Building a Proactive Customer Support Strategy

Adriti Gulati & Yelena Martial | September 2025

Adriti Gulati

**Principal Professor**

Yelena
Martial

Inbound Professor

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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

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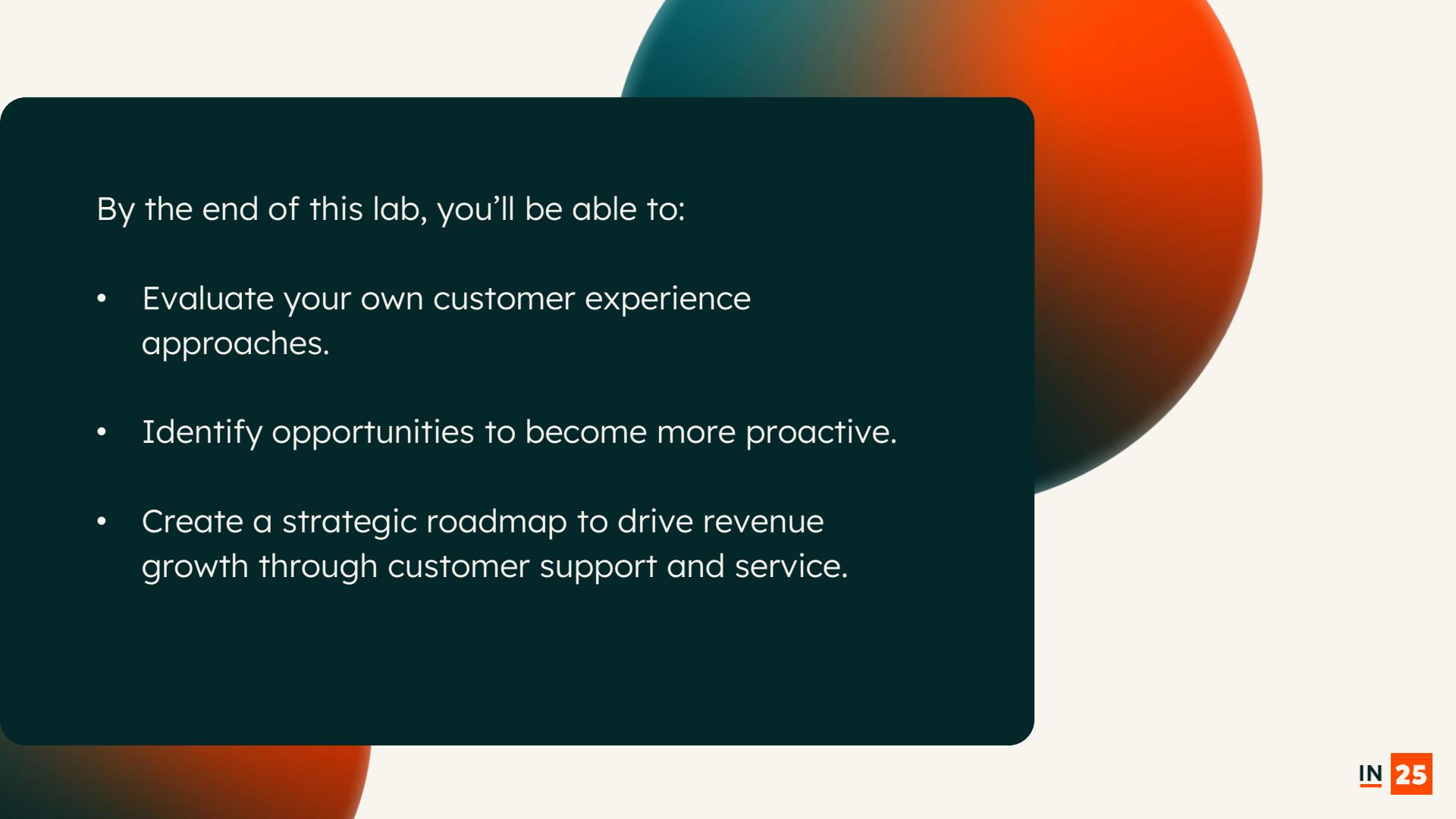
By the end of this lab, you'll be able to:

- 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.

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?

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The Path to Proactive Customer Support

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**

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Skills-Based Routing Ideas

Language

Billing

Technical Support

Onboarding

VIP

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.

Customer Feedback

Goal

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

Key Tools

- Reports

- Customer Feedback Surveys

- Workflows

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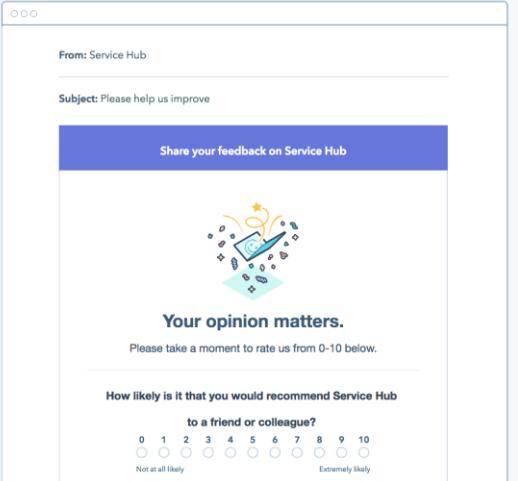
Customer Feedback

1. Send timely surveys

1. Personalize & Contextualize

1. Use multiple channels

2. Keep it short

3. Incentivize

1. Show impact

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**

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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

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**

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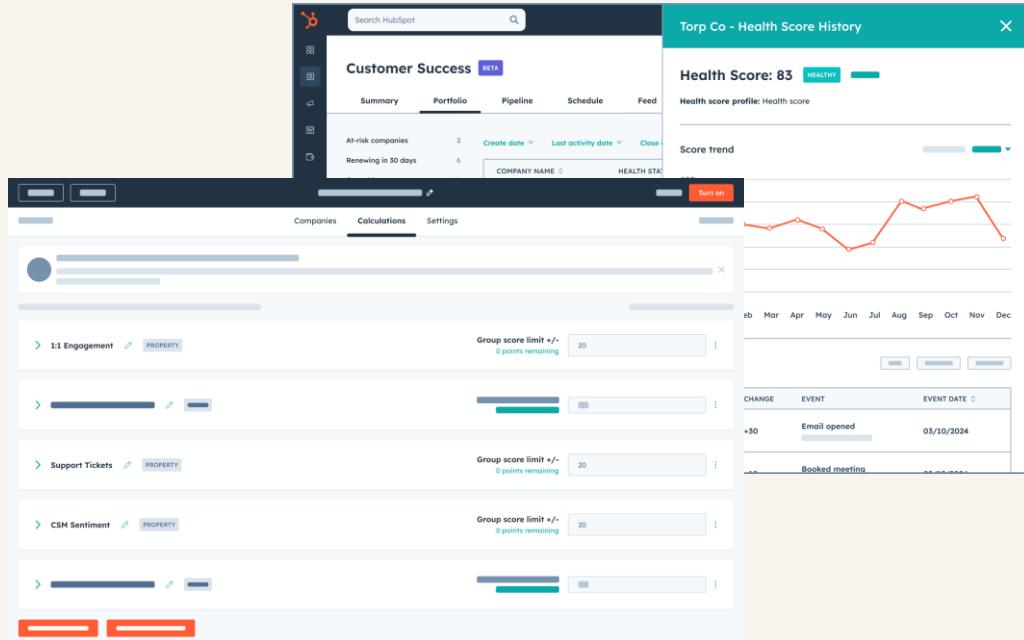
1. Define "healthy"

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

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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?

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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

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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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