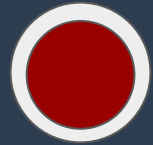Ying Chen

GENERAL MANAGER, SERVICE HUB

Celine Kimberly

DIRECTOR OF CUSTOMER SUCCESS

A recording will be sent out along with a link to some remote work resources following today's webinar.

User Webinar Tomorrow (link in the resources section)

Building a Customer Experience that Drives Retention

Free webinar training for HubSpot users

May 29, 2020, 11 AM ET

Register

TODAY'S AGENDA:

1. Empowering your customer

2. Empowering your team

3. Audience Q+A

Treating Customers Well Matters

Legend: Not at all important | Not very important | Somewhat important | Important | Very Important
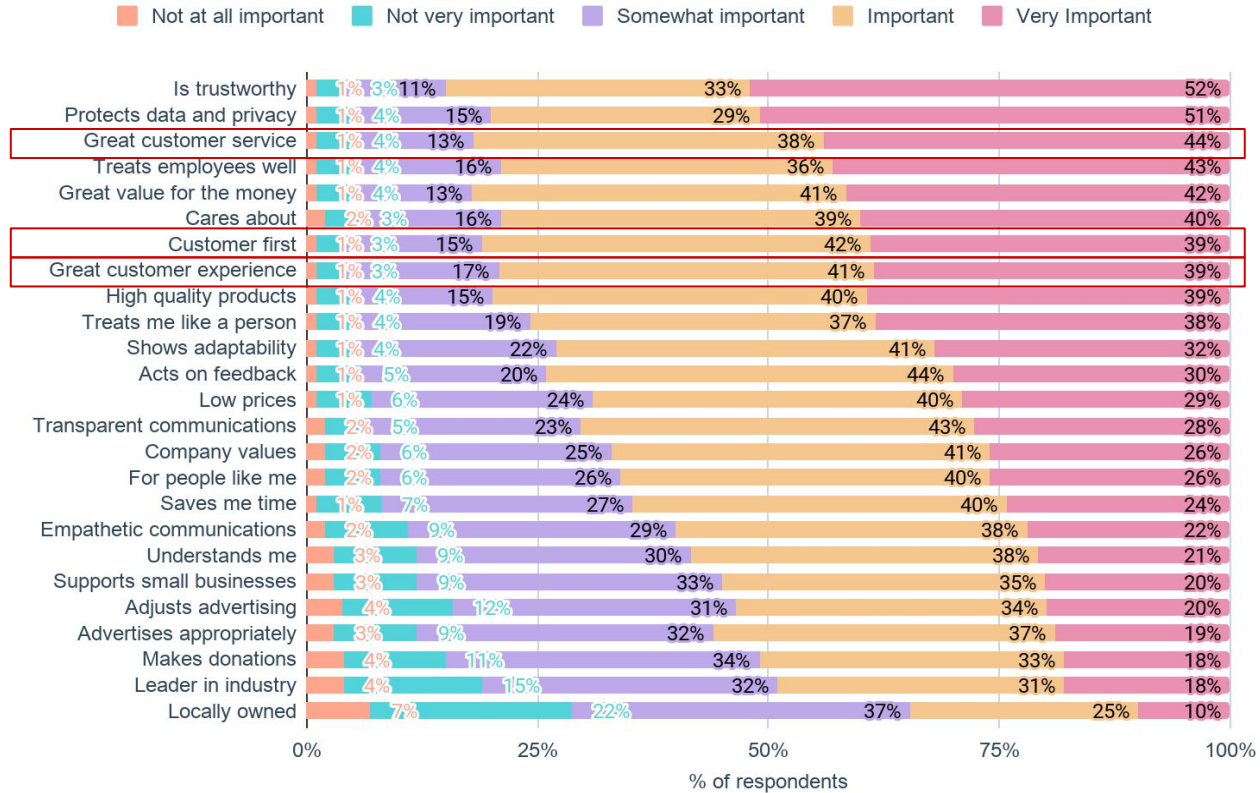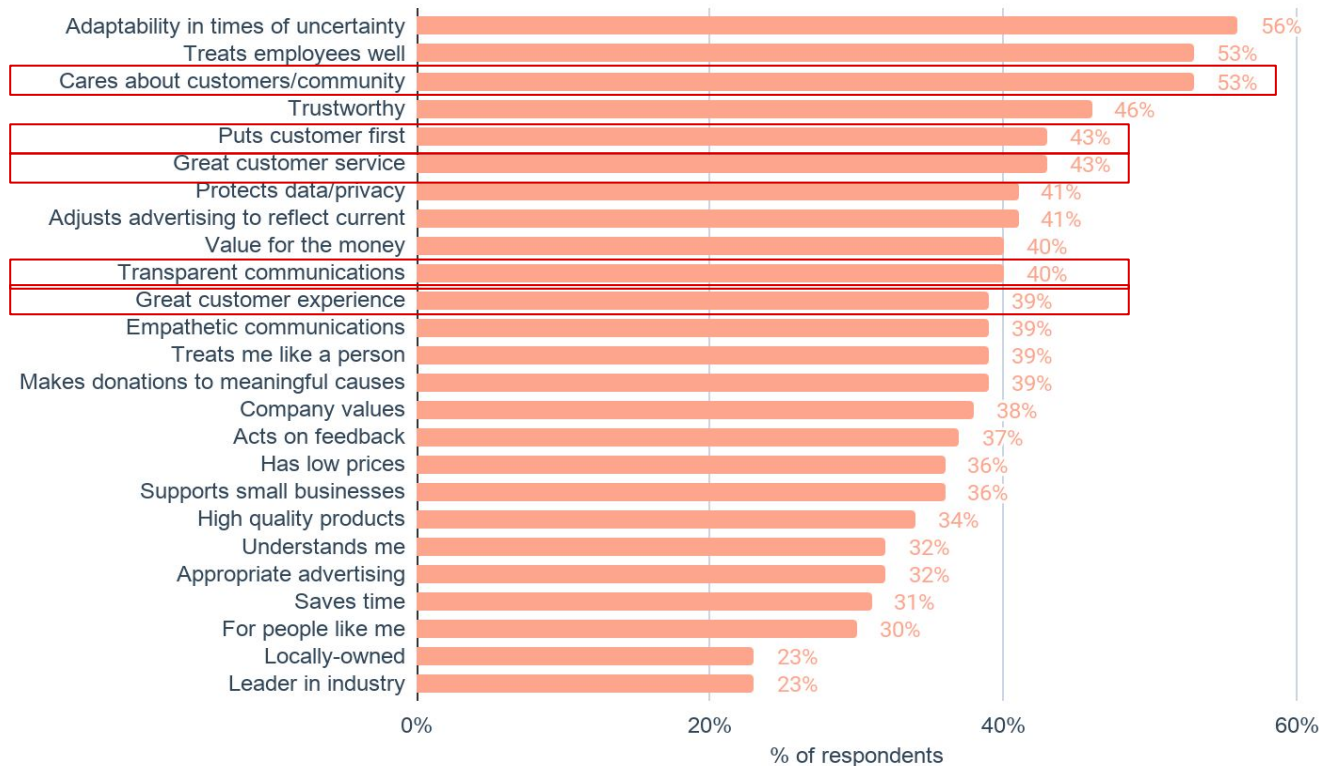
	Not at all important	Not very important	Somewhat important	Important	Very Important
Is trustworthy	1%	3%	11%	33%	52%
Protects data and privacy	1%	4%	15%	29%	51%
Great customer service	1%	4%	13%	38%	44%
Treats employees well	1%	4%	16%	36%	43%
Great value for the money	1%	4%	13%	41%	42%
Cares about	2%	3%	16%	39%	40%
Customer first	1%	3%	15%	42%	39%
Great customer experience	1%	3%	17%	41%	39%
High quality products	1%	4%	15%	40%	39%
Treats me like a person	1%	4%	19%	37%	38%
Shows adaptability	1%	4%	22%	41%	32%
Acts on feedback	1%	5%	20%	44%	30%
Low prices	1%	6%	24%	40%	29%
Transparent communications	2%	5%	23%	43%	28%
Company values	2%	6%	25%	41%	26%
For people like me	2%	6%	26%	40%	26%
Saves me time	1%	7%	27%	40%	24%
Empathetic communications	2%	9%	29%	38%	22%
Understands me	3%	9%	30%	38%	21%
Supports small businesses	3%	9%	33%	35%	20%
Adjusts advertising	4%	12%	31%	34%	20%
Advertises appropriately	3%	9%	32%	37%	19%
Makes donations	4%	11%	34%	33%	18%
Leader in industry	4%	15%	32%	31%	18%
Locally owned	7%	22%	37%	25%	10%

% of respondents

In a Crisis, It Matters Even More

Attribute	% of respondents
Adaptability in times of uncertainty	56%
Treats employees well	53%
Cares about customers/community	53%
Trustworthy	46%
Puts customer first	43%
Great customer service	43%
Protects data/privacy	41%
Adjusts advertising to reflect current	41%
Value for the money	40%
Transparent communications	40%
Great customer experience	39%
Empathetic communications	39%
Treats me like a person	39%
Makes donations to meaningful causes	39%
Company values	38%
Acts on feedback	37%
Has low prices	36%
Supports small businesses	36%
High quality products	34%
Understands me	32%
Appropriate advertising	32%
Saves time	31%
For people like me	30%
Locally-owned	23%
Leader in industry	23%

% of respondents

Retention is More Important Than Ever:

1. **Cost of acquiring customer**: It's 5-25X more expensive to acquire a new customer than it is to retain an existing customer.
2. **Lifetime value**: A 5% increase in customer retention can increase company revenue by 25-95%. That's a big improvement especially when new business is hard to generate.
3. **Loyalty**: Retained customers are more likely to chose your business over others or to come back and spend once the economic crisis improves.

EMPOWERING YOUR CUSTOMER

Be Where Your Customers Are

Frictionless Self Service & Assisted Experiences

Manage Expectations

Be Where Your Customers Are

Be Where Your Customers Are

Your list of available channels is shifting - and fast

Storefront
In-home Visits
Office Visit

Chat
Email
Phone
Video Calls
Review Sites
Website
Community
Knowledgebase
Social Media

Be Where Your Customers Are

Prioritize new channels for support: chat
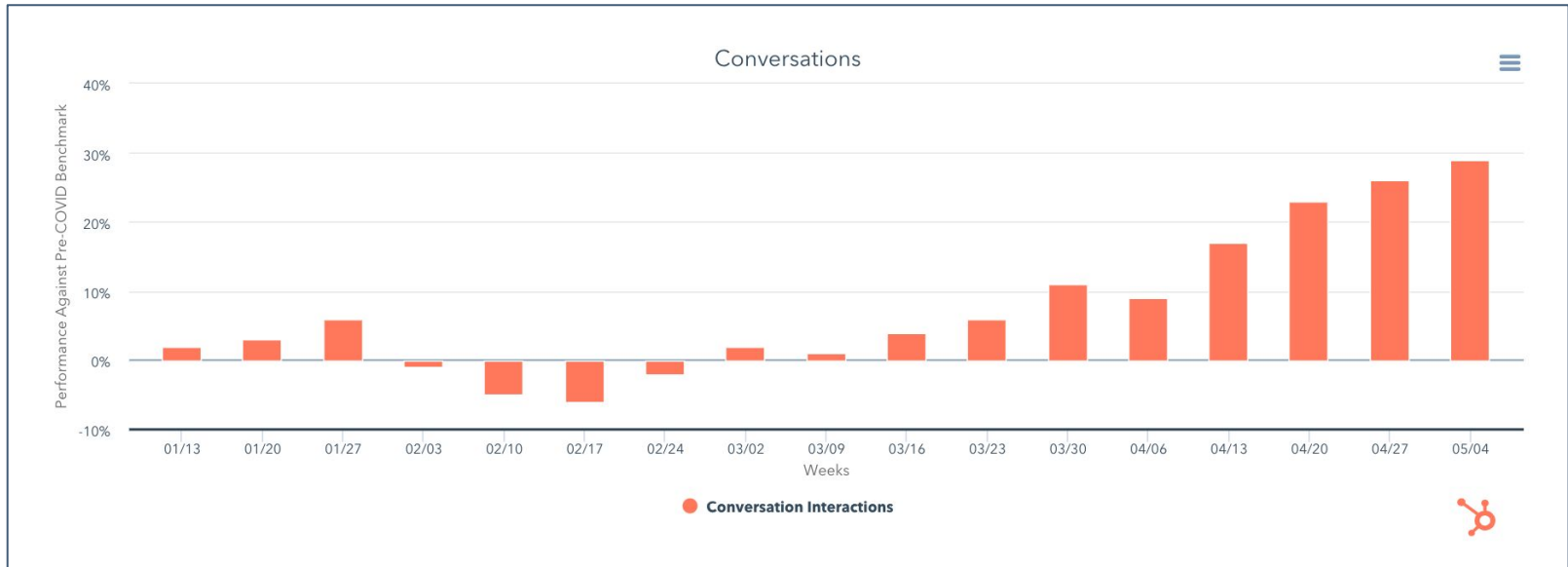
On-site chat volume has increased 29% since pre-covid averages and seems to still be on the rise

Be Where Your Customers Are

Prioritize new channels for support: knowledge-base
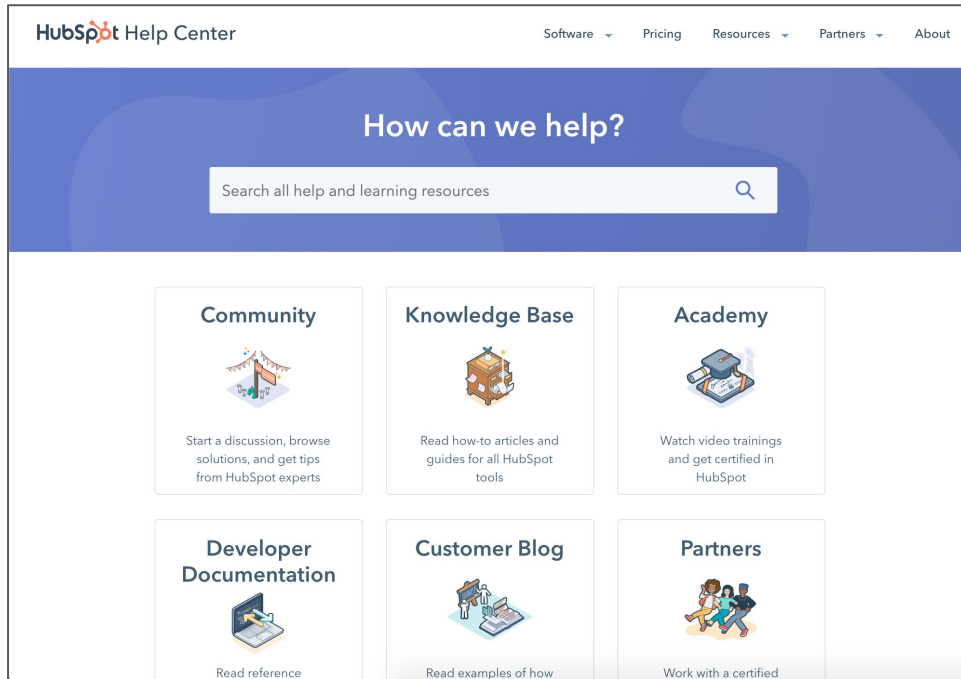
Lighten the load for chat, email, and phone support by making as many answers available as possible in self-serve form. Source material from:

- Customer success call, email, or chat logs
- Customer success training
- Community-generated content
- Sales conversations

Be Where Your Customers Are

One channel should not block access to others

When one channel doesn't have the right answer - provide people another option.

Be Where Your Customers Are

Sometimes, you need more than a bot

At HubSpot, our current experiments show that 91% of our conversations with customer support bots end up with a human to human interaction.
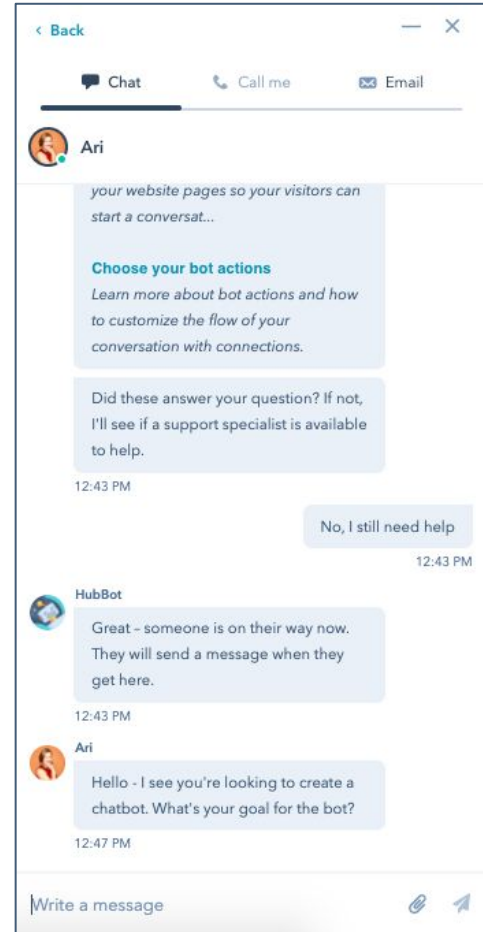
Frictionless Self Service and Assisted Experiences

Frictionless experience between self vs. assisted

Organization need to nail these 3 questions:

1. What are the common needs that can and "should" be addressed via self service
2. Where are possible dead ends between self vs. assisted. For example, do you have chatbots that traps the user in the channel rather than connect to live chat?
3. How frictionless is the transition from self to assisted at the moment?

Manage Expectations

Manage Expectations

People should not have to guess:

1. How long will it take to talk to someone?
2. Are there alternate channels of communication?
3. What type of requests can be accomodated?
4. Is there any documentation they can reference first?

Manage Expectations

A wait is ok, a wait without warning is not

---

customersuccess-emea@hubspot.com
To: Billing Team

2 MONTHS

Hi,

Thank you for your email. Due to the global impact of COVID-19 our responses may be slightly slower than normal as we want to make sure we address each email thoughtfully. Rest assured we will get back to you as quickly as possible, and thank you for your understanding.

Stay Safe,
Your Customer Success Team

↩ Reply   ↞ Reply all

Manage Expectations

Help people understand their options

Contact Support

Support options are based on your product plan.

- **CRM Free** accounts are supported by the Community.

- All **Starter** accounts are supported by the above + email and chat.

- All **Professional** and **Enterprise** accounts are supported by the above + phone. Log into your account to request a call or contact us directly:

Select your country

United States ▼

1-888-HUBSPOT x3 (1-888-482-7768 x3)

Please note that not all phone carriers allow toll-free dialing.

	Free	Starter	Professional	Enterprise
Community	✓	✓	✓	✓
Email		✓	✓	✓
Chat		✓	✓	✓
Phone			✓	✓

If you have multiple HubSpot products, your support options are based on your highest subscription. Learn more about getting help with HubSpot.

Manage Expectations

Be transparent to your customers about what you can accommodate

EMPOWERING YOUR TEAM
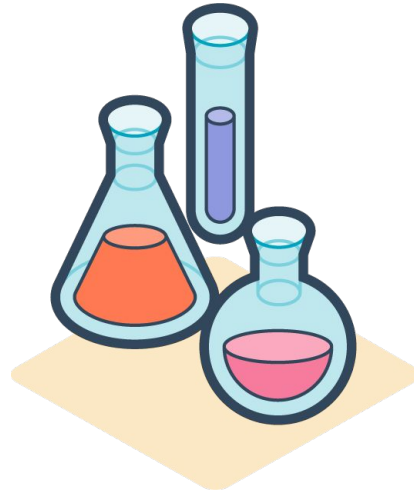
Remove Barriers   Foster Creativity   Provide Data

Remove Barriers

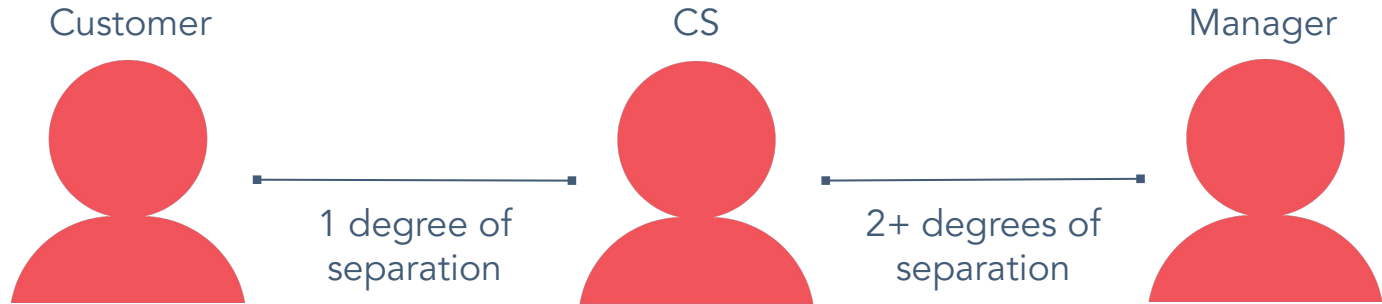# Remove Barriers

There's nothing worse than…

I was supposed to get a 15% discount and it was never applied to my account.

Unfortunately, my manager is the only person who can update discounting - let me talk to her when she's in tomorrow.
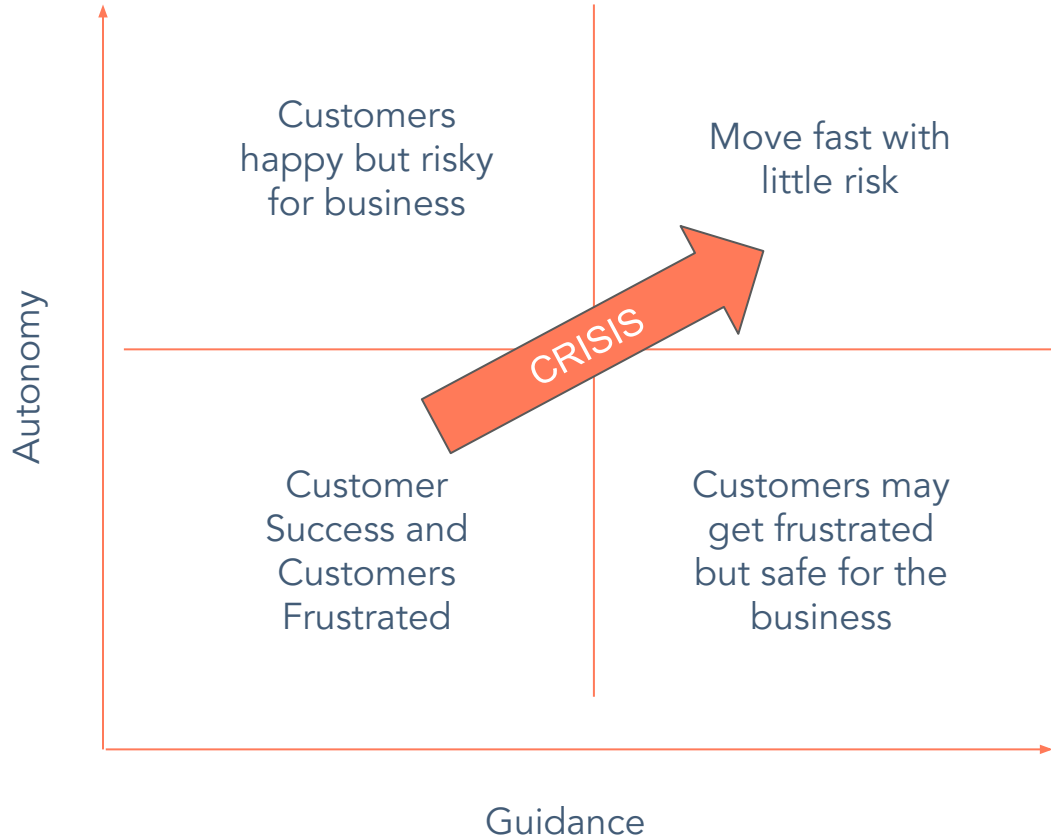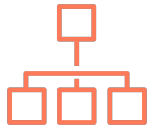
Remove Barriers

Who knows your customer best?

Customer		CS		Manager
	1 degree of separation		2+ degrees of separation	

Autonomy (vertical axis), Guidance (horizontal axis)

Top-left quadrant: Customers happy but risky for business

Top-right quadrant: Move fast with little risk

Bottom-left quadrant: Customer Success and Customers Frustrated

Bottom-right quadrant: Customers may get frustrated but safe for the business

Remove Barriers

3 Key Strategies to Help our Teams Move Faster

Guide & flowcharts to guide CS on options

Weekly stand-ups for managers

Streamlined approval processes

A HubSpot customer success story from not too long ago...

Foster Creativity

Foster Creativity

Have an *a-la-carte* menu of customer retention tools

Customer Conversation
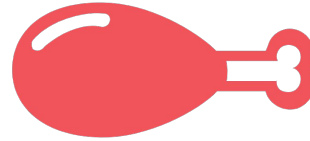
Discounting

Downgraded Package

Delayed Payments

Foster Creativity

Let your team and customers propose solutions

Consider Implementing:

- Customer Success weekly stand-ups
- A way to flag and forward relevant feedback more quickly within current systems
- A "Voice of the Customer" program
- Customer Roadblocks program
- Regular customer NPS surveys
- Slack channels with marketing, CS, and leadership

Foster Creativity

Use education as a tool to quell panic - example (this series!)

Foster Creativity

Don't forget to educate your own team

Provide Data

Provide Data

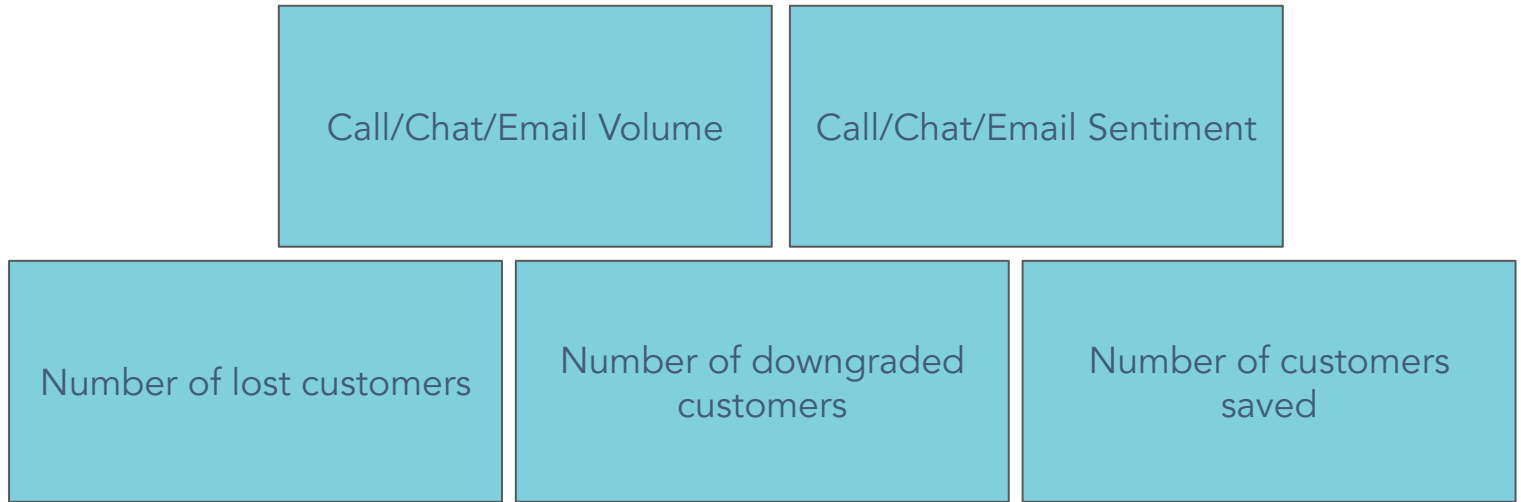Bring visibility into the support process

Your customers are under a lot of pressure right now. Lead with empathy and then ask - what information can help you better anticipate and solve someone's problem?

- Content of interest
- Past support calls/tickets
- Purchase history
- Emails sent from marketing/sales

Provide Data

Don't make it a guessing game

Call/Chat/Email Volume	Call/Chat/Email Sentiment	
Number of lost customers	Number of downgraded customers	Number of customers saved

ALL OF THIS HELPS YOU BUILD EMPATHY.

3 Takeaways:

1. Retention is "earned"
2. Empathy needs to go both ways (customers & employees)
3. Play the long game

Q + A

Feel free to suggest if you haven't yet!