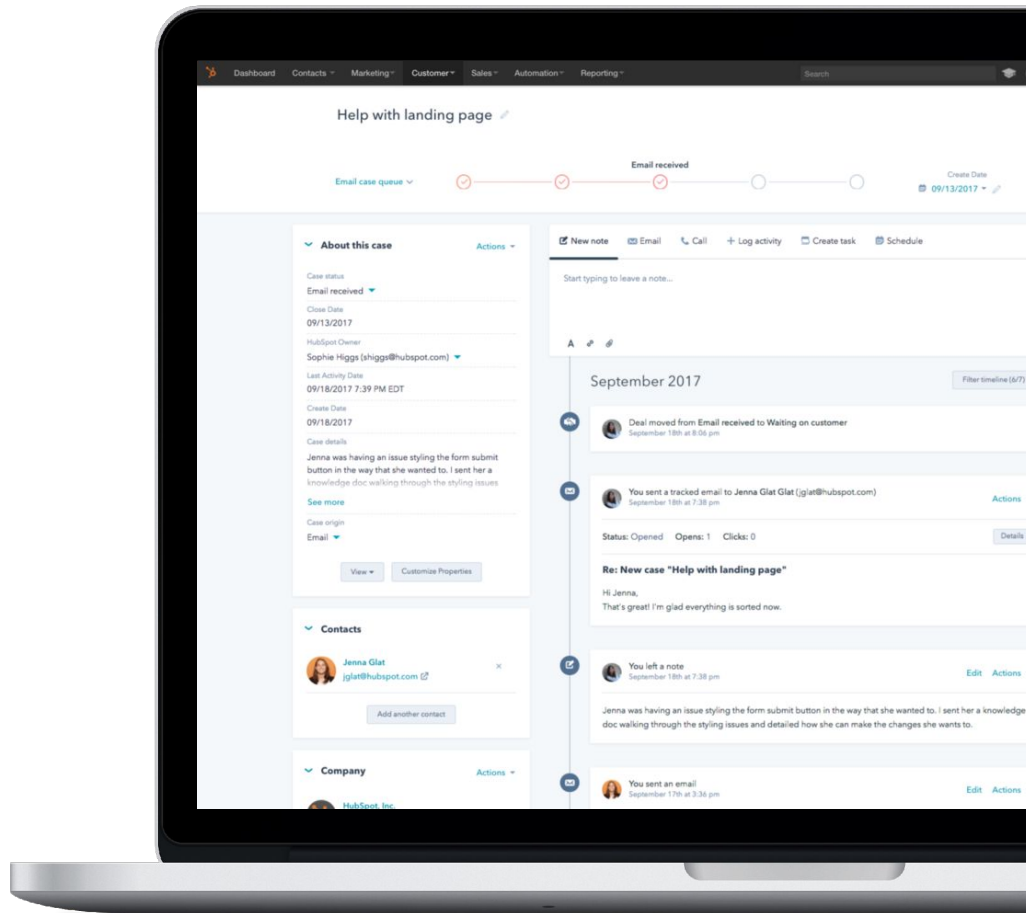
# Tickets

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](https://research.hubspot.com)





 Dashboard Contacts ▾ Marketing ▾ Customer ▾ Sales ▾ Automation ▾ Reporting ▾

Search

   biglytics.com  
Hub ID: 2450743

Tickets ▾

TableBoard

Search for a ticket

Customize ▾
























Create ticket

All tickets

All saved filters >

All tickets  
27 ticketsOptions ▾

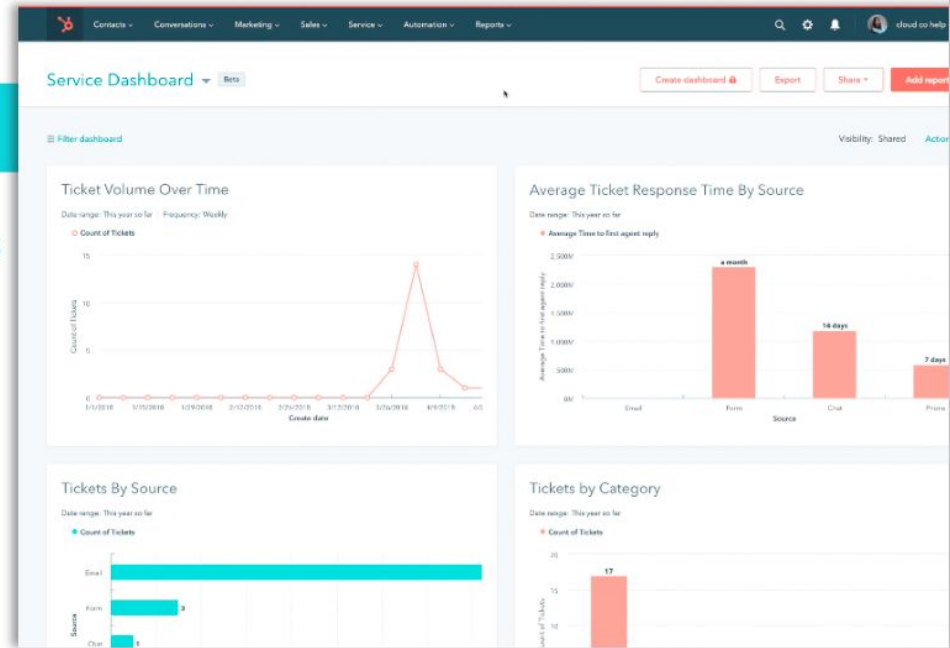
+Add filter

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

# Reporting

## HELPDESK : REPORTING

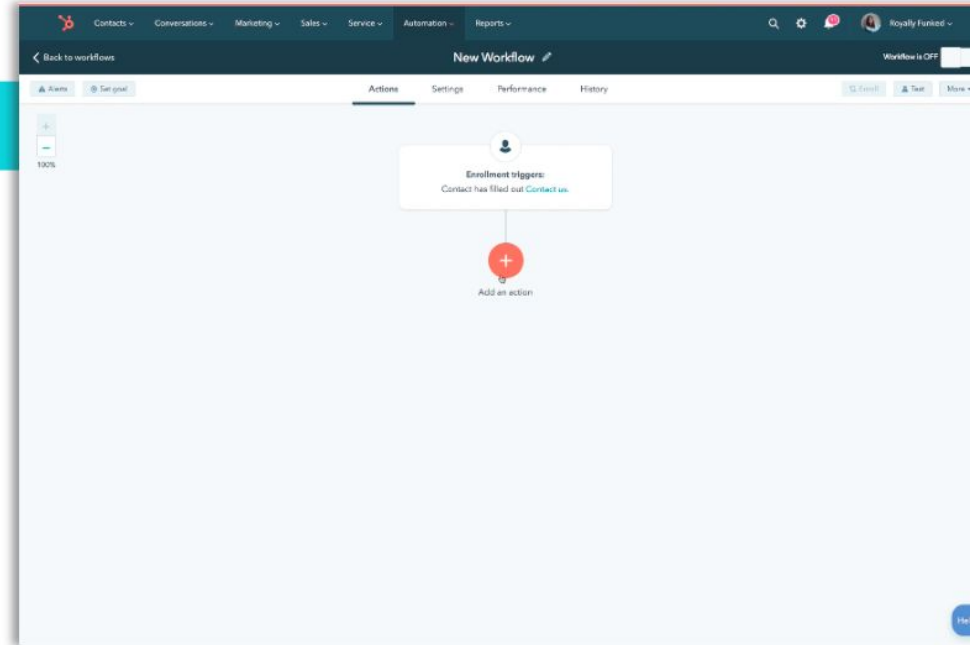
- Integrated reporting on tickets
- See key support stats like ticket volume and source



# Automation

## HELPDESK : AUTOMATION

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



## How do we Guide Customers Better?

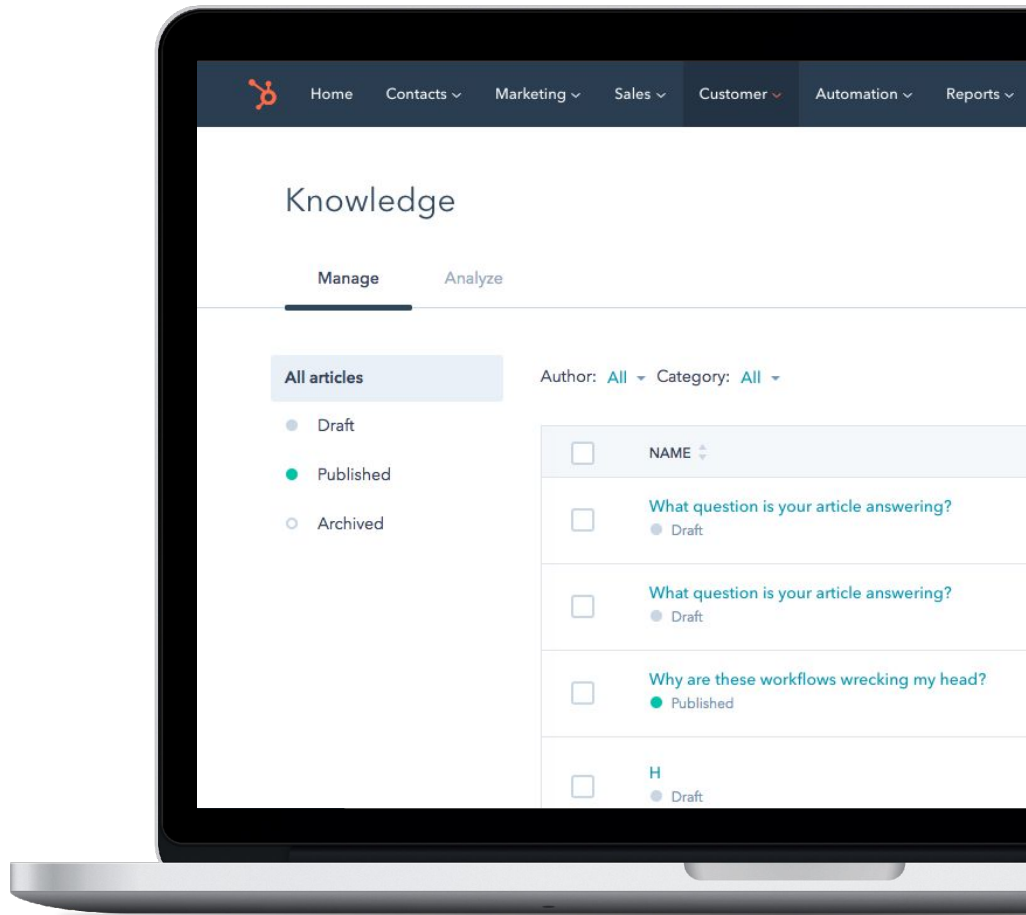
1. Enable customer self-service and reduce customer friction
2. Create content to solve recurring issues and guide customers proactively
3. Deliver guidance at the right time in the customer journey

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

Culture Amp

Help Centre

Q 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.

Hotlist Surveys

Browser

Template Library

Administration

Create Onboard Survey

All Surveys

Showing 14 surveys

STATUS	NAME	TYPE	CREATED	UPDATED
	Worldwide Engagement Survey	Engagement	22 Jan 2017	24 Apr 2017
	Onboard Survey Apr 2017	Experience	6 Apr 2017	24 Apr 2017
	Manager Effectiveness Apr 2017	Effectiveness	6 Apr 2017	19 May 2017
	Local Qx Engagement Survey	Engagement	19 May 2017	19 May 2017

Filter

Clear all

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

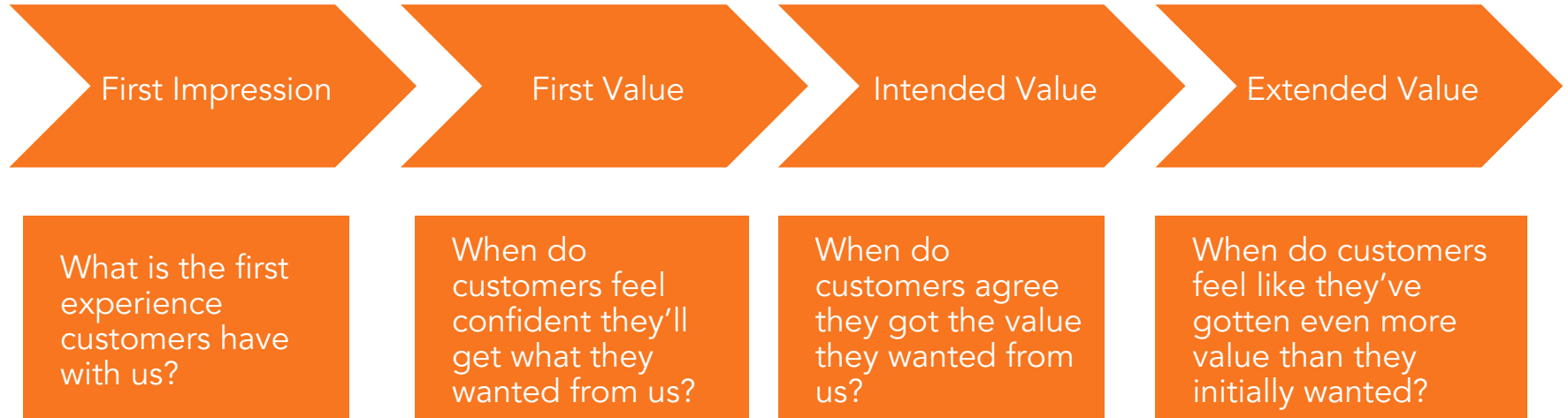
Why doesn't my gift card work?

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



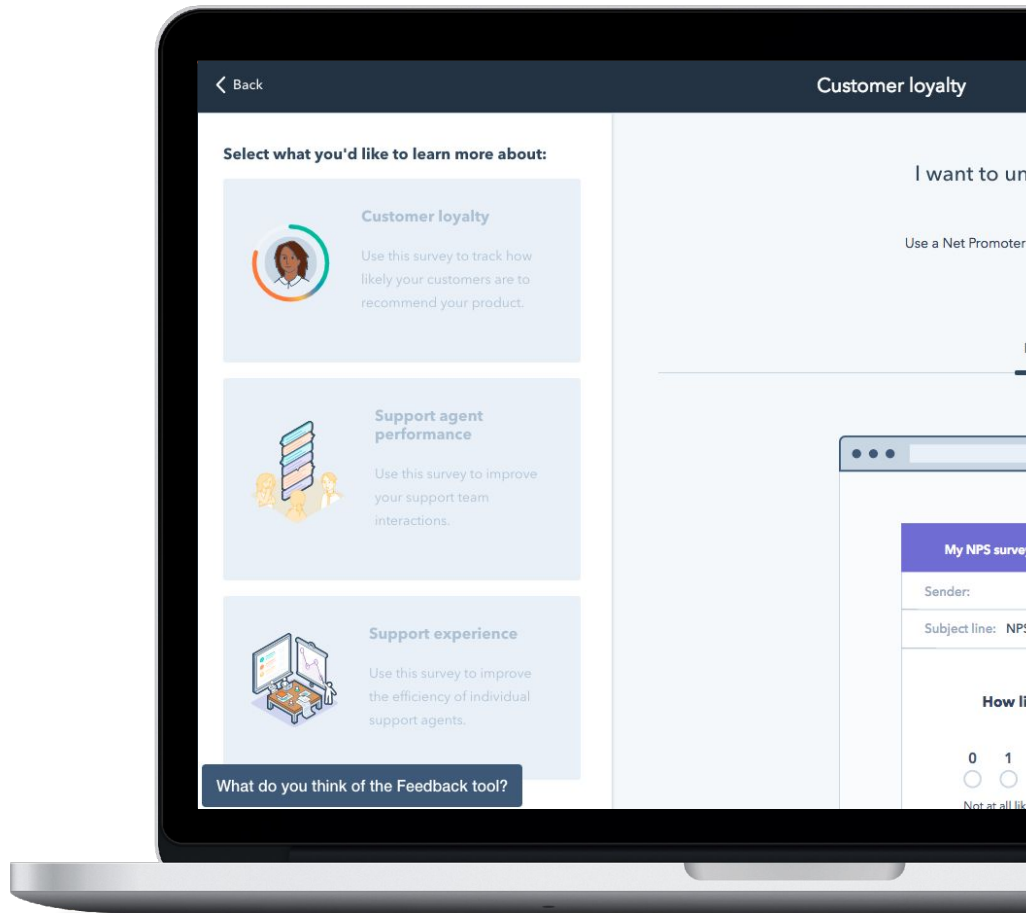


Grow with Customers:

# 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

Search

Customer feedback

Customer Loyalty

Support Experience

Support agent performance

Trends

All feedback submissions

Detractors (0)

Passives (2)

Promoters (10)






Archived (0)

Filter


☐ Show text only submissions

Export

Search

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

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 displays the HubSpot CRM interface for a contact named Sophia Bernazzani. The top navigation bar includes links for Customer, Dashboard, Contacts, Feedback, and Settings, along with a search bar and user profile information (Redbord.com, Hub ID: 120083). The left sidebar shows the contact's profile information, including first and last name, email, phone number, last contacted date, lifecycle stage, lead status, and HubSpot owner status. The main content area is divided into two sections: a top section for actions (New note, Email, Call, Log activity, Create task, Schedule) and a bottom section for the contact's timeline. The timeline is currently set to February 2018 and shows a single event: a Customer loyalty survey shown to Sophia Bernazzani on February 16 at 1:03 PM EST. The survey 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 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."

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 [icon] [icon] [icon]

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 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.

Help



SERVICE HUB

# Pricing and Packaging

Service Hub Professional

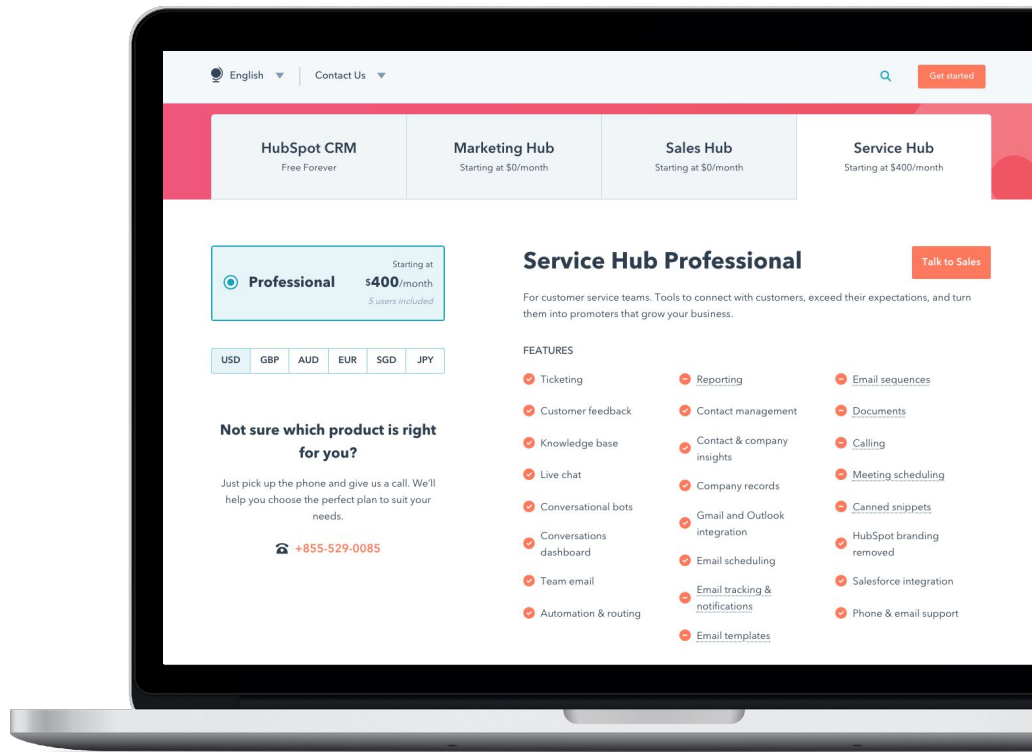
## Pricing & Packaging

\$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>Every user free or paid has access to:</p> <ul style="list-style-type: none"><li>- Tickets</li><li>- Knowledge base</li><li>- Customer Feedback</li><li>- Conversations</li><li>- Automation (Workflows)</li><li>- Reporting</li></ul>	<p>Paid users only (comes with 5 or \$80 per additional seats):</p> <ul style="list-style-type: none"><li>- Templates</li><li>- Sequences</li><li>- Calling</li><li>- Meetings</li><li>- Snippets</li><li>- Documents</li><li>- Messages</li><li>- Notifications</li></ul>



SERVICE HUB

# What it means to be customer first

A woman with a high ponytail, wearing a pink tank top and colorful leggings, is performing a kettlebell exercise in a modern gym. She is holding two kettlebells with both hands, pulling them towards her chest. The gym has large windows in the background, and various pieces of exercise equipment like treadmills and weight racks 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://linkedin.com/in/vourneentaylor)



The background is a solid orange color. It features several abstract geometric shapes: a small solid circle on the left, a large solid circle at the bottom left, and a series of concentric circles on the right side.

**THANK YOU**