



ORIGIN 63



Arrows

The Complete Guide: How to Transform Customer Success into a Revenue Generator

Guide



Foreword

Welcome to the partner e-book created to deepen and enhance the insights shared during our recent webinar, "How to Transform Customer Success into a Revenue Generator."

Exceptional customer success is no longer a nice-to-have—it's essential. The rising customer acquisition costs and the increasing importance of retention make it clear that sustainable growth depends on your ability to nurture and retain your existing customers.

This eBook builds on the foundations laid during the webinar. It offers a clear, practical guide to understanding the strategic value of customer success, implementing effective onboarding processes, and managing the entire customer journey to deliver consistent value.

Along the way, we'll share actionable strategies, best practices, and key metrics to help you prove the impact of customer success on your bottom line.

Introduction

Organizations have poured resources into marketing and sales for years, chasing new customer acquisition at breakneck speeds. However, the tides are changing.



The cost of acquiring new customers has skyrocketed by 222%. Brands are losing a record \$29 for each new customer they acquire.

(Source: *Business Dasher*)

This dramatic shift has forced businesses to look hard at customer retention strategies. The math is simple yet profound: retaining an existing customer is five times less expensive than acquiring a new one.

As we stand on the cusp of 2025, customer success is no longer just about solving problems—it's about proactively driving value, maintaining momentum, and transforming customers into long-term partners.

This is a fundamental reimaging of how businesses create sustainable growth. From the moment a deal closes to the ongoing journey of customer engagement, every interaction becomes an opportunity to deliver value, understand needs, and drive revenue.

This eBook is designed as a companion to our webinar, "How to Transform Customer Success into a Revenue Generator," going deep into customer success's role for businesses.

Gone are the days of reactive support. Welcome to the era of strategic, data-driven customer success.

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The Top Challenges in Customer Success

During our recent webinar, we asked you about your biggest challenges in customer success. Here's a closer look at these issues and why they matter:

1. Lack of Budget and Resources

A significant challenge for many customer success teams is the lack of budget and resources. This issue is crucial because, without proper investment, it's difficult for teams to scale and meet the increasing demands of customers.



Customer success is often seen more as a cost center rather than a revenue driver. Without the necessary resources, teams can struggle with burnout, missed engagement opportunities, and an inability to provide the level of support that drives customer retention and growth.

2. Challenges in Team Alignment: Working in Silos

Another common challenge is the misalignment between customer success and other departments like sales and marketing. When these teams operate in silos, it can lead to fragmented customer experiences and missed opportunities.



The lack of a unified approach across departments means customers might not receive consistent support, affecting their overall satisfaction and loyalty. When teams aren't working together seamlessly, retaining customers and fostering long-term relationships becomes harder.

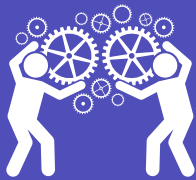
3. Complex Onboarding Processes: Losing Momentum Early On



Onboarding is a vital phase in the customer journey, but many teams find it difficult to make this process smooth and effective. A complicated or inefficient onboarding experience can result in lost momentum after the sales process.

Customers who don't quickly understand how to use the product or service may feel frustrated or disengaged early on, which increases the risk of churn.

Streamlining onboarding is critical to making sure customers feel supported and are able to see the full value of what they've bought right from the start.



Team Integration: How Well Are We Connecting?

We asked you how well customer success teams are integrated with the rest of your organizations. Many of you told us that your teams are "moderately integrated," meaning there's progress but still room for improvement.

This suggests that while communication is improving, there's still a gap in collaboration across departments. When teams aren't fully aligned, customer insights can get lost in translation, and customers may experience delays or inconsistencies in their journey.



We need seamless integration to deliver a consistent, positive experience across every touchpoint.

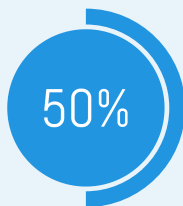


Why Customer Success is a Must for Business Growth

As customer acquisition becomes more expensive and competitive, businesses can no longer afford to ignore the value of retaining and nurturing their existing customers.

But what makes customer success so essential in today's business landscape? Let's learn about why prioritizing customer success is a business imperative.

1. The Economics of Retention vs. Acquisition



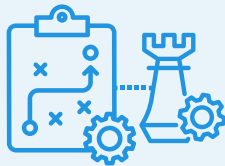
Getting new customers is expensive. Over the past five years, the cost of acquiring new customers has risen by more than 50%.

That's a massive hit to any business's budget, making acquisition harder and less sustainable in the long run. Now, consider this: retaining a customer you already have is five times cheaper than bringing in a new one.

But retention isn't just about cutting costs. Loyal customers are likelier to buy again, spend more, and recommend your business to others. They create a ripple effect of value that goes far beyond their initial purchase.

So why chase costly new leads when your current customers can become your biggest advocates and your most consistent revenue drivers?

Failing to focus on retention has real consequences. Losing a customer isn't just about lost revenue—it's about lost trust and wasted effort. Imagine pouring resources into acquiring someone, only to watch them leave before you've recovered your costs.



The bottom line? Retention isn't just a smart strategy; it's critical to sustainable growth.

2. Retention Builds Predictable, Sustainable Growth



When prioritizing customer retention, you're investing in long-term, reliable revenue. Instead of constantly scrambling to replace churned customers with new ones, you're building a stable foundation for growth.

Think of companies like Netflix or Spotify. Their business models rely on keeping customers engaged for months or even years. They don't just measure their success by new sign-ups—they focus on minimizing churn and maximizing customer lifetime value (CLV).

Shifting your focus to retention, you're reducing the cost of acquiring new customers and creating a predictable revenue stream that supports sustainable growth.

3. Retention is the Foundation for Upselling and Referrals

Satisfied, loyal customers aren't just a consistent revenue source but a gateway to additional opportunities. When customers feel valued and supported, they're more likely to explore premium offerings, additional services, or upgrades.



Loyal customers also spread the word about your brand, bringing in high-quality referrals at no extra cost. This kind of organic growth is invaluable when paid acquisition is costly and competitive.

Customer success is the cornerstone of these opportunities. Proactively driving value, addressing needs, and ensuring satisfaction set the stage for customers to invest more in your business and recommend it to others.



What is Customer Success, Really?

Customer success is a term that gets thrown around a lot, but what does it actually mean? Is it just another name for customer support? Far from it.



Customer success is a proactive, strategic approach to helping customers achieve their goals, ensuring they see value in your product or service at every stage of their journey.

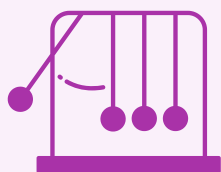
Businesses can't afford to wait for customers to come to them with problems. Instead, they need to actively guide customers toward success, creating long-lasting relationships and opportunities for growth. Let's break it down further.

From Reactive Support to Proactive Success

Success isn't just about solving problems; it's about helping customers avoid them altogether.

Traditional customer support is about solving problems by answering tickets, troubleshooting issues, and responding to customer concerns. While this is important, it's reactive by nature—it addresses problems after they've already happened.

Customer success flips this approach on its head. Instead of waiting for issues to arise, it's about anticipating customer needs and ensuring they're consistently seeing value.



As mentioned in the webinar, “Customer success starts on day one—it's about keeping the momentum going from the moment the sale is made.”

Think about the last time you canceled a subscription or left a service. Chances are, the issues that led to your decision started in the early stages of your experience. That's why proactive customer success is necessary—it sets the tone for the entire relationship.

A Continuous Journey, Not a Single Touchpoint

Customer success isn't just one stage in the journey—it's the thread that ties every stage together.

Customer success doesn't stop after onboarding. It's a continuous process that spans the entire customer journey, from the first post-sale interaction to renewals, upsells, and beyond.



Customer success never really ends—every milestone is an opportunity to re-onboard, re-engage, and deliver value.

For example, when a new team leader joins your customer's organization or when they expand their use of your product, you have a chance to reaffirm your value and deepen the relationship.

Customer Success and Data-Driven Insights

Data is the foundation of proactive, effective customer success.

Proactive customer success relies on having the right information at the right time. Modern tools like HubSpot Service Hub offer insights into customer behavior, engagement, and health scores, enabling teams to identify at-risk accounts and take action before churn becomes a reality.

For example:

- Are customers completing key onboarding tasks?
- How often are they engaging with your product or service?
- Are there usage patterns that signal potential issues or opportunities?

This kind of data allows customer success teams to move from guesswork to informed decision-making, ensuring that every interaction is timely, relevant, and valuable.



Customer success isn't a single event or stage—it's a continuous process that spans the entire customer journey. From the moment a deal closes to every interaction that follows, customer success ensures customers feel supported, see value, and ultimately achieve their goals.

Each stage of the journey presents unique opportunities and challenges, requiring businesses to engage with customers and meet their needs. Let's break down the basic stages of the customer journey and explore how customer success can impact every step.

1. Onboarding: Setting the Stage for Success

Onboarding is the first and arguably most important step in the customer journey. This is where you set expectations, introduce customers to your product or service, and ensure they can start seeing value as quickly as possible.

If you never get the opportunity to onboard your customers fully, there's no chance you'll retain them. A poor onboarding experience often leads to confusion, frustration, and early churn, while an exceptional onboarding process creates momentum and excitement that carries forward.

Tips for effective onboarding:

- Provide clear instructions and quick wins to build confidence.
- Use automation to streamline repetitive tasks and ensure consistency.
- Maintain open communication to address any concerns early.

Remember, onboarding is where the foundation of the relationship is built. A strong start sets the tone for everything that follows.

2. Adoption: Helping Customers Realize Value

Once customers are onboarded, the focus shifts to adoption—ensuring they use your product or service effectively and see the promised value. This stage is all about turning potential into reality.

You should track behaviors and metrics to understand where customers are in their journey and what they need next. For example, if a customer isn't using key features of your product, they may not be realizing its full value, putting them at risk of disengagement or churn.

Some actions for driving adoption:

- Provide training and resources tailored to customer needs.
- Regularly check in to ensure customers are meeting their goals.
- Use data to identify patterns and proactively address gaps in engagement.

Focusing on adoption ensures customers use your product and benefit from it in meaningful ways.

3. Growth: Creating Opportunities for Expansion

As customers become more comfortable and successful with your product, the next step is growth. This stage involves identifying opportunities for upsells, cross-sells, or expansion—while ensuring the customer feels their needs remain the priority.

Growth is driven by understanding customer goals and aligning your offerings with their evolving needs. Expanding relationships with customers is only possible when they trust you and believe in the value you provide.

Strategies for fostering growth:

- Regularly revisit customer goals and identify new ways to help them succeed.
- Use health scores and other data to spot opportunities for upselling or cross-selling.
- Position additional offerings as solutions to customer challenges, not sales pitches.

Growth isn't just about increasing revenue—it's about deepening the relationship and reinforcing your value.

4. Retention: Keeping Customers for the Long Haul

Retention is the ultimate goal of customer success. It's about ensuring customers stay with your business, renew their contracts, and remain engaged over time. A high retention rate is a sign that your customers see value, feel supported, and trust your brand.

Retention is where businesses can make or break their revenue model. A leaky bucket—where churn offsets new customer acquisition—will keep any company from growing.

Tips for driving retention:

- Continuously engage customers with relevant touchpoints, not just when something goes wrong.
- Address churn risks proactively by monitoring engagement and usage metrics.
- Celebrate customer milestones to build loyalty and strengthen relationships.

Retention isn't just about avoiding churn—it's about creating loyal advocates who stay and refer others to your business.



Building a successful customer success strategy requires more than good intentions—it demands alignment, clarity, and actionable insights.

When the foundation is solid, customer success can seamlessly support the customer journey, driving retention, growth, and loyalty.

Let's look at the key elements that create a strong foundation for customer success and how you can implement them effectively.

1. Aligning Teams Across the Customer Journey

Customer success doesn't operate in isolation. Its effectiveness relies on alignment with sales, marketing, and support teams to create a seamless customer experience.

When these teams share goals, processes, and data, it ensures customers receive consistent and meaningful interactions at every stage.

How to create alignment:

- **Shared Objectives:** Establish unified goals, such as improving retention rates or increasing net revenue retention (NRR), that all teams contribute to.
- **Clear Handoffs:** Ensure smooth transitions between teams, such as from sales to onboarding, by sharing critical customer data and context.
- **Collaborative Tools:** Use a centralized CRM or platform where all teams can access and update customer information in real-time.

Alignment isn't just about reducing friction; it's about building a unified approach to customer success that benefits the entire organization.

2. Understanding and Tracking Key Metrics

To drive meaningful outcomes, you need to measure your efforts. Metrics provide insight into what's working, what isn't, and where to focus your attention. A successful customer success strategy is data-driven, with teams constantly using metrics to refine their approach.

Here are a few examples of metrics you can track:

- **Retention Metrics:** Customer retention rate, churn rate, and customer lifetime value (CLV).
- **Engagement Metrics:** Product usage, feature adoption, and time-to-value (how quickly customers see the benefits of your product).
- **Growth Metrics:** Net revenue retention (NRR), cross-sell/upsell rates, and account expansion.
- **Health Scores:** Composite scores based on engagement, satisfaction, and risk factors to identify at-risk accounts and growth opportunities.

Regularly reviewing these metrics lets teams identify trends, address risks, and proactively support customer success at scale.

3. Building Processes for Proactive Engagement

Great customer success doesn't just happen—it's the result of well-defined, repeatable processes prioritizing proactive engagement. These processes ensure that no customer falls through the cracks and that your team consistently delivers value.

Steps to create proactive processes:

1. Use automated workflows to trigger timely follow-ups, onboarding steps, or engagement emails based on customer behavior.
2. Develop templates for onboarding, adoption, and retention plans that can be customized for each customer.
3. Regularly review customer health scores, activity levels, and milestones to identify where intervention is needed.

Proactive engagement isn't about overloading customers with interactions; it's about reaching out at the right times with the right messages to keep them on track and supported.

4. Empowering Your Team with the Right Tools and Training

Even the best strategy can falter without the tools and training to support it. A strong foundation includes equipping your team with the resources they need to succeed—whether that's a robust CRM, specialized software, or ongoing skill development.



To empower your team, use tools that centralize customer data and allow for real-time collaboration across teams. Implement systems that track customer behavior and surface actionable insights for your team.

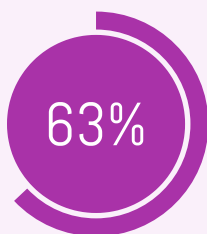
You can also provide regular training on new tools, best practices, and communication techniques to keep your team sharp and effective.

When your team has the tools and knowledge they need, they can focus more on building strong customer relationships and less on administrative tasks.



The Role of Onboarding: Setting the Stage for Success

Onboarding is where the customer relationship truly begins. It's the bridge between the excitement of the sales process and the long-term value your product or service delivers.



63% of customers consider the onboarding period when deciding to subscribe to a service or purchase a product. When done right, onboarding creates momentum, builds trust, and ensures customers start seeing results as quickly as possible.

But onboarding isn't just about making a good first impression—it's a foundation for retention and growth. Customers who don't experience value early are more likely to disengage or churn. Here's why onboarding matters and how to get it right.

Why Onboarding Matters

Customers often decide whether they'll stick with your product or service in the onboarding phase. This is the moment to prove that their purchase meets their expectations and solves their problems.

A poor onboarding experience—where customers feel unsupported or unclear about what to do next—can create frustration and cause them to lose confidence in your solution. On the other hand, a strong onboarding process helps customers:

- Understand how to use your product or service effectively.
- Achieve early wins that reinforce their decision to choose your business.
- Build trust in your team's ability to support their goals.

The early days set the tone for the entire relationship. A seamless, value-driven onboarding experience creates momentum that carries customers through to adoption and beyond.

Creating a Seamless Onboarding Process

An effective onboarding process isn't just about handing customers a welcome packet and hoping for the best. It's about guiding them to achieve their first meaningful outcomes.

Here are the components of a strong onboarding process:

1. Set Expectations from the Start



Onboarding works best when your customers know what's happening at every step. That's why clear communication is key. It's about giving customers a simple roadmap that lays out what to expect, how long it'll take, and the steps they'll need to complete along the way.

When customers have a clear picture of what's ahead, they're more confident and less likely to feel lost or frustrated.

For example, you could provide a quick overview of the onboarding journey, explaining how long it will take and highlighting major milestones like setup, first use, and initial results.

Consistency is important too. Whether customers are chatting with your support team or reading an email, the message should be the same. And don't forget to communicate in a way that works for them—whether that's over email, live chat, or even video calls.

2. Show Value Early



The faster customers see results, the more excited they'll be about your product or service. That's where quick wins come in. These are small, simple goals customers can achieve early on, like setting up an account, using a key feature, or solving their first problem.

Quick wins help build momentum. When customers feel like they're already getting value, they'll be more motivated to stick with the process.

For example, if your product helps teams manage projects, showing them how to create and share their first project plan in minutes can make a big difference.



It's also a good idea to celebrate these moments. A quick email or notification that says, "Great job completing your setup!" can boost their confidence and keep them engaged.

3. Tailor the Experience

Not every customer has the same goals, so a one-size-fits-all onboarding process often falls short. That's why personalization matters. Taking the time to understand what your customers want to achieve and tailoring the experience to their needs can make all the difference.

For instance, a small startup might care most about saving time, while a larger enterprise might focus on collaboration features. By adapting your approach based on their priorities, you can make the process feel more relevant and helpful.



If possible, assign customers a dedicated person they can reach out to during onboarding. This creates a sense of partnership and ensures they feel supported.

And remember, some customers may want a hands-on walkthrough, while others prefer to figure things out on their own. Adjusting to their preferred style can go a long way in making them feel comfortable.

4. Don't Wait for Problems

Even when things seem to be going smoothly, it's important to stay one step ahead. Proactive support means checking in with customers regularly, even if they haven't reached out to you. This way, you can address small concerns before they become big issues.

For example, if you notice a customer hasn't logged into your platform or hasn't completed an important step, send them a friendly message offering help. Regular check-ins, whether through email or a quick call, can reassure customers that you're there for them.



You can also anticipate common problems. If you know customers often get stuck on a certain step, provide them with easy-to-access guides, videos, or FAQs to help them through it.

Proactive support isn't about overwhelming customers—it's about making sure they know you're there when they need you.

5. Automation Where It Makes Sense



Automation can make onboarding smoother for both you and your customers. It handles repetitive tasks like sending reminders or sharing resources, so your team can focus on providing personalized support when it's really needed.

For instance, you can automate welcome emails, reminders for incomplete steps, or follow-ups that guide customers through the process. If a customer hasn't scheduled their setup call, an automated nudge can help keep them on track.

At the same time, automation can alert your team when a customer isn't progressing as expected. That way, they can step in and offer support before the customer feels stuck.

When using automation, you need balance—it should keep things running smoothly without replacing the human touch.

Common Onboarding Pitfalls and How to Avoid Them

Even with the best intentions, onboarding can go off track. Missteps like overwhelming customers with information or failing to follow up can leave them frustrated and disengaged.

These mistakes can be avoided with the right approach. Let's look at some common pitfalls and how to steer clear of them.

1. Overwhelming Customers with Too Much Information

It's tempting to show off everything your product or service can do immediately. But bombarding customers with too much information at once can backfire. Instead of feeling empowered, they're likely to feel overwhelmed, leading to confusion or disengagement.



Focus on what matters most in the early stages. Share only the key information they need to get started and save the more advanced details for later.

For example, during the first week, you might guide them through setting up their account and learning one or two essential features. Once they're comfortable, you can introduce additional tools or workflows.

Think of onboarding as a journey, not a race. Break it into manageable steps so customers can absorb information at their own pace and build confidence.

2. Failing to Address Individual Needs

A cookie-cutter onboarding process rarely works because every customer is different. Some might be tech-savvy and ready to dive in, while others may need more hand-holding. Some customers may prioritize cost savings, while others care most about streamlining their workflows.



To make onboarding meaningful, take the time to understand what each customer is trying to achieve. During the kickoff, ask about their goals, challenges, and how they plan to use your product. Then, tailor the onboarding experience to match their priorities.

For instance, if a customer is most concerned about saving time, show them how to automate key tasks. If collaboration is their focus, highlight features that make it easier to work as a team. Personalization shows customers that you're invested in their success, not just their business.

3. Lack of Follow-Up

Onboarding isn't a "set it and forget it" process. Just because you haven't heard from a customer doesn't mean everything is fine. Customers might be struggling but unsure how to ask for help—or worse, they might already be losing interest.

Regular follow-ups are key to keeping customers engaged. Check-in after major milestones to see how they're doing or ask if they have questions. If a customer hasn't completed a vital step, send them a friendly reminder or offer additional guidance.



Follow-ups aren't just about solving problems—they're also an opportunity to celebrate progress. A quick note like, "Great job completing your setup!" can reinforce their confidence and motivate them.

4. Ignoring Feedback



Onboarding is a two-way street. While you're guiding customers, they're also giving you valuable insights into what's working and what isn't. Ignoring this feedback is a missed opportunity to improve your process and meet their needs.

Make it easy for customers to share their thoughts. For example, you could send a quick survey about their onboarding experience or simply ask during a check-in, “Is there anything we could do to make this process easier?”

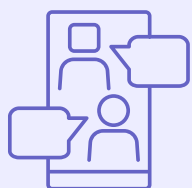
But gathering feedback isn’t enough—you need to act on it. If multiple customers mention the same pain point, address it.

Maybe they find a particular step confusing or need more examples to understand a feature. Updating your materials or process based on feedback shows customers you’re listening and constantly improving.



Using HubSpot and Arrows to Streamline Onboarding

Onboarding is a major phase in the customer journey. It’s where your customer’s expectations meet reality, and you begin to deliver on the promises made during the sales process.



With HubSpot Service Hub and tools like Arrows, you can create a structured, scalable, and collaborative onboarding process that balances automation, visibility, and customer engagement.

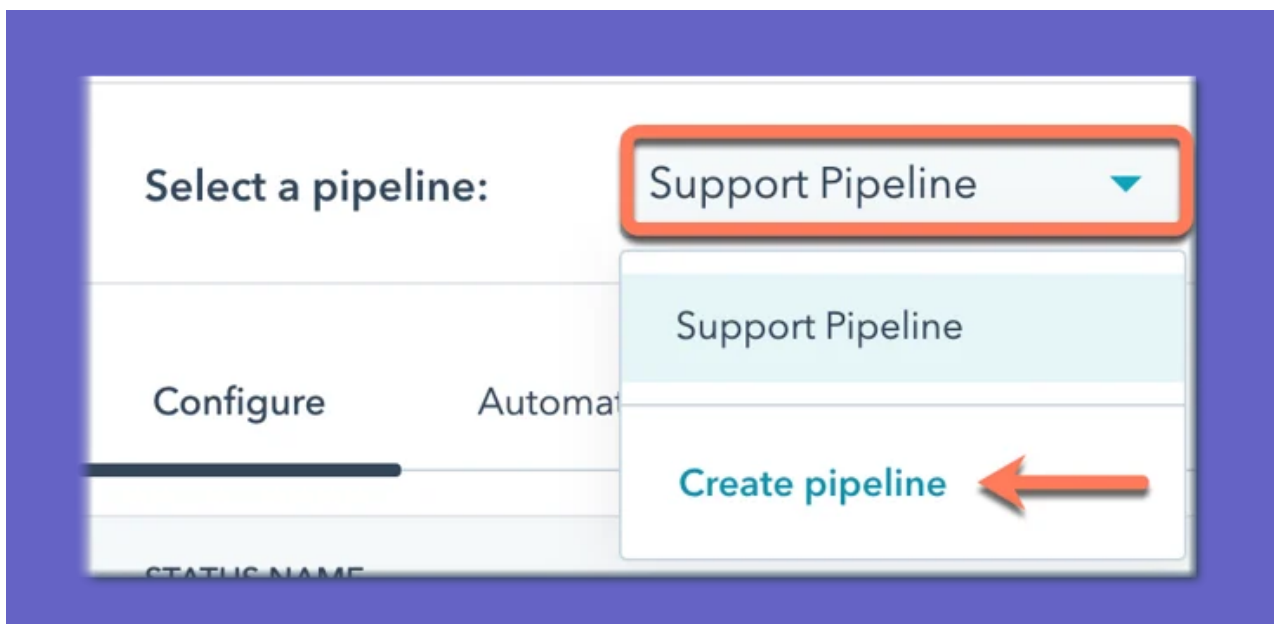
Here’s how you can use HubSpot to streamline your onboarding process while ensuring it stays both efficient for your team and engaging for your customers.

Creating a Structured Onboarding Process with HubSpot Tickets

The first step in scaling onboarding is creating a repeatable process that ensures consistency across every customer interaction.

HubSpot's ticket pipelines are an excellent tool for this. Unlike deals, which are sales-focused, ticket pipelines are specifically designed to manage processes like onboarding with clear stages, automation, and reporting.

To set up a ticket pipeline for onboarding:



- 1, Go to **Settings** → **Tickets** → **Pipelines** in HubSpot and create a new pipeline.
2. Define key stages for your onboarding process, such as:
 - *Ready for Onboarding*: Holding stage to ensure all sales-to-onboarding handoff requirements are met.
 - *Kickoff Scheduled*: An onboarding call or meeting is scheduled with the customer.

- *Account Setup*: The customer account and key configurations are completed.
- *Go Live*: Customer actively using the product or service.
- *Onboarding Complete*: Onboarding successfully finalized.
- *Onboarding Failed*: Optional stage for reporting on incomplete onboardings.

Each stage should reflect the major milestones in your onboarding process. For example, during “Kickoff Scheduled,” your team might ensure the customer has clear instructions on what’s expected and that all stakeholders are aligned.

HubSpot’s ticket pipeline also allows you to add required properties to each stage. This ensures critical information (like customer goals or technical requirements) is collected before the ticket progresses, reducing errors and bottlenecks.

Adding Automation to Your Onboarding Process

The screenshot displays the HubSpot automation interface. On the left, a form titled "4. Create record" is shown, with tabs for "Edit action" and "Deals in action". The form includes fields for "Type of record to create" (set to "Ticket"), "Ticket name *" (with a placeholder "Deal Name"), "Ticket pipeline and status *" (set to "READY FOR ONBOARDING (Onboarding Pipeline)"), and several property selection options: "Amount" (Copy from the deal property Amount), "Migration Needed" (Copy from the deal property Migration Required), "Customer Segment" (Copy from the deal property Persona), "Sales Owner" (Copy from the deal property Deal owner), and "Success Metrics" (Copy from the deal property Success Metrics). An "Add more properties" button is at the bottom.

On the right, a workflow diagram is visible. It starts with a trigger "All Data is Ready". This is followed by a series of actions: "2. Create record" (Create deal "Renewal for Deal Name - Year 1" and assign it to Deal owner), "4. Create record" (Create ticket "Deal Name" and assign it to no one), and "5. Send Slack notification" (Would send "New Deal Closed by Deal owner Deal Name is now ready for onboarding! They're hoping to: Success Metrics" to @Stuart).

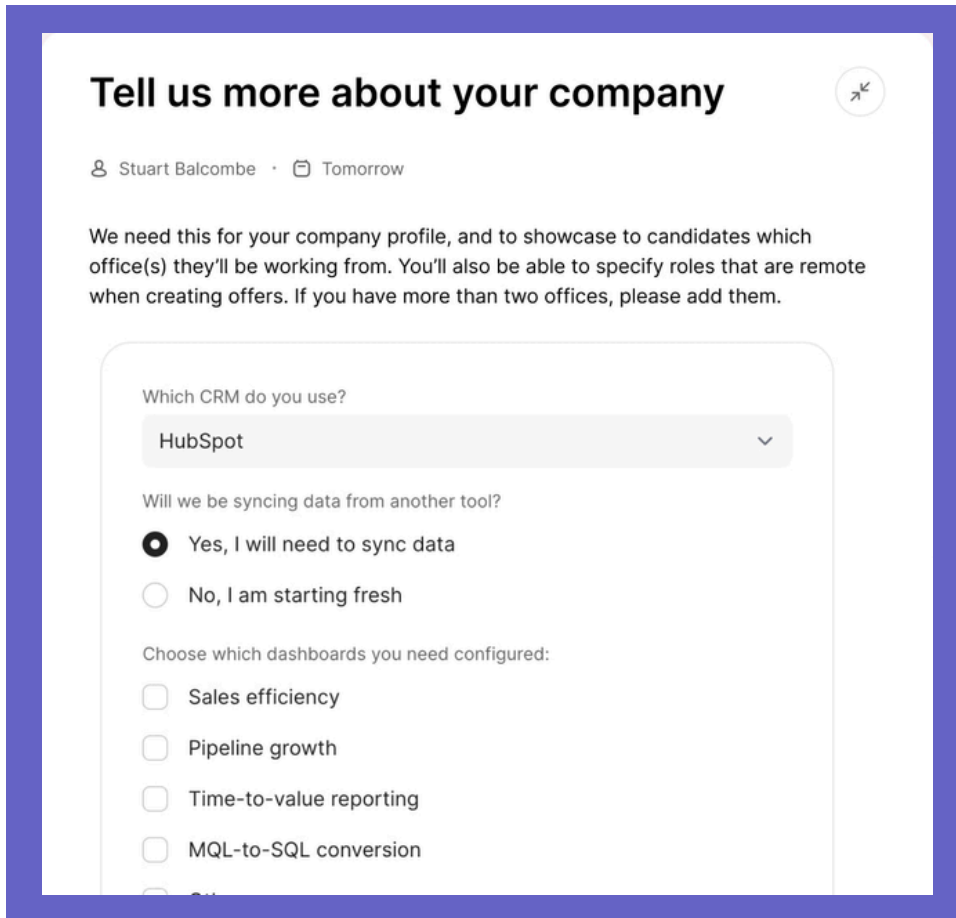
Automation makes onboarding scalable while keeping your team focused on high-value tasks. HubSpot's workflows make it easy to automate repetitive steps, ensuring a smoother and more efficient process.

Here are a few examples of what you can automate:

- **Sales Handoff to Onboarding:** Use workflows to create an onboarding ticket when a deal is closed. This ensures a seamless transition between sales and onboarding.
- **Task Reminders:** Automate reminders for customers and internal teams about incomplete steps, like scheduling a kickoff call or completing an account setup.
- **Email Communication:** Send welcome emails, resource links, and follow-ups automatically based on the customer's progress in the pipeline.
- **Pipeline Updates:** Automatically move tickets to the next stage as tasks are completed or milestones are reached, reducing manual tracking.

Automating these tasks improves efficiency and creates a more consistent experience for your customers.

Collaborating with Customers Using HubSpot and Arrows



The screenshot shows a HubSpot onboarding form titled "Tell us more about your company". At the top, it identifies the user as "Stuart Balcombe" and the session as "Tomorrow". The form includes a close button in the top right corner. The main text explains that the information is for the company profile and to showcase office locations to candidates. Below this, there are three sections: a dropdown menu for "Which CRM do you use?" with "HubSpot" selected; a radio button question "Will we be syncing data from another tool?" with "Yes, I will need to sync data" selected; and a section titled "Choose which dashboards you need configured:" with four unchecked checkboxes: "Sales efficiency", "Pipeline growth", "Time-to-value reporting", and "MQL-to-SQL conversion".

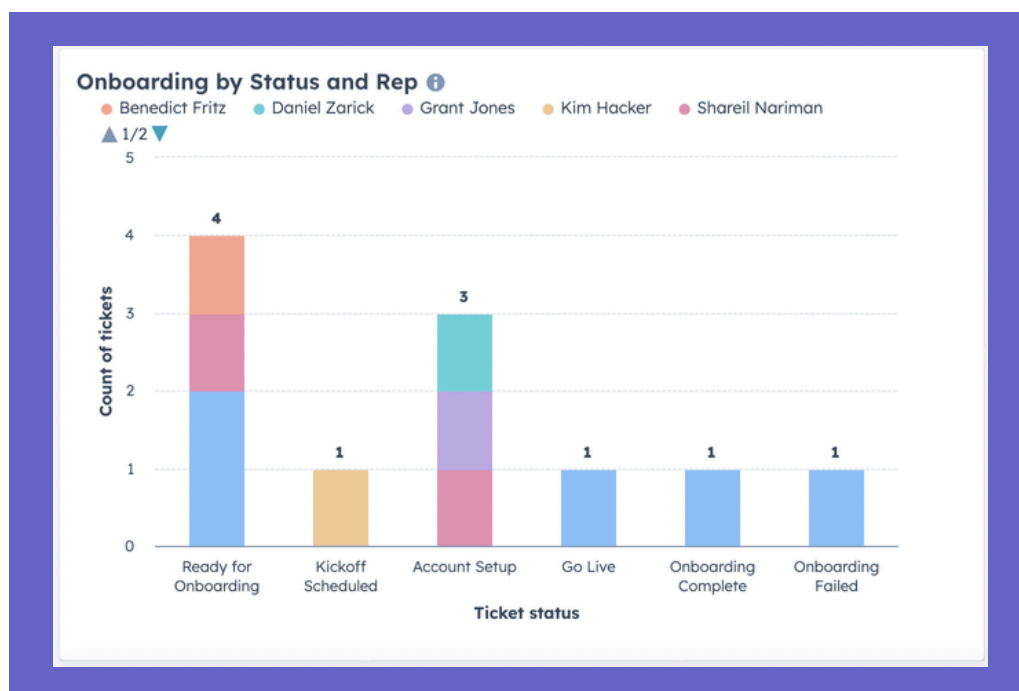
Collaboration leads to a successful onboarding experience. Customers need a clear understanding of what's expected of them and an easy way to take action. This is where Arrows, a collaborative onboarding tool integrated with HubSpot, can enhance your process.

With Arrows, you can create mutual action plans outlining the onboarding journey, helping customers stay on track while syncing their progress directly with HubSpot. These plans serve as a shared workspace where you can:

- Assign tasks to your team or the customer, like completing forms or scheduling meetings.
- Collect information directly from the customer, which syncs into HubSpot properties.
- Provide clear deadlines and communicate the impact of delays.
- Keep everyone informed about progress, ensuring accountability without overwhelming customers.

For example, if a customer needs to upload a file, fill out a form, or sign a document, they can do so directly within the Arrows plan. This data is automatically attached to their ticket in HubSpot, making it easy for your team to stay updated.

Enhancing Visibility and Reporting in HubSpot



As your onboarding process scales, visibility becomes increasingly important. HubSpot's reporting tools let you track the performance of your onboarding pipeline in real-time, offering insights into customer progress and process efficiency.

Build centralized dashboards to monitor:

- The status of each onboarding ticket.
- Completion rates for onboarding stages.
- Where customers are getting stuck in the process.

Integrating granular data from tools like Arrows allows you to see not just high-level metrics but also specific details about task completion and customer engagement.

For example, if multiple customers struggle with a particular task, you can use this insight to refine your onboarding materials or provide additional support.



The customer journey doesn't stop after onboarding—it's just getting started. To keep customers engaged, satisfied, and loyal, you must deliver consistent value at every stage of their relationship with you.

This means being proactive, solving challenges before they arise, and showing customers how your product or service helps them reach their goals.

Let's see how to deliver meaningful value across the customer journey and ensure your customers stay excited to work with you.

1. Proactive Engagement: Stay Ahead of Customer Needs



One of the most effective ways to provide value is by anticipating what customers need before asking. Proactive engagement means staying ahead of potential challenges, offering solutions early, and making customers feel like you're always one step ahead in supporting them.

For example, use your customer data to identify patterns, like which features they use or where they might get stuck. If you notice someone hasn't logged in recently or completed a key step, you can reach out with a helpful suggestion or resource.

Regular check-ins are also essential—these touchpoints allow you to share valuable insights, answer questions, and ensure everything's running smoothly.

Educational content like guides or tutorials can make a big difference, too. Whether it's showing them how to get more out of your product or helping them tackle a common problem, these resources show customers that you're invested in their success, not just their business.

When you engage proactively, customers feel supported and reassured that you're there to help them succeed.

2. Tailored Support at Critical Moments

Throughout the customer journey, there are moments when personalized support makes all the difference. These might include preparing for a renewal, launching a new feature, or adapting to a leadership change within their organization.



For renewals, it's essential to highlight the value your product has already delivered. Use data to show how you've helped them achieve their goals and paint a clear picture of how you can continue to support their future success.

When rolling out a new feature or product update, personalized training or tailored resources can help customers adopt it seamlessly.

Taking the time to walk them through how the new tool can solve their specific challenges shows that you're not just handing them new features—you're solving problems.

If leadership changes within their organization, reintroduce yourself to the new decision-makers and show them why your product or service is essential. Aligning with their new goals ensures you remain a trusted partner in their success.

3. Empowering Customers to Achieve Their Goals

Empowering your customers to succeed is at the core of delivering value. It's not just about providing tools—it's about ensuring they have the knowledge, resources, and confidence to use those tools effectively and independently.



One way to do this is by celebrating their milestones. Whether they've completed onboarding, hit a usage goal, or achieved a specific outcome, recognizing these moments reinforces the value of their efforts and your product.

You can also empower customers by giving them access to resources like a knowledge base, FAQs, or community forums. Self-service tools help customers solve problems independently, making them feel more capable and less dependent on your team for essential support.

Finally, it creates opportunities for customers to share feedback. When customers see that you're listening and improving based on their input, they feel like active participants in their success and yours.

Empowered customers are likelier to stick around, recommend your product, and advocate for your brand.

4. Consistent Communication That Adds Value

Your communication should never feel like filler. Bombarding customers with generic check-ins or updates wastes their time and can damage the relationship. Instead, every interaction should feel relevant, helpful, and timely.



To keep your communication customer-focused, frame every message around their goals and successes. Instead of saying, "Here's a new feature we launched," try, "This new feature can help you achieve X goal." This approach shows that you're always thinking about their needs.

It's also important to space out your touchpoints strategically. Customers don't need to hear from you daily—but when you reach out, it should feel intentional and meaningful.

Highlighting their progress, celebrating wins, or sharing valuable insights keeps the relationship strong without overwhelming them.

Consistent, value-driven communication reassures customers that you're invested in their journey and reinforces their confidence in your product.



As customer success becomes more integral to business growth, you should measure its impact is essential—both to optimize your efforts and demonstrate value to leadership.



While customer success is often seen as a “soft” discipline, its value can be measured in concrete, actionable metrics directly linked to business outcomes.

This section will explore how to measure customer success effectively, track key metrics, and prove its ROI to stakeholders.

1. Defining the Right Metrics

Tracking the right metrics helps you understand the health of your customer relationships, the effectiveness of your engagement efforts, and the overall contribution of customer success to revenue. Below is a breakdown of key metrics and their significance:

Metric Type	Key Metrics	Definition
Retention Metrics	Customer Retention Rate (CRR)	The percentage of customers who remain with your business over a given period.
	Churn Rate	The percentage of customers who leave during a specific timeframe. Lower churn reflects strong retention.
	Net Revenue Retention (NRR)	Measures revenue growth or shrinkage from existing customers, including upsells and churn.
Engagement Metrics	Product Usage	Tracks how often customers use your product. Higher usage often correlates with satisfaction.
	Time to Value (TTV)	Measures how quickly customers see the benefits of your product. Shorter times indicate more effective onboarding.

	Customer Health Scores	Composite scores based on engagement, satisfaction, and usage patterns, used to predict churn risks or growth potential.
Growth Metrics	Upsell and Cross-Sell Rates	Tracks how often customers expand their relationship by purchasing additional products or services.
	Customer Lifetime Value (CLV)	Calculates the total revenue a customer generates over their lifetime with your business.

Monitoring these metrics regularly allows you to evaluate the short- and long-term outcomes of your customer success initiatives.

2. Using Data to Drive Decisions

Once you're tracking the right metrics, the next step is to use the data to improve your customer success strategy. Analyzing trends and patterns helps you identify areas for growth, address risks, and make more informed decisions.

For example, if you notice a drop in product usage or declining health scores, it may signal that customers are struggling or disengaged.



Reaching out with additional support or resources can help re-engage them before they churn. Similarly, identifying customers who frequently engage with key features can open opportunities for upselling or cross-selling. Data can also help you measure the success of specific initiatives.

For instance, tracking retention rates before and after introducing a new onboarding process can show whether your efforts are paying off. With this insight, you can refine your approach and better serve your customers.

3. Proving the ROI of Customer Success

Proving the value of customer success to leadership can be challenging, especially if it's seen as a cost center. However, when you link your metrics to tangible business outcomes, you can clearly demonstrate its ROI.

Here are three ways to prove the value of customer success:

1. Show how customer success drives retention, renewals, and expansion through upselling and cross-selling. For example, reducing churn by just 5% can significantly boost revenue over time.
2. Retaining existing customers is far less expensive than acquiring new ones—typically five times cheaper. Demonstrating these savings can justify additional investment in customer success.
3. Frame customer success as a driver of net revenue retention (NRR), increased referrals, and customer advocacy. These outcomes contribute directly to long-term growth.

When leadership sees the clear link between customer success and financial results, it becomes easier to secure buy-in and resources.

4. Communicating Success to Stakeholders

Once you've gathered data and measured impact, it's time to share your findings with stakeholders. To ensure your message resonates, focus on making the data easy to understand and directly relevant to business goals.



Use visuals like dashboards or charts to present complex metrics in a digestible format. For example, a graph showing the improvement in churn rates over time can effectively illustrate progress.

Beyond the numbers, tell a story. Share specific examples of how your customer success efforts have improved retention, driven revenue, or enhanced satisfaction.

Always tie your results back to broader company objectives, such as revenue growth, cost efficiency, or customer loyalty. This alignment reinforces the strategic importance of customer success and ensures it gets the recognition and resources it deserves.



Let's Recap!

This guide explored how HubSpot Service Hub and tools like Arrows can help you transform your customer onboarding process and overall customer success strategy. Here's a quick recap of the core strategies and tools we've covered:

1. Structured Onboarding with HubSpot Tickets

HubSpot Tickets allow you to manage onboarding as a defined, repeatable process. With custom ticket pipelines, you can easily track each onboarding step, automate transitions, and report on outcomes. This ensures every customer receives a consistent, high-quality experience.

2. Automation for Scaling Onboarding

Using HubSpot workflows, you can automate repetitive onboarding tasks like sales-to-onboarding handoffs, email follow-ups, and progress updates. These workflows allow your team to focus on more personalized, high-value interactions while ensuring no customer falls through the cracks.

3. Enhanced Collaboration with HubSpot and Arrows

Integrating Arrows with HubSpot can create collaborative action plans that keep both your team and customers aligned. Customers can easily track their responsibilities and progress, while your team benefits from real-time updates synced directly into HubSpot.

4. Visibility and Reporting in HubSpot

HubSpot's robust reporting capabilities let you track onboarding performance, identify bottlenecks, and optimize your process. With centralized dashboards and insights from tools like Arrows, you can make data-driven improvements to increase adoption and retention.

5. Customer-First Onboarding

The combination of structured processes, automation, and collaboration ensures that onboarding isn't just efficient but also engaging. Customers feel supported, achieve their goals faster, and develop lasting trust in your business.

Implementing these strategies can help you scale your onboarding efforts without compromising quality—setting the stage for long-term retention and growth.



Turning Knowledge into Action

As we've explored throughout this guide, customer success is no longer just a support function—it's a strategic driver of growth and long-term business sustainability.

From understanding the importance of retention over acquisition to implementing a proactive, data-driven customer success strategy, the key to success lies in consistently delivering value at every stage of the customer journey.

We've seen that great customer success starts with a solid foundation: team alignment, clear metrics, and a focus on delivering meaningful engagement.

Understanding the customer journey and creating a seamless, supportive experience from onboarding to retention, you're setting your customers—and your business—up for success.

But knowing what works isn't enough. To truly transform customer success into a growth engine, you need to implement these principles. Measure what matters, use the data to drive decisions, and demonstrate the value of customer success to your leadership team.

With the right strategies, you can reduce churn, increase retention, and build lasting relationships that fuel sustainable growth.

Remember, customer success is a continuous journey. As you refine your approach and adapt to evolving customer needs, you'll continue to build a foundation of trust, loyalty, and growth that pays dividends for years to come.

Now that you have the tools, insights, and strategies to implement a winning customer success strategy, it's time to start. Take the next step, refine your processes, and build deeper, more valuable customer relationships today.