ORIGIN 63

Driving Customer Success with HubSpot Sales & Service Hub

Guide

Foreword

Welcome to **"Driving Customer Success: The HubSpot Sales and Service Hub Integration Guide,"** designed to accompany and enhance the valuable insights shared during our recent webinar, "Driving Customer Success with HubSpot Sales and Service Hub."

Customer success is a driver of growth, retention, and profitability. For business owners, customer service leaders, and sales professionals, understanding how to leverage powerful tools like HubSpot to drive customer success is more important than ever.

This ebook serves as a comprehensive guide, building upon the foundation laid during our webinar. It offers practical insights, step-by-step instructions, and real-world examples to help you harness the full potential of HubSpot's Sales and Service Hubs.

Whether you're new to HubSpot or looking to optimize your existing processes, this guide will equip you with the knowledge and strategies to elevate your customer success initiatives.

Introduction

It's no secret that customer success directly impacts business success. Happy, successful customers are likelier to stick around, spend more, and become brand advocates.

91%
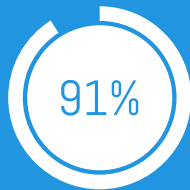
A well-designed customer success program can yield a 91% return on investment over three years.

(Source: Forrester's 2020 Report)

Despite this impressive potential, many businesses are still not paying enough attention to customer success. They're missing a golden opportunity to boost their bottom line while improving customer satisfaction and loyalty.

In this guide, you'll learn:

- What customer success means and why you need it

- How to use HubSpot's Sales and Service Hubs to create a unified customer experience

- Practical strategies for aligning your sales and service teams

- Tips for leveraging HubSpot's tools to anticipate and meet customer needs

This guide has something for everyone, whether you're just starting out with HubSpot or looking to improve your customer success strategy.

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The Importance of Customer Success

Customer success is an approach to business that focuses on helping customers reach their goals through your product or service. At its core, customer success is about aligning your company's success with that of your customers.

It's not just about selling a product or resolving issues; it's about actively working to ensure your customers derive real, tangible value from their relationship with your company.

Why is customer success so important? Simply having a great product isn't enough. Customers have more choices than ever before, and they're not just looking for features—they're looking for outcomes.

They want to know that your product or service will help them solve real problems or achieve specific goals.

For example, if you're selling project management software, your customers aren't just buying a tool with a nice interface and many features.

They're buying into the promise of better organization, improved team collaboration, and, ultimately, more successful projects. Customer success is about making sure they achieve these outcomes.

You're not just helping your customers—you're also setting your business up for sustainable, long-term growth. **Let's explore how:**

| Impact on Business Growth	Integrated Sales and Service Tools
• Increased customer retention • Higher customer lifetime value • Positive word-of-mouth and referrals	• Enable a seamless customer journey • Provide a unified view of customer interactions • Facilitate proactive support and engagement

Impact on Business Growth

Customer success profoundly impacts business growth, influencing everything from your bottom line to your reputation in the market. Here's how:

1. Increased Customer Retention

When customers achieve their desired outcomes with your product or service, they're much more likely to stick around. This increased retention is crucial for business growth.

95%

25%
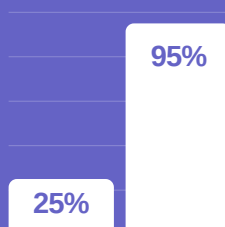
According to research, increasing customer retention rates by just 5% can increase profits by 25% to 95%. Customer success programs help reduce churn by ensuring customers are continuously deriving value from your offering.

For instance, a software company might implement regular check-ins, provide ongoing training, and continuously gather feedback to ensure their customers are using the product effectively and seeing results.

2. Higher Customer Lifetime Value

Customer Lifetime Value (CLV) represents the total revenue a business can expect from a single customer account throughout their relationship. Customer success initiatives can significantly boost CLV by:

1. **Encouraging upgrades and upsells**. Satisfied customers achieving their goals will likely invest in additional features or higher-tier plans.
2. **Increasing usage and adoptio**n. The more customers use and rely on your product, the more valuable it becomes, reducing the likelihood of churn.
3. **Extending the customer relationship**. Continually providing value extends the duration of the customer relationship, increasing their overall lifetime value.

For example, a SaaS company might see a customer start with a basic plan, upgrade to a premium version as they grow, and maintain their subscription for years due to the consistent value they receive.

3. Positive Word-Of-Mouth and Referrals

Happy, successful customers become your best marketers. They're likely to recommend your product or service to others, providing a powerful and cost-effective form of marketing.

92% According to Nielsen, <u>92% of consumers</u> trust recommendations from friends and family over all forms of advertising.

Customer success can fuel this word-of-mouth marketing by creating success stories and case studies, encouraging and incentivizing customer referrals, and building a community of brand advocates.

For instance, a B2B software company might showcase customer success stories on their website, feature customers in webinars, or create a referral program that rewards customers for bringing in new business.

Integrated Sales and Service Tools

To effectively drive customer success, it's crucial to have integrated sales and service tools. **Here's why:**

1. Enable A Seamless Customer Journey

Integrated tools allow a smooth transition from prospect to customer to brand advocate. This seamless journey ensures that no customer falls through the cracks and that each stage of their relationship with your company is optimized for success.

For example, when a sales rep closes a deal in HubSpot's Sales Hub, all the relevant information can be automatically transferred to the Service Hub, allowing the customer success team to hit the ground running with onboarding and support.

2. Provide A Unified View of Customer Interactions
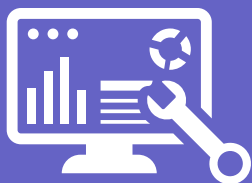
When sales and service tools are integrated, everyone in your organization can access a complete picture of each customer's history, preferences, and interactions. This 360-degree view allows for more personalized, effective interactions.

For instance, if a customer reaches out with a support issue, the service rep can see their purchase history, previous interactions, and any open sales opportunities, allowing them to provide more contextual, helpful support.

3. Facilitate Proactive Support And Engagement

Integrated tools allow you to anticipate customer needs and address potential issues before they become problems. By analyzing data from both sales and service interactions, you can identify patterns and proactively reach out to customers who might need additional support or be ready for an upgrade.

For example, if usage data shows that a customer isn't utilizing a feature of your product, you could trigger an automated email campaign or schedule a check-in call to provide additional training and ensure they're getting the most value from your offering.
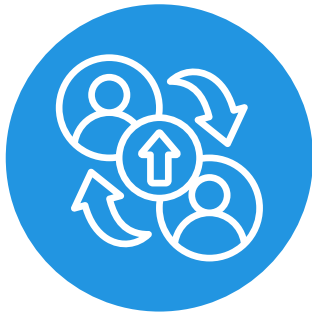
Managing Customer Interactions with HubSpot CRM

Keeping track of customer interactions can feel like juggling while riding a unicycle. That's where HubSpot CRM comes in. It's like having a super-organized personal assistant who never forgets details about your customers.

Whether you're a small business just starting or a growing company looking to streamline your processes, HubSpot CRM can help you manage customer interactions more efficiently and effectively.

HubSpot Support Tools Overview

HubSpot offers a suite of support tools that work together seamlessly to help you provide top-notch customer service. Let's break them down:

Ticketing System

First up, we have the Ticketing System. Think of this as your digital customer service desk. When a customer has an issue or question, it becomes a ticket. This ticket can come from various sources—emails, forms, live chat, or even Facebook Messenger.

The beauty of this system is that it keeps all customer issues organized and ensures nothing falls through the cracks. You can even set up different pipelines for different issues, making it easier for your team to prioritize and resolve problems efficiently.

Knowledge Base

Next, we have the Knowledge Base. This is like a self-serve library for your customers. You can create articles that answer common questions or provide helpful information about your products or services.

The great thing about a knowledge base is that it's available 24/7, so customers can find answers even when your support team is off the clock.

Plus, it helps reduce the number of simple, repetitive questions your team has to handle, freeing them up to tackle more complex issues.

Live Chat

Last but not least, there's Live Chat. This is your direct line to customers who are browsing your website. It's like having a friendly sales or support person ready to help at a moment's notice.

Live chat can answer quick questions, guide customers through your website, or even qualify leads for your sales team. And the best part? It can be customized to match your brand and even use chatbots to handle basic inquiries automatically.

Benefits of Support Tools

Now that we've covered what these tools are let's discuss why they're so beneficial for your business.

Centralized customer communication

These tools provide centralized customer communication. Imagine having all your customer interactions—whether emails, chat messages, or support tickets—in one place. It's like having a one-stop shop for all things customer-related.

This means your team doesn't have to jump between different systems or spend time searching for information. Everything they need is right there at their fingertips. This not only saves time but also ensures that no important customer information gets lost in the shuffle.

Faster issue resolution

Next up is faster issue resolution. With tools like the ticketing system and knowledge base, your team can quickly resolve customer issues.

The ticketing system helps prioritize and track issues, while the knowledge base quickly answers common questions. It's like giving your support team superpowers—they can swoop in and solve problems faster.

Improved customer satisfaction

These tools also improve customer satisfaction. When customers get quick, helpful responses to their questions or issues, they're happier. It's as simple as that.

And happy customers are more likely to stick around and recommend your business to others. It's like planting seeds of loyalty that grow into long-term customer relationships.

Self-service options for customers
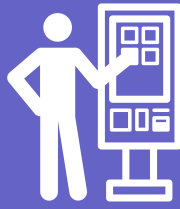
Finally, these tools provide self-service options for customers. Many customers prefer to find answers on their own rather than reaching out to support.

With a well-organized knowledge base and smart chatbots, customers can often solve their problems or find the information they need without waiting for your team's response. It's like giving your customers a Swiss Army knife of support options—they can choose the best tool.

Ticketing System

HubSpot's Ticketing System is a powerful tool within the Service Hub that helps you manage and resolve customer service requests efficiently.

Its main goal is to ensure that no customer inquiry goes unanswered and that all issues are resolved efficiently.

It centralizes customer communications and streamlines the process of addressing customer issues, leading to faster resolution times and improved customer satisfaction.

Here's how you can use it for customer success:

1. Create tickets automatically

One strength of HubSpot's Ticketing System is its ability to create tickets from various sources automatically.

Whether a customer reaches out via email, fills out a form on your website, or sends a message through Facebook, the system can capture these interactions and turn them into actionable tickets.

This automation ensures that every customer touchpoint is recorded and addressed, regardless of the channel they choose to use.

2. Customize pipelines

Think of pipelines as different lanes for different types of customer needs. For example, you might set up a "Technical Support" pipeline for issues like login problems or app crashes.

Another pipeline could be "Billing Inquiries" for questions about invoices or subscription changes.

You could even have a "Feature Requests" pipeline to track product improvement ideas. This way, when a ticket comes in about a forgotten password, it automatically goes into the Technical Support pipeline, making it easy for your tech team to spot and resolve quickly.

3. Personalize stages

Stages help you track the progress of each ticket. Let's say you run a software company. Your stages might look like this:

- **"New"**: The ticket just came in

- **"Investigating"**: Your team is looking into the issue

- **"In Development"**: If it's a bug, this stage shows it's being fixed

- **"Waiting for Customer"**: You've asked the customer for more info

- **"Testing"**: The fix is being tested

- **"Resolved"**: The issue is solved

These stages give you a birds-eye view of where every issue stands, helping you manage your team's workload and ensure nothing falls through the cracks.

4. Use HubSpot Helpdesk

HubSpot's newer Helpdesk feature takes the Ticketing System to the next level. It provides a more structured support system with advanced ticket tracking, automation capabilities, and seamless integration with the Knowledge Base.

This integration lets your team quickly access relevant information while addressing customer issues, leading to more efficient and accurate problem-solving.

5. Set up automation
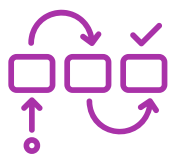
Create workflows to route tickets to appropriate teams or agents, send automated responses, and trigger follow-ups.

You can create rules that do the work for you. For example:

- **Auto-assignment**: Any ticket with the word "billing" automatically goes to your finance team

- **Initial response**: When a new ticket comes in, an automatic email is sent saying, "We've received your request and will respond within 24 hours"

- **Follow-ups**: If a ticket has been "Waiting for Customer" for 3 days, it automatically sends a gentle reminder
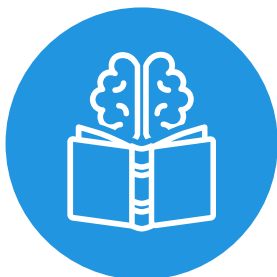
- **Escalation**: If a "High Priority" ticket hasn't been addressed in 2 hours, it's automatically escalated to a manager These automations ensure consistent service and help your team focus on solving problems rather than managing tickets.

6. Integrate with other HubSpot tools

The Ticketing System doesn't exist in a vacuum—it's part of the HubSpot ecosystem. Let's say a sales rep, Mike, is about to call a prospect, Jane. He can see that Jane recently had a support ticket about a free trial issue that was successfully resolved.

This info helps Mike tailor his conversation. Conversely, if Jane calls support, the agent can see she's in talks with sales, ensuring they provide service that aligns with her potential future needs.
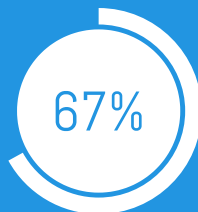
Knowledge Base

HubSpot Knowledge Base

Help Center   Documentation ⌄   Training ⌄   Community ⌄   Blogs ⌄

Search the Knowledge Base

Highest rated articles

Connect your personal email   Connect your domain to HubSpot

Import one object   HubSpot's default contact properties

Add HubSpot users   Choose your workflow actions

HubSpot billing and payment | Frequently Asked Questions   Academy certifications | Frequently Asked Questions

The Knowledge Base is HubSpot's answer to empowering customers with self-service options. It's essentially an online library of helpful information about your product or service, designed to be easily accessible and navigable by your customers.

67%

67% of customers prefer self-service over talking to a support agent. A knowledge base lets customers find answers to their questions independently, reducing the workload on your support team while providing instant solutions to common queries.

Here's how you can use it for customer success:
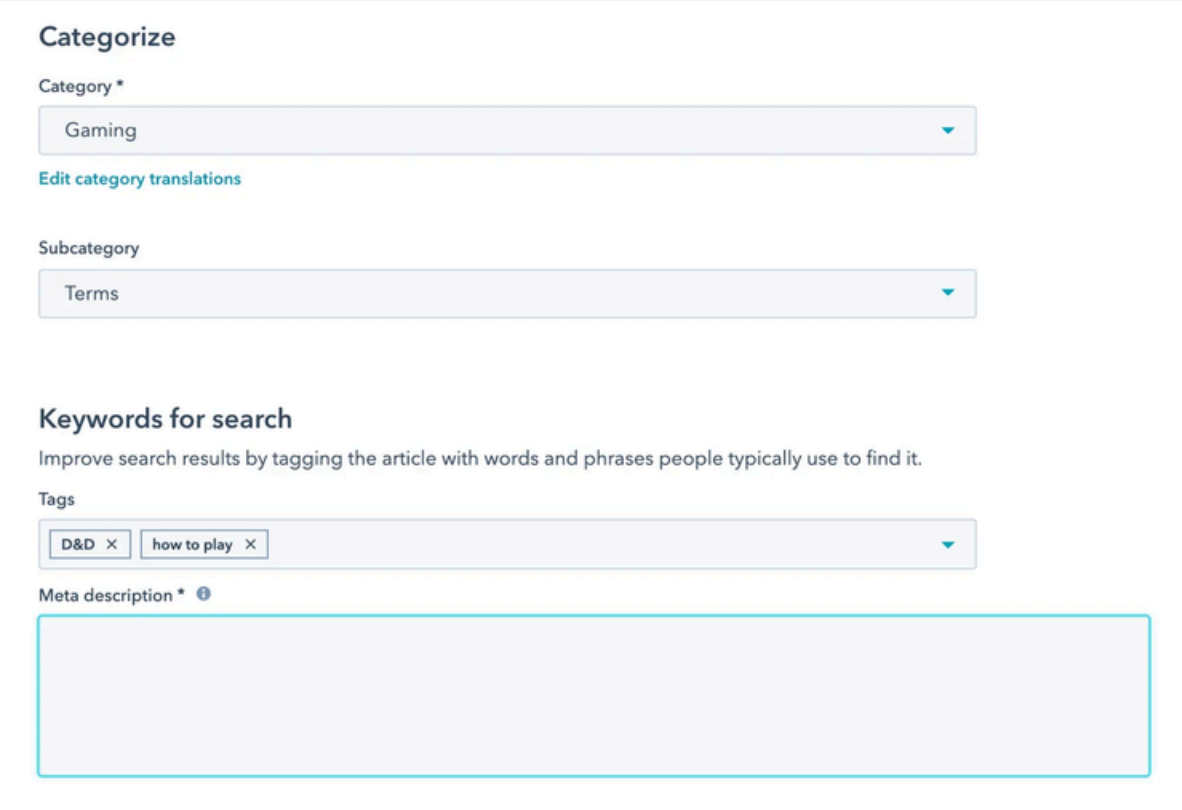
1. Create rich, informative content

HubSpot's Knowledge Base isn't just about plain text articles. You can create engaging and truly helpful content. Let's say you're selling a smart home device.

You could write an article about "How to Set Up Your SmartHome Hub," complete with step-by-step instructions, screenshots of the app interface, and even embed a video walkthrough.

The rich text editor lets you add headers, bullets, tables, and more, making your content easy to scan and understand.

2. Organize with categories and tags

Imagine your Knowledge Base as a well-organized library. Categories are like the main sections of your library, while tags are like the index cards that help find specific topics.

For a software company, you might have categories like "Getting Started," "Billing," "Advanced Features," and "Troubleshooting."

Within these, you could use tags like "password reset," "integration," or "error messages." This structure helps customers quickly find what they need, browsing or searching.

3. Implement powerful search functionality

HubSpot's search feature is like having a super-smart librarian. When a customer types "How do I change my plan?", the search doesn't just look for those exact words.

It understands the intent and can pull up articles about "upgrading subscription," "downgrading account," or "modifying billing cycle." You can even set up synonyms, so if someone searches for "tariff," they'll find articles about "pricing."

4. Customize branding and design

Your Knowledge Base should feel like a seamless part of your website. With HubSpot, you can add your logo, use your brand colors, and even set up a custom domain like "help.yourcompany.com."

For example, if you're a fun, youth-oriented brand, you could use bright colors and casual language in your design and articles. This consistency helps build trust and makes the self-service experience natural for your customers.

5. Ensure mobile responsiveness

People want answers on the go. HubSpot's Knowledge Base automatically adjusts to look great on any device. Imagine a customer is setting up your product and hits a snag.

They can pull out their phone, quickly find your guide, and solve the issue without ever needing to contact support. This mobile-friendly design means help is always at your customers' fingertips.

6. Integrate with chatbots and live chat

This is where things get really smart. You can connect your Knowledge Base to HubSpot's chat tools. Let's say a visitor asks your chatbot, "How do I reset my password?" The bot can instantly provide a link to the relevant Knowledge Base article.

Or, if someone's in a live chat and asks about your return policy, the support agent can quickly grab the link to your returns article and share it in the chat. This integration makes your entire support system more efficient and helpful.

7. Gather and utilize feedback

HubSpot lets you add feedback options to your articles, like a simple "Was this helpful?" button. You might notice that your article on "Troubleshooting Login Issues" is getting a lot of "No" responses.

This is a clear signal that the article needs improvement. You can then update it, perhaps adding more screenshots or clarifying certain steps to make it more helpful for future readers.

# 8. Analyze usage and improve

The platform provides insights into how your Knowledge Base is being used. You might see that your article on "How to Export Data" is the most viewed page.

This could indicate that this feature is crucial for your users or that your product does not have enough intuitiveness. You could use this information to improve your product's UI, create a video tutorial, or even add an export wizard to your software.
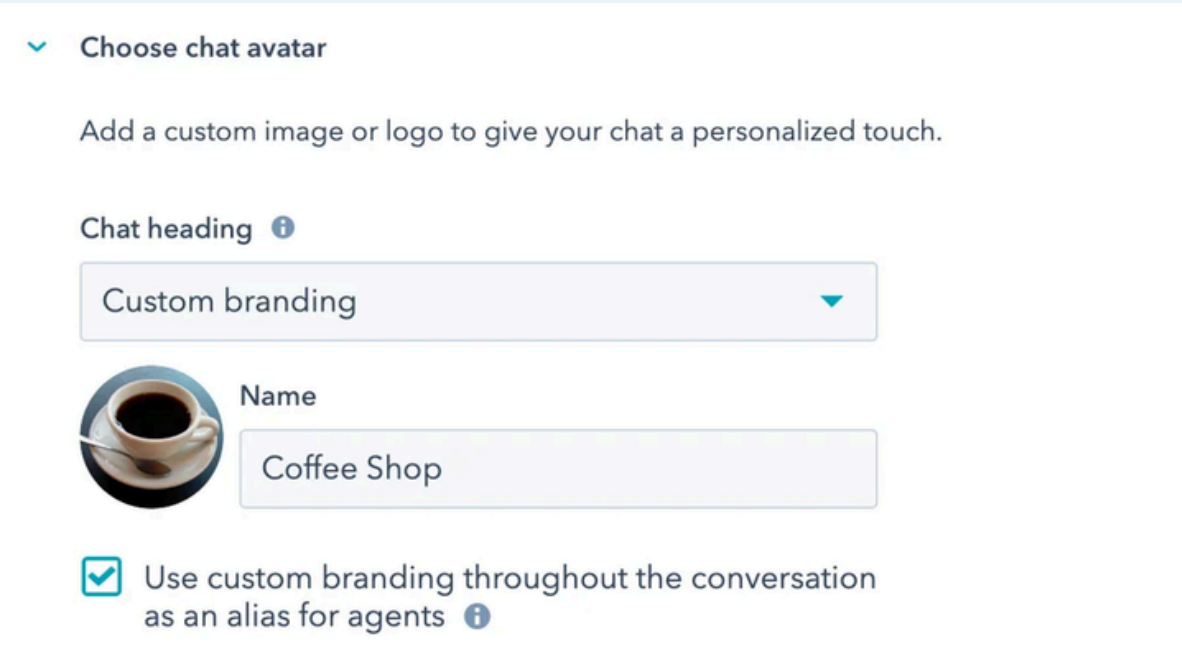
Live Chat
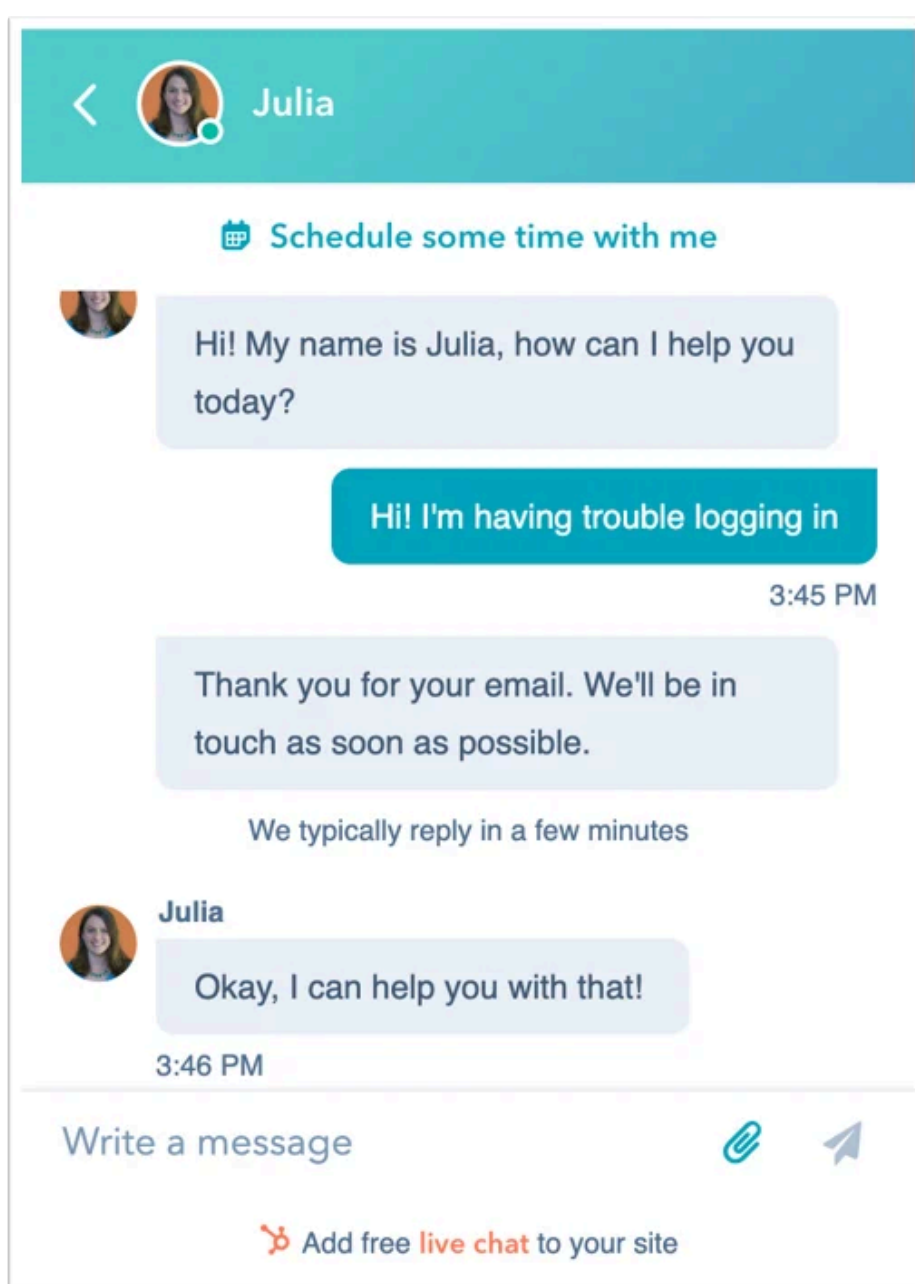
HubSpot's Live Chat is a real-time communication tool that bridges the gap between your website visitors and your support team. It's a powerful way to provide immediate assistance, capture leads, and enhance customer experience.

Live Chat allows instant communication and significantly reduces friction in the customer journey, whether helping a prospect make a purchase decision or assisting a current customer with a support issue.

Here's how you can use it for customer success:

1. Customize your chat widget
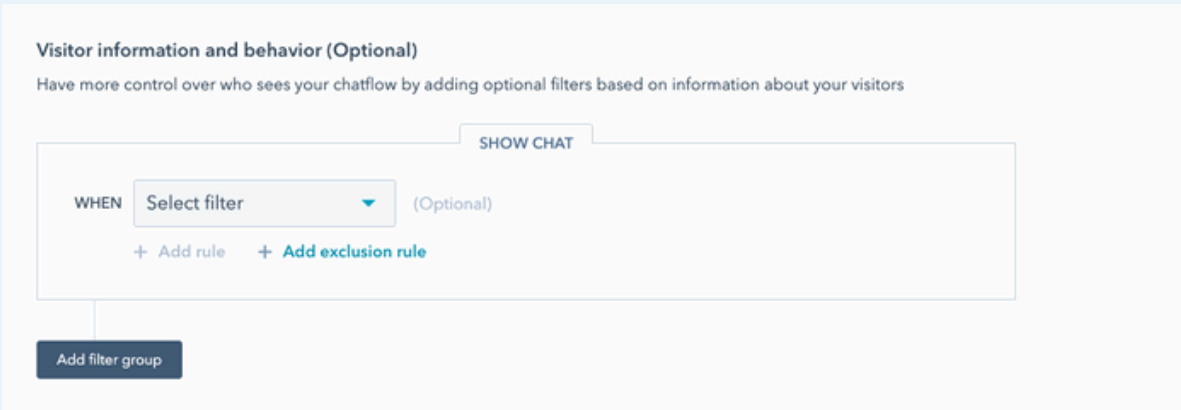
HubSpot's chat widget is like your digital storefront greeter. You can make it truly yours! Let's say you run a fun, quirky brand selling eco-friendly products.

You could customize your chat widget with bright colors, add a playful welcome message like "Hey there, Earth warrior! Need any help saving the planet today?" and even include a photo of your customer service mascot (maybe a cute cartoon Earth).

This personalization makes the chat feel inviting and on-brand, encouraging visitors to engage.

2. Set up targeted messages

Think of these as your chat widget's conversation starters. You can set different messages based on which page a visitor is on, how long they've been browsing, or even their past behavior.

For example, if someone's been on your pricing page for more than 2 minutes, you could trigger a message saying, "Hey there! Having trouble choosing a plan? I'd be happy to help you find the perfect fit for your needs."

This proactive approach can significantly increase engagement and conversions.

3. Utilize chatbots for 24/7 support

Chatbots are like your tireless digital assistants. You can create automated conversation flows to handle common queries or tasks.

For instance, if you run an online bookstore, your chatbot could help with tasks like tracking orders ("What's the status of my order?"), providing book recommendations ("I'm looking for a mystery novel"), or even initiating returns ("I want to return a book").

This ensures your customers get instant help, even outside of business hours.

4. Integrate with your CRM

This integration is like giving your chat agents superpowers. When a returning customer starts a chat, your agent can see their purchase history, past support issues, and recent website activity.

Imagine a customer named Sarah starts a chat about a product issue. Your agent can see that Sarah recently purchased a premium plan and has had a few technical queries in the past.

This context allows the agent to provide more personalized, informed support, potentially turning a frustrating moment into a loyalty-building interaction.

5. Implement chat routing
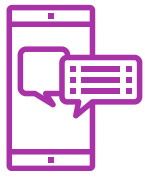
Chat routing is like having a super-efficient receptionist for your digital conversations. You can set up rules to direct chats to the most appropriate team or individual.

For example, chats that mention "refund" could be routed to your billing team, while those that include "bug" or "error" go to technical support.

If a VIP customer starts a chat, you could have it automatically routed to a senior support agent. This ensures that each query is handled by the person best equipped to help, leading to faster resolutions and happier customers.

6. Use chat for proactive sales

Live chat isn't just for support—it's a powerful sales tool too! You can use it to engage potential customers at critical moments in their buyer's journey.

For instance, if someone adds a high-value item to their cart but doesn't complete the purchase, you could trigger a chat offering to answer any questions they might have.

Or, if a visitor has viewed your enterprise plan page multiple times, you could have a sales rep proactively reach out to offer a personalized demo.

7. Collect feedback and insights
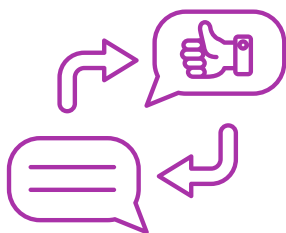
Every chat is an opportunity to learn more about your customers. You can set up post-chat surveys to gauge satisfaction, but the real gold is in the chat transcripts. Reviewing these can reveal common pain points, frequently asked questions or even feature requests.

For example, you might notice many customers asking about a particular integration your product doesn't currently offer—that's a valuable insight for your product development team!

8. Analyze chat performance

HubSpot provides robust analytics for your chat interactions. You can track metrics like chat volume, response times, customer satisfaction scores, and even conversion rates from chats. This data is like a roadmap for improving your customer service.

For instance, if you notice that satisfaction scores dip during certain hours, you might need to adjust your staffing. Or, if you see that chats initiated from your pricing page have a high conversion rate, you might want to make your chat more prominent on that page.

Customer Success Workspace

The Customer Success Workspace is a dedicated area in HubSpot designed specifically for customer success managers to manage their portfolio of clients.

Think of it as a command center for all your customer success activities. Although it's a relatively new feature in HubSpot, currently in beta, it's set to revolutionize how businesses manage their customer relationships post-sale.

This workspace brings together all the information and tools that customer success managers need to ensure their clients are achieving their desired outcomes. Here's what it includes:

1. Portfolio Overview

This gives you a bird's-eye view of all the companies assigned to you. You can see important metrics, such as health score, CSM sentiment, health status, annual revenue, and last activity date.

2. Health Score

This numerical representation of a customer's overall relationship with your company. HubSpot allows you to set up custom criteria to calculate this score, including factors like product usage, support ticket volume, NPS scores, and more.

3. Pipeline View

This lets you see deal and ticket pipelines in one place, giving you a complete view of the customer's journey from sales to support.

4. Task Management

You can track and manage all your customer success-related tasks within the workspace.

5. Reporting

The workspace allows you to add up to five custom reports, giving you quick access to the metrics that matter most to your role.

6. Activity Feed

This shows you recent activities related to your customers, like email opens, document views, or ticket updates.

Combining all these elements in the Customer Success Workspace helps you proactively manage your customer relationships, identify at-risk accounts, and spot opportunities for growth.

Integration Tips

Integrating the Customer Success Workspace (and HubSpot's tools in general) into your existing processes can be a game-changer for your business. However, it's important to approach this integration strategically.

Here are some tips to help you make the most of these tools:

Align with your customer success strategy

Before you start using any new tool, it is crucial to ensure it aligns with your overall customer success strategy. Take some time to think about what success looks like for your customers and how you can use HubSpot's tools to support that vision.

For example, if reducing churn is a key goal, you might focus on setting up the health score feature to give you early warnings of at-risk customers. If increasing upsells is a priority, you might configure your pipeline to highlight expansion opportunities.

Remember, the tool should serve your strategy, not vice versa. Don't get caught up in using features just because they're there – focus on the ones that drive value for your customers and your business.

Train team members on tool usage

Having powerful tools is great, but they're only as effective as those using them. Invest time in thoroughly training your team on how to use HubSpot's features, particularly the Customer Success Workspace.

This training should cover not just the technical aspects of using the tool but also the why behind it. Help your team understand how using these tools improves customer and business outcomes.

Consider creating standard operating procedures (SOPs) for common tasks in the workspace. For example, you might have an SOP for how to update the health score, or how to use the activity feed to prepare for customer check-ins.

Don't forget ongoing training, too. As HubSpot releases new features or as you refine your processes, make sure to keep your team updated and skilled in using the tools effectively.

Regularly review and optimize processes

Implementing new tools isn't a "set it and forget it" situation. It's important to regularly review how your team uses the

Customer Success Workspace and other HubSpot tools and look for opportunities to optimize.

Set up regular check-ins (maybe monthly or quarterly) to discuss what's working well and what could be improved. Are there features you're not using that could be valuable? Are there processes that are more cumbersome than helpful?

Pay attention to the metrics, too. Are you seeing improvements in key areas like customer health scores or retention rates? If not, it might be time to adjust your approach.

Don't be afraid to iterate and experiment. Maybe you try a new way of calculating health scores or adjust how you use the pipeline view. The key is to stay flexible and always look for ways to improve how you use these tools to drive customer success.

Remember, the goal of using these tools is to make your customer success efforts more effective and efficient.

Integrating Sales and Service for a Unified Approach

The line between sales and service is becoming increasingly blurred. Customers expect a seamless experience from the moment they first interact with your brand through their entire journey as a customer. This is why aligning sales and service teams is more crucial than ever.
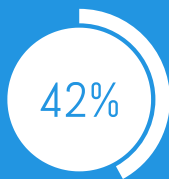
42% Unfortunately, for many businesses, sales and service still operate in silos. 42.5% of leaders say their customer success team is aligned with their sales team, while 4% say the teams are completely out of sync.

Sales teams focus on closing deals, while service teams handle post-sale support, often with little communication between the two.

This disconnect can lead to a fragmented customer experience, missed opportunities, and customer churn.

The good news is that with the right strategies and tools, like HubSpot's integrated Sales and Service Hubs, businesses can break down these silos and create a unified approach that benefits both the company and its customers.

Strategies for Alignment

You need a strategic approach to truly integrate your sales and service teams. **Here are a few strategies to consider:**

Shared customer data and insights

One of the most powerful ways to align sales and service is through shared data. When both teams have access to the same customer information, magic happens.

For example, imagine a service rep is on a call with a customer with an issue. With shared data, the rep can see that this customer recently upgraded their account and has been a loyal user for years. This context allows the rep to provide more personalized, empathetic support.

Similarly, when a sales rep prepares for a call with a prospect, they can see any previous support interactions. This insight might help them address potential concerns proactively or tailor their pitch based on the prospect's history with your company.

This shared view is built right into HubSpot's platform. Sales and service teams can see a complete timeline of customer interactions, making providing a consistent, informed experience easy.

Consistent communication across departments

It's not enough for teams to have access to the same data – they need to be actively communicating with each other too. This means creating channels and processes for regular information sharing.

You might set up a Slack channel for sales and service to share quick updates or insights. Or you could use HubSpot's internal notes feature to leave comments on customer records that both teams can see.

The key is to make communication easy and encourage both teams to share information that could be valuable to the other. A service rep might flag a customer who seems ready for an upsell, or a sales rep might give a heads up about a new customer who might need extra onboarding support.

Collaborative goal-setting

When sales and service teams have separate, sometimes conflicting goals, it's hard to work together effectively. Instead, try setting some shared goals that encourage collaboration.

For instance, you might set a joint goal around customer retention or net promoter score (NPS). This encourages sales to think beyond just closing the deal, and motivates service to identify expansion opportunities.

In HubSpot, you can set up dashboards that track these shared KPIs, making it easy for both teams to see how they're progressing towards common goals.

Regular cross-team meetings

Face-to-face (or virtual) communication is invaluable for building alignment. Set up regular meetings between sales and service teams to share insights, discuss challenges, and identify opportunities for collaboration.

These meetings might include:

- Case studies of successful (or challenging) customer interactions
- Updates on new products or features
- Discussions about common customer pain points or objections
- Brainstorming sessions on how to improve the customer experience

The goal is to foster a sense of shared purpose and help both teams understand how they contribute to the overall customer journey.

Benefits of Unified Approach

When you successfully integrate your sales and service teams, **the benefits can be significant:**

Improved customer experience

Customers enjoy a more consistent, seamless experience when sales and service are aligned. They don't have to repeat information as they move from sales to service, and they receive more personalized support based on their full history with your company.

For example, a new customer might receive a welcome call from a service rep who already knows what features they're most interested in (thanks to notes from the sales process).

This personalized onboarding can get the customer up and running more quickly and set the stage for a positive long-term relationship.

Increased efficiency

Alignment between sales and service can significantly boost operational efficiency. When teams share information freely, they can work more quickly and effectively.

For instance, if service reps regularly share common customer pain points with the sales team, salespeople can proactively address these concerns in their pitches. This not only helps close deals faster but also sets more accurate expectations, leading to happier customers down the line.

Better anticipation of customer needs

When sales and service work together, they can often predict and address customer needs before they arise. Sales teams can use service insights to better understand what types of customers are most successful with your product.

Meanwhile, service teams can use sales data to prepare for incoming customers and their likely needs.

For example, if the sales team notices a trend of customers from a particular industry signing up, they can alert the service team. Service can then prepare resources or training specific to that industry's needs, ensuring a smooth onboarding process.

Higher customer retention and loyalty

Perhaps the most significant benefit of a unified sales and service approach is improved customer retention and loyalty. When customers experience a seamless journey from prospect to long-term user, they're more likely to stick around and even become advocates for your brand.

Sales teams that stay involved post-sale can identify upsell or cross-sell opportunities. Service teams that understand the sales process can reinforce the value proposition and help customers get the most out of their purchases.
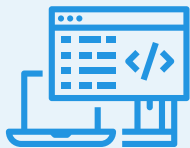
Together, they create a powerful engine for customer success and business growth.

Key Takeaways

Customer success is necessary for business growth. Focusing on customer success can drive retention, increase customer lifetime value, and generate positive word-of-mouth. It's not just about making customers happy—it's actively helping them achieve their goals.

HubSpot CRM provides powerful tools for managing customer interactions, from the ticketing system that keeps support organized to the knowledge base that empowers customers to find answers independently to the live chat that provides immediate assistance.

Integrating sales and service creates a unified customer experience. You can create a seamless journey for your customers from prospect to loyal advocate. This integration is key to shared data, consistent communication, and collaborative goal-setting.

Implementing these strategies can improve customer satisfaction and loyalty. When you align your teams, leverage the right tools, and focus on customer success, the results speak for themselves. You'll see happier customers, increased efficiency, and, ultimately, business growth.

The Next Steps

Now that you're armed with knowledge about driving customer success with HubSpot Sales and Service Hub, it's time to put this information into action. Here are some suggested next steps:

1. Assess your current state: Take a close look at how your sales and service teams currently operate. Are they aligned or working in silos? How are you currently measuring customer success?

2. Set clear goals: Based on your learning, set specific, measurable goals for improving your customer success efforts. This might include reducing churn, increasing customer lifetime value, or improving your Net Promoter Score.

3. Implement HubSpot tools: If you're not already using HubSpot, consider starting with a free trial to explore its capabilities. If you are a HubSpot user, ensure you're leveraging all the tools available, especially the new Customer Success Workspace.

4. Train your team: Ensure that both your sales and service teams understand the importance of customer success and how to use HubSpot tools effectively. Consider setting up regular training sessions to keep everyone up to date.

5. **Start small and iterate**: Don't try to change everything overnight. Start with one or two key strategies, implement them, and then assess the results. Use what you learn to refine your approach.

6. **Keep learning**: Customer success is evolving, and HubSpot is constantly updating its tools. Stay curious, keep learning, and don't be afraid to experiment with new strategies and features

Remember, the journey to outstanding customer success is ongoing. It requires commitment, patience, and a willingness to adapt and improve.

But with the right mindset, strategies, and tools, you can create a customer experience that satisfies and delights your customers, turning them into long-term advocates for your brand.