





Welcome to the Powering Up Your Call Center with HubSpot and Aircall ebook, your go-to resource for leveling up your customer service operations!



This ebook is packed with insights straight from our recent webinar, Powering a Call Center: Connecting HubSpot and Aircall to Resolve Customer Frustrations. If you missed it, don't worry—you can access the ondemand recording here: [insert link].

This ebook is your comprehensive guide to transforming your call center operations by seamlessly integrating HubSpot's powerful CRM and customer service tools with Aircall's innovative cloudbased phone system.

Imagine a system where all your customer data, communication history, and service tools live under one roof. No more juggling systems, no more lost customer context—just seamless, personalized service from the moment a call comes in.

We'll walk you through practical strategies, real-world solutions, and actionable steps to revolutionize how your team connects with and supports your customers.

Get ready to dive into a hands-on guide to transforming your call center using the powerful integration of HubSpot's CRM and Aircall's cloud-based phone system.



A frustrated customer calls in, eager for a solution. They've bounced around between departments, forced to explain their issue repeatedly, only to hang up feeling unheard and even more upset than when they started. Sound familiar?



40% of service reps want better team communication tools.

(Source: HubSpot)

Unfortunately, that's the reality for many call centers using outdated, disconnected systems. But it doesn't have to be that way. With the HubSpot-Aircall integration, you can flip the script entirely.

In this ebook, we'll tackle the most pressing challenges facing modern call centers today and show you exactly how HubSpot's Service Hub and Aircall can come together to deliver personalization, automation, and efficiency at scale.

Here's what you can expect to learn:



 How to meet rising customer expectations and avoid the costly pitfalls of disconnected systems.







 How the HubSpot-Aircall integration creates a smooth, personalized customer experience that makes your agents' lives easier.



 Step-by-step guidance on starting the integration, including tips on the number porting process.

Transforming your call center isn't just about adopting new tools; it's about reimagining how your team interacts with customers.

With the integration of HubSpot and Aircall, you can eliminate the frustration of disconnected systems and automate repetitive tasks, allowing your agents to focus on delivering exceptional, personalized service.

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During the webinar, we asked you, the call center professionals, about your biggest challenges. Here's what we learned from your responses:

01

Limited Automation Is Holding You Back (57% of You Know This Pain)



So, what's the real impact of limited automation? Time-wasting, manual tasks that could easily be streamlined.

Without automation, your agents are stuck doing tedious data entry, chasing down information, and scrambling to keep up with customer requests. All this adds up to slower service, frustrated agents, and even more frustrated customers.

The good news? HubSpot's Service Hub offers robust automation tools that can eliminate these inefficiencies.

From automatic ticket creation based on call outcomes to instant workflows triggered by customer interactions, automation gives your team time to focus on resolving issues and building stronger customer relationships.

Disconnected Systems Are Creating Blind Spots (43% of You Feel This Pain)



Disconnected systems lead to chaos—plain and simple. When your team has to switch between multiple tools for calling, CRM, ticketing, and reporting, information can easily slip through the cracks.

You lose customer context, and your agents spend more time searching for answers than solving problems. The result? Slower response times, miscommunication, and frustrated customers.

But with HubSpot and Aircall in a unified platform, all your data is in one place.

Your agents have complete visibility into the customer journey, from past purchases to previous support interactions, allowing them to offer personalized solutions on the spot. The integration doesn't just save time—it builds trust and keeps your customers coming back.



It's a new era for customer service. These days, your clients are more empowered than ever—they know what they want, have sky-high expectations, and are not afraid to take their business elsewhere if you don't meet the mark.

So, if you think you can get away with outdated processes and disconnected systems, think again. The customer is demanding a personalized, efficient experience like never before.

Here are the top customer expectations that are keeping call center leaders up at night:

01

82% of Customers Expect First-Contact Issue Resolution



Raise your hand if you've ever had a customer call in only to get bounced around between agents who can't find the info they need to resolve the issue.

It's a frustrating experience for everyone involved, and 82% of customers say they expect their problems to be solved by the first agent they speak to. No pressure, right?

02

72% of Customers Want Agents to Access Previous Interactions



Speaking of that complete customer view, 72% of clients expect your agents to have crystal-clear access to their entire history—from past purchases to previous support interactions.

Why? Because they want to feel known, valued and heard. Anything less than that, and you risk damaging their trust in your brand.

90% of Customers Say Issue Handling Shapes Their View of a Company



A staggering 90% of customers say how a company handles their issues will influence their overall perception of the organization. Yikes. One bad experience, and they could be out the door for good, taking their business (and their scathing online reviews) with them.



The Hidden Costs of Disconnected Systems



40% of service reps say they could use better communication tools to do their jobs effectively. Outdated, fragmented systems make accessing customer data and collaborating as a team is a headache.

But these disconnected systems' true cost goes far beyond agent frustration. Let's take a closer look at the hidden impacts:



Data Fragmentation



With customer information scattered across multiple platforms, your agents are flying blind, missing the complete picture they need to provide personalized, empathetic support. Talk about a missed opportunity.



Performance Blind Spots



Without real-time visibility into team metrics and call center analytics, managers are left in the dark, unable to identify issues or make data-driven decisions to improve efficiency and productivity.



Customer Frustration



And the final nail in the coffin? 72% of clients say they blame poor service experiences on having to repeat themselves to multiple agents. Talk about a direct hit to customer satisfaction and retention.

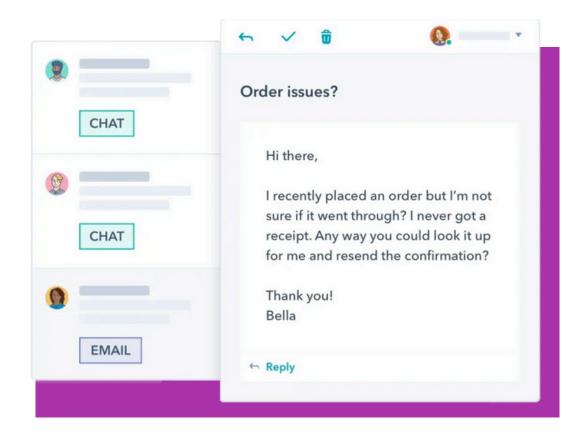


Call centers face increasing pressure to provide personalized, efficient, and responsive support as customer expectations rise. Meeting these demands requires more than just answering phones—it requires the right tools and data to make every interaction meaningful.

HubSpot's Service Hub offers a complete solution to help your team streamline processes and deliver next-level customer service. Here's how:



Ticketing System: Centralize and Streamline Customer Issues

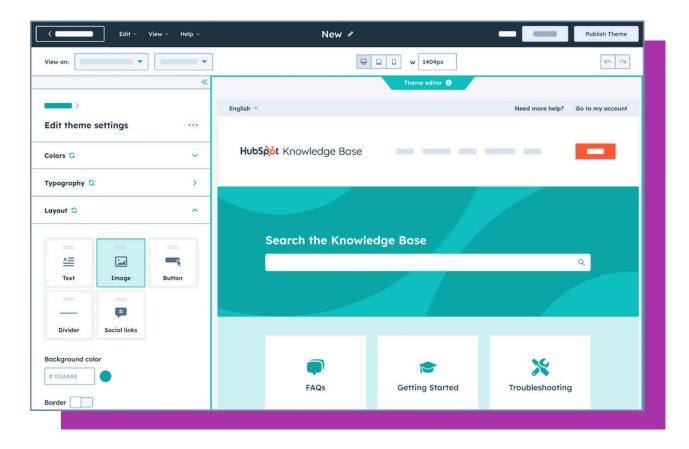


One of the biggest hurdles for any call center is keeping track of customer inquiries across multiple channels. With HubSpot's ticketing system, all customer issues are centralized into one platform, making managing and prioritizing tasks easy.

When integrated with Aircall, the system automatically creates tickets based on call interactions, ensuring that nothing slips through the cracks and agents have complete visibility into every issue.

You can automatically create tickets from Aircall interactions for seamless tracking and centralize all customer inquiries, regardless of the channel they come from.





Customers want answers fast. With HubSpot's knowledge base, you can provide them with a self-service portal, giving them easy access to solutions for common problems. This reduces call volume and empowers your customers to resolve issues on their own terms.

This feature helps your team focus on more complex inquiries, ensuring time and resources are used more efficiently. It lets you build a self-service portal with FAQs, guides, and tutorials and reduce call volume by offering easy access to common solutions.





Understanding customer feedback is essential for identifying areas where your team excels and where improvements are needed.

HubSpot's Service Hub enables you to collect and analyze customer satisfaction scores (CSAT) and Net Promoter Scores (NPS) directly from calls and interactions.

Gathering these insights, you can refine your knowledge base and optimize your service processes, allowing your team to continuously adapt and improve.

Real-time feedback helps monitor customer satisfaction and ensures you stay in tune with customer needs, using these insights to consistently enhance service quality.





Your call center is only as good as its data. With HubSpot's reporting dashboard, you can monitor key performance metrics like ticket volume, resolution time, and overall customer satisfaction.

When combined with Aircall's call data, you get a comprehensive, real-time view of your entire call center's performance. This allows managers to identify bottlenecks, monitor agent productivity, and make data-driven decisions to improve service quality.

You can track ticket volume, resolution times, and customer satisfaction. You can also combine Aircall data with Service Hub metrics for a complete picture of your call center's performance.



Conversation Inbox: Keep Customer Conversations Unified



Managing multiple communication channels can get chaotic. With HubSpot's conversation inbox, you can manage all customer interactions—whether they're coming through calls, emails, or chat—in one place.

This feature makes it easy for agents to switch between channels without losing context, providing customers with a seamless and cohesive experience.

They can manage calls, emails, and chats in one unified inbox, and provide consistent support without losing track of previous conversations.



Automation: Supercharge Efficiency



Manual workflows slow your team down and leave room for error. HubSpot's automation features allow you to automatically route tickets, trigger follow-ups, and escalate issues based on call data from Aircall.

This tool not only improves response times but also ensures that the right agent is handling the right ticket at the right time. Efficiency goes up, and frustration goes down—for both your team and your customers

Agents can set up workflows to route tickets, send follow-ups, and escalate issues. They can also integrate with Aircall data to trigger specific service actions automatically.



The integration of HubSpot's Service Hub with Aircall is more than just connecting two platforms—it's about unlocking the full potential of your call center by bringing all customer interactions, data, and processes into one unified system.

Together, these tools create an efficient, personalized, and scalable solution to overcome the most common call center challenges, from fragmented systems to inconsistent customer experiences. Here's how the integration can elevate your operations:

01

Personalization at Scale: Real-Time Customer Insights



One of the biggest benefits of the HubSpot-Aircall integration is the ability to personalize customer interactions at scale, thanks to Aircall's custom insight cards.

These cards pop up automatically during calls and display all the relevant information about the caller—such as their name, company, past interactions, and any existing tickets.

Custom Insight Cards provide a 360-degree view of the customer, ensuring that agents have access to all relevant data, including customer history and existing tickets, which allows them to deliver tailored support in real time.

With the integration of Aircall and HubSpot, every conversation is based on the most accurate and up-to-date customer information.

This level of personalization dramatically improves the customer experience. When your team can access detailed context instantly, they spend less time searching for information and more time focusing on resolving the issue at hand.

02

Consistent and Reliable Context: Real-Time Data Sync



Disconnected systems often lead to a frustrating customer experience, where agents are constantly switching between platforms and missing important details. The HubSpot-Aircall integration solves this by syncing data in real time.

Every call, note, and interaction gets automatically logged in HubSpot, giving your agents a complete and consistent view of the customer's journey.

With Aircall, all the important call details—like notes and outcomes—are seamlessly added to HubSpot. Your team doesn't need to manually enter data or jump between different systems, because everything updates instantly.

This way, agents always have the full picture in one place, helping them provide smoother, more efficient service.

03

Ticketing and Workflow Automation: Boosting Efficiency



Automation is a game changer for call centers, and with HubSpot and Aircall, you can easily automate a lot of tasks to make things run smoother.

For example, when a call comes in, Aircall can automatically create a ticket in HubSpot, based on things like call outcomes, tags, or specific customer issues. This ensures that nothing gets missed, and any follow-ups are triggered right away.

Agents can also use custom tags during calls to kickstart specific actions, like sending the ticket to the right department or escalating it if needed.

HubSpot's workflows can handle the rest, like sending follow-up emails or managing post-call tasks, so agents can focus on resolving issues faster. It's all about cutting down on manual tasks and making sure everything is handled efficiently.

04

Efficient Call Routing: SmartFlows for Tailored Journeys

Call routing can make or break a customer's experience, and with Aircall's SmartFlows, you can make sure calls get to the right place quickly. SmartFlows lets you customize how calls are routed based on things like location, language, or previous interactions.

Customers are sent directly to the right agent or department, cutting down wait times and improving their experience.

You can set up multi-layered IVRs (like "Press 1 for support, Press 2 for sales") so customers can find the right team easily. You can even route calls based on business hours, team availability, or customer details like account tier or past interactions.

The HubSpot-Aircall integration also lets you route calls using CRM data, like sending a returning customer to the same agent they've worked with before.

SmartFlows helps to optimize the customer journey from the moment they dial your number. This results in fewer transfers, faster resolutions, and a more satisfying customer experience overall.





When HubSpot and Aircall come together, the results speak for themselves. You can expect measurable improvements in both operational efficiency and customer experience.

In our webinar, we shared real-world data that highlights the transformative impact of this integration on call centers. Here's how it can work for you:

Reduced Ticket Creation (79% Fewer Tickets)



Think about cutting the number of support tickets your team handles by almost 80%. With HubSpot's knowledge base and self-service tools, customers can find answers to many of their questions without needing to call in.

Aircall works alongside HubSpot to log interactions and simplify workflows, letting agents focus on more complex issues. This combination allows customers to solve simple problems on their own, reducing the overall ticket load while still maintaining quality support.

The knowledge base empowers customers to fix common issues themselves, meaning agents can step in only when truly needed.

02

Increased Ticket Resolution (324% More Tickets Closed)



Reducing the number of tickets is great, but resolving them quickly and efficiently is just as important. With HubSpot's ticketing system and Aircall's smooth call management, your team can close 324% more tickets than before.

How? Agents get instant access to all customer data, past interactions, and history, which helps them resolve issues faster and cut down on time wasted going back and forth with customers.

Having everything in one place makes it easy for agents to quickly find the information they need, speeding up the resolution process. Automated ticket routing also makes sure that each issue goes to the right person from the beginning, meaning faster results and happier customers.

03

Improved Customer Satisfaction and Retention



When customers are happy, they stick around. Integrating HubSpot and Aircall doesn't just make your support faster and more efficient—it creates a more personalized and consistent experience.

Agents have real-time insights and automation tools to anticipate customer needs and respond thoughtfully, reducing frustration and boosting overall satisfaction. This kind of tailored service is key to keeping customers happy and loyal in the long run.

With real-time customer data, agents can provide a personal touch. Each interaction more meaningful. When customers know their issues will be handled quickly and with care, they're more likely to stay loyal, improving retention and building long-term relationships.

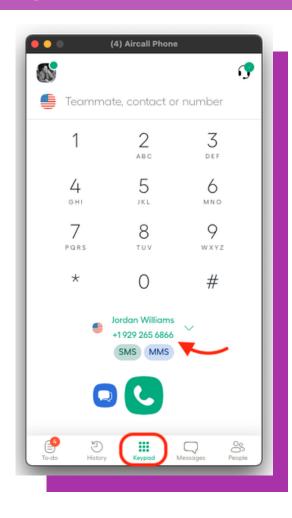


The integration between HubSpot and Aircall is designed to streamline call center operations by bringing voice, data, and workflows into one unified platform.

This setup enables seamless communication, automatic ticket creation, and real-time reporting, all within a single interface. Here's how the integration works:

01

Aircall Softphone App & HubSpot Dashboard Integration



The integration between Aircall and HubSpot provides a seamless experience for managing calls and customer interactions all within one platform. The Aircall softphone app, available for Mac, Windows, iOS, and Android, allows your agents to make and receive calls directly.

The app is embedded into HubSpot's dashboard, making it easy for agents to access everything they need in one place, including call activity, reporting, and even backend settings.

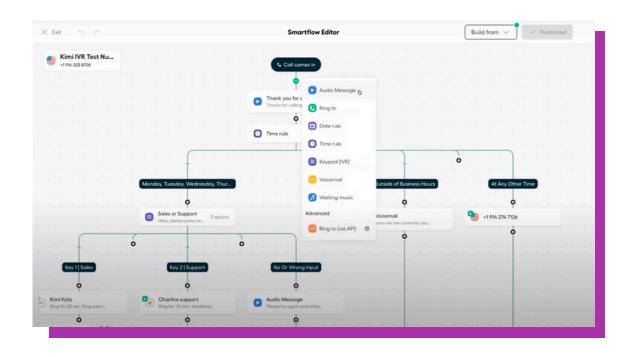
For admins, the Aircall dashboard within HubSpot offers a centralized space to manage call flows, adjust settings, and generate reports without leaving the HubSpot environment.

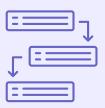
Agents can field calls from multiple phone lines, view details about which number the call is coming from, and even see which Interactive Voice Response (IVR) option the customer selected.

This means they can handle complex workflows efficiently and ensure customers are routed to the correct place from the start.

02

Customized Call Flows with SmartFlows





The SmartFlows feature in Aircall lets you fully customize what happens when a call comes in, making it a key element of the Aircall-HubSpot integration.

You can design tailored call journeys depending on customer needs—whether it's routing calls to a single agent, a team of agents, or using round-robin to distribute calls evenly.

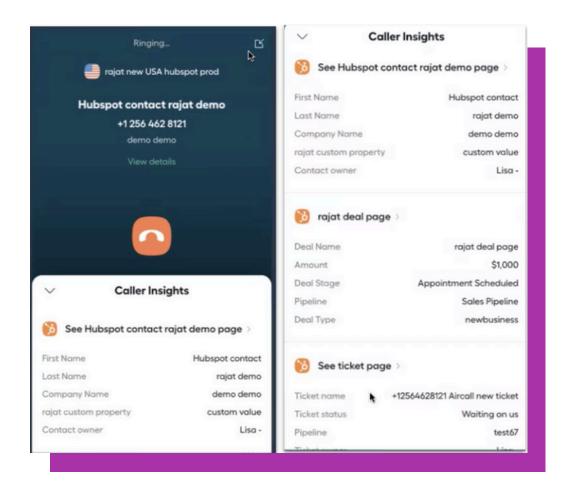
For example, you can have a call route to the first available representative or set it to ring all agents in a team simultaneously.

SmartFlows also lets you pre-schedule holiday closures, customize business hours routing, and ensure that even when your team is offline, customers receive the right response (like voicemail or an out-of-office message).

IVR options can be layered, enabling customers to easily navigate call options, such as "Press 1 for support" or "Press 2 for sales." This ensures that each call is handled correctly from the beginning, based on the customer's region, language, or other key criteria.

In addition to routing options, Aircall's open API allows you to optimize call flows further by pulling in customer data from HubSpot. For instance, calls can be routed to the same agent who handled the customer's previous issue, providing a consistent and personalized experience.

Real-Time Call Insights with Custom Insight Cards



One of the standout features of the Aircall-HubSpot integration is the custom insight cards that pop up during calls. These cards provide agents with real-time access to important customer details, including their name, company, ticket history, and any ongoing or resolved issues.

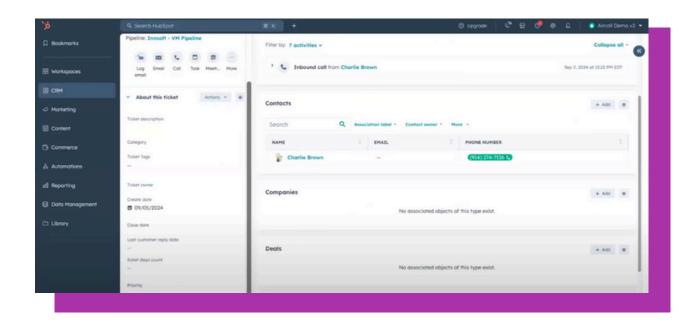
This information is displayed before, during, and after the call, allowing agents to understand the full context of the customer's journey and tailor their responses accordingly.

Insight cards update in real time and can be customized to show the most relevant data. If agents need deeper insights, clicking on the card takes them directly to the appropriate HubSpot contact or ticket page.

Agents are always equipped with the most accurate, up-to-date information during interactions, resulting in faster issue resolution and a better overall customer experience.

04

Automatic Ticket Creation and Updates



The Aircall-HubSpot integration streamlines workflows with automatic ticket creation. The moment a call comes in, a ticket is automatically generated in HubSpot and linked to the correct customer, ensuring no interaction is overlooked.

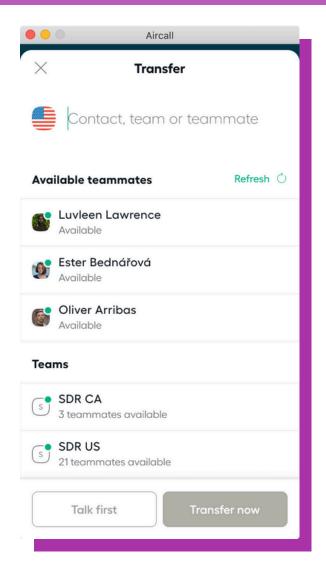
This ticket contains all relevant call data, including call duration, notes, and recordings, so agents don't have to waste time inputting details manually.

During the call, agents can add notes or tag specific outcomes, and these updates are instantly reflected in HubSpot.

Call recordings, transcriptions, and key topics are stored within the customer's record for future reference, making it easier for agents to access crucial information when following up or handling ongoing issues.

This automation reduces the risk of human error and ensures that all customer interactions are logged and tracked in real time.

Advanced Features for Call Handling and Transfer



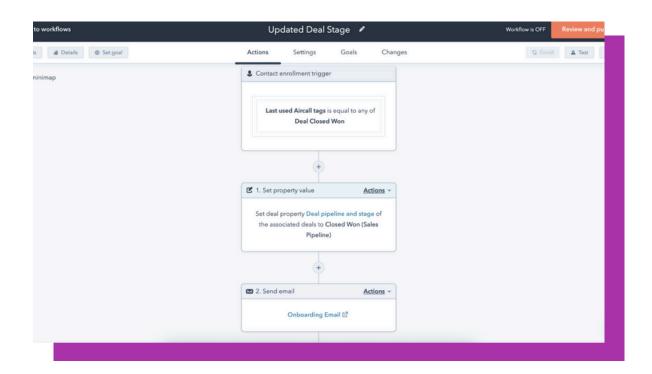
Aircall offers several advanced features for call handling and transfers, which can significantly improve the customer experience.

Agents can perform warm transfers, where they brief the receiving agent before transferring the call, or direct transfers, where the call is sent to the next agent without any additional steps. They can ensure that customers are connected to the right person in the shortest time possible.

The system also supports conference calls with up to five participants, ideal for handling more complex issues or involving multiple departments in a customer query.

If the agent is unavailable for transfer, the call can be assigned to that agent for follow-up, ensuring that no customer interaction is left unresolved.

Tagging and Automation for Enhanced Workflows



The integration between Aircall and HubSpot takes efficiency to another level with customizable tags and automated workflows.

Agents can apply custom tags to calls, marking specific outcomes or issues, and these tags can then trigger actions in HubSpot, such as sending follow-up emails, updating contact information, or routing the ticket to the appropriate department for further action.

These tags are completely customizable and can even be made mandatory to ensure that each call is properly categorized. Workflows can then be built in HubSpot to automate processes based on these tags, such as escalating high-priority tickets or initiating post-call follow-ups.

This combination of tagging and automation guarantees that all customer issues are tracked, categorized, and handled efficiently, improving both team productivity and customer satisfaction.

07

Detailed Reporting and Live Activity Feed



Finally, the HubSpot-Aircall integration provides detailed, customizable reporting capabilities. The Aircall dashboard integrated into HubSpot allows managers to track performance metrics such as total call volume, average call duration, the number of calls with specific tags, and even terms mentioned during calls (e.g., "pricing" or "support").

This data helps in understanding customer trends and identifying areas for improvement. The live activity feed shows which agents are currently on calls, who is available, and who is busy, giving managers full visibility into team performance in real time.

Features like call whispering and call monitoring let managers coach agents during live calls without the customer knowing, offering real-time support and guidance.



We received a lot of great questions during the webinar, and we want to ensure you have all the information you need. Here are questions and answers worth reviewing:



What happens if multiple tags are used on the same call? How does HubSpot handle that in reporting?

Great question! When multiple tags are applied to a call, Aircall automatically logs them into HubSpot, and you can track those tags in a few different ways. You can pull reports based on individual tags or multiple tags together.

HubSpot's reporting tools allow you to customize dashboards to focus on the tags that matter most to your operations.

Additionally, you can leverage HubSpot workflows to update custom properties based on the tags used, giving you even more granular control over how data is segmented and reported.



How does Aircall's SMS feature work for both customers and agents?

Aircall's SMS functionality is built right into the app. Agents can send and receive text messages directly from the Aircall phone app, including files and images.

Every SMS is automatically logged into HubSpot as part of the customer's activity history, so agents have full context for every interaction.

This feature ensures that customer conversations are centralized, whether they happen via phone call or SMS, allowing your team to manage and track communication effortlessly.



Can I manage both SMS and chat within the Aircall-HubSpot integration?

Absolutely! While SMS is handled directly through Aircall, HubSpot manages chat functionality natively. When a chat comes in through your website or customer portal, it automatically creates a new ticket in HubSpot's helpdesk.

Your team can handle multiple chats at once within HubSpot, alongside phone calls and SMS through Aircall, keeping all communications unified in a single platform.

This ensures that agents never have to switch between systems, and all interactions are tracked within the same interface.



What's the best way to track and report on SMS activities within HubSpot?

Currently, Aircall logs SMS activities as timeline events in HubSpot. While this gives basic tracking capabilities, more advanced features are on the roadmap for late Q3 or early Q4.

In the future, SMS events will be logged as actual activities, making it easier to track, filter, and report on SMS interactions within your HubSpot dashboards.

For now, reporting on how often SMS messages are sent or received is basic, but these enhancements will offer more detailed tracking options soon.



What's the difference between using Aircall with HubSpot Service Hub vs. Helpdesk?

The primary difference lies in how tickets are created and managed. With HubSpot Service Hub, Aircall follows its own operations to decide when and how to create tickets, giving you more flexibility in how tickets are categorized and managed.

You can set criteria based on call outcomes, SMS, or specific customer actions. With HubSpot's Helpdesk, ticket creation follows HubSpot's standard rules, which currently offer less customization.

However, the integration with Helpdesk is still evolving, and more features are expected as the product develops.



How does the number porting process work if I'm switching to Aircall?

The number porting process with Aircall is straightforward and fully supported by the Aircall team. Once you submit your number porting request, Aircall takes over and works directly with your current carrier.

There's no downtime, and your team can continue using your numbers as they are being ported. The process typically takes 10 to 15 business days, and Aircall ensures you're kept informed at every step.



In this guide, we've walked through how integrating HubSpot and Aircall transforms your call center into a streamlined, customer-focused operation. Here's a quick recap of the key features that drive efficiency and deliver a personalized experience:

1. Centralized Ticketing

Automatically create and manage customer tickets in one place as soon as a call comes in. This ensures that no customer issue is ever missed, with all interactions easily tracked within HubSpot.



2. SmartFlows for Customized Call Routing

Tailor your call flows with SmartFlows to ensure customers are always directed to the right agent or department. You can route calls based on criteria like business hours, customer type, or region, minimizing wait times and improving customer satisfaction.



3. Personalized Interactions at Scale

Empower your agents with real-time customer data through Aircall's custom insight cards. These provide a 360-degree view of the customer, enabling more informed, personalized interactions during every call.

4. Automation for Efficiency



Streamline repetitive tasks such as follow-ups and ticket escalations using HubSpot's automated workflows. This boosts agent productivity and reduces customer wait times by ensuring that key actions happen automatically.

~

5. Real-Time Reporting and Analytics

Track key performance metrics and customer satisfaction through integrated reporting dashboards. These combine data from both HubSpot and Aircall, giving you actionable insights into how your team is performing.

It's a simple formula. HubSpot + Aircall = a more efficient and customer-centric call center, driving both operational improvements and better customer experiences.



Customer service is no longer a reactive, back-end function—it's a driving force behind brand loyalty, customer retention, and business growth. Customers expect fast, personalized, and efficient support at every turn.

To meet these rising expectations, you need tools and strategies you use to manage and engage with customers. This is where the HubSpot and Aircall integration becomes invaluable.

This integration empowers your team to deliver more meaningful, human interactions while also making your operations leaner and more efficient, whether it's through SmartFlows that route calls intelligently, or real-time data syncing ensuring your agents have the full customer history.

The HubSpot-Aircall integration is your path forward, bringing your team closer to customers, reducing inefficiencies, and building the kind of loyalty that drives long-term success.

As the customer service industry continues to evolve, the ability to respond quickly and effectively—without sacrificing the personal touch—will set the great businesses apart from the good.

Adopting an integrated, automated, and customer-focused approach ensures that your call center isn't just keeping up with the times, but leading the charge into a future where exceptional customer service is the norm.