

Building a Proactive Customer Support Strategy

Adriti Gulati & Yelena Martial | September 2025



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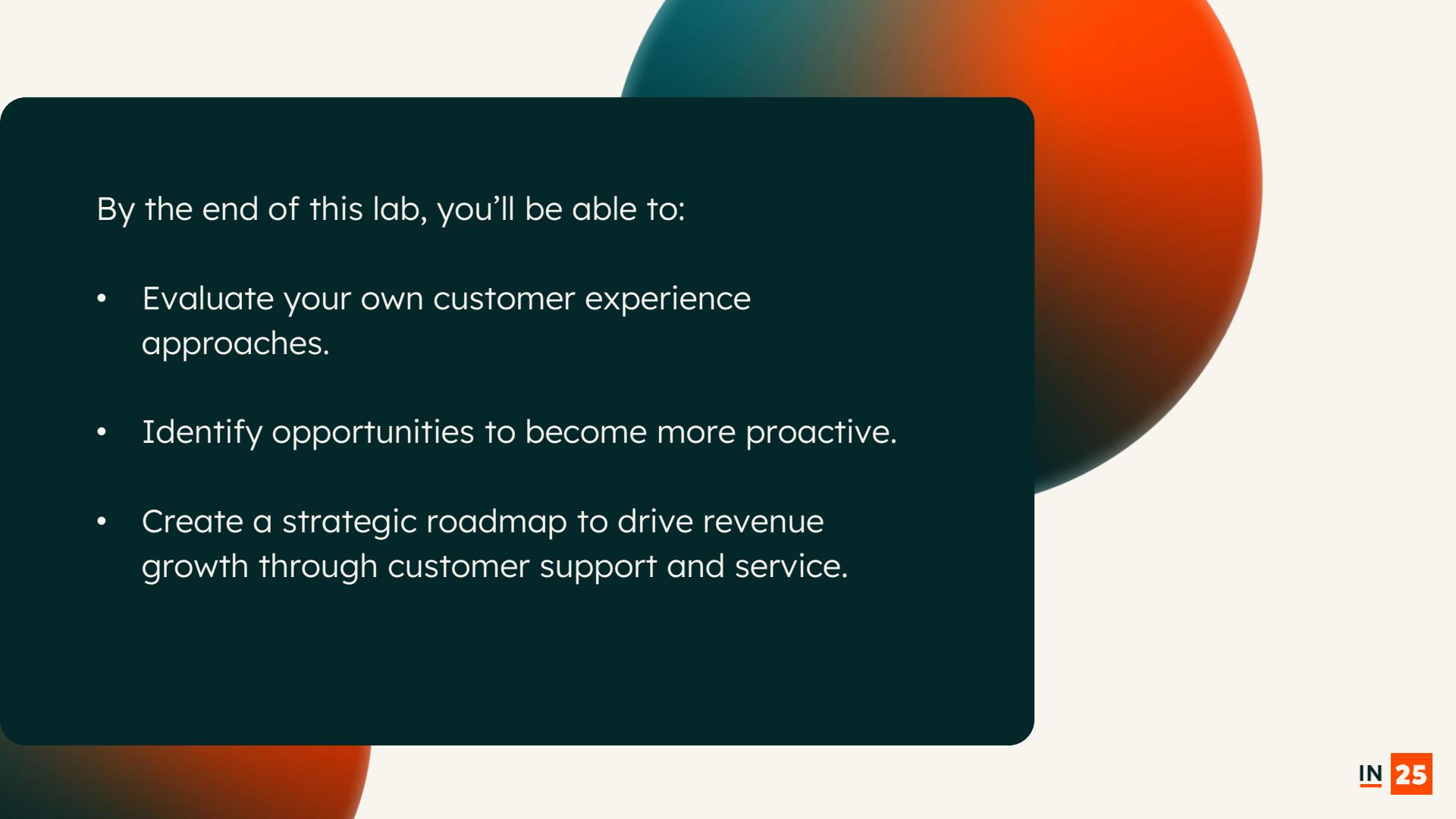
HubSpot Academy



Our vision is to empower a global learning community through content, experiences, and credentials, so that we **drive** adoption, maximize career potential, and scale HubSpot capabilities upmarket.

Agenda

1. **The Customer Experience landscape**
2. **Reality Check**
3. **The Path to Proactive Customer Support**
4. **Building Your Proactive System**
5. **Q&A**



By the end of this lab, you'll be able to:

- Evaluate your own customer experience approaches.
- Identify opportunities to become more proactive.
- Create a strategic roadmap to drive revenue growth through customer support and service.

Proactive Customer Support/Service Goal

Transform from a cost center that reacts to problems to a growth engine that prevents them.



Customer Experience (CX)

Help me fix the problem

**Customer
Support**

Help me achieve my goals

**Customer
Success**

Help me get set up

**Service
Delivery**

CX Operations

Reality Check

01

What's your biggest customer experience challenge today?

02

What percentage of your tickets could be prevented?

03

How much of your team's energy goes into firefighting vs. fire prevention? What's your ideal state?

The Path to Proactive Customer Support

Health Scores

Notifications & Reminders

Customer Feedback

Self-Service Excellence

Intelligent Automation & Routing

Getting issues to the right person quickly

Intelligent Automation & Routing

Goal

Reduce time to value by ensuring the right person is handling the right issue.

Key Tools

- Help Desk
- Skills-based routing
- Advanced SLAs

Success Metrics

- **First-contact resolution rate**
- **SLA compliance rate**
- **Escalation rate**

Skills-Based Routing Ideas

Set your SLA goals

Selected ticket property

Pipeline

Set your time goal

Pipeline	TIME TO FIRST REPLY	TIME TO NEXT REPLY	TIME TO CLOSE	MARK AS DUE SOON	ON/OFF*
VIP Customers	2	2	8	60	<input checked="" type="checkbox"/>
General Support	4	2	8	60	<input checked="" type="checkbox"/>
Pricing Support	4	2	8	60	<input checked="" type="checkbox"/>

Manage Pipeline [Edit](#)

◀ Prev Next ▶

Done Cancel

Language

Billing

Technical Support

Onboarding

VIP

Health Scores

Notifications & Reminders

Customer Feedback

Self-Service Excellence

Intelligent Automation & Routing

Self Service Excellence

Goal

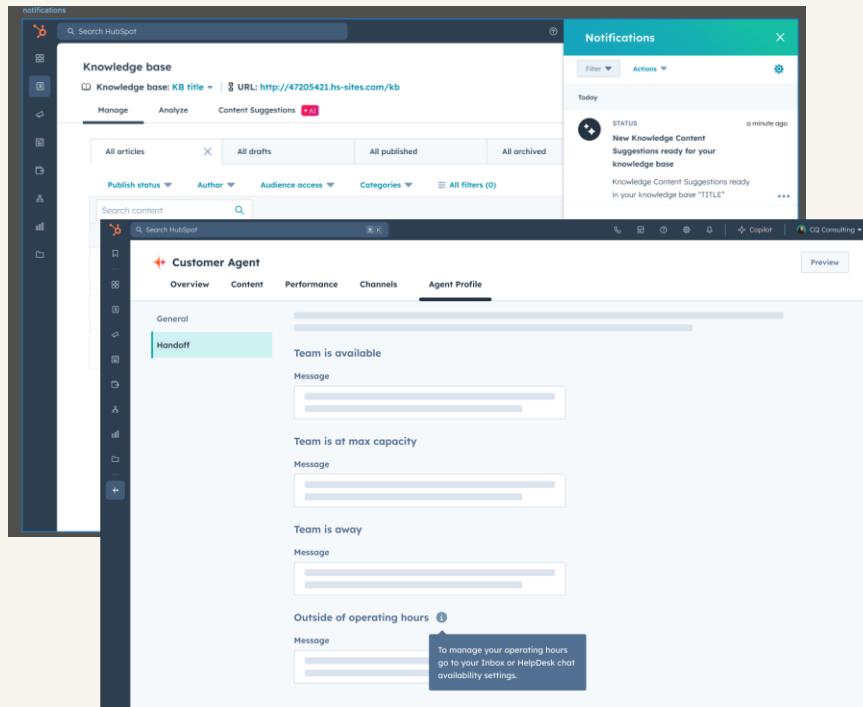
Reduce ticket volume
through better self service

Key Tools

- Knowledge Base
- Knowledge Base and Customer Agent
- Customer Portal

Success Metrics

- **Ticket count**
- **Cost per resolution**



The image shows two HubSpot interface screenshots. The top screenshot is the 'Knowledge base' section, displaying a list of articles with filters for 'All articles', 'All drafts', 'All published', and 'All archived'. The bottom screenshot is the 'Customer Agent' profile, showing the 'Agent Profile' tab with sections for 'General' (Handoff status: 'Team is available', 'Team is at max capacity', 'Team is away', 'Outside of operating hours'), 'Content', 'Performance', and 'Channels'.

Customer Agent Best Practices

Audit your current support inquiries to identify the most common questions and requests.

Upload content that is clear, uses simple language, has a variety of search phrases.

Configure escalation rules to ensure complex issues reach the right human agents quickly.

Monitor performance metrics to understand customer agent's impact and identify areas for improvement.

Health Scores

Notifications & Reminders

Customer Feedback

Self-Service Excellence

Intelligent Automation & Routing

Identify and fix common problems

Customer Feedback

Goal

Identify patterns and trends to prevent problems before they affect other customers

Key Tools

- Reports
- Customer Feedback Surveys
- Workflows

Customer Feedback

Back to customer feedback

Customer loyalty survey

Delivery **Customize** Follow-up Thank you Recipients Options Preview Summary Publish

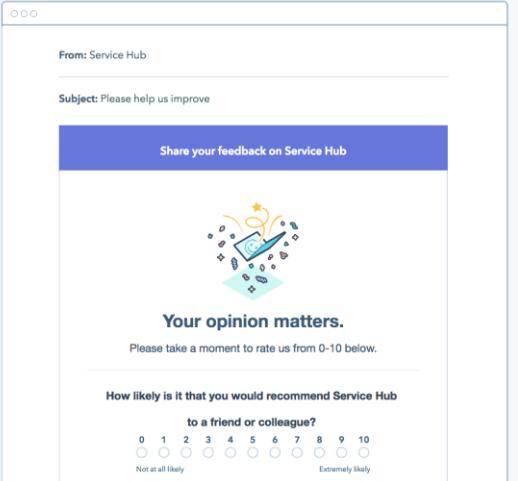
Customize the appearance of your survey email

While the wording of the NPS question stays the same the world over, you can customize the look and feel of your survey to suit your brand and website.

Company name: Service Hub (19)

Choose your colors: ● ● ● ● ●

Or select a custom color: #6a78d1 ●



1. Send timely surveys

1. Personalize & Contextualize

1. Use multiple channels

2. Keep it short

3. Incentivize

1. Show impact

Health Scores

Notifications & Reminders

Customer Feedback

Self-Service Excellence

Intelligent Automation & Routing

Take action on customer insights

Notifications and Reminders

Goal

Keep customers informed and on track before having to ask for help.

Key Tools

- Workflows
- Sequences
- Views
- Segments

Success Metrics

- Ticket volume
- Customer health scores

Back to customer feedback

Customer loyalty survey

Delivery **Customize** Follow-up Thank you Recipients Options Preview Summary Publish

Customize the appearance of your survey email

While the wording of the NPS question stays the same the world over, you can customize the look and feel of your survey to suit your brand and website.

Company name: Service Hub

Choose your colors: 6a78d1 0070C0 E91E63 009688 00796B

Or select a custom color: #6a78d1 0070C0

The screenshot shows the SurveyMonkey interface for creating a 'Customer loyalty survey'. On the left, there's a sidebar for 'Delivery' and 'Customize' (which is selected). The main area shows a preview of the survey email. The email header includes 'From: Service Hub' and 'Subject: Please help us improve'. The body of the email features a blue header bar with the text 'Share your feedback on Service Hub' and a central graphic of a speech bubble with a checkmark and confetti. Below this, the text 'Your opinion matters.' is displayed. A rating scale from 0 to 10 is shown with the question 'How likely is it that you would recommend Service Hub to a friend or colleague?'. The scale has points from 'Not at all likely' to 'Extremely likely'.

Reminder Ideas

1. Renewal reminders with personalized upgrade recommendations
2. Product usage patterns indicate potential issues
3. Educational content based on where customers are in the journey
4. Milestones & Success Moments

Health Scores

Notifications & Reminders

Customer Feedback

Self-Service Excellence

Intelligent Automation & Routing

Prevent issues before they happen

Health Scores

Goal

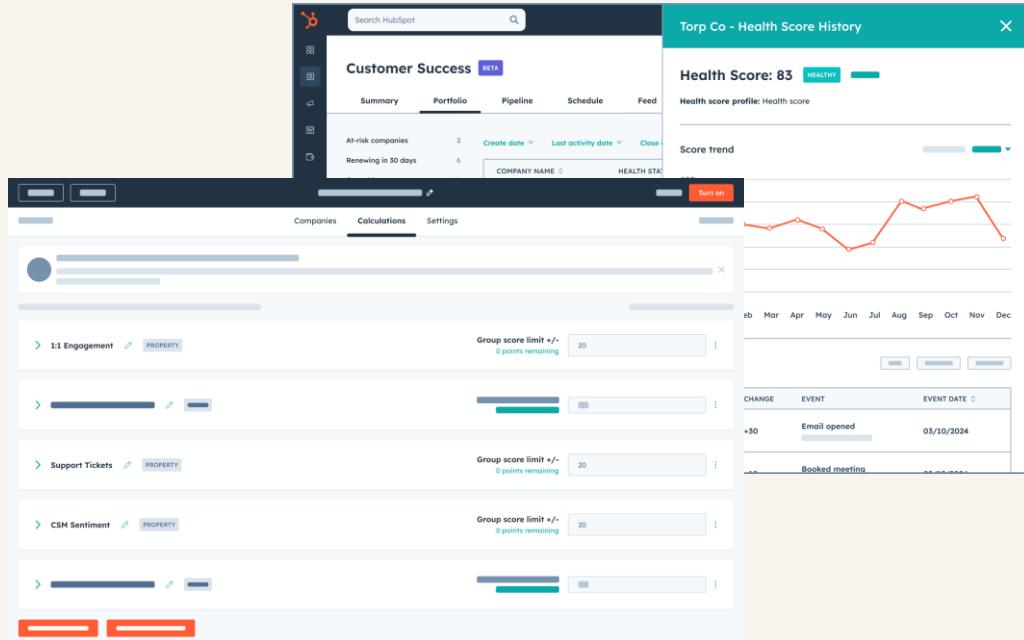
Transform from cost center to revenue driver

Key Tools

- Customer Success Workspace

Success Metrics

- NPS
- Net Revenue Retention



1. Define “healthy”
2. Choose predictive metrics (not lagging)
3. Use multiple data sources
4. Weight behaviors by impact
5. Look for patterns
6. Start simple, then iterate

Pyramid Assessment

Self-score each pyramid level on a 1-5 scale based on your current maturity.

1 = Not started

2 = Basic

3 = Developing

4 = Advanced

5 = Optimized

Health Scores

Notifications & Reminders

Customer Feedback

Self-Service Excellence

Intelligent Automation & Routing

Reality Check

- 01** What needs to change to strengthen your pyramid? What tools should you be using that you're not?
- 02** What metrics do you need to move?
- 03** What does success look like 90 days from now?

Choose Your Own Adventure

Based on your Pyramid Audit score,
identify which category you'd like to
spend the next 15 minutes workshopping.



Intelligent Automation and Routing

1. Map your team's skill sets in HubSpot
2. Create skills-based routing
3. Set SLA targets



Self Service Excellence: Create your Customer Agent

1. Gather/make a list of all content sources you need to upload for Customer Agent
2. Make a list of trigger words
3. Identify where you want Customer Agent to live



Customer Feedback: Create your own surveys

1. Identify when you want to send customer feedback
2. Identify what type of customer feedback surveys you want to send
3. Create your follow up plan for promoters, neutrals, and detractors
4. Create workflows for automated follow ups



Notifications and Reminders

1. Identify what you want to track: product usage, renewal dates, milestones, etc.
2. Create saved views in your CRM
3. Create emails, sequences, or workflows to proactively communicate with your customers



Health Scores

1. Define what makes a healthy customer
2. Identify what behaviors you can track in HubSpot
3. Identify how you should weight certain behaviors



Q&A

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Thank you!

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Thank You!