

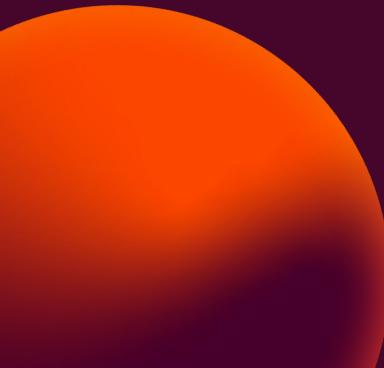
Lab: Making Customer Success Impact Undeniable

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



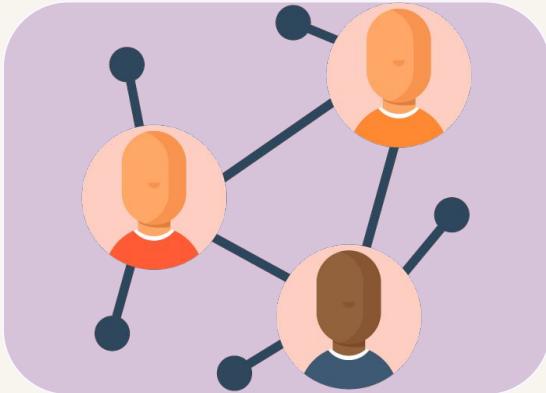
Our vision is to empower a global learning community through content, experiences, and credentials, so that we drive adoption, maximize career potential, and scale HubSpot capabilities upmarket.

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

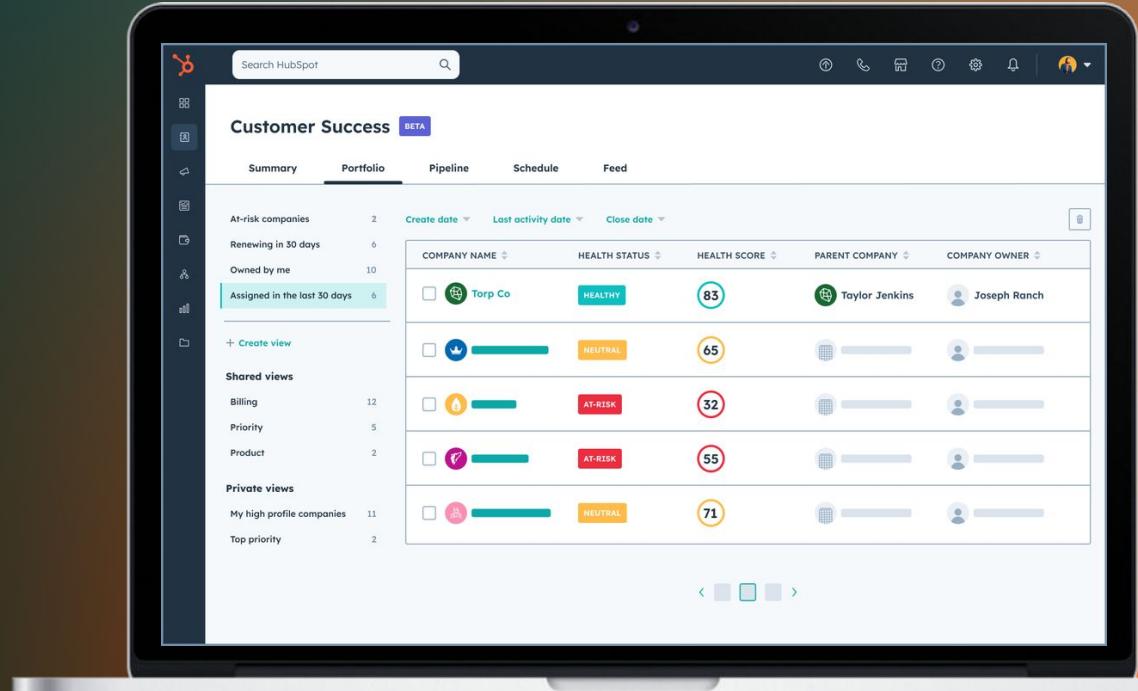


Pet Pantry is a fictional subscription service that delivers pet food and supplies to your door. Pet Pantry's goals are as follows.

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

Demo Time!

Tour the customer success workspace.



The image shows a tablet displaying the HubSpot Customer Success workspace. The screen is titled "Customer Success" and includes tabs for "Summary", "Portfolio" (which is selected), "Pipeline", "Schedule", and "Feed". The left sidebar shows filters for "At-risk companies" (2), "Renewing in 30 days" (6), "Owned by me" (10), and "Assigned in the last 30 days" (6). The main area displays a list of companies with the following data:

COMPANY NAME	HEALTH STATUS	HEALTH SCORE	PARENT COMPANY	COMPANY OWNER
Torp Co	HEALTHY	83	Taylor Jenkins	Joseph Ranch
	NEUTRAL	65		
	AT-RISK	32		
	AT-RISK	55		
	NEUTRAL	71		

At the bottom of the screen, there are navigation icons for back, forward, and search.

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.

Customer Success BETA

Summary Portfolio Pipeline Schedule Feed

At-risk companies 2

Renewing in 30 days 6

Owned by me 10

Assigned in the last 30 days 6

+ Create view

Shared views

Billing 12

Priority 5

Product 2

Private views

My high profile companies 11

Top priority 2

Search HubSpot

COMPANY NAME	HEALTH STATUS	HEALTH SCORE	PARENT COMPANY	COMPANY OWNER
Torp Co	HEALTHY	83	Taylor Jenkins	Joseph Ranch
	NEUTRAL	65		
	AT-RISK	32		
	AT-RISK	55		
	NEUTRAL	71		

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

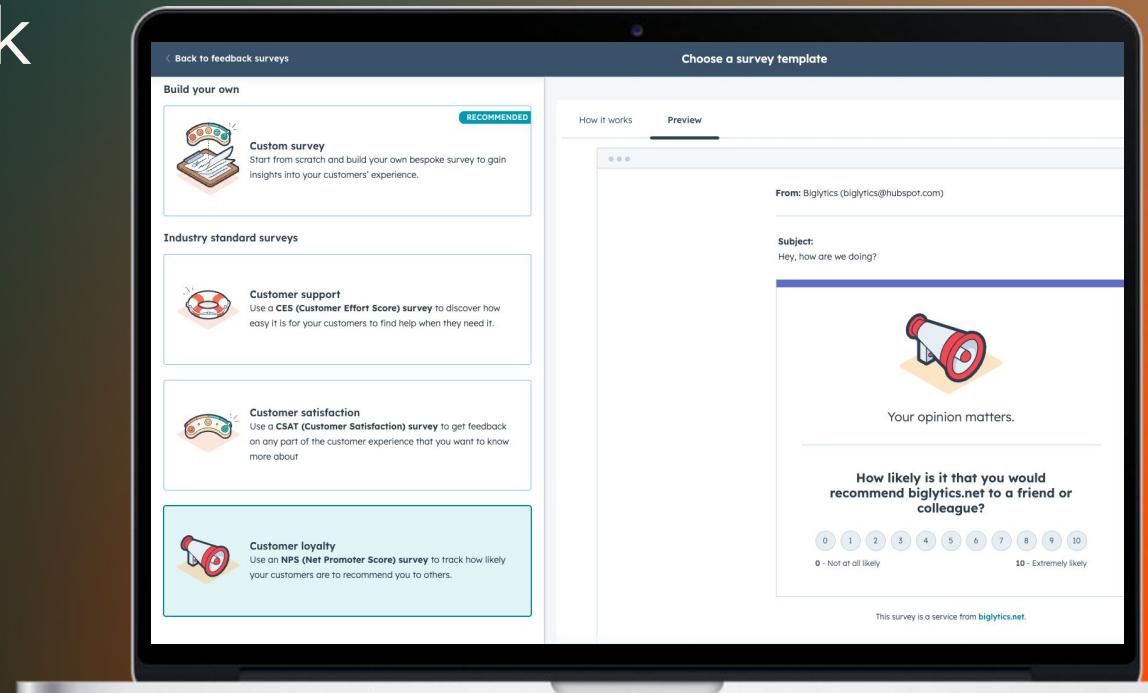


Follow-up

Ask for Feedback

Most Common Survey

- NPS



The image shows a laptop screen displaying a survey template from biglytics.net. The interface is divided into two main sections: 'Build your own' on the left and 'Choose a survey template' on the right.

Build your own:

- Custom survey (RECOMMENDED):** 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.
 - Customer loyalty:** Use an NPS (Net Promoter Score) survey to track how likely your customers are to recommend you to others.

Choose a survey template:

- How it works:** A preview of the survey template.
- Preview:** A preview of the survey template.

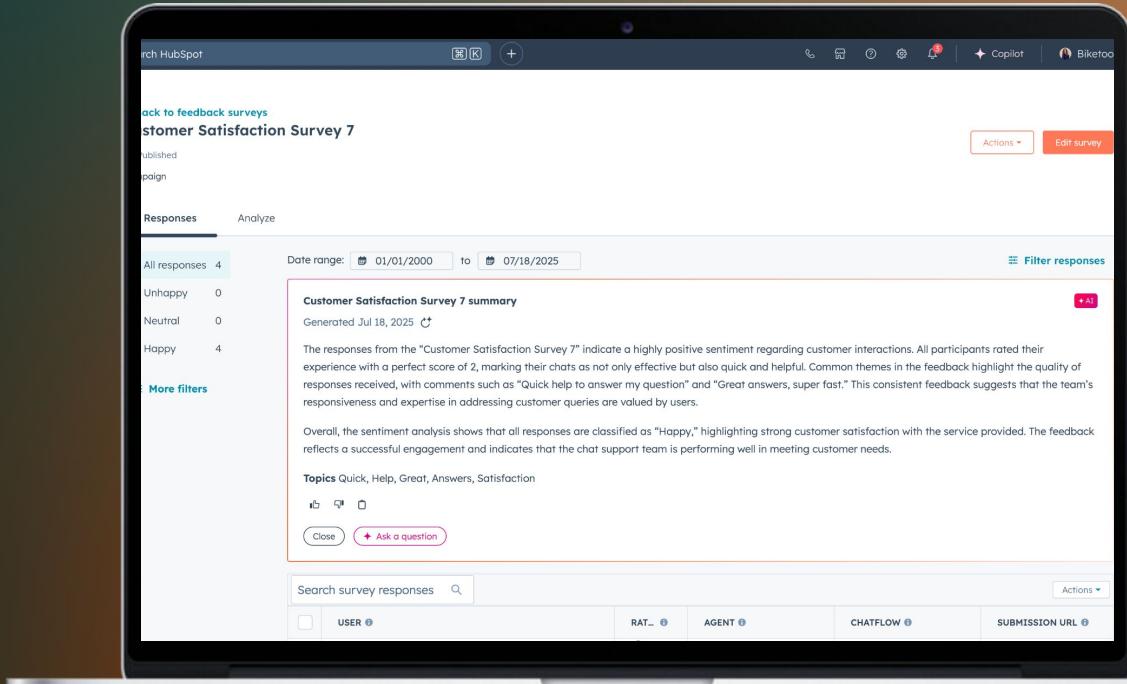
Preview Content:

- From:** Biglytics (biglytics@hubspot.com)
- Subject:** Hey, how are we doing?
- Body:** Your opinion matters.
- Question:** How likely is it that you would recommend [biglytics.net](#) to a friend or colleague?
- Scale:** A scale from 0 to 10, with 0 - Not at all likely and 10 - Extremely likely.

This survey is a service from [biglytics.net](#).

Categorize Feedback

Organize the feedback into meaningful categories.



Customer Satisfaction Survey 7

Published

Responses

All responses 4

Unhappy 0

Neutral 0

Happy 4

More filters

Customer Satisfaction Survey 7 summary

Generated Jul 18, 2025

The responses from the "Customer Satisfaction Survey 7" indicate a highly positive sentiment regarding customer interactions. All participants rated their experience with a perfect score of 2, marking their chats as not only effective but also quick and helpful. Common themes in the feedback highlight the quality of responses received, with comments such as "Quick help to answer my question" and "Great answers, super fast." This consistent feedback suggests that the team's responsiveness and expertise in addressing customer queries are valued by users.

Overall, the sentiment analysis shows that all responses are classified as "Happy," highlighting strong customer satisfaction with the service provided. The feedback reflects a successful engagement and indicates that the chat support team is performing well in meeting customer needs.

Topics Quick, Help, Great, Answers, Satisfaction

Close Ask a question

Search survey responses

USER

RAT...

AGENT

CHATFLOW

SUBMISSION URL

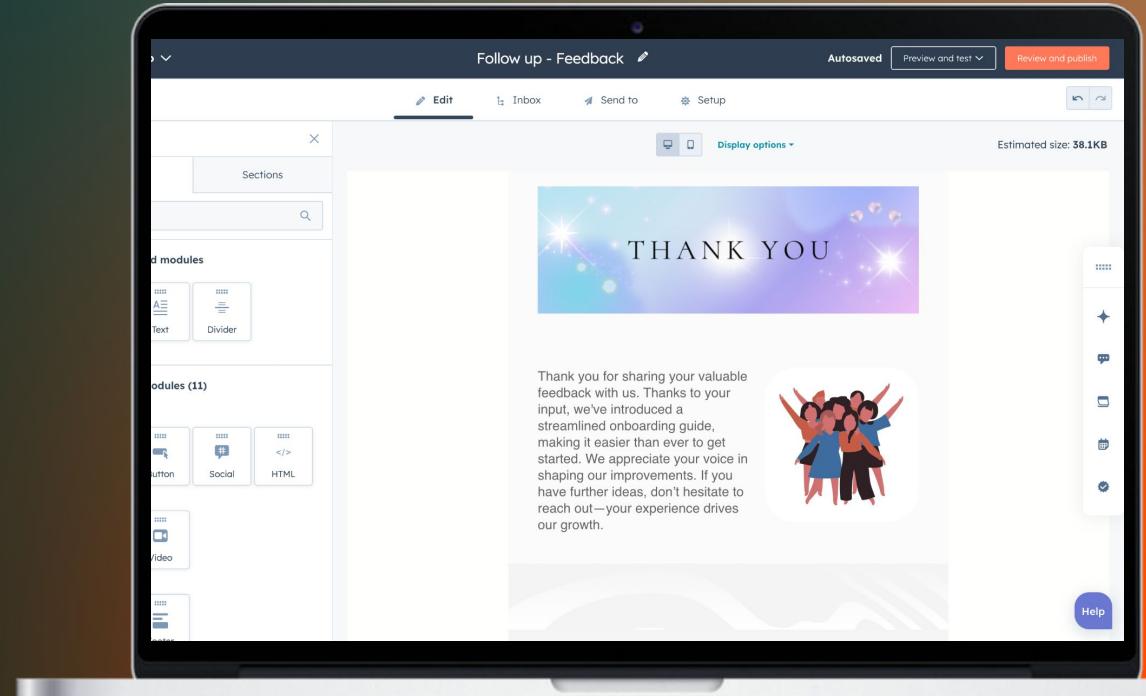
Act on Feedback

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.



Choose a survey template

How it works Preview

Build your own

Custom survey RECOMMENDED

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.

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

- 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.

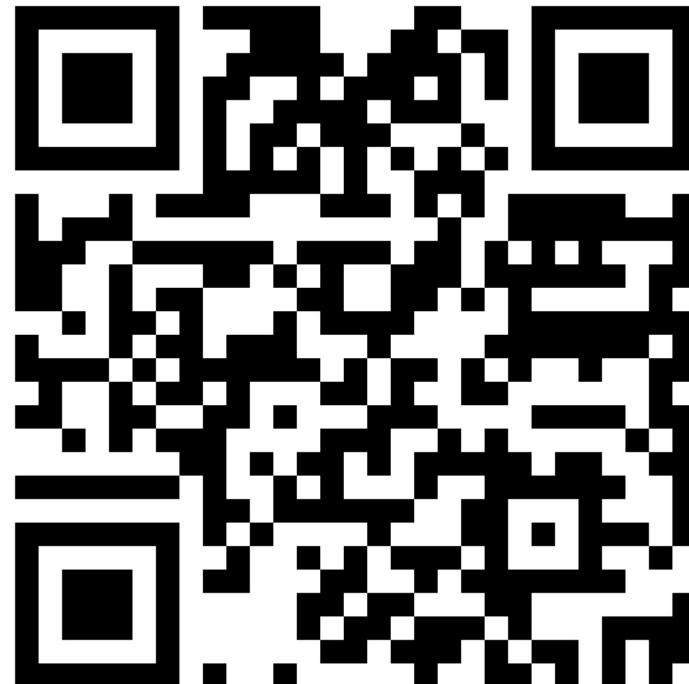
Feedback Survey

- 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.

Stay connected!

Scan this QR-Code to find:

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

