Positioning Guide to Service Hub in 2019

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Prepared by Team Service Hub

Introduction

To date, Service Hub is the fastest growing product in HubSpot's history. When HubSpot was a little startup, it took us many years to see that same growth. We're off to a fast start! Even better is that we're now a "full flywheel" company: a front-office platform (marketing/sales/service) for every SMB.

For the next few pages, imagine you're the new CMO of Service Hub Inc. It's day 1 on the job at this ever-so-promising startup that's off to such a fast start. You need to learn the persona, competition, pricing, vocabulary, and more -- and do it fast. **That's what this document is for.**

By diving into this new world of service, you'll emerge with an understanding of our new service product, our new service persona, and how Service Hub completes the suite to deliver the full flywheel vision to all of our customers.

Thanks for your time spent reading, learning, and collaborating.

-- Mike Redbord, GM Service Hub

In this document you'll find everything you need to understand the 2019 Service Hub:

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Narrative

The Change: Customers today are less patient, more skeptical, and have higher expectations. They expect you to know them well, answer their questions quickly, and the ability to help themselves. They hate friction, and notice anytime you make them do something they'd prefer not to. Their voices are louder and collectively more influential than your own marketing.

The new customer is empowered and in a world where customers have more control. Happy customers are the new secret to growth.

How Businesses should Match the Change: It's time to put customers at the center of everything you do, and recognize service as a critical component in your growth. Doing this requires many companies to shift their growth model from a funnel to a flywheel. It also requires new tools and strategies.

Service Hub: In response to this change, HubSpot built Service Hub. Service Hub is a complete suite of customer service software that can be purchased as a standalone solution for service teams, or combined with the HubSpot Sales and Marketing Hubs. The tools in Service Hub are designed to help growing businesses improve the customer experience, help customers help themselves, and turn happy customers into growth. Service Hub grows with your business, it's free to get started, and offers pro, and enterprise tiers.

Key product stories / talking points

1. Customer Experience: We're here to help mid-market companies build a modern, frictionless customer experience:
    a. Customer expectations are high and they hate friction. They simply won't tolerate being ignored, passed around, or misunderstood. They expect you to know their history, offer complete answers, and help them in a way that's convenient for them.
    b. For most growing mid-market companies, it's a challenge to create this frictionless experience. As you acquire more customers email becomes overwhelming, many new support channels emerge, your teams struggle to collaborate, and customers slip through the cracks.
    c. Service Hub helps you design the customer experience you want. Our tools consolidate service channels, surface contextual customer data, improve collaboration, and help you build a system that maximizes individual productivity.
    d. Features that support this talking point:

      i.   Conversations, contextual CRM data, contextual marketing/sales data, automation, reporting, collaboration tools, post support feedback surveys.

     ii.   Help desk: Tickets, Automation, Reporting

2. **Self Service:** We're here to help mid-market companies build self service solutions that help their customers help themselves.
   a. Today, people are technically savvy and expect to be able to do more themselves. The best service experience is often to get out of their way and help them help themselves.
   b. For growing companies, it's hard to pivot from being totally reactive to customer needs, to building proactive solutions like self service. Most companies also struggle to maintain and improve these solutions if they do develop them.
   c. Service Hub helps you consolidate and organize valuable information, and then make it available to your customers in them way that is easiest for them consume. This may be via a Google search, live chat, or a self service portal.
   d. Features that support this talking point:
      i. Knowledge base, Live chat, Service Bot, search, customer portal.

3. **Feedback / Advocacy:** We're here to help mid-market companies understand their customers, improve the customer experience, identify advocates, and build relationships with them that translate to growth.
   a. Today, buyers don't lack information, they lack credible sources of truth. If you want people to think your business is credible, you have to create social proof, and customer advocates willing to tell their story are the only way to do this.
   b. It used to be simpler for growing companies to attract an audience and stand out from the crowd. But increased competition and the rising cost of customer acquisition has made this difficult. Most companies are struggling to differentiate and compete on something other than price.
   c. Service Hub helps you truly understand your customers needs and the actions you should take to improve their well being. The tools help you identify your happiness customers, and enroll them into content and campaigns that build social proof into your marketing and lend you credibility.
   d. Tools that support this talking point:
      i. NPS surveys, customer satisfaction surveys, reputation management, promoter score, review requests, testimonial collection, case study collection.

Public product usage data

Service Hub is used by thousands of services teams (not a public number) to improve the customer experience and create promoters. To help tell this story we've collected some high level proof points that have been approved by legal for external use. All numbers are reflective of usage during all of Q1 2019.

In the first quarter of 2019 - Service Hub customers have:
- Closed almost 1.4 Million tickets (1.388)
- Published over 21,000 knowledge base articles (21,440)
- Collected over 57,000 survey entries from customers (57,033)

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HubSpot's Free & Starter Service Tools Users (pricing)

***Key features** = Conversations, tickets, productivity tools*

HubSpot's free CRM now offers a number of solutions for helping customers. Service teams can engage more customers more effectively with live chat and the shared inbox. They stay organized and establish a basic help desk with the shared inbox, tickets, and bots. They increase individual productivity with meetings, snippets, and more.

The free tools are geared towards small teams and individuals who want to bring some clarity and process to how the support customers. As their customer base grows they'll quickly start to seek ways to do more with less.

When they upgrade to starter they'll gain features that help them improve productivity. They'll be about to route different customer messages to different team members and use email sequences to nurture customers through repeatable processes like onboarding.

Free and starter offer some powerful features but they lack automation, proactive solutions, and the insights a full functioning service team need.

Service Hub Pro's Users ([pricing](#))

***Key features** = Automation, knowledge base, customer feedback, video, custom reporting*

Service Hub pro brings automation to a team's help desk. Ticket routing, escalation, automatic task creation and more eliminate manual work and provide scale. At pro powerful proactive solutions are also unlocked. A robust knowledge base gives customers a quick self service option solving issues before they happen and customer feedback surveys allow teams to uncover issues and predict issues with certain customers. Investing in proactive solution helps service teams spend less time on support and be more strategic with their time. Among other tools pro also unlocks the use of video as a tool to respond to tickets and custom reporting. Over all pro is a complete service solution perfect for companies with at least 2 service reps and up to 100. It's especially powerful for companies when paired with Marketing and Sales Hub. The trio of Hubs give users a complete view of the customers and unite various teams.

For larger service teams or teams that have more sophisticated needs, Service Hub enterprise is our most complete service software.

Service Hub Enterprise Users ([pricing](#))

***Key features** = Enterprise features, playbooks, Goals, hierarchical teams*

Enterprise offers everything found in pro, as well as additional features that help solve for the flexibility and control needed by more sophisticated teams. Enhance security with single sign-on, support your global team with multiple currencies, better organize your team with hierarchical teams, and more - see all the [enterprise platform features here](#).

Service Hub Enterprise also has some new features particularly helpful feature for service agents. Playbooks are smart, built in, best practices and scripts that give your agents the best soundbite in any given situation, even if they just joined the team. Goals provides individual agents and teams the ability to report on metrics related to a specific personal goal.

Service Hub pro and enterprise can be purchased as standalone products or as part of the [HubSpot Growth Suite bundle.](#)

Products ([Product Page](#))

Service Hub is a complete product line. This means it's a "Hub", a powerful standalone suite of tools that provide a services organization everything it needs to run and maximize efficiency and production. The tools are grouped by our [product stories](#), customer experience, self service, and advocacy.

Free Tools (Conversations, Tickets)

Conversations and tickets are part of HubSpot's free tools. Together these tools can be used to **engage** customers and help manage their needs. They can be used to establish a simple help desk, but will require some manual work to manage the process.

An early problem of most service teams is that as their customer base grows individual email or a group alias stop working. The shared inbox in Conversations is a perfect solution for this.

Help Desk / Tickets ([Product Page](#))

Tickets are created when a customer has an issue that needs to be tracked or collaborated on to solve. It's similar to a deal in structure. Teams can collaborate on tickets, information is recorded, and it comes loaded with all the contextual information you already have in the CRM for that customer. Agents can respond to customers from tickets, schedule meetings, send a video recording, and much more. Tickets come together to form a ticket queue or pipeline. This gives support teams direction and focuses their work.

A help desk isn't a product in HubSpot, but a system that our customers build to help their customers. They are all unique but have a common goal. Service Hub helps teams build a help desk, which they use to intake, manage, organize, automate, respond to, and report on customer questions or issues. Generally Service Hub enables a help desk with these tools.

1. Intake: Conversations shared inbox, support form
2. Management: Conversations, tickets
3. Organization: Tickets pipeline
4. Automation: Ticket automation, conversation routing, ticket stage automation
5. Response: Conversations, email responder in tickets object
6. Reporting: Service dashboard and service custom reporting

Knowledge Base ([Product Page](#))

Today, when a customer needs help their first response is to turn to Google. People want solutions fast, are more technically savvy than in the past, and know that the best information usually exist online. It's important for companies build a self service solution, where customers can find helpful answers, specific to their questions, via Google. That is what our knowledge base tool offers. Simple structured help articles, powered by the HubSpot CMS, that support video, and are built to rank well in Google search.

Customer Feedback and Advocacy ([Product Page](#))

Customer Feedback: For teams to really spin the flywheel and move from reactive customer service solutions, to proactive solutions, they have to truly understand what their customers

need and want. This is what starts to turn service into growth, and it's what customer feedback was designed to do. The tool help users create surveys that try to discover customer insights. Net Promoter Score surveys to understand customer health and happiness, customer support surveys to measure the support experience, and customer experience surveys to measure any part of the customer experience. The qualitative and quantitative feedback generated by these surveys is then analyzed in an insights dashboard, that often becomes the command center of the services leadership team.

Advocacy:

Engaging, guiding, and improving customer happiness in and of itself is going to help you build a better company. But to really see growth improve from an investment in service you need to give your happy customers a microphone and amplify their stories. To do this you need to know how customers feel, take action to improve it, identify happy customers, and then enroll those customers in programs that help leverage their voice. Advocacy tools to help accomplish this vision are now in development and will roll out in 2018.

Reporting & Automation

Reporting is central to building a successful help desk, knowledge base, and services team. How your team and customers interact with Service Hub is tracked in a services reporting dashboard. Help desk or tickets reporting helps you understand how well your help desk is operating, what topics customers are asking about, how well your team and individuals are performing and more. Knowledge base, and customer feedback data is also pumped into the main dashboard, to give you a complete picture of the delight portion of your flywheel.

Automation is used to eliminate manual process and speed up operations in Service Hub. The most common use case is to use automation as part of the help desk process. For example many customers automatically assign a ticket to a specific support rep as it comes in through the support form or add it to a certain ticket pipeline based on information in the ticket.

Integrations & APIs

Coming soon!

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Content & Methodology

Service Hub is built to help you delight your customers and turn service into growth. To do that you need more than just tools, you need a system and strategy to get there. To help you do

that, Michael Redbord and the Academy Team have worked hard to create a simple framework that shaped the tools and will help customers achieve Service Hub's mission.

- Read about the Inbound Service Framework
- Take the HubSpot Academy - Getting Started with the Service Hub Lesson

Content and other Service Hub resources

- Redbord in Harvard Business Review - Scaling Customer Service as Your Startup Grows
- Engage, Guide, and Grow Video - Academy Master Class
- Product launch post and guide - Introducing: HubSpot Service Hub
- Why Your Marketing Needs More Social Proof and How to Create the Advocates Who Create It in HubSpot - HubSpot User blog

Customer Stories

- How Yoga International Decreased Churn 20% With Service Hub [Customer Story]
- How Unific Built a Help Desk and Improved Customer Happiness With Service Hub [Customer Story]
- How Santa Cruz Bikes Uses Service Hub to Scale Customer Happiness as They Grow [Customer Story]
- How a Century-Old Company Delivers 21st Century Customer Service [Customer Story]

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