

The background features several large, overlapping geometric shapes in shades of orange, red, and teal. These shapes are positioned around the central text, creating a modern and dynamic visual effect. The central text is contained within a white rectangular area.

# Lab: Making Customer Success Impact Undeniable

Julie Lugten and Jehad Begraoui

# Agenda

1. Intros
2. Customer success challenges
3. Key metrics
  - Revenue
  - Health scores
  - Feedback
4. Activity time
5. Debrief and Q&A



# About This Lab

We'll start off with the basics to make sure everyone is aligned and will explore further during our activity time.

If any questions pop into your mind throughout the presentation/activity, please use the Q&A form we will share with you in a moment.

If you have any examples to share, feel free to raise your hand. This is a shared learning experience and we welcome your input!

# Resources

Scan this QR-Code to find:

- Q&A.
- Mentimeter.
- Workbooks.



# Icebreaker

Share your job title and  
a goal you have for  
today's session.



Julie  
Lugten

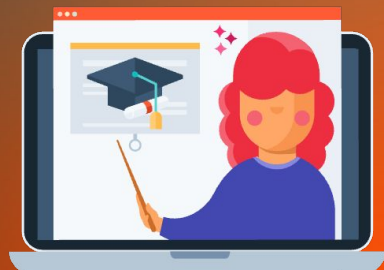
Senior Professor



Jehad  
Begraoui

Inbound Professor

# 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.**

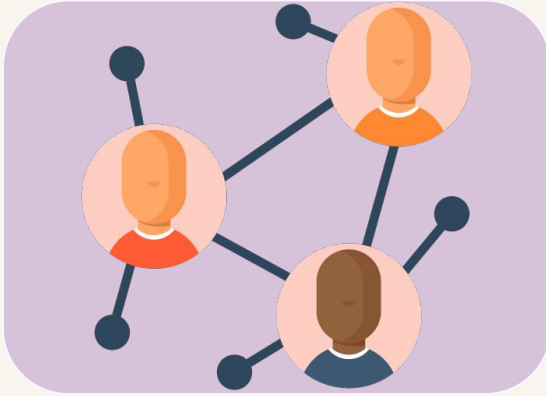
# Learning Objectives

You'll be able to:

- Manage renewals, cross selling, and upselling in the customer success workspace.
- Create a health score.
- Create a feedback survey.



# Customer success matters.



Managing  
Relationships



Solving Complex  
Challenges



Protecting and  
Generating Revenue

# The Challenge



Sales plays offense.



Success plays defense.

# Metrics We'll Cover

In this session, we'll show you how to track:

- Revenue.
- Health scores.
- Feedback.

# Revenue



The probability of selling to an **existing customer** has a **60%–70% success rate**, while the success rate for a **new prospect** is **5%–20%**.

Invesp

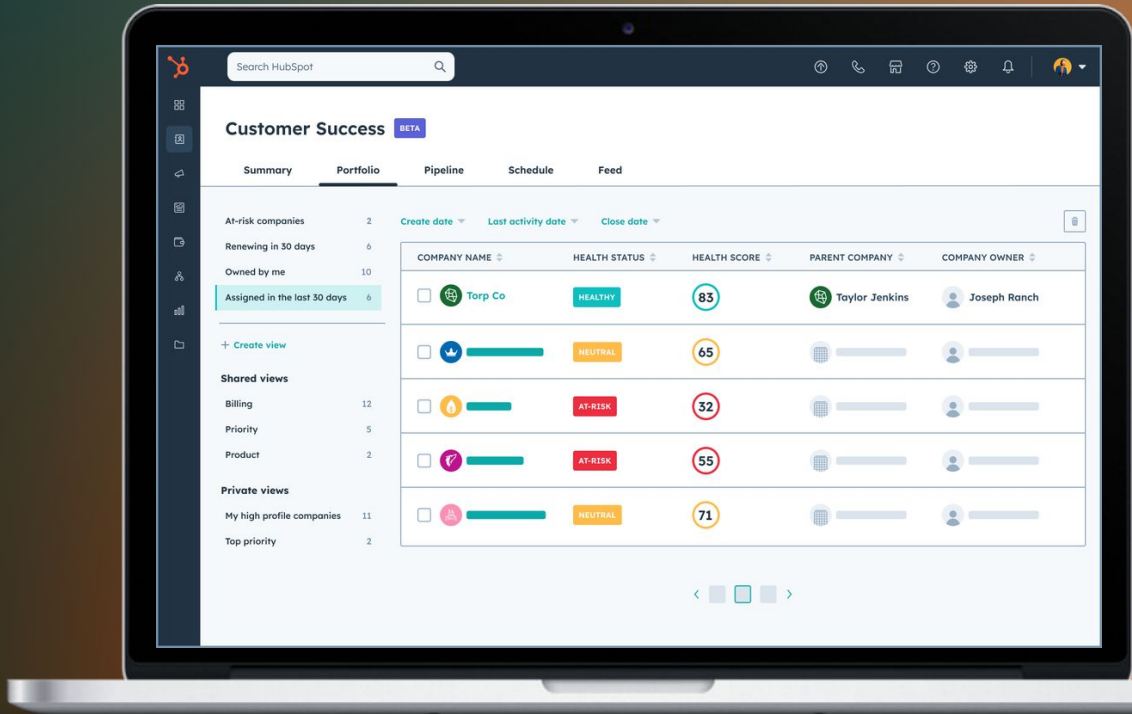


Pet Pantry is a fictional subscription service that delivers pet food and supplies to your door. Pet Pantry's goals are as follows.

- Retain their customer base.
- Identify good fits for additional products.
- Measure customer satisfaction.

# Demo Time!

Tour the customer success workspace.



# Customer Health Score

A customer health score is a quantitative metric that measures the overall well-being of a customer relationship and its likelihood of success.

It combines multiple data points and behaviors to predict whether a customer is likely to renew, expand their usage, or churn.





# Developing a Customer Health Score



## Step 1

Define customer health.



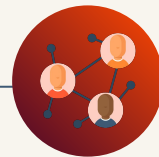
## Step 2

Set your predictive metrics.



## Step 3

Create a scoring system.



## Step 4

Segment your customer data.

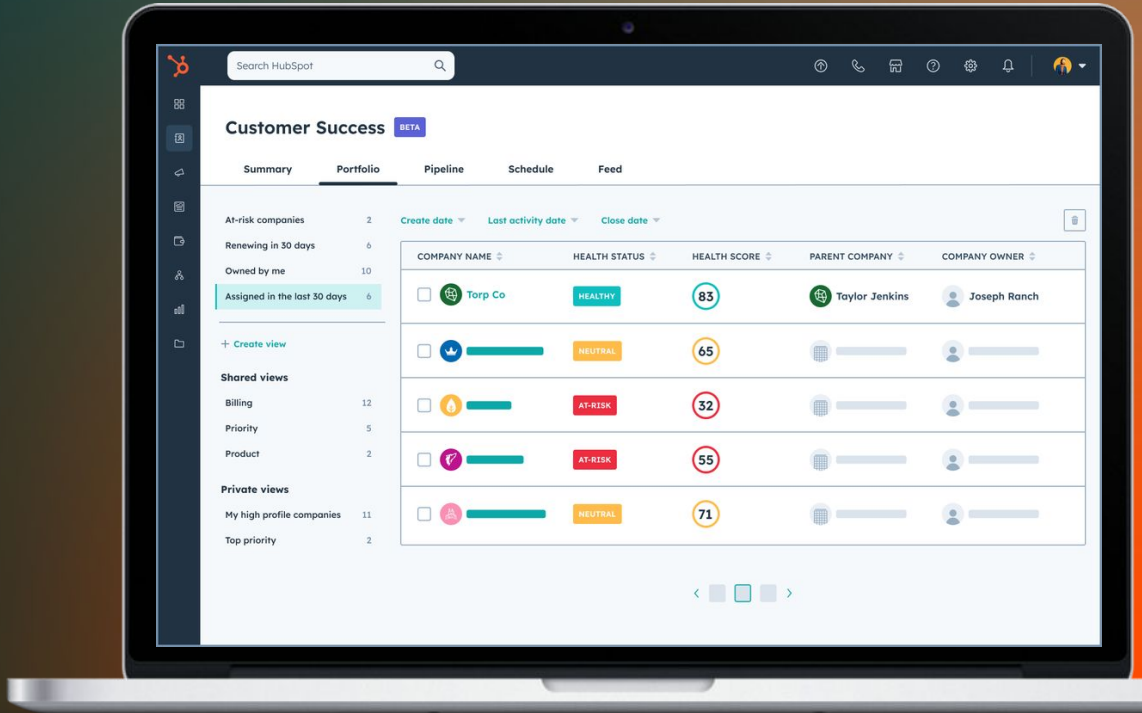



## Step 5

Visualize your customer health score.

# Demo Time!


Create a health score.





Gathering and acting on  
customer feedback can  
**increase retention  
rates by 14%.**

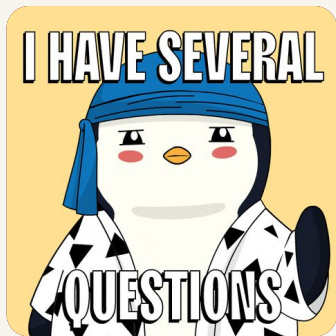
Firework



A **5%** increase in customer retention results in **25% – 95% increase in revenue.**

[ThinkImpact](#)

# ACAF



Ask



Categorize



Act

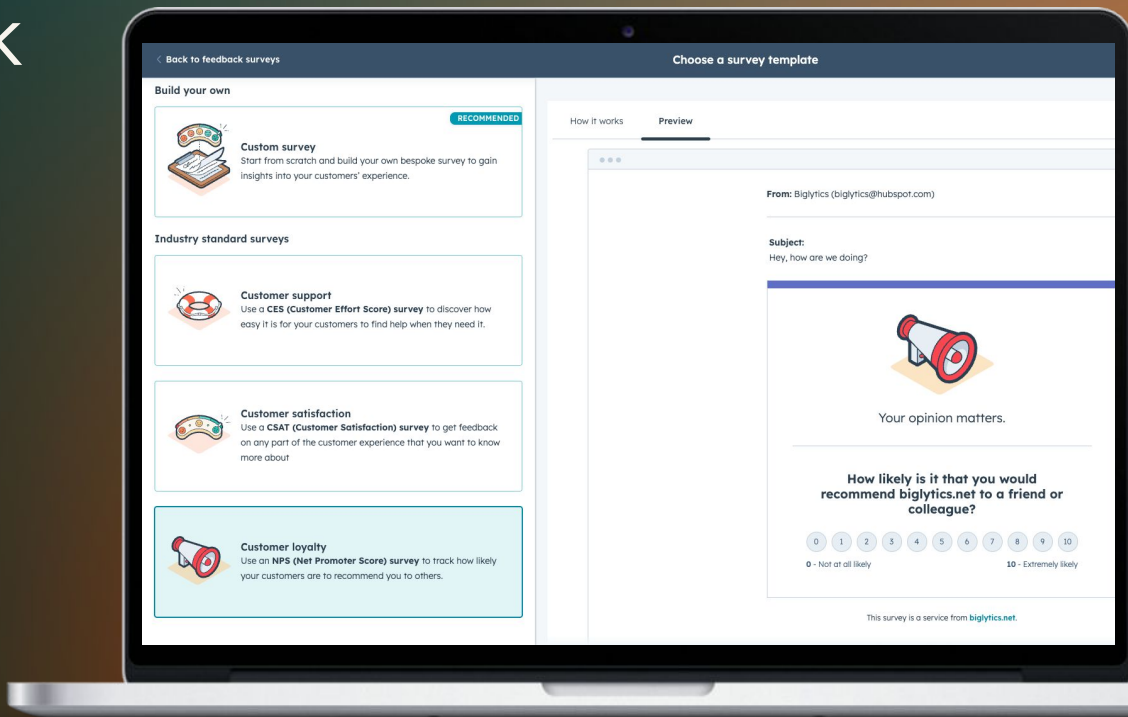


Follow-up

# Ask for Feedback

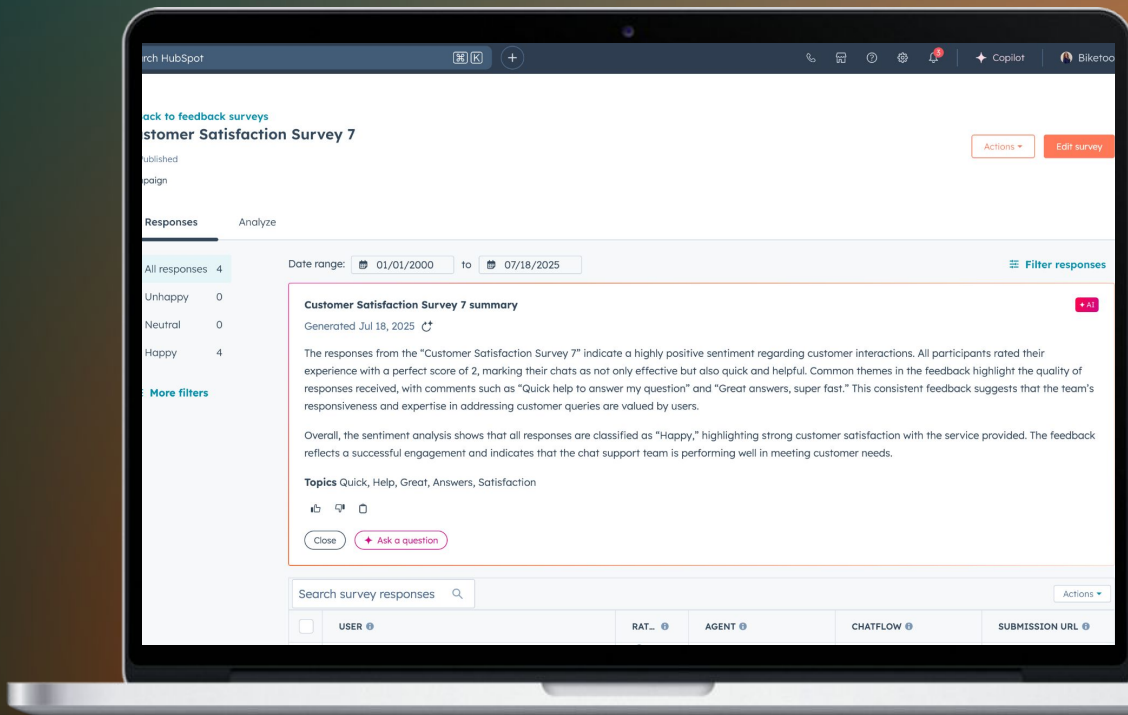
## Most Common Survey

- NPS



# Categorize Feedback

Organize the feedback into meaningful categories.



# Act on Feedback

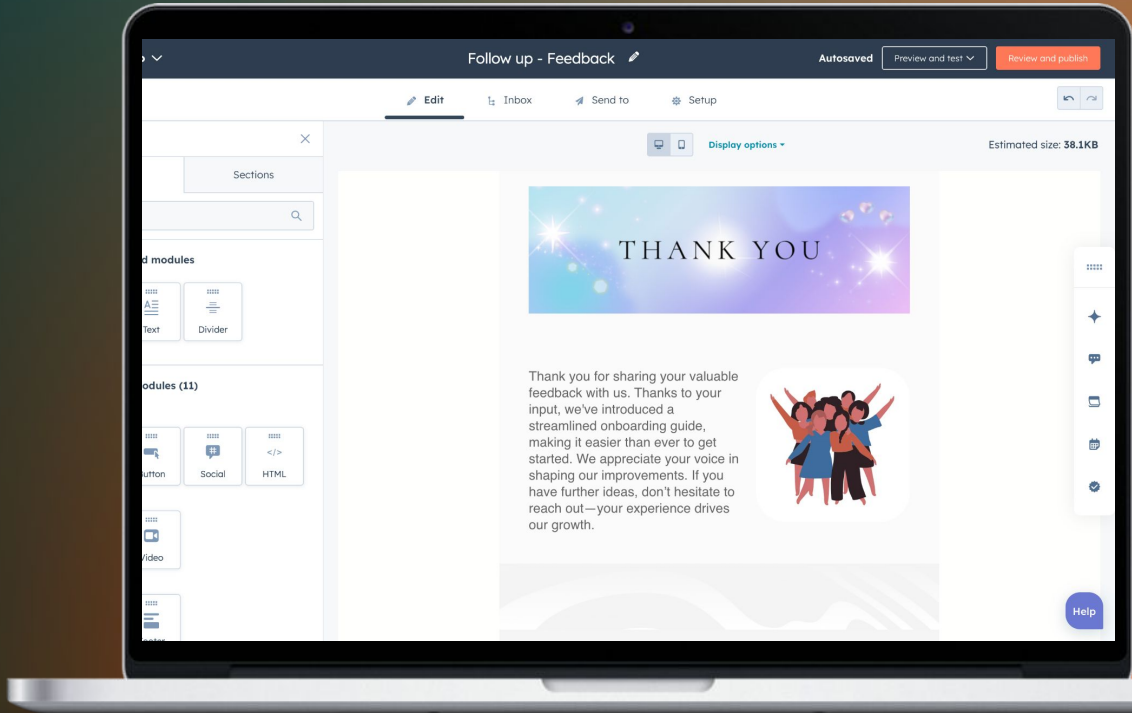
Take appropriate actions based on the feedback to improve your products or services.





# Follow-up

Reach out to customers to inform them about the actions taken and thank them for their input.



## Build your own



RECOMMENDED

**Custom survey**

Start from scratch and build your own bespoke survey to gain insights into your customers' experience.

## Industry standard surveys

**Customer support**

Use a **CES (Customer Effort Score)** survey to discover how easy it is for your customers to find help when they need it.

**Customer satisfaction**

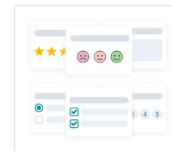
Use a **CSAT (Customer Satisfaction)** survey to get feedback on any part of the customer experience that you want to know more about

## How it works

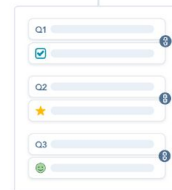
## Preview

**Build your survey**

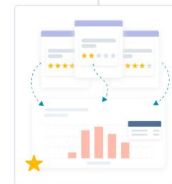
Find out what your customers really think with custom surveys. You can use a mix of questions and rating types to gather information from contacts and link their responses to your CRM.

**Link questions to properties**

Questions in your custom surveys are linked to feedback properties in your CRM. You can use these properties to organize the information you gather from your contacts.

**Power other HubSpot tools**

Feedback properties that you link to your questions in custom surveys also power other tools in HubSpot. You can use workflows to trigger follow-up actions and use custom reports to analyze your data.



Activity Time! (30 minutes)

# Choose your own adventure.

## Health Score

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- Start with Activity 1 if you have never created a health score.
- Start with Activity 2 if you're looking to optimize your existing health score.

## Feedback Survey

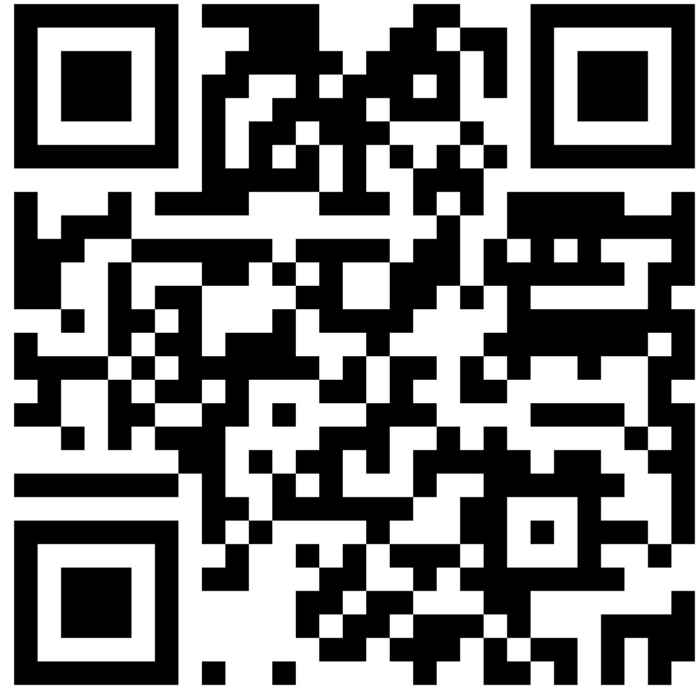
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- Start with Activity 1 if you have never created a custom survey.
- Start with Activity 2 to measure and action existing customer feedback.

# Resources

Scan this QR-Code to find:

- Workbooks with activity instructions.
- Further resources.





# Discussion Questions

- What insights surprised you during this exercise?
- How do you think health scores and feedback surveys will help your team achieve their goals?
- What are you most excited to implement following today's session?

# Q&A

# Top Takeaways

1. Selling to existing customers has a higher success rate than selling to new prospects. CS reps can manage revenue and relationships in the customer success workspace.
2. Every business has their own definition of a “healthy” customer. You can customize health scores to meet your team’s unique needs.
3. Acting on feedback is a key lever for retention. Custom surveys allow you to collect the feedback that’s most valuable for your team.



**Thank you!**  
**Please rate my session.**

We hope you enjoyed today's session.  
Please head to the INBOUND mobile app  
to provide your feedback.



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- Take home workbooks.
- Our LinkedIn profiles (feel free to say hi!).

