



Quick Wins with HubSpot Service Free



Casey McGaw

Senior Customer Success Manager





Who is already a **HubSpot** user?



Free Email Marketing – Now in the Free HubSpot CRM

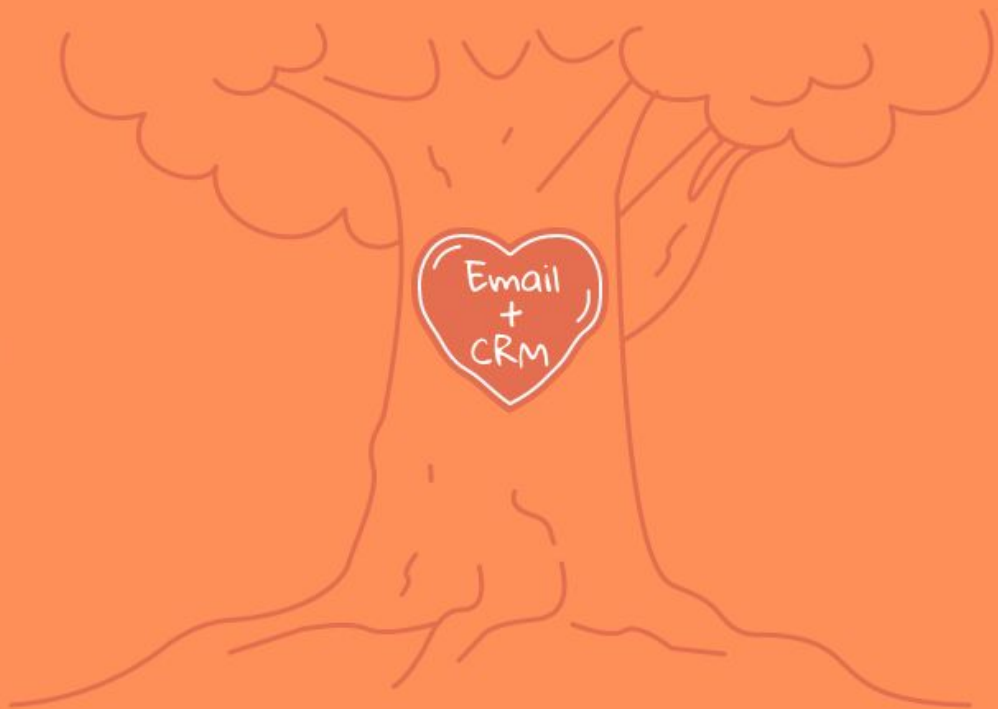
Email *loves* CRM

And Love Shouldn't Cost a Thing

Send email for free in HubSpot's CRM – not just because it's free, but because it's powerful. Email + CRM. Some things are just better together.

Get free email + CRM

Learn more



Get Started With HubSpot

Whether you want to increase leads, accelerate sales, organize your contacts, or better serve your customers, HubSpot has a solution to help you grow.



Organize your contacts, get deeper insights on every lead, and monitor deals with ease – all for free.

 Now with free email marketing

[Get free CRM](#)



HubSpot

HubSpot CRM is 100% free. Forever.



Have an account? [Sign in.](#)

Create your free CRM



Sign up with Google

OR

First name *

Last name *

Email address *

Use your work email address if you're using HubSpot CRM for business.

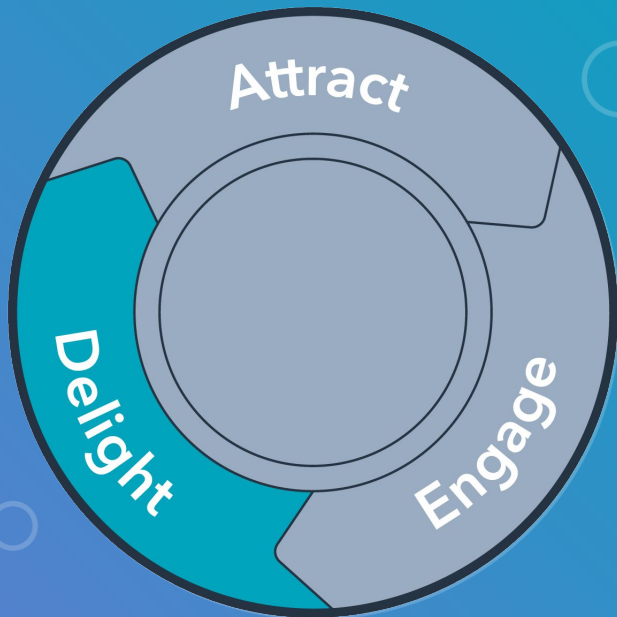
Password *

[Show Password](#)

Get HubSpot CRM

By creating a HubSpot account, you're agreeing to accept the [HubSpot terms of service.](#)

We're committed to your privacy. HubSpot uses the information you provide to us to contact you about our relevant content, products, and services. You may unsubscribe from these communications at any time. For more information, check out our [Privacy policy.](#)



Delight

Tie your success to your customers' successes. After all, how you treat your customers affects what prospects hear about you.

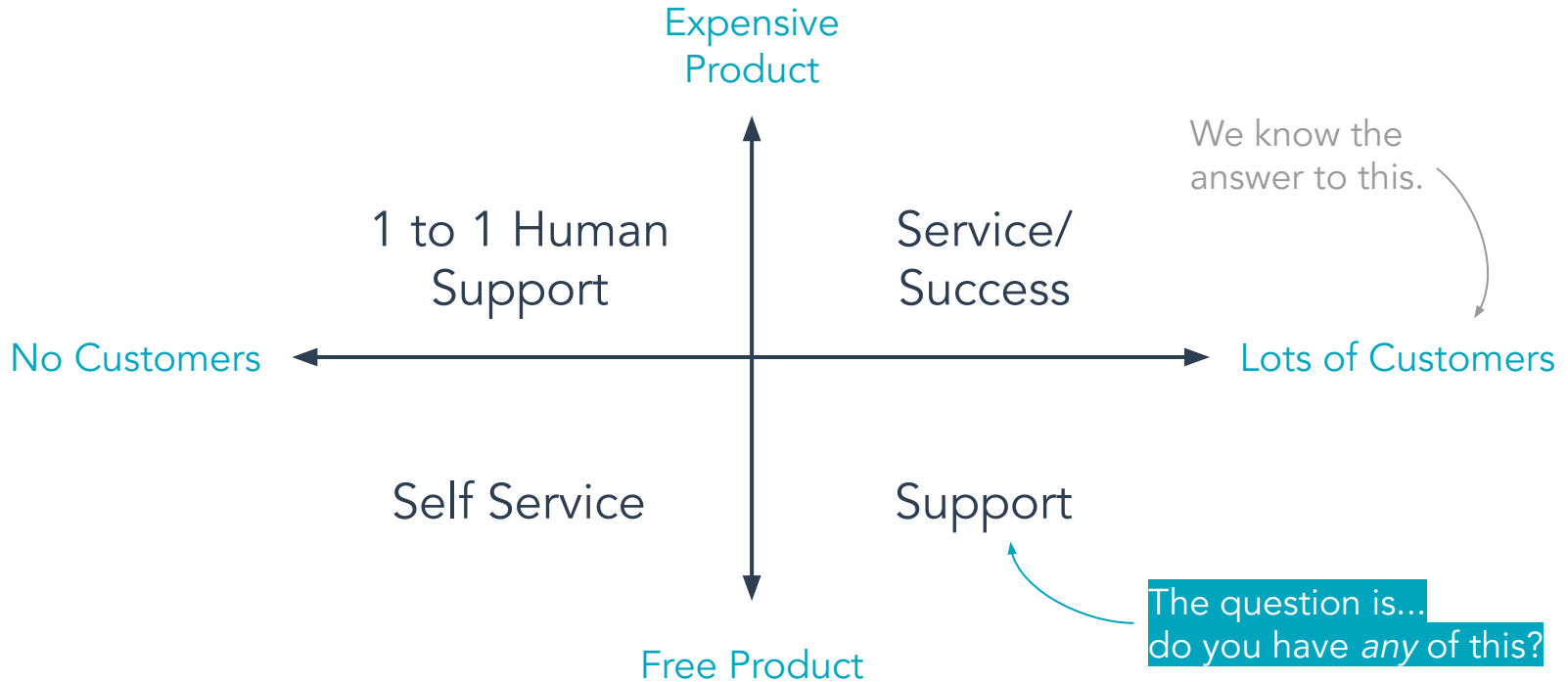


Implementing a **customer retention strategy** helps:

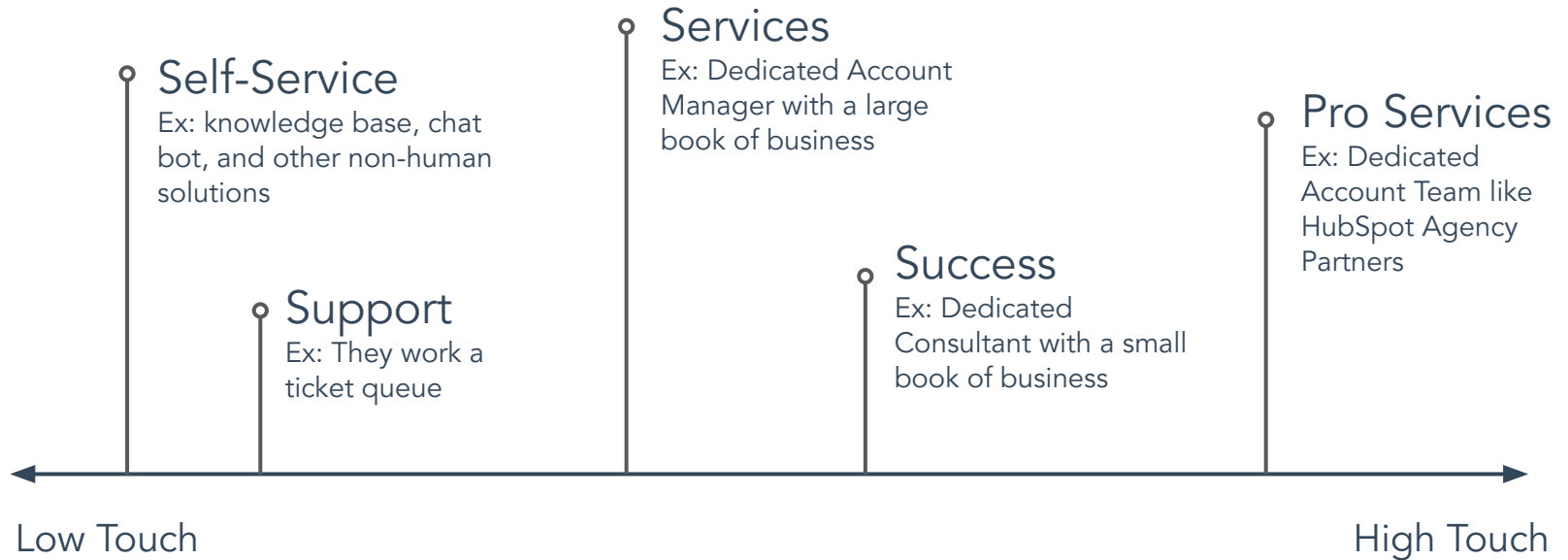
- Identify and explore referral **sales opportunities**
- Build and foster constructive relationships with customers
- Identify and rectify flaws within company policies and processes
- **Enhance brand reputation**
- Understand future needs of the customers



What kind of service should a company offer?



Spectrum of Service Offerings



Note: While these are typical SaaS terms, your industry may have different names for these offerings.



Self-Service

Requirements/Considerations:

- Knowledge Base / FAQ
- Blogs, guides and How-to Videos
- Social Media / Online Communities / Forums
- Live chat bots

Customer Support

Requirements/Considerations:

- Customer Intake
- An shared inbox
- A way to organize issues
- A way to report on success

Services/Success

Requirements/Considerations:

- CRM and Project management tools
- Customer feedback surveys
- Renewal management
- Advocate management
- Lifecycle management

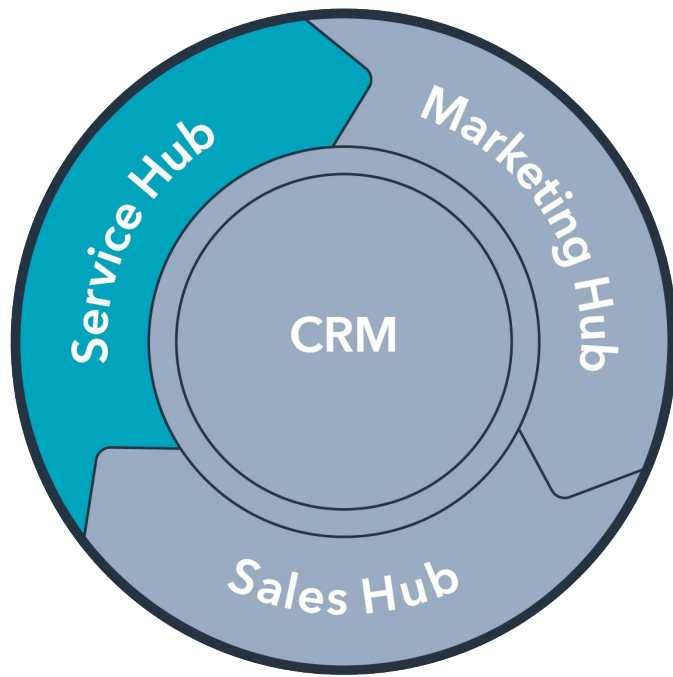
Professional Services

Requirements/Considerations:

- Software suites
- Time management
- Project management
- Note: These services can be 3rd-party providers



HubSpot Service Hub



Service Tools

Ticketing

Live chat

Conversations inbox

Canned snippets

Tickets closed reports

Rep productivity reports

Time-to-close reports



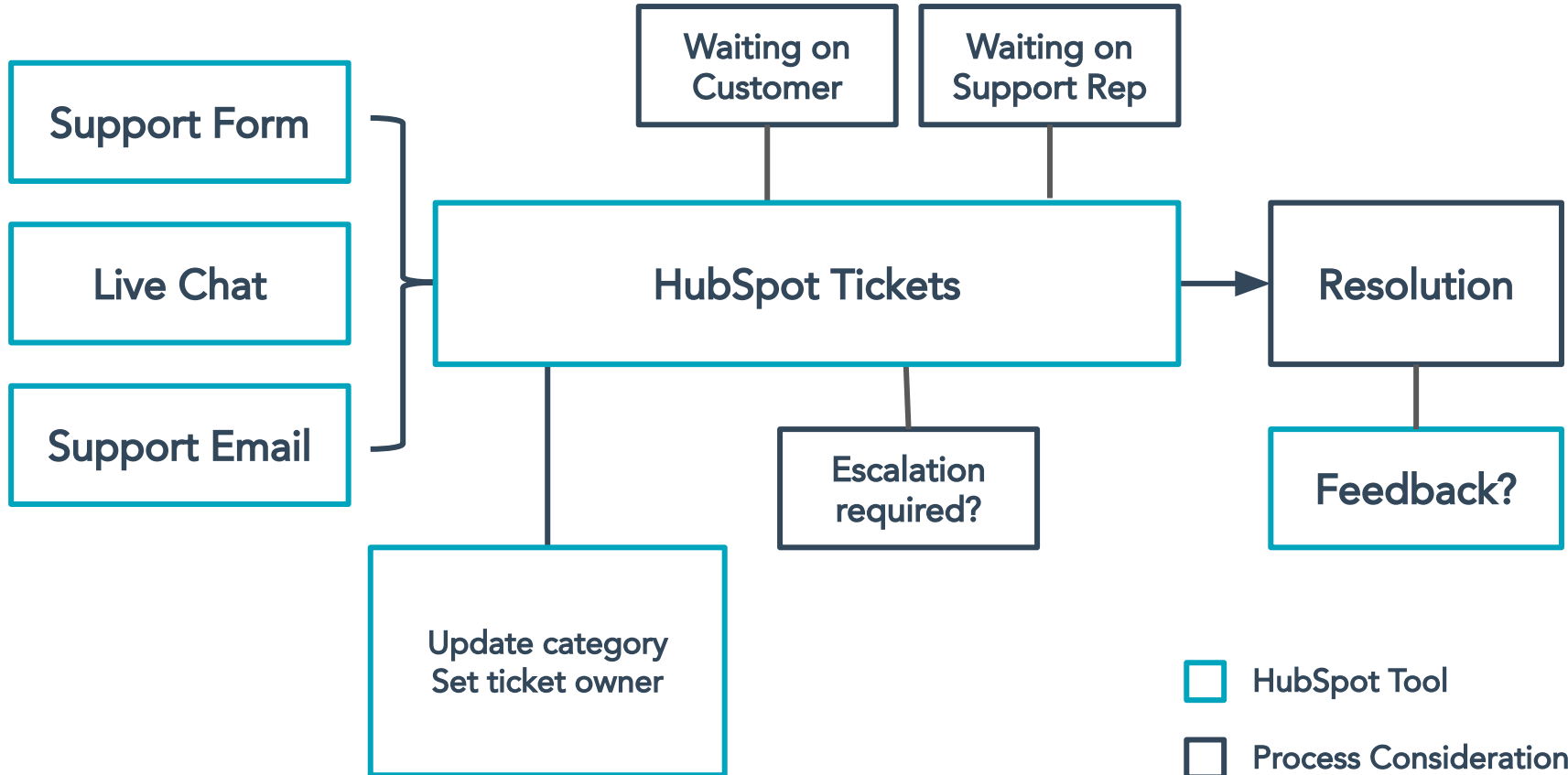
Tickets



- Build a helpdesk to log, organise, and keep track of customer issues all in one place with tickets.
- Automate ticket creation, routing and progression
- Surface customer trends and concerns
- Categorise queries to streamline the resolution process



A Help Desk is a System





Let's get into the tool and have a look...



How do we find our promoters?



Feedback is the breakfast of champions.

How many of you skip breakfast?



Consider:

- ✓ **How do you identify a happy customer?**
E.g. Evangelist Lifecycle Stage, a specific assigned account owner, etc.
- ✓ **How do you measure customer sentiment?**
E.g. NPS, CSAT, CES, other?
- ✓ **What channel/format of feedback will you collect?**
E.g. Form submission, email reply, booked meeting, inbox, live chat.
- ✓ **When will you collect feedback?**
You should be setting up “listening posts” at every stage of your customer journey
- ✓ **How will you respond to collected feedback?**
You must have a defined process for responding to feedback - otherwise you're essentially eating breakfast without digesting it!



The A.C.A.F. Customer Feedback Loop

4. Follow-up

Follow-up with customers who gave feedback on your plans so they know you're truly listening.

3. Act

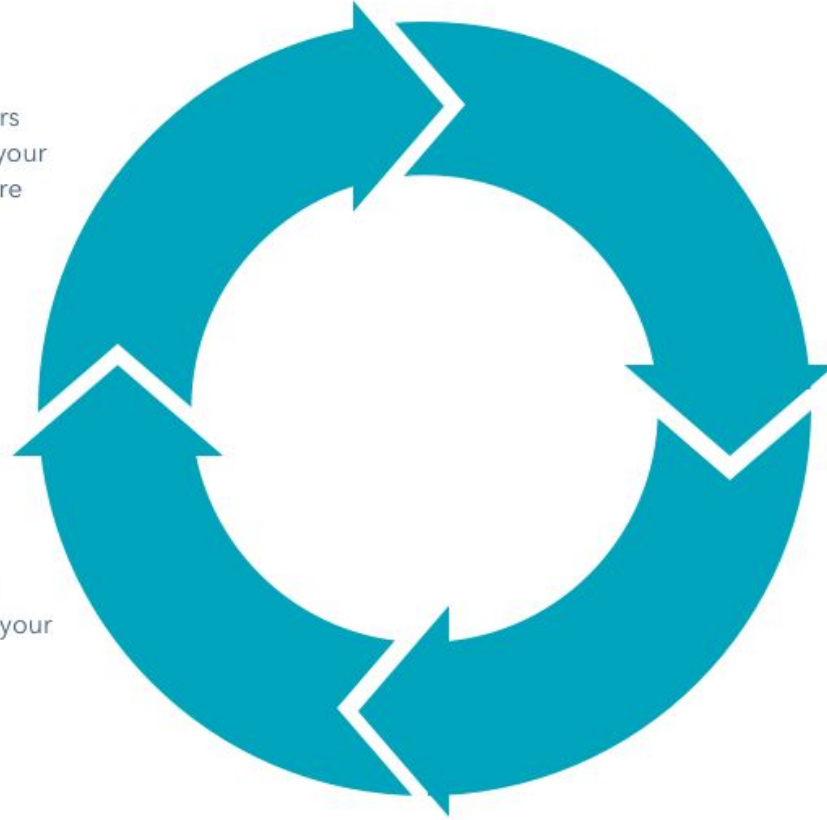
Act on the feedback by sharing it with others at your company who can implement changes.

1. Ask

Ask your customers for feedback on your product or service.

2. Categorize

Categorize the feedback into different buckets that are meaningful to your business.



1. Ask

2. Categorise

3. Act

4. Follow Up

Hi {First Name},

Congratulations on your first month as a Happy Harp Seal Customer! If you had 30 seconds, [please share your initial thoughts with us.](#)

Best,

Cindy



1. Ask

2. Categorise

3. Act

4. Follow Up


First name

Email*

How satisfied are you as our customer?

- ✓ Please Select
- Not satisfied at all
- Somewhat satisfied
- Very satisfied

Submit

 Create your own [free form with HubSpot](#)




1. Ask

2. Categorise

3. Act

4. Follow Up

Upcoming

 Task


Unsatisfied Customer Response

Assigned to Cindy Huang Due date 24/07/2019 8:00 AM

@Cindy Huang - can you please follow up on this customer? They said they don't like seals.

[Details](#)

July 2019

 Form submission

Cindy submitted [Customer Feedback Form](#) on [Customer Feedback Form](#)

Updated 5 properties

Create Date	23 Jul 2019 8:57 AM
Email	cindyh@hubspot.com
First Name	Cindy
How satisfied are you as our customer?	Not satisfied at all



1. Ask

2. Categorise

3. Act

4. Follow Up

Hi {First Name},

I'm sorry to hear that you're not satisfied by your experience as our customer. Would you be open to a quick call to discuss further?

[Feel free to find 10 minutes that suit you here in my calendar.](#)

Best,

Cindy



Templates, Meetings & Forms



- Create pre-made emails that you can send to contacts and personalise, without having to type the same content each time.
- Use CRM Data to pull in relevant personalisation automatically
- Conveniently schedule meetings without the back-and-forth emails
- Capture data from your website or directly from your prospects, and feed that data directly into your CRM.



Questions?



Thank you