

The background features abstract geometric shapes in shades of orange, red, and teal. A large teal shape is in the top right, and another is in the bottom left. Orange and red curved shapes are positioned in the top left, middle left, and bottom right.

# Building a Proactive Customer Support Strategy

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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

Language

Billing

Technical Support

Onboarding

VIP

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

< Prev Next >

Done

Cancel



Health Scores

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Help customers help themselves

# Self Service Excellence

## Goal

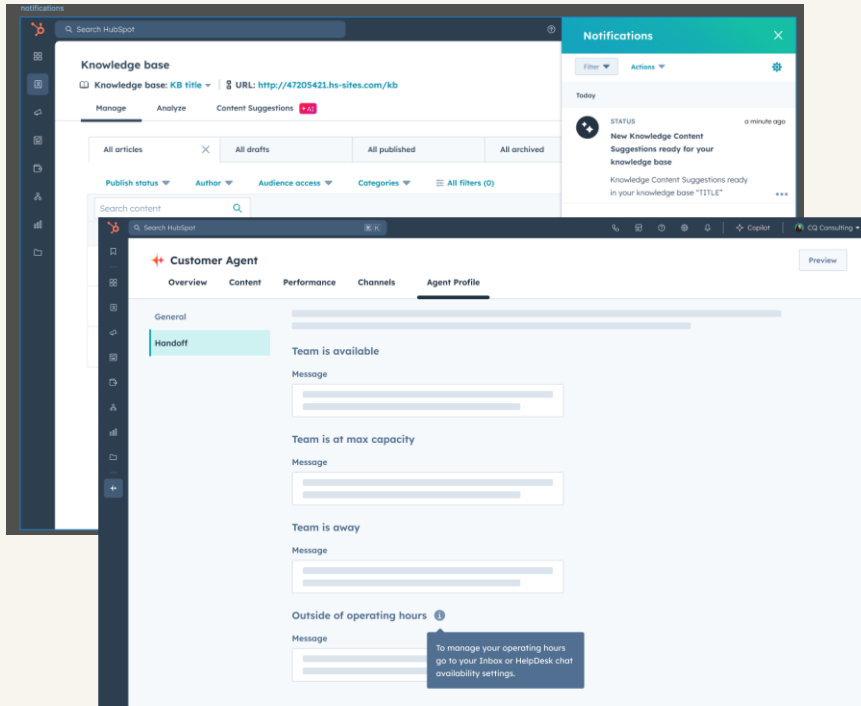
**Reduce ticket volume  
through better self service**

## Key Tools

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

## Success Metrics

- Ticket count
- Cost per resolution



# 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.



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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 loyalty survey

Back to customer feedback Publish

Delivery Customize Follow-up Thank you Recipients Options Preview Summary

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

Or select a custom color  
# 6a78d1

19

From: Service Hub

Subject: Please help us improve

Share your feedback on Service Hub

Your opinion matters.

Please take a moment to rate us from 0-10 below.

How likely is it that you would recommend Service Hub to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

Not at all likely Extremely likely

## Customer Feedback

1. Send timely surveys

1. Personalize & Contextualize

1. Use multiple channels

2. Keep it short

3. Incentivize

1. Show impact



Health Scores

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# 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

Customer loyalty survey

Back to customer feedback

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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

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Prevent issues before they happen

# Health Scores

## Goal

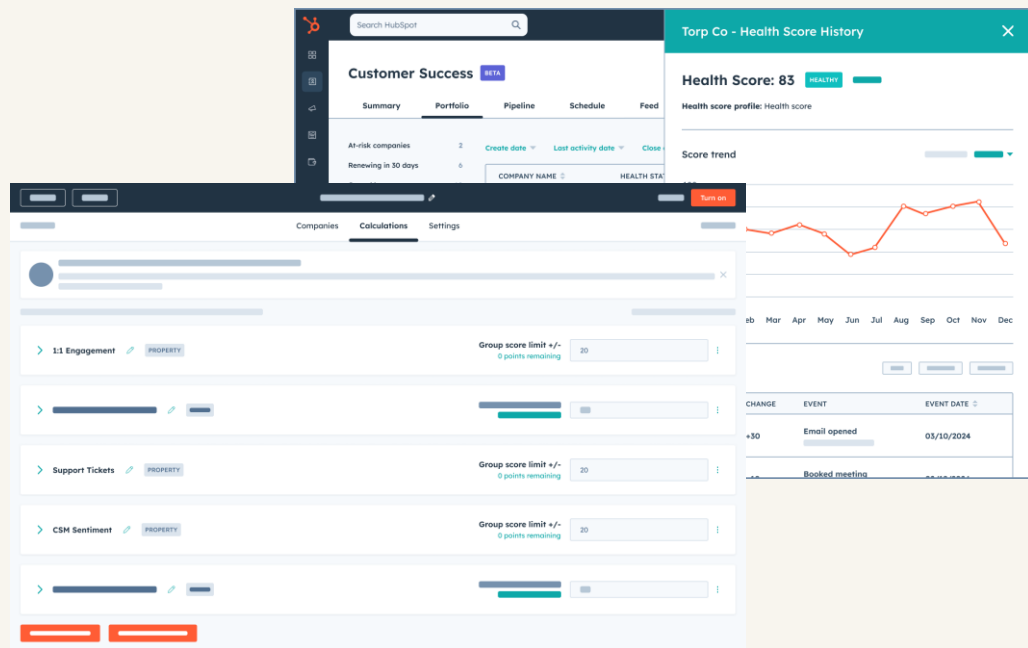
Transform from cost center to revenue driver

## 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!**