

INBOUND

SERVICE HUB PRODUCT FEATURE: HOW TO BEND YOUR FUNNEL INTO A FLYWHEEL AND GROW WITH YOUR CUSTOMERS

MICHAEL REDBORD

#INBOUND19

INBOUND

SERVICE HUB PRODUCT FEATURE: HOW TO BEND YOUR FUNNEL INTO A FLYWHEEL AND GROW WITH YOUR CUSTOMERS

MICHAEL REDBORD

#INBOUND19

OUTBOUND

(Interruption)



Cold Calling
Cold Emails (SPAM)
Interruptive Ads
Marketer - Centric

VS

INBOUND

(Permission)



SEO
Blogging
Attraction
Customer - Centric

OUTBOUND
(Interruption)

INBOUND
(Permission)

Humans have changed.

**Match that change
and grow better.**

VS

Cold Calling
Cold Emails (SPAM)
Interruptive Ads
Marketer - Centric

SEO
Blogging
Attraction
Customer - Centric

OUTBOUND (Interruption)



Cold Calling
Cold Emails (SPAM)
Interruptive Ads
Marketer - Centric

VS

INBOUND (Permission)



SEO
Blogging
Attraction
Customer - Centric

BRIAN HALLIGAN | DHARMESH SHAH
COFOUNDERS OF HUBSPOT

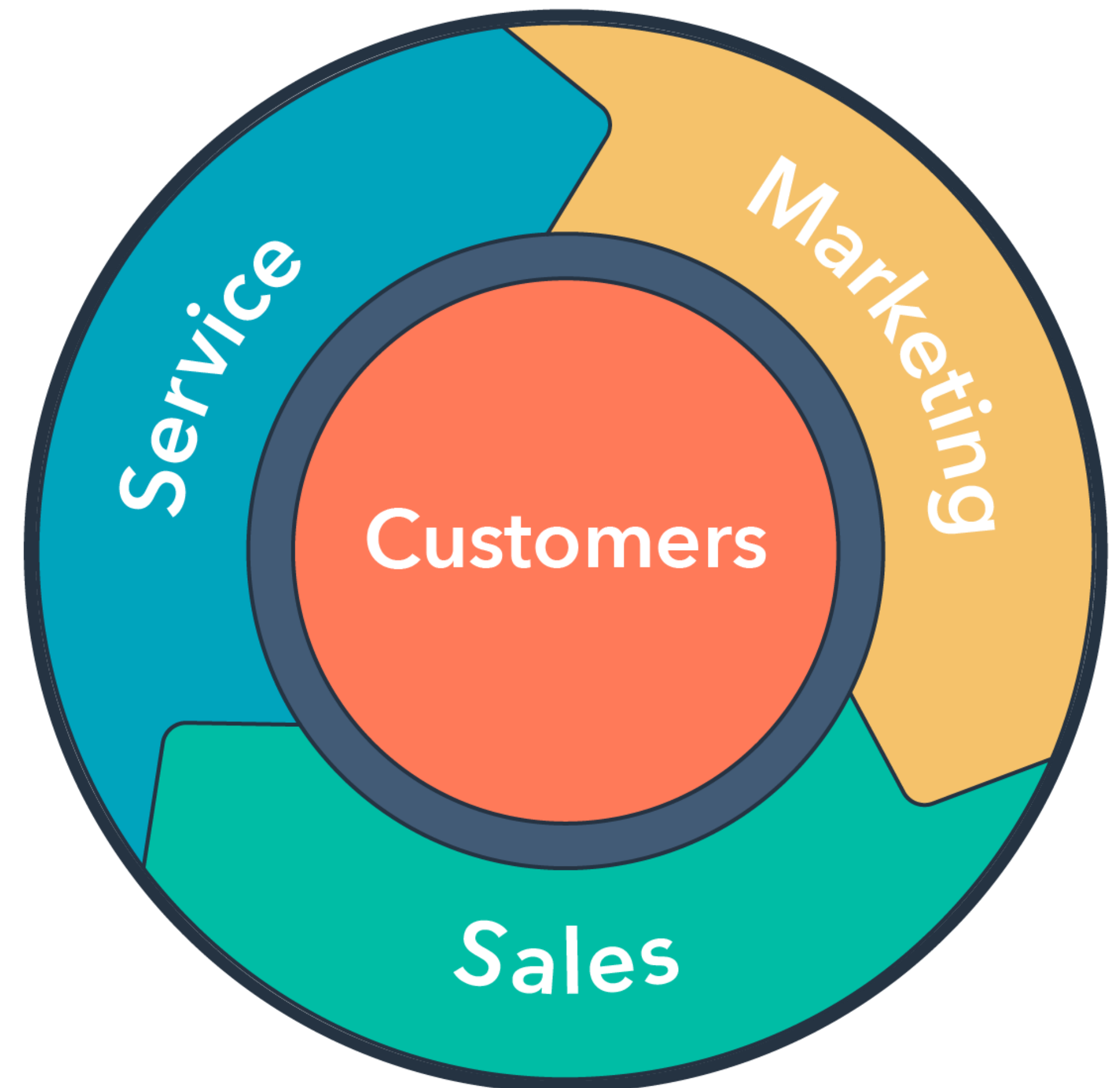
INBOUND MARKETING

ATTRACT, ENGAGE, AND
DELIGHT CUSTOMERS ONLINE

BONUS!
Entrepreneur's
Guide to Startup
Marketing



VS





Humans continue to change.

**Match that change
and grow better.**



INBOUND18: The Flywheel Guide

1. Put the customer first
2. Eliminate friction
3. Delight customers
4. Build word-of-mouth



Star Service Hub Customers



plannuh



COMPLETE
PAYROLL

Star Service Hub Customers



- **What:** Performance mountain bikes
- **Who:** Kyle Harder & Christie Pearson
- **Challenge:** Growing customer delight while growing their business, fast.



Star Service Hub Customers

- **What: Marketing Budgeting Software**
- **Who: Peter Mahoney**
- **Challenge: Setting up a seamless customer experience, from their first day.**



plannuh



Star Service Hub Customers

*SANTA
CRUZ*



plannuh



- **What: Dustless blasting machinery**
- **Who: Michael Mashlan & Molly Metzger**
- **Challenge: Making it easier for customers to get help with their machines.**

Star Service Hub Customers

*SANTA
CRUZ*



- **What:** Accounting software & services
- **Who:** CJ Maurer
- **Challenge:** Turning their happy customers into new business growth.



**COMPLETE
PAYROLL**

INBOUND18: The Flywheel Guide

1. Put the customer first
2. Eliminate friction
3. Delight customers
4. Build word-of-mouth



Flywheel Step #1

Put The Customer First



How to Put the Customer First



Build your systems around your customers, not vice versa

How to Put the Customer First



Build your systems around your customers, not vice versa



Remove friction in your customer experience

How to Put the Customer First



Build your systems around your customers, not vice versa



Remove friction in your customer experience

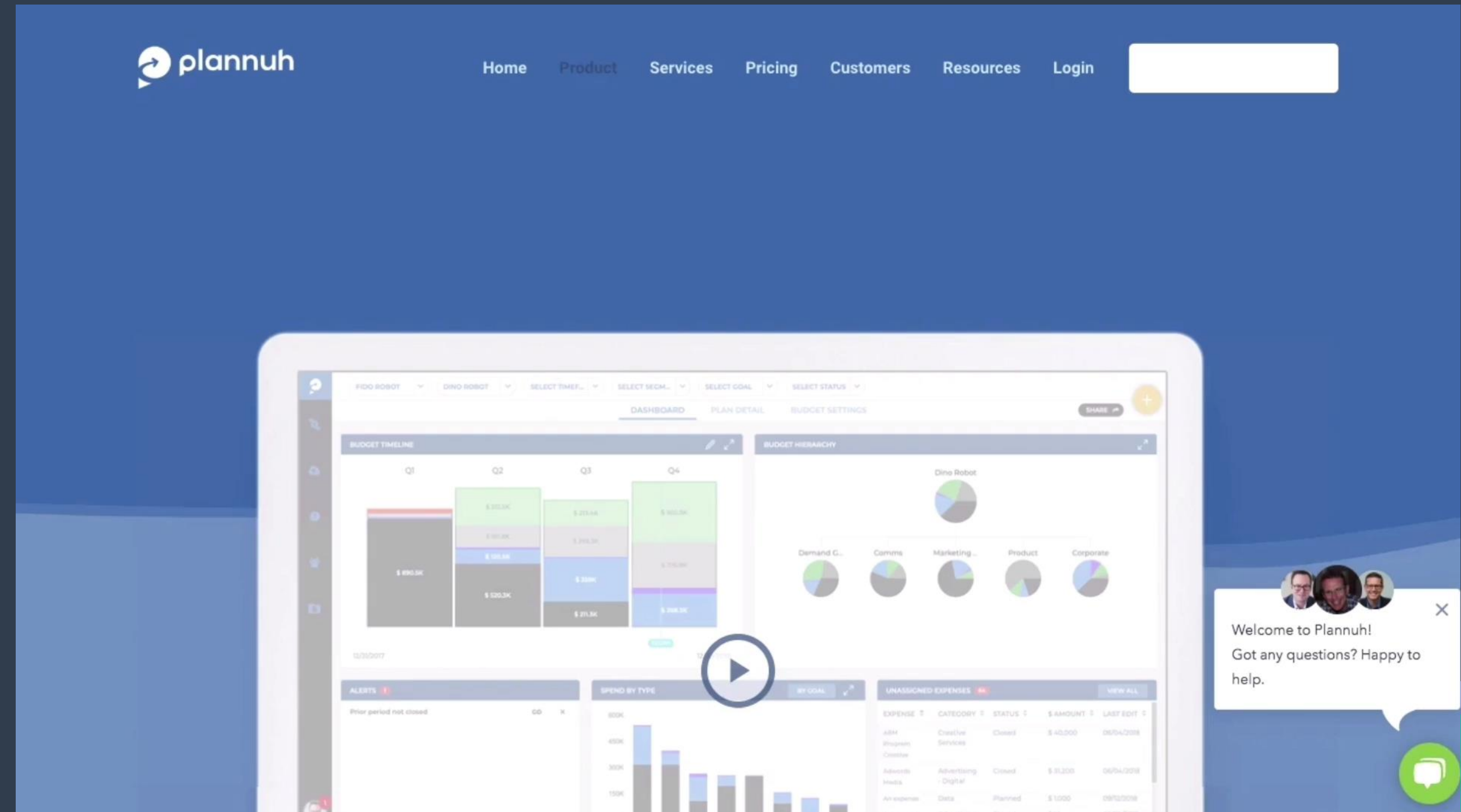


Get a 360° view of your customer in CRM

Customer First with Service Hub

Plannuh

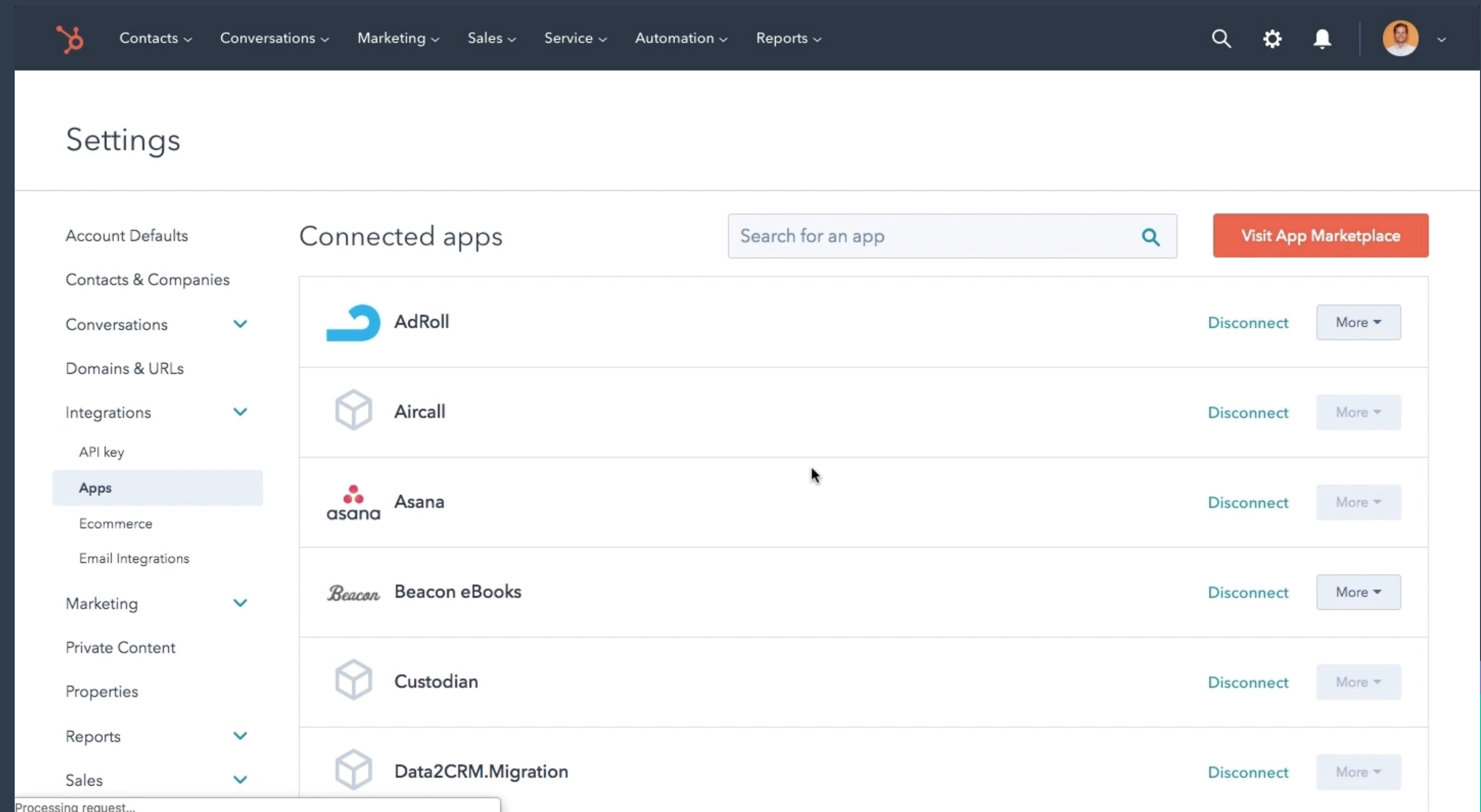
- Opened up chat conversations



Customer First with Service Hub

Plannuh

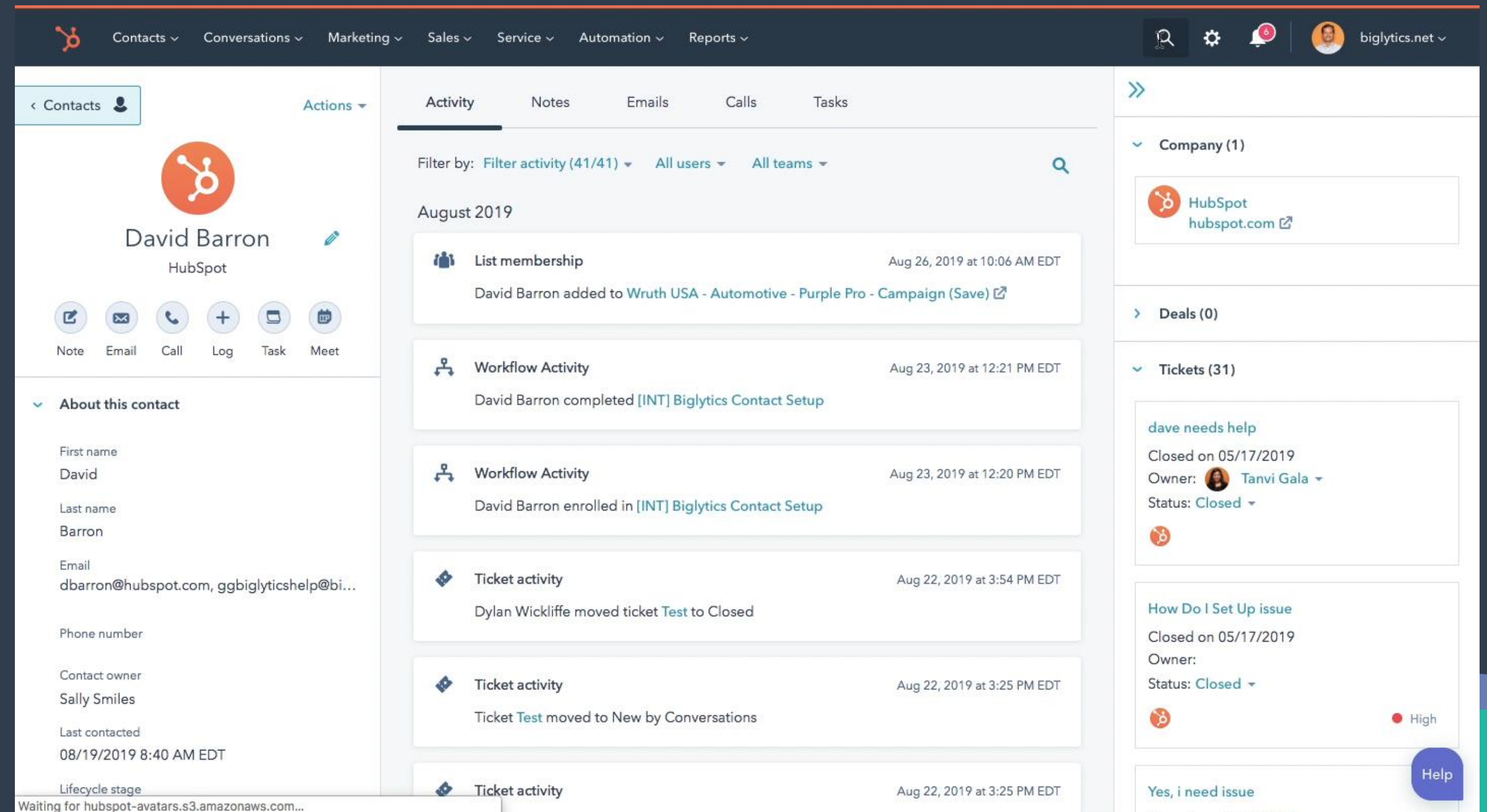
- Opened up chat conversations
- Leveraged integrations



Customer First with Service Hub

Plannuh

- Opened up chat conversations
- Leveraged integrations
- Intertwined product & service



#1 Customer First

**Solve for your customer's success,
not your system's.**

#INBOUND19

Service Hub Roadmap: Customer First

- Ticket extensions to pull in your favorite tools

The screenshot displays the HubSpot Service Hub interface for a contact named Marcus Andrews. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, and Automation. The left sidebar shows the contact's profile, including their name, role (Product Marketing at HubSpot), and various action buttons (Note, Email, Call, Log, Task, Meet). Below this, there are sections for 'About this contact', 'Communication subscriptions', and 'Website activity'. The main content area shows a list of tickets, with the first one titled 'Look forward to connecting' and the second one titled 'Web bars not loading'. The right sidebar shows a list of tickets, including 'Open Issue' and 'Open Bug - Web bars not loading'. The bottom of the interface shows a 'Help' button and a 'Text Messaging by Salesmsg' section.

Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾

Search ⚙️ 20 [User Profile]

< Contacts [User Icon] Actions ▾

Activity Notes **Emails** >>

Marcus Andrews [HubSpot Logo]

Product Marketing at HubSpot

Note Email Call Log Task Meet

> About this contact

Communication subscriptions

Marcus Andrews is opted in to 1 subscription.

Add subscription View history

Website activity

38 71

SITE VISITS PAGES VIEWED

January 2019

Email

Look forward to connecting

Clicked Opens: 1 Click

Expand

Marcus Andrews to Marcus Andrews De

Reply

October 2018

Jira

Open Issue

Status: Draft

Created: 1 year ago

Created By: Marcus Andrews

Actions ▾

Open Bug - Web bars not loading

Status: Draft

Created: 2 years ago

Created By: Marcus Andrews

Actions ▾

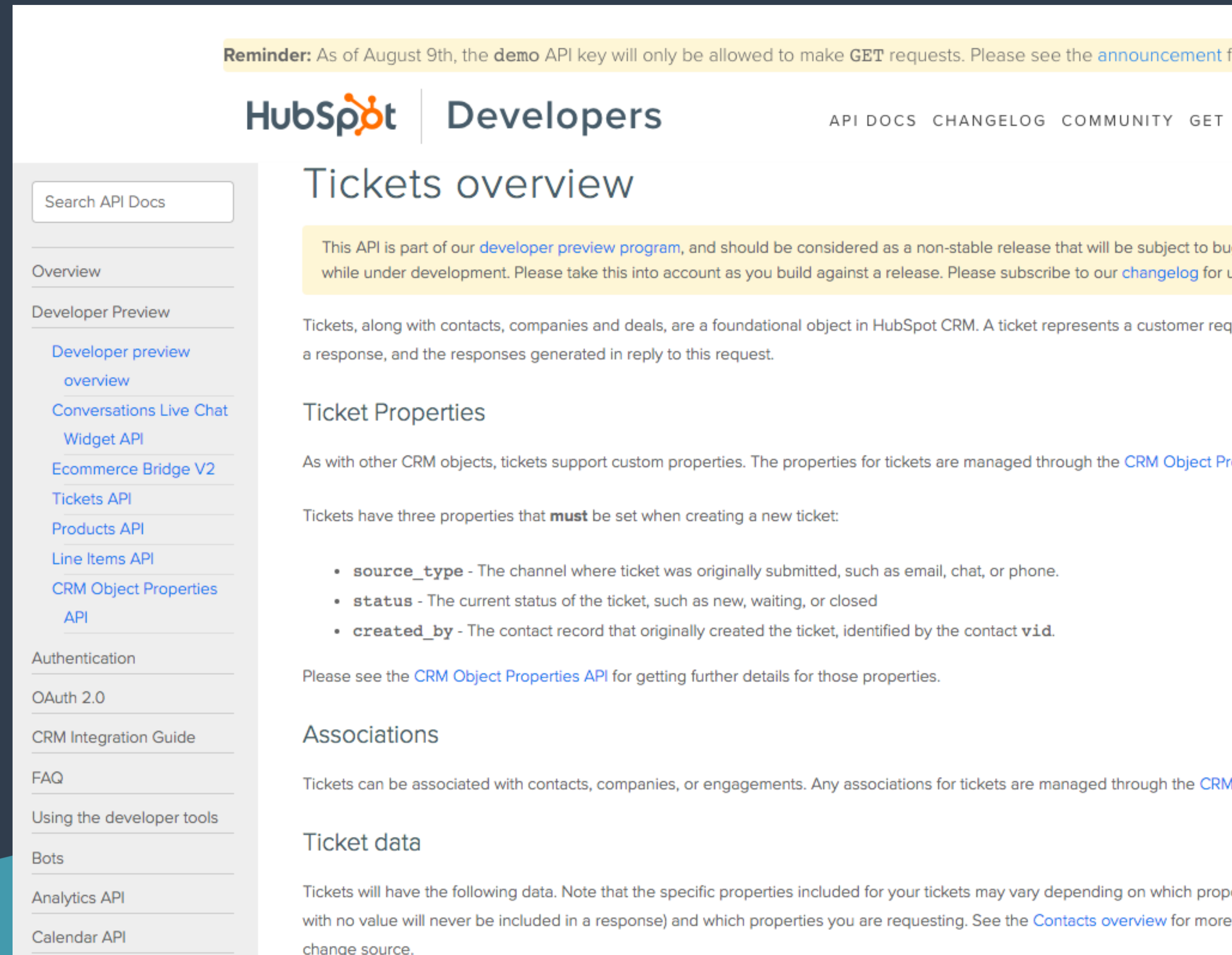
Create Document Actions ▾

Help

Text Messaging by Salesmsg

Service Hub Roadmap: Customer First

- Ticket extensions to pull in your favorite tools
- Conversations APIs to extend your customer communications



Reminder: As of August 9th, the **demo** API key will only be allowed to make **GET** requests. Please see the [announcement](#) for more details.

HubSpot Developers

API DOCS CHANGELOG COMMUNITY GET

Tickets overview

This API is part of our [developer preview program](#), and should be considered as a non-stable release that will be subject to change while under development. Please take this into account as you build against a release. Please subscribe to our [changelog](#) for updates.

Tickets, along with contacts, companies and deals, are a foundational object in HubSpot CRM. A ticket represents a customer request for a response, and the responses generated in reply to this request.

Ticket Properties

As with other CRM objects, tickets support custom properties. The properties for tickets are managed through the [CRM Object Properties API](#).

Tickets have three properties that **must** be set when creating a new ticket:

- **source_type** - The channel where ticket was originally submitted, such as email, chat, or phone.
- **status** - The current status of the ticket, such as new, waiting, or closed
- **created_by** - The contact record that originally created the ticket, identified by the contact **vid**.

Please see the [CRM Object Properties API](#) for getting further details for those properties.

Associations

Tickets can be associated with contacts, companies, or engagements. Any associations for tickets are managed through the [CRM Object Properties API](#).

Ticket data

Tickets will have the following data. Note that the specific properties included for your tickets may vary depending on which properties you request (properties with no value will never be included in a response) and which properties you are requesting. See the [Contacts overview](#) for more details on the change source.

Search API Docs

Overview

Developer Preview

- [Developer preview overview](#)
- [Conversations Live Chat Widget API](#)
- [Ecommerce Bridge V2](#)
- [Tickets API](#)
- [Products API](#)
- [Line Items API](#)
- [CRM Object Properties API](#)

Authentication

OAuth 2.0

CRM Integration Guide

FAQ

Using the developer tools

Bots

Analytics API

Calendar API


Service Hub Roadmap: Customer First

- Ticket extensions to pull in your favorite tools
- Conversations APIs to extend your customer communications
- **Contact deduplication to keep your customer records clean**

Review your contacts

X

Which record would you like to keep?




Kyle Nichols [↗](#)

☒

Email
knichols@hubspot.com

Phone
6034907868

Last Activity Date
Jun 14, 2019 8:00 AM



Kyle Nichols [↗](#)

☐

Email
knichols+1@hubspot.com

Phone
--

Last Activity Date
Jun 29, 2018 12:00 AM

Once you merge contacts, this can't be undone.

- The final contact record will have "knichols@hubspot.com" as its primary email address.
- Timeline activity for both contact records will be available in the final record.
- The most recent value for each property (for example, "Kyle") will be used in the final record.

Read more: [What happens when I merge two contacts?](#) [↗](#)

Merge

Cancel

Flywheel Step #2

Eliminate Friction

HubSpot



How to Eliminate Friction



Consolidate your knowledge



How to Eliminate Friction



Consolidate your knowledge



Make your knowledge SEO'd, organized, and public

How to Eliminate Friction



Consolidate your knowledge



Make your knowledge SEO'd, organized, and public

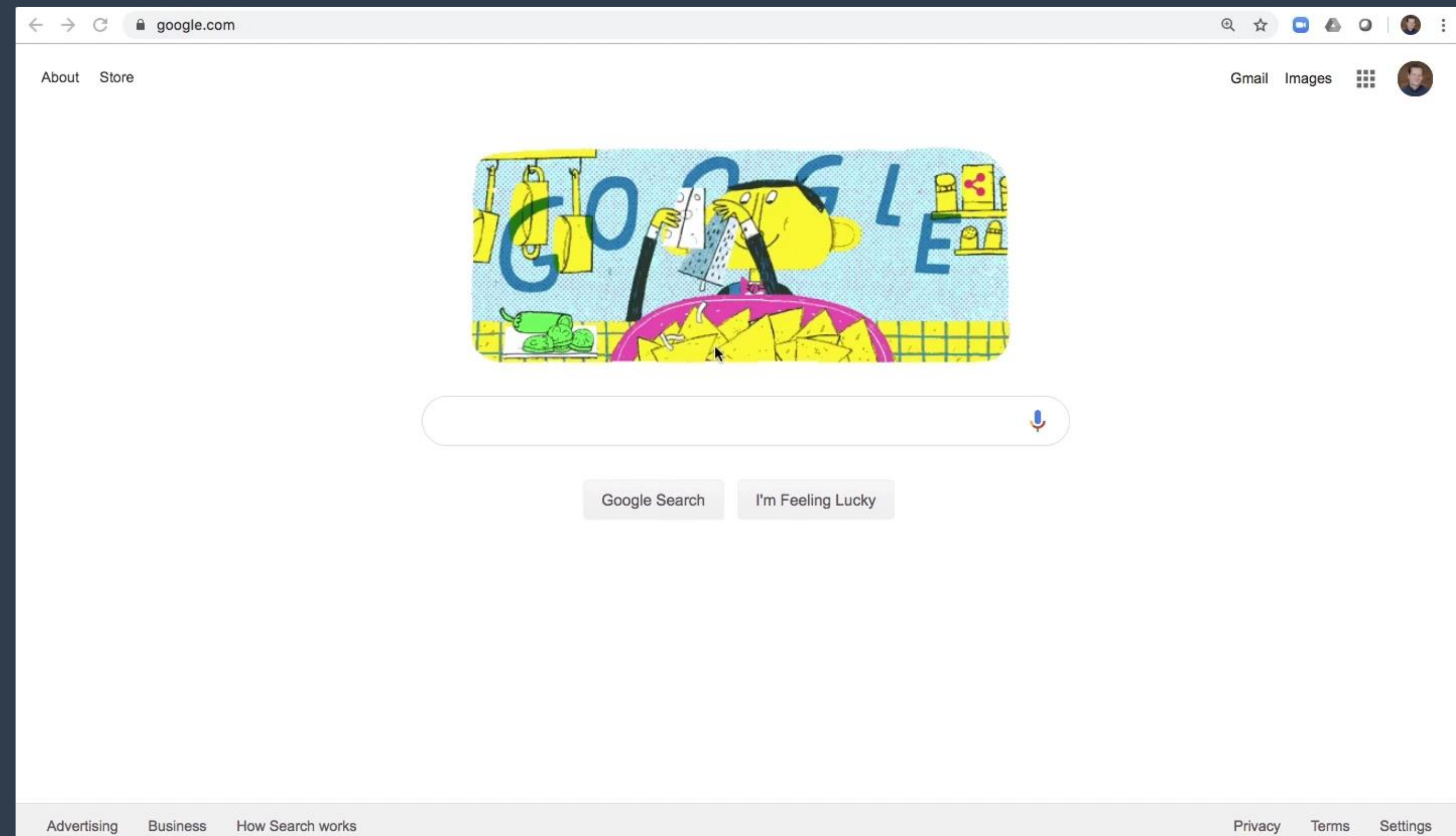


Help your customers help themselves

Eliminate Friction with Service Hub

MMLJ

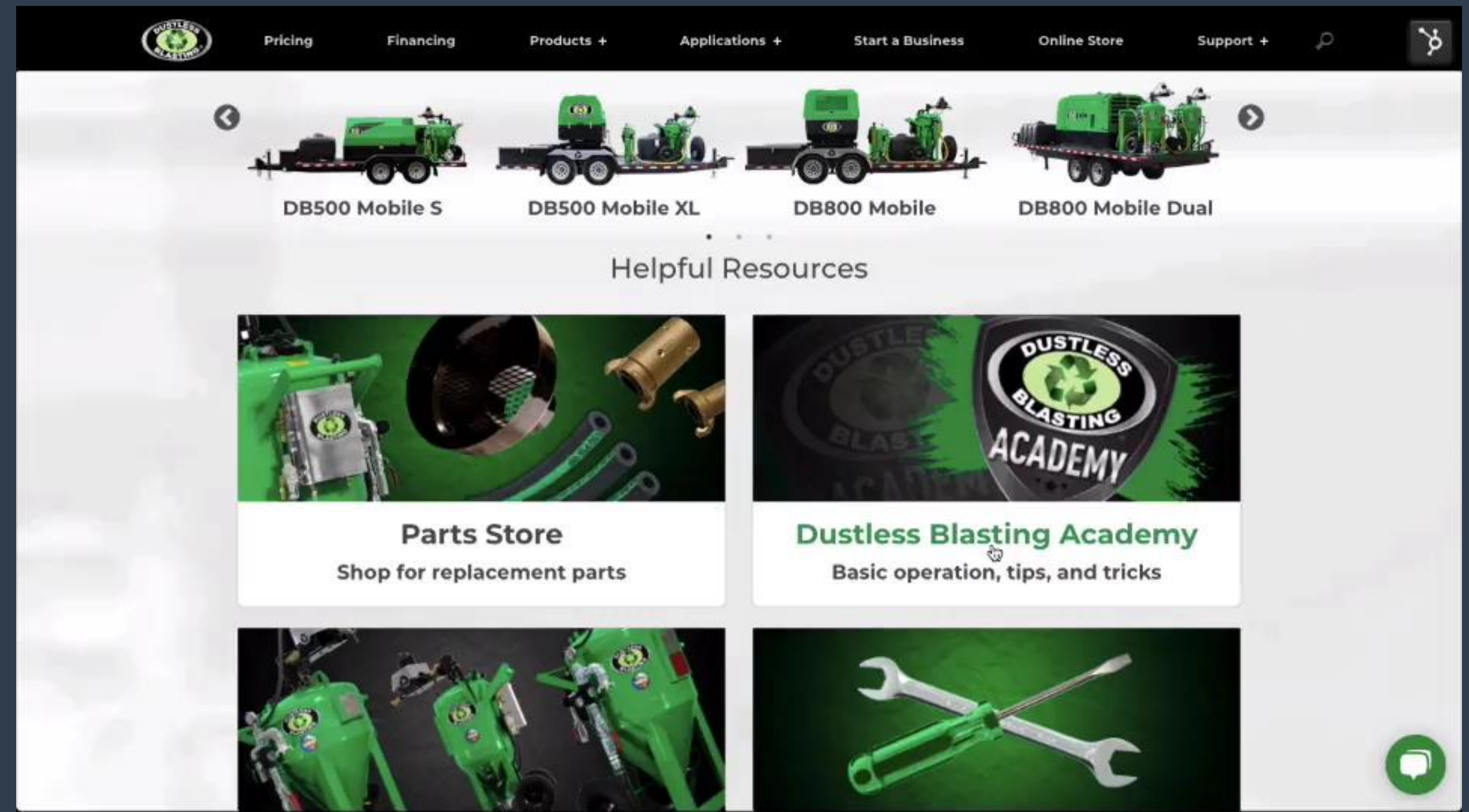
- Consolidated company knowledge



Eliminate Friction with Service Hub

MMLJ

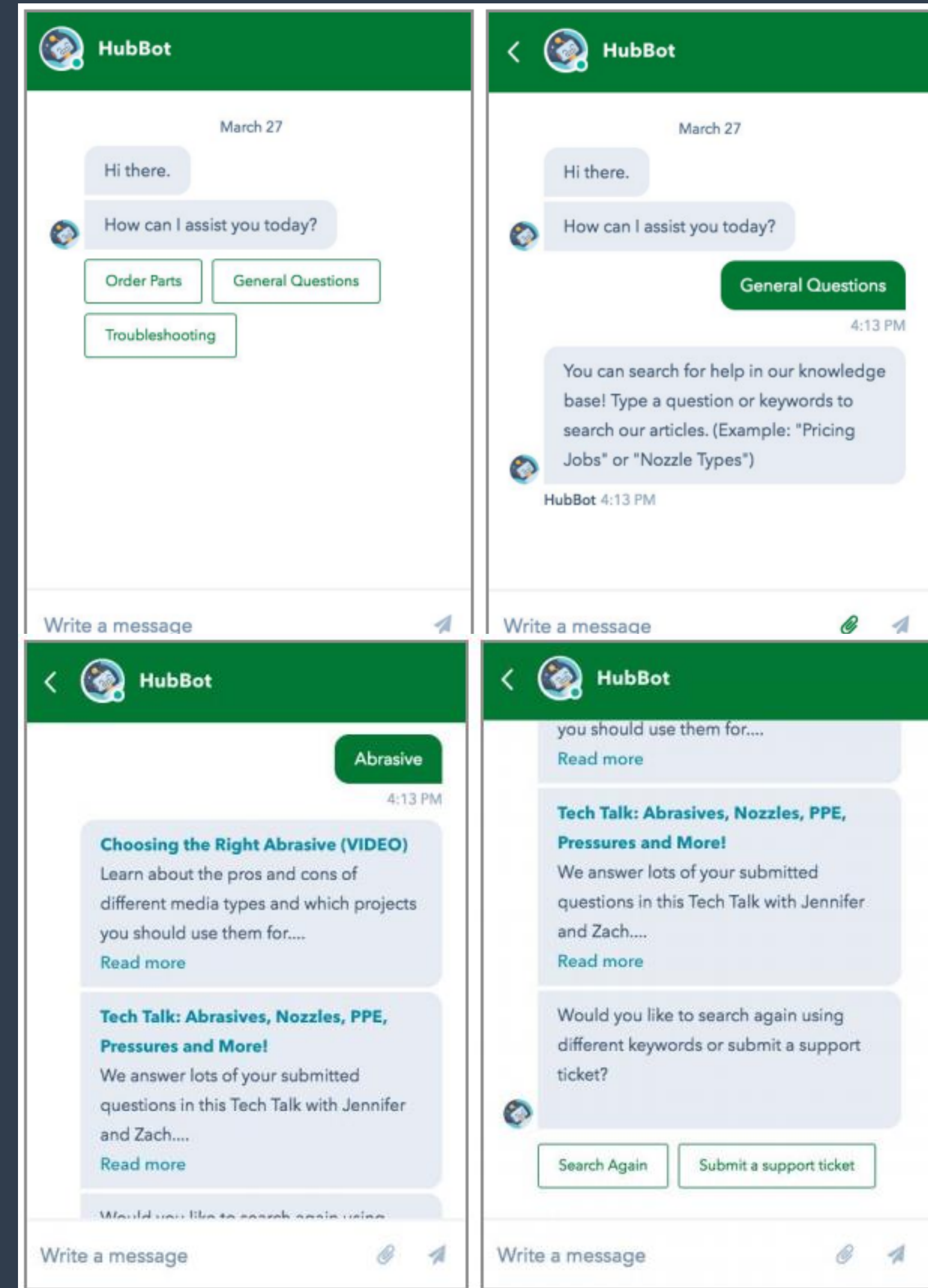
- Consolidated company knowledge
- Organized persona-specific content



Eliminate Friction with Service Hub

MMLJ

- Consolidated company knowledge
- Organized persona-specific content
- Used self service to eliminate friction



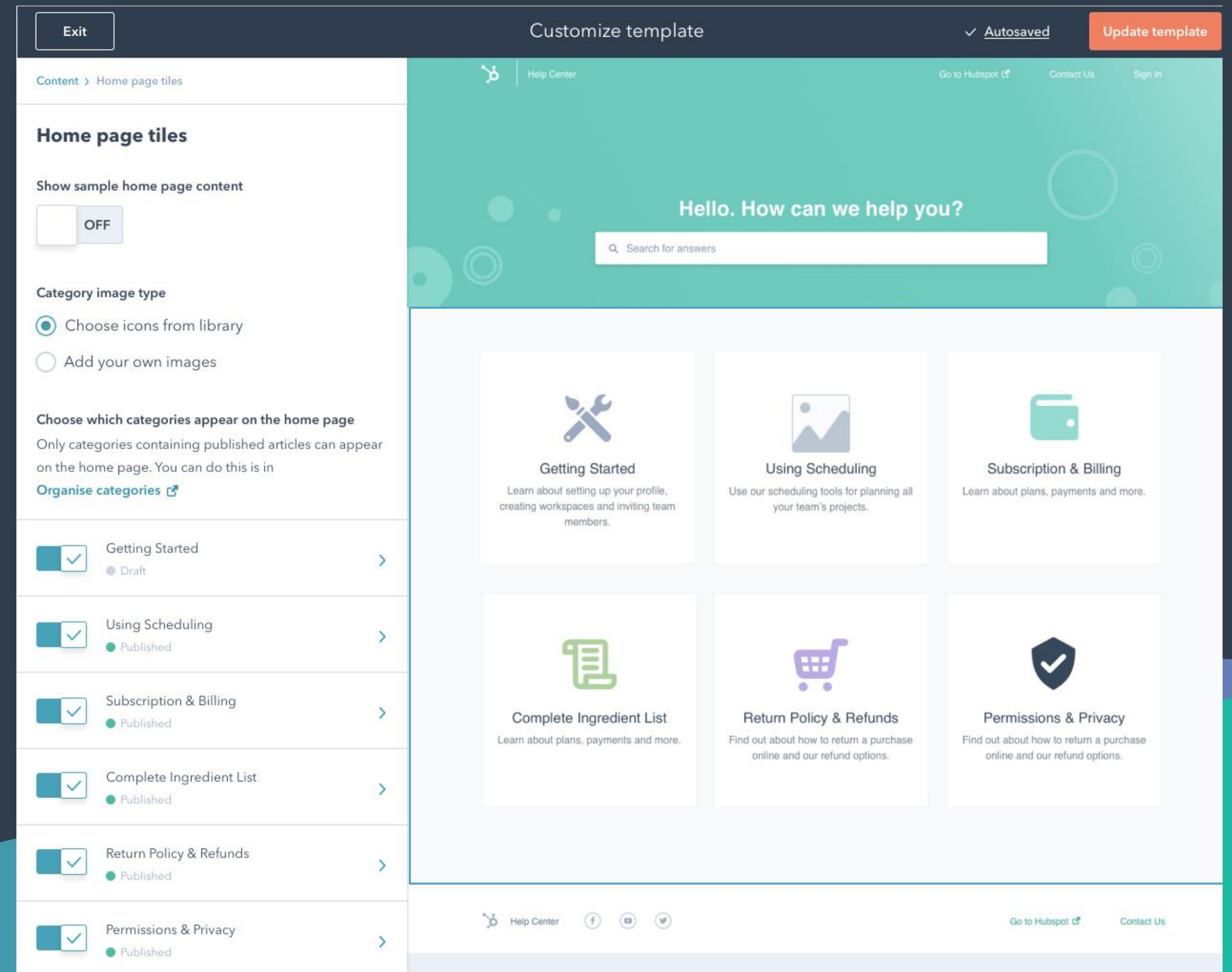
#2 Eliminate Friction

**Knowledge is power,
but only when it's free.**

#INBOUND19

Service Hub Roadmap: Eliminate Friction

- New knowledge base design options



Service Hub Roadmap: Eliminate Friction

- New knowledge base design options
- **List-controlled KB access**

Sign in to view this page

This page is only available to people who have been given access.

Email*

Email

Password* [Show password](#)

Password

☒ **Remember Me**
Forgot your password?

Login

[Having trouble? Contact the admin](#)

Settings

Edit your article URL *

www.biglytics.net/knowledge/ using-biglytics/login-and-password-resets

[Edit the root URL in settings](#)

Category * (required)

Using Biglytics

Subcategory * (optional)

No

Control lists * (optional)

Search for a list

- ☐ Active App Users (0)
- ☒ Active Customer (471)
- ☐ Active Customers (19265)
- ☒ Active List - InfoPro [save] event attendance (5)
- ☐ Ads events (Facebook, LinkedIn, AdWords) (4)
- ☐ Ads events - Facebook, LinkedIn, AdWords (4)

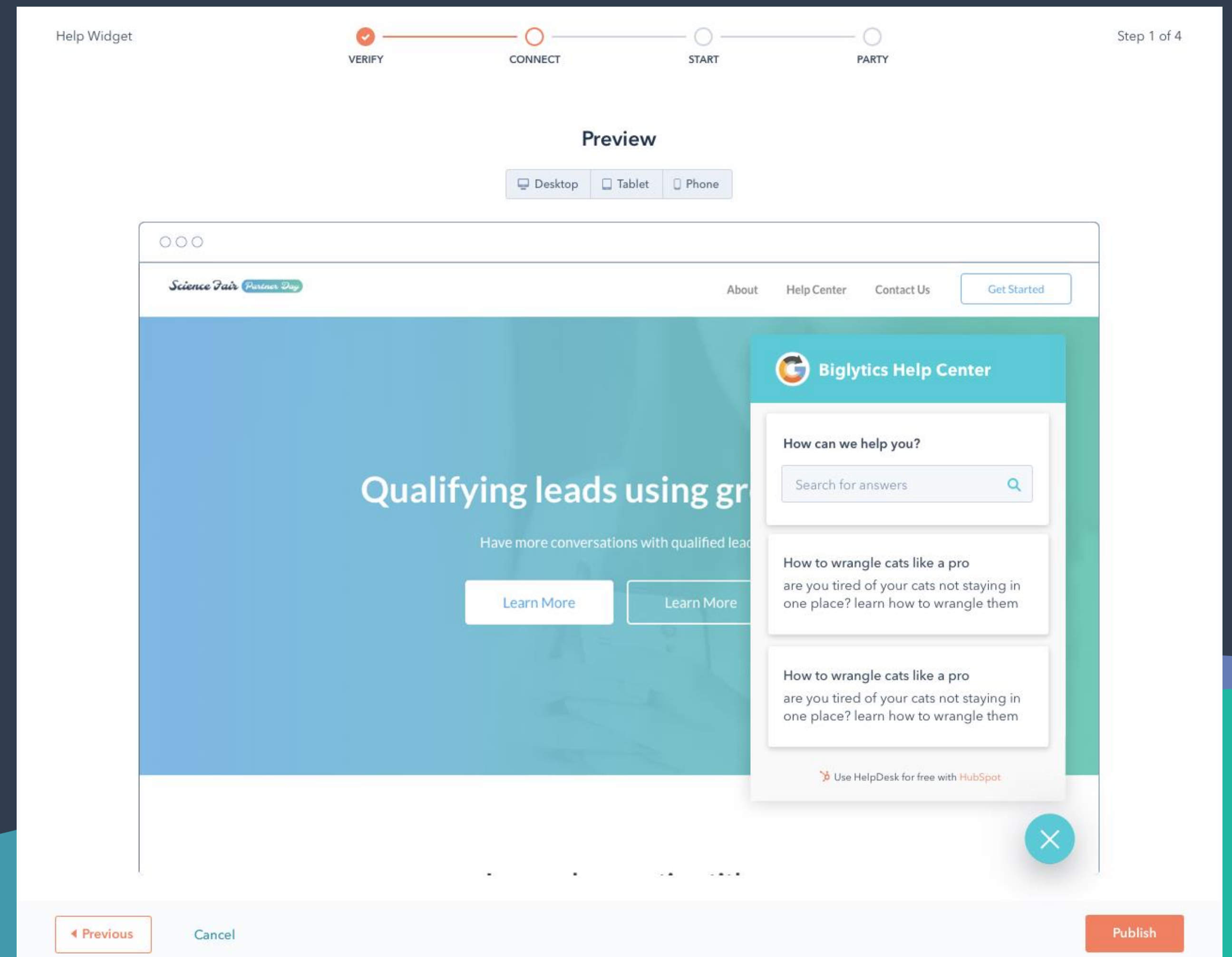
[Create new list](#)

Active Customer × Active List - InfoPro [save] event attendance ×

This will send a registration email to any contacts on these lists who haven't already registered.

Service Hub Roadmap: Eliminate Friction

- New knowledge base design options
- List-controlled smart access
- **On-site knowledge & help widget**



Service Hub Roadmap: Eliminate Friction

- New knowledge base design options
- List-controlled smart access
- On-site knowledge & help widget
- Self-service customer portal

The screenshot shows the 'Graphdocs Help Center' interface. At the top, there's a teal header with the Graphdocs logo, 'Graphdocs Help Center', a 'Go to Graphdocs' link, and a user profile icon. Below the header, a breadcrumb trail reads 'Help Center Home > Support requests'. The main section is titled 'Support requests'. A sub-header 'All requests' with a back arrow is visible. The selected request is titled 'Sorting lists of users'. To the right of the title, the status is 'Open', the issue number is '531707', and it was created on 'May 27, 2019'. The request is from 'John Ward' (JW) on 'May 27, 2019, 11:55 AM'. The message states: 'The sync button has disappeared from my craft toolbar and I can't sync to invasion'. A response from 'Nancy Allen' on 'Today, 11:28 AM' follows, saying 'Hey John' and 'Thanks for getting in touch and apologies for the trouble, I'll do my best to help. As a first step, I wanted to check if you you are able to see the "Sync + Prototype" toggle within Craft Manger (the "C" icon in your top toolbar)'. Below the text is a screenshot of the 'CRAFT Player' interface. In the 'Sketch Tools' section, the 'Sync + Prototype' toggle is highlighted with a red box. The toggle is currently turned on, showing a blue circle. Below the screenshot, Nancy continues: 'If you toggle it off, then back on and then restart Sketch, does that help at all? Additionally, can you confirm the version number of that plugin by hovering over it as well as your Craft Manager version (click the "C" icon in the top toolbar to open Craft Manager> gear icon>Preferences)'. She ends with 'I look forward to hearing back from you!' and 'Thanks, Monika'. At the bottom, there are two buttons: 'Reply' and 'Close issue'.

Flywheel Step #3

Delight Customers



How to Delight Customers

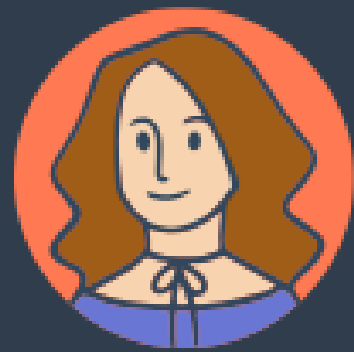


Engage your customers in a modern conversation

How to Delight Customers



Engage your customers in a modern conversation

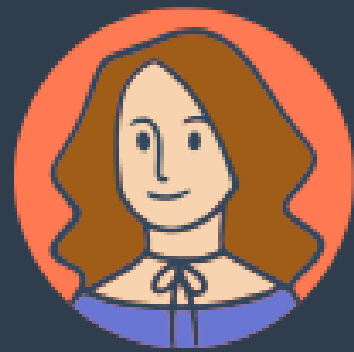


Grow your team without compromising quality

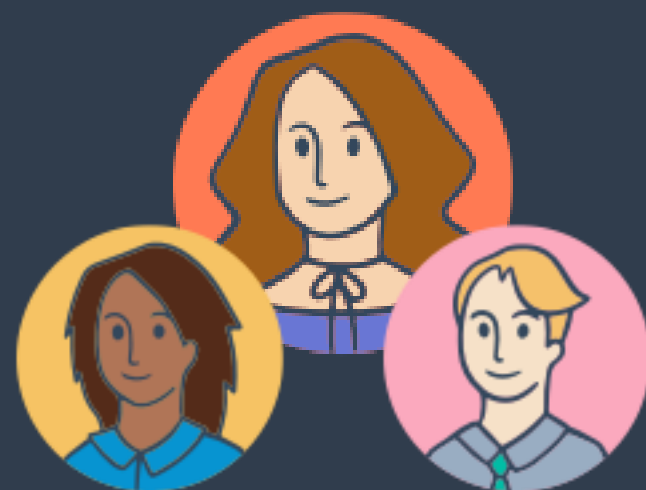
How to Delight Customers



Engage your customers in a modern conversation



Grow your team without compromising quality

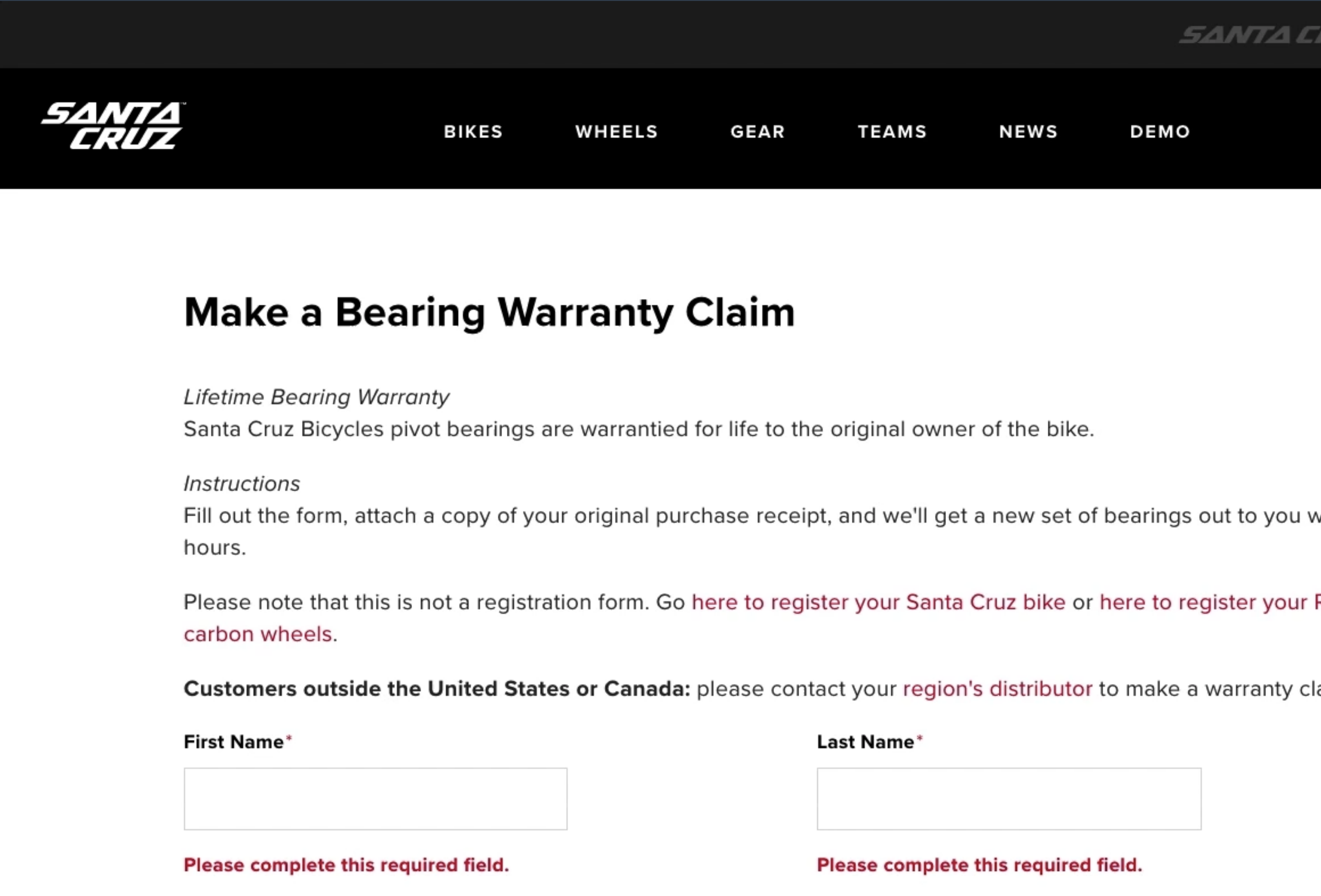


Make your service a team sport during busy seasons

Delight Customers with Service Hub

Santa Cruz Bicycles

- Streamlined warranty claims



The screenshot shows the Santa Cruz Bicycles website's 'Make a Bearing Warranty Claim' page. The header features the Santa Cruz logo and navigation links for BIKES, WHEELS, GEAR, TEAMS, NEWS, and DEMO. The main heading is 'Make a Bearing Warranty Claim'. Below it, the 'Lifetime Bearing Warranty' section states that Santa Cruz Bicycles pivot bearings are warranted for life to the original owner. The 'Instructions' section explains that users must fill out the form, attach a purchase receipt, and will receive new bearings within 48 hours. A note clarifies that this is not a registration form, with links to register bikes or carbon wheels. A disclaimer for customers outside the US and Canada directs them to contact their regional distributor. The form includes two required text input fields for 'First Name' and 'Last Name', each with a red error message below it: 'Please complete this required field.'

SANTA CRUZ BIKES WHEELS GEAR TEAMS NEWS DEMO

Make a Bearing Warranty Claim

Lifetime Bearing Warranty
Santa Cruz Bicycles pivot bearings are warrantied for life to the original owner of the bike.

Instructions
Fill out the form, attach a copy of your original purchase receipt, and we'll get a new set of bearings out to you within 48 hours.

Please note that this is not a registration form. Go [here to register your Santa Cruz bike](#) or [here to register your carbon wheels](#).

Customers outside the United States or Canada: please contact your [region's distributor](#) to make a warranty claim.

First Name*

Last Name*

Please complete this required field. Please complete this required field.

Delight Customers with Service Hub

Santa Cruz Bicycles

- Streamlined warranty claims
- **CRM-ized Willie's & Steve's brains**

The screenshot displays the HubSpot Settings interface for Santa Cruz Bicycles. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The left sidebar lists various settings categories, with 'Properties' currently selected. The main content area shows the 'Account Verified' status, with a link to 'Back to contact properties'. Below this, a grid of metrics is displayed:

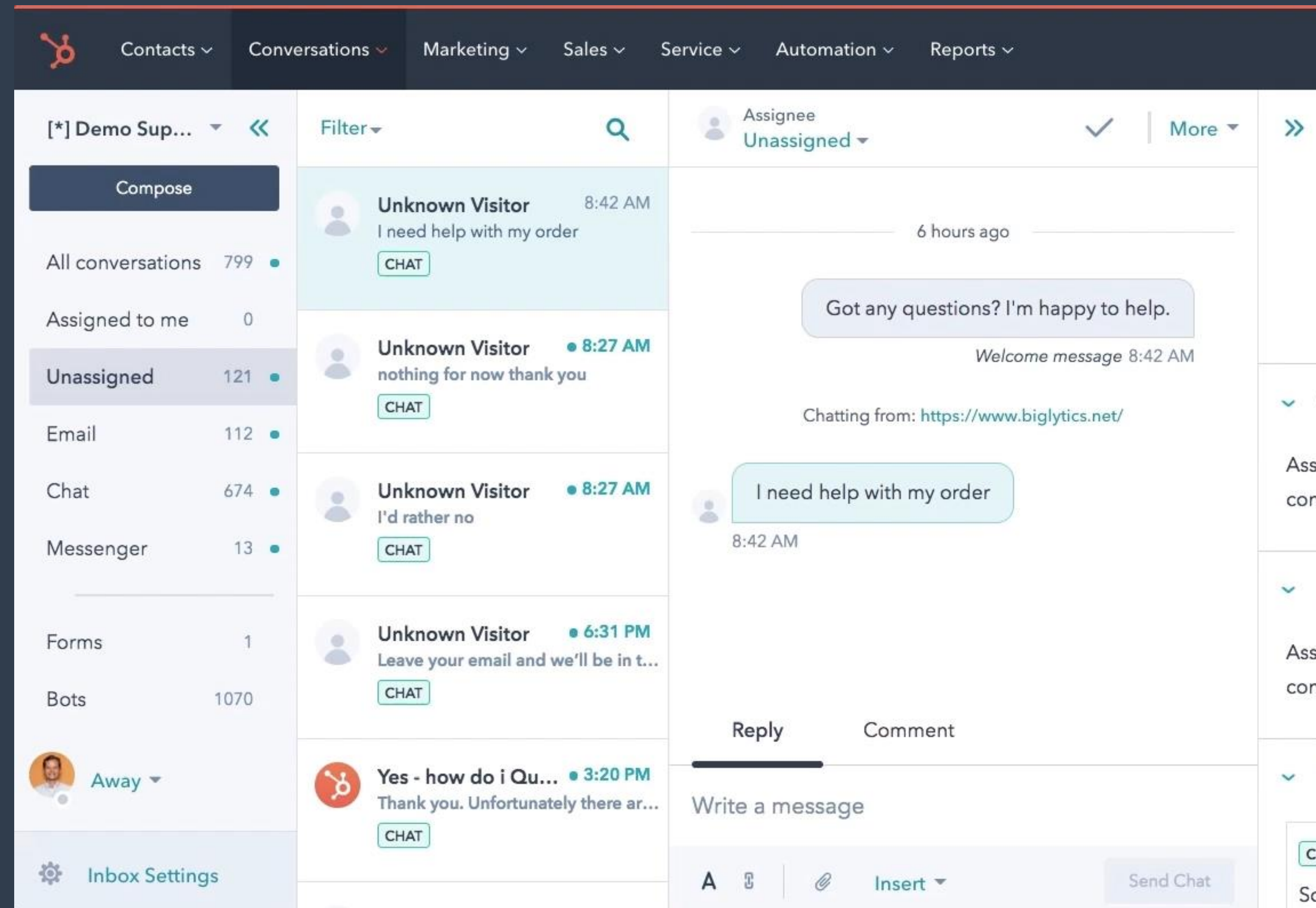
Metric	Value
CONTACTS WITH A VALUE Out of 581,455 contacts	3
FORMS	0
WORKFLOWS	2
SCORING RULES	0
CHATFLOWS	0
CALCULATED PROPERTIES	0

At the bottom of the metrics grid, there is a 'Label' input field.

Delight Customers with Service Hub

Santa Cruz Bicycles

- Streamlined warranty claims
- CRM-ized Willie & Steve's brains
- Empowered the whole team to service



#3 Delight Customers

**Delight your customers,
because it's the right thing to do.**

#INBOUND19

Service Hub Roadmap: Delight Customers

- Efficient inbox enhancements

The screenshot displays the HubSpot Service Hub interface. At the top, a navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The left sidebar shows a list of conversation categories: Compose, All conversations (766), Assigned to me (0), Unassigned (98), Email (115), Chat (641), Messenger (10), Forms (2), Bots (1056), Filtered (246), and Trash. A user status indicator shows 'Away'. The main area is divided into a list of conversations and a detailed view of the selected conversation with Tomas Jensen.

Conversations List:

Name	Date	Channel
Daniel Palacios Godoy	Jul 29	MESSENGER
Johanna Hernández	Jul 23	MESSENGER
Tomas Jensen	Jul 18	MESSENGER
Cristiano Fortest	Jul 16	MESSENGER
Unknown Visitor	May 31	MESSENGER
Unknown Visitor	May 30	MESSENGER

Conversation Details (Tomas Jensen):

- Assignee:** Karla Bohan
- Status:** Mark as closed
- Timestamp:** July 18, 11:41 AM
- Message:** Chatting from: <https://m.me/1556161204710508>
- Bot Message:** Get Started from Biglytics
- Assignment Note:** Karla Bohan was automatically assigned to this conversation on Jul 18th, 11:41 AM
- User Message:** Hi, Thanks for messaging us. We try to be as responsive as possible. We'll get back to you soon.
- Reply:** Tomas test

Reply Section:

- Buttons: Reply, Comment
- Text input: Write a message
- Rich text editor: Bold (A), Italic (i), Link (🔗), Attach (📎)

Service Hub Roadmap: Delight Customers

- Efficient inbox enhancements
- Streamlined ticket automation

Change ticket status on outbound email

Automatically change ticket status when an email is sent to a customer.

Waiting on Customer

ON ✓

Change ticket status on inbound reply

Automatically change ticket status when a customer replies to an email.

Waiting on Customer

ON ✓

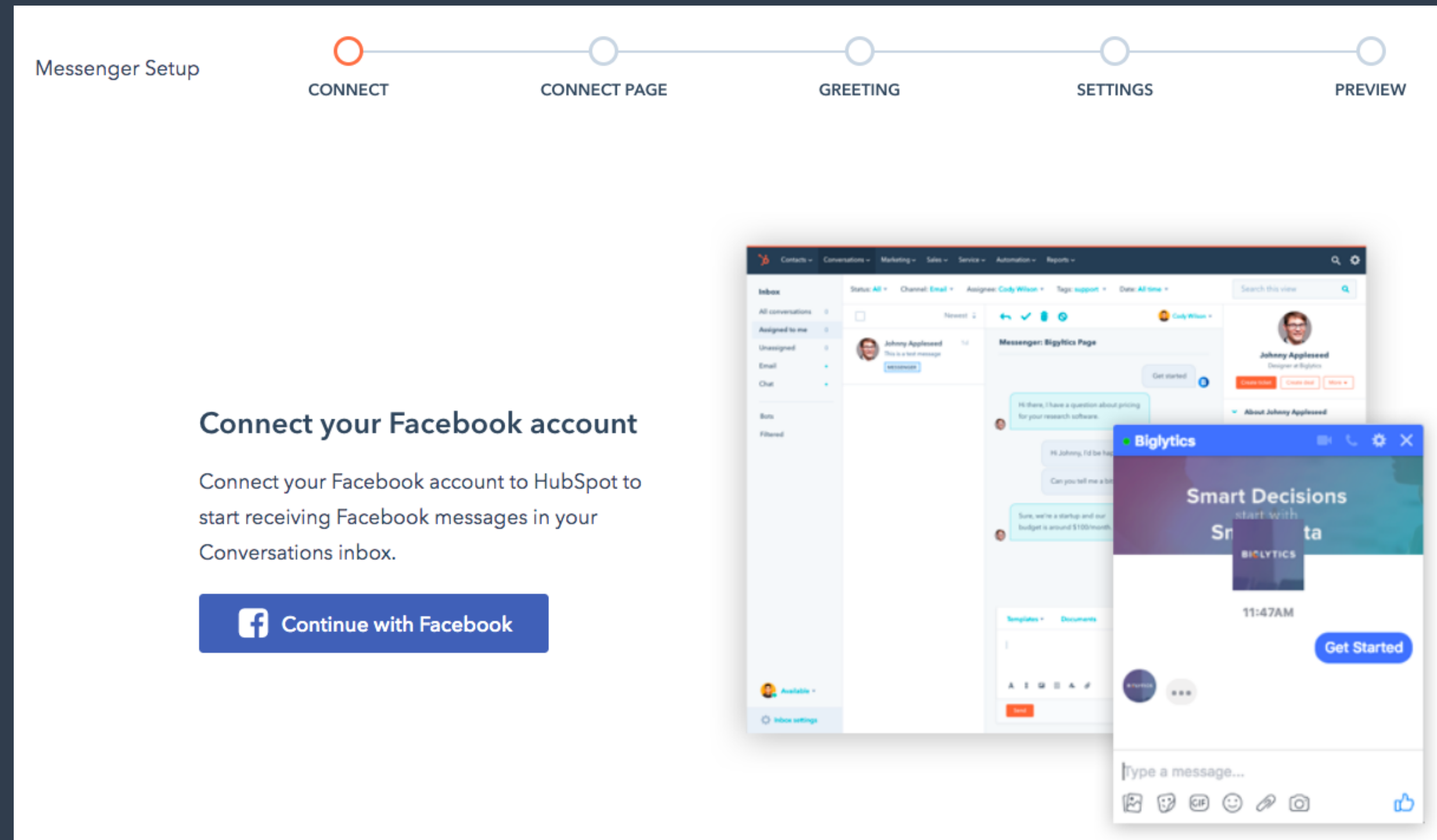
Trigger actions when tickets reach certain statuses

Trigger the actions below when a ticket moves into the associated ticket status

When a ticket reaches...	When a ticket reaches...	When a ticket reaches...	When a ticket reaches...
NEW	WAITING ON CUSTOMER	WAITING ON US	CLOSED
<div><div>Enroll in workflow</div><div>Pipeline is "[*] Support Pipeline", Ticket status is "New"</div></div>	<div><div>Enroll in workflow</div><div>Pipeline is "[*] Support Pipeline", Ticket status is "Waiting on Customer"</div></div>	<div><div>Enroll in workflow</div><div>El pipeline es "[*] Technical Support", el estado del ticket es "Waiting on us"</div></div>	<div><div>+</div><div><div>Send email</div><div>Ticket closed</div></div><div><div>+</div><div><div>Rotate ticket to owner</div><div>Rotate ticket between 3 owners</div></div></div><div><div>+</div><div><div>Create task</div><div>Create task "Pick up stuff - Ticket: Category of TA Request" and assign to Ticket owner</div></div></div></div>

Service Hub Roadmap: Delight Customers

- Efficient inbox enhancements
- Streamlined ticket automation
- **All your channels in HubSpot**

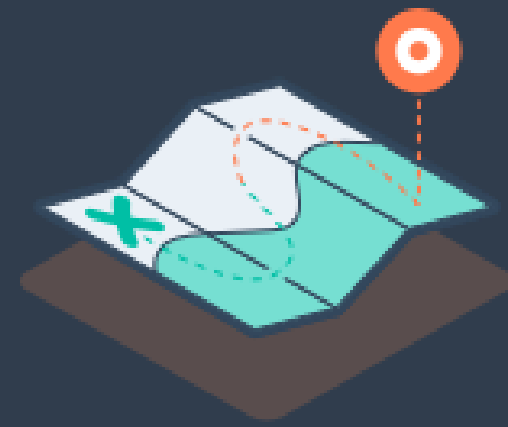


Flywheel Step #4

Build
Word-of-Mouth



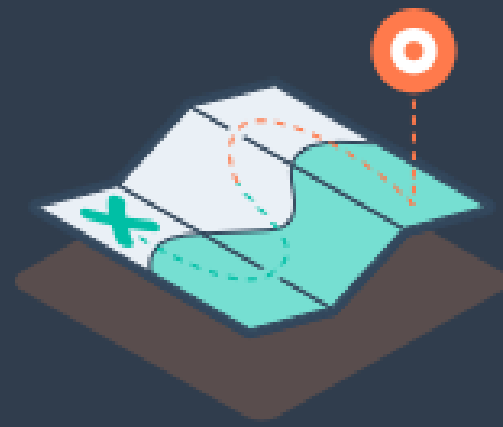
How to Build Word-of-Mouth



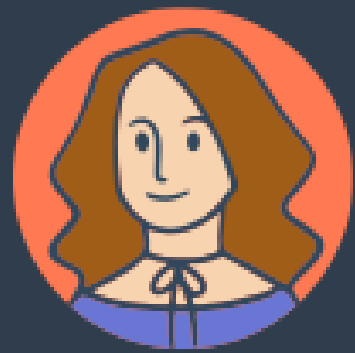
Measure your customer delight



How to Build Word-of-Mouth



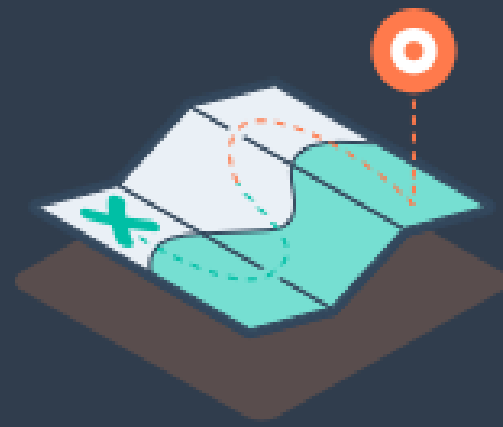
Measure your customer delight



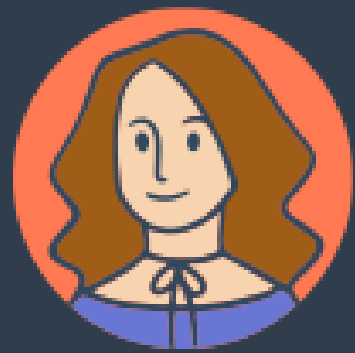
Build lists of your happiest customers



How to Build Word-of-Mouth



Measure your customer delight



Build lists of your happiest customers



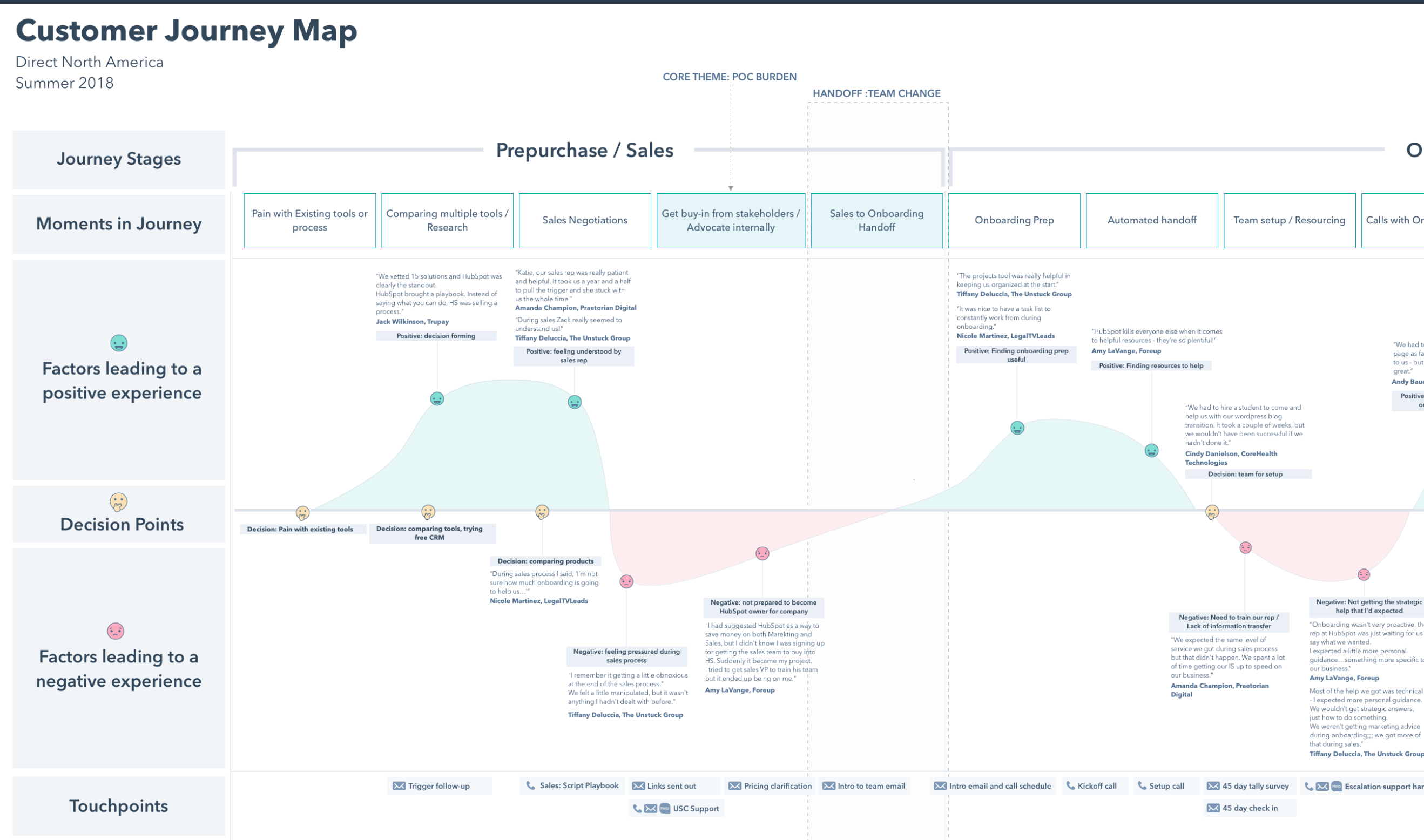
Activate your happy customers as advocates



Build Word-of-Mouth with Service Hub

Complete Payroll

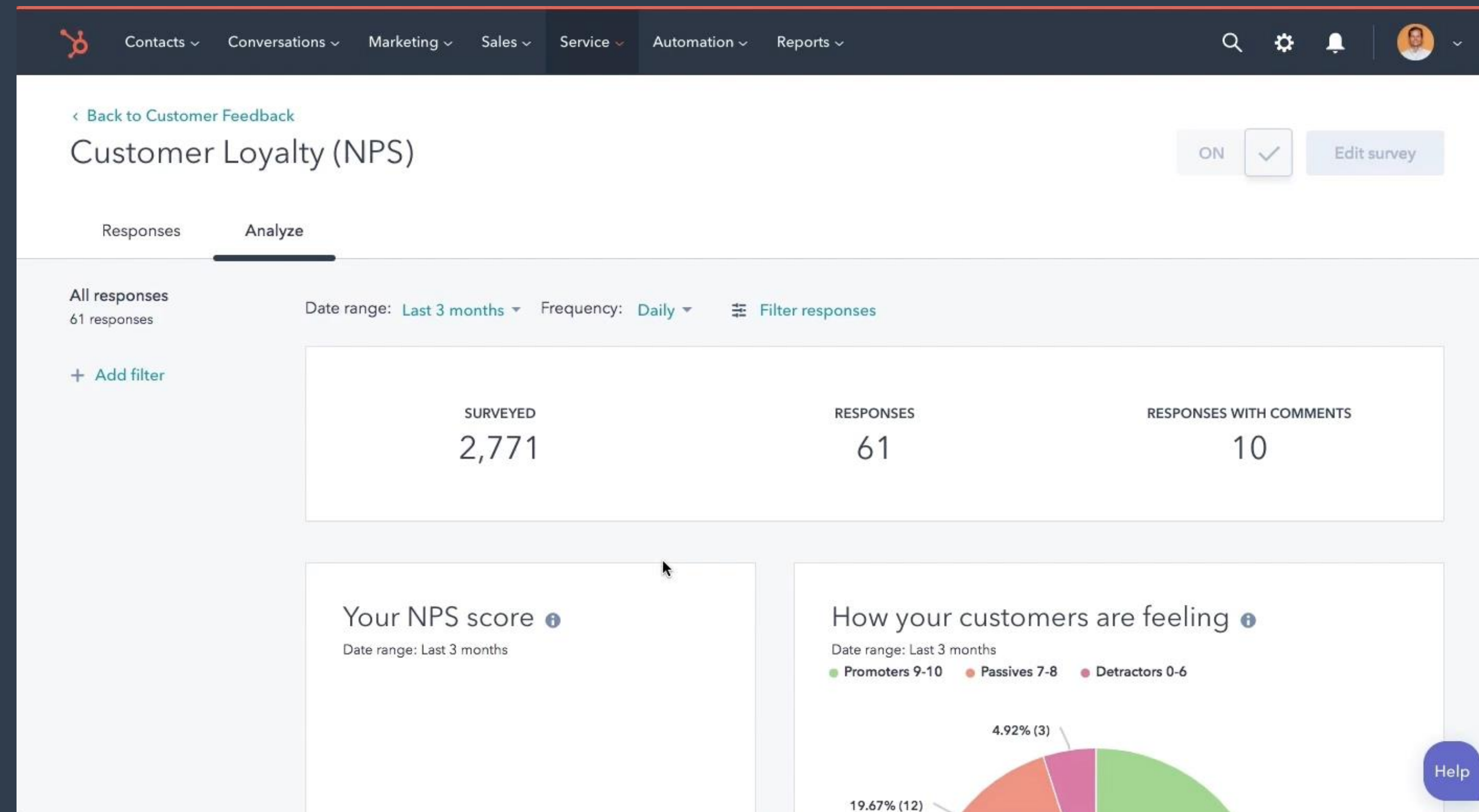
- Organized a flywheel journey workshop



Build Word-of-Mouth with Service Hub

Complete Payroll

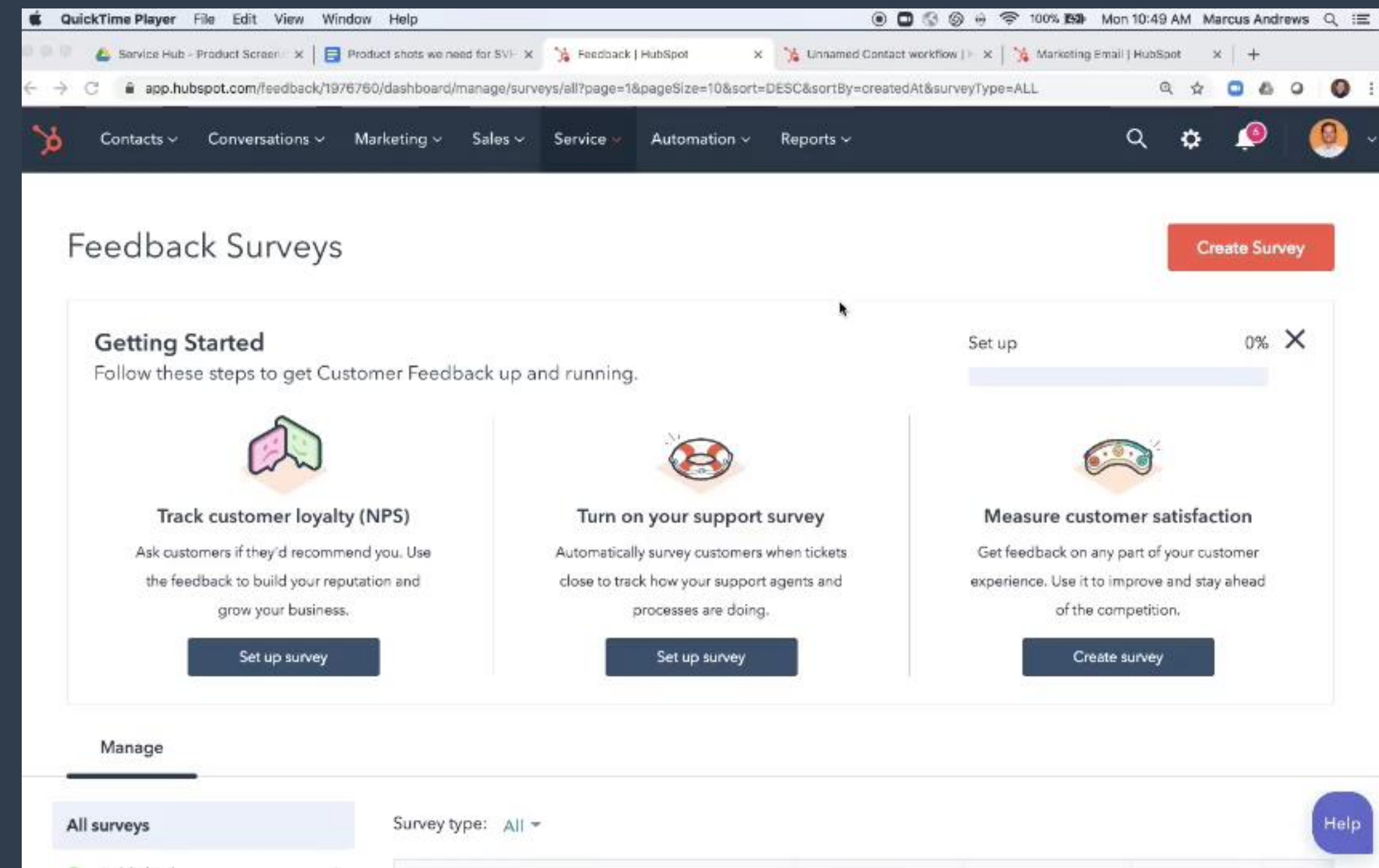
- Organized a flywheel journey workshop
- **Measured sentiment with micro-surveys**



Build Word-of-Mouth with Service Hub

Complete Payroll

- Organized a flywheel journey workshop
- Measured sentiment with micro-surveys
- **Built post-survey automation for advocates**



#4 Build Word-of-Mouth

**Humans trust humans,
not companies.**

#INBOUND19



“We want to show we put customers first. But rather than sharing it ourselves, we let our customers share on our behalf. With customer testimonials, our clients now say it for us.”

CJ Maurer, Director of Marketing
Complete Payroll

Service Hub Roadmap: Advocacy

- **Advocacy automation**

The screenshot displays the HubSpot Service Hub interface for an automation workflow titled "Post-NPS Customer Advocacy & Testimonial Process". The navigation bar includes "Sales", "Service", "Automation", and "Reports". The workflow is currently in the "Actions" tab, showing a sequence of steps:

- Enrollment triggers:** A box containing two conditions: "Last NPS survey rating is any of 9 or 10" and "Last NPS survey comment is known", connected by "and".
- Delay the next action:** A box with a clock icon, set to "for 10 minutes." and showing "0 contacts".

A modal window titled "Enrollment triggers" is open on the right, showing the configuration for the first step. It has tabs for "Trigger" and "Re-enrollment". Under "Trigger workflow:", the "Automatically" option is selected. Under "Trigger workflow when:", the "Test criteria" button is visible. The criteria list includes:

- Last NPS survey rating** (with an edit icon): "Last NPS survey rating that this contact gave". A "See details" link is present.
- ☒ is any of: A dropdown menu shows "9" and "10" selected.
- ☐ is none of
- ☐ is known
- ☐ is unknown
- ☐ has ever been any of
- ☐ has never been any of
- ☐ is equal to all of

The HubSpot logo is visible in the bottom left corner.

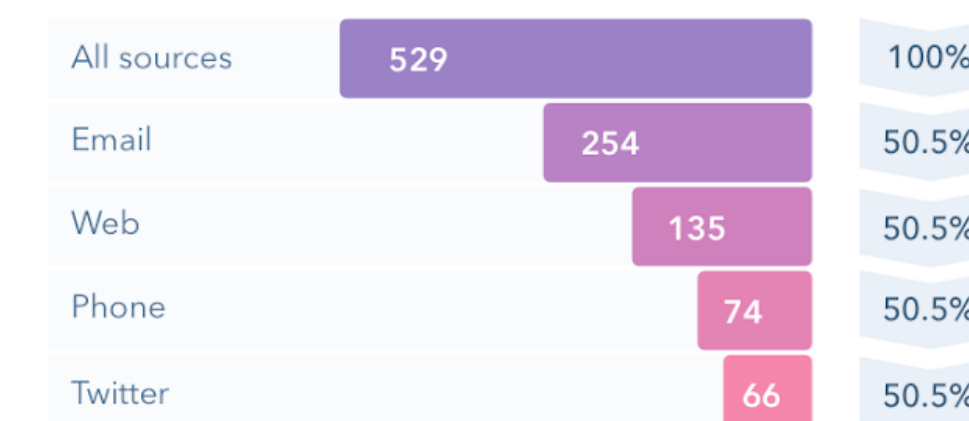
Service Hub Roadmap: Advocacy

- Advocacy workflow automation
- Enhanced survey reporting

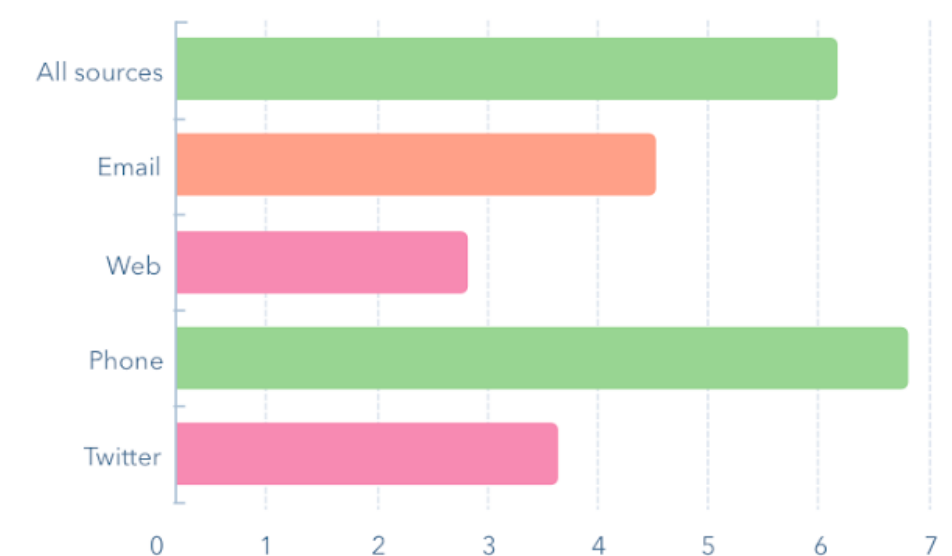
Support Agent Performance

AGENT	TICKETS CLOSED	AVERAGE TIME TO CLOSE	AVERAGE CUSTOMER SATISFACTION
Elva Phillips	34	38 mins 42 secs	6.3 
Eula Obrien	16	17 mins 34 secs	5.6 
Amy Griffin	85	32 mins 06 secs	4.0 
Ronnie Padilla	76	05 mins 11 secs	3.3 
Luella Mack	101	23 mins 03 secs	2.1 

Tickets per source




Average satisfaction per source



Service Hub Roadmap: Advocacy

- Advocacy workflow automation
- Enhanced survey reporting
- **Start conversations with surveys**

Feedback submission




Aaron Ryan
Optics health care NL

Feedback

Overview

Aaron Ryan submitted a **detractor (3)** feedback submission

Thanks for your feedback. What could we do better for next time?




Hey, I've been thinking about to using your software for a while and its really made a positive impact on growing our sales.

Sep 4, 2:56 PM

Want to continue the conversation?

Make it easy for any one on your team to continue the conversation by connecting your team email with the conversation inbox

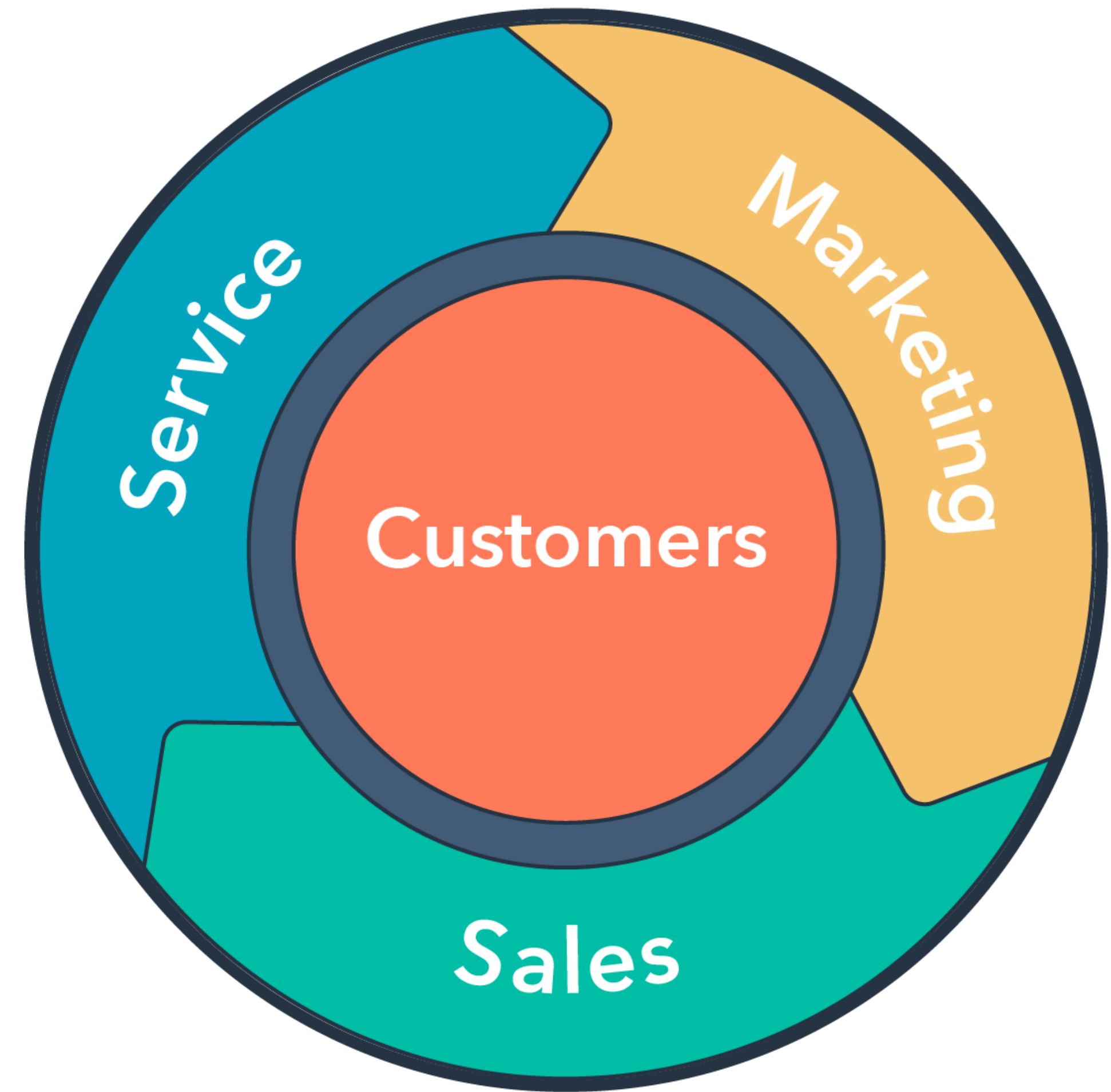
Setup conversations inbox




INBOUND18: The Flywheel Guide

1. Put the customer first
2. Eliminate friction
3. Delight customers
4. Build word-of-mouth







**When you're a startup,
marketing is your voice.**

**When you're a scale up,
customers are your voice.**

#INBOUND19



HubSpot

SERVICE HUB
Michael Redbord



**10:45
AM**

**1:15
PM**

PLATFORM
Nancy Riley



**2:30
PM**

**3:45
PM**



MARKETING HUB
Nicholas Holland



SALES HUB
Lou Orfanos

HubSpot



Thank you.

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