

# How to 5x Your Revenue: Uniting Marketing & Customer Success

Boost Retention • Unlock Expansion • Align Your Teams

Samantha Anderson | Origin 63

## Sam Anderson

Sam is CEO of Origin 63, helping organizations grow revenue and retention by transforming how they use HubSpot. With 11 years of expertise, she's led 550+ teams to streamline journeys, unify tech stacks, and turn customer success into a revenue engine. She is also the Host of The Phoenix Table podcast.



[www.Origin63.com](http://www.Origin63.com)



[@samanderson\\_onfire](https://www.instagram.com/samanderson_onfire)

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# Today's Philosophy

Every company, regardless of industry, can (and should) have a **Customer Success Strategy**.

CS = **Proactive** motion to **retain and grow** existing customers in a way that provides value to them

Let's get to know one  
another!



# Marketing's New Mandate

87% of  
CMOs

say their performance  
is now measured by  
revenue impact, not  
campaign  
performance  
(Gartner).

70% of  
companies

have Marketing  
accountable for a  
portion of retention or  
NRR  
(McKinsey)

53% of  
marketers

say they are now  
responsible for  
post-sale engagement  
(LinkedIn B2B Benchmark Report)



Acquisition is Eating Your Budget – Not Driving Growth

Customer acquisition  
cost is up  
**70% over last 5 year**

# The Customer Success Multiplier Effect


Acquiring new customers is **5x more expensive** than keeping existing ones.

Selling to existing customers yields **5 to 25 times more profit** than acquiring new customers

Increasing retention by just **5% = up to 95% profit increase.**

Loyal customers **spend 31% more** and refer others

Sources: Bain, Vitally, Invesp



**"We've experienced a 40% increase in our CLV over the past year due solely to our large investment in scaling and optimizing our customer success."**

JAMES WILKINSON,  
CEO OF BALANCE ONE SUPPLEMENTS



# Design Your First 30-Day Experiment

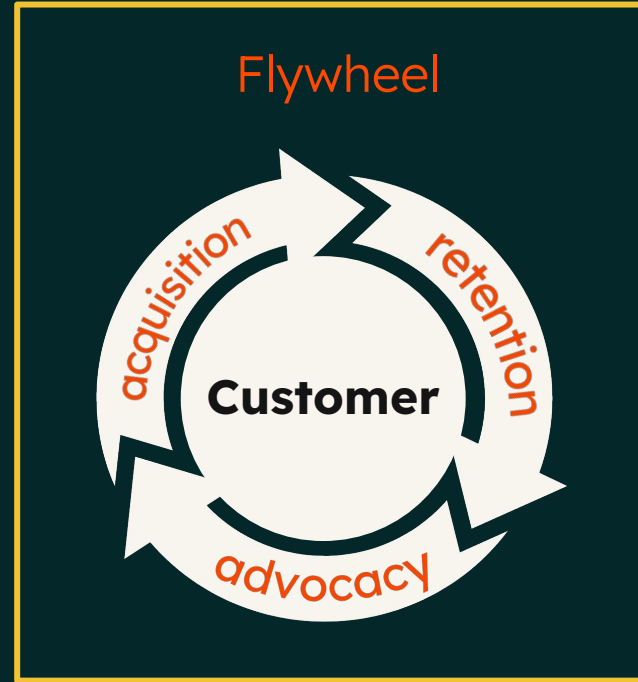
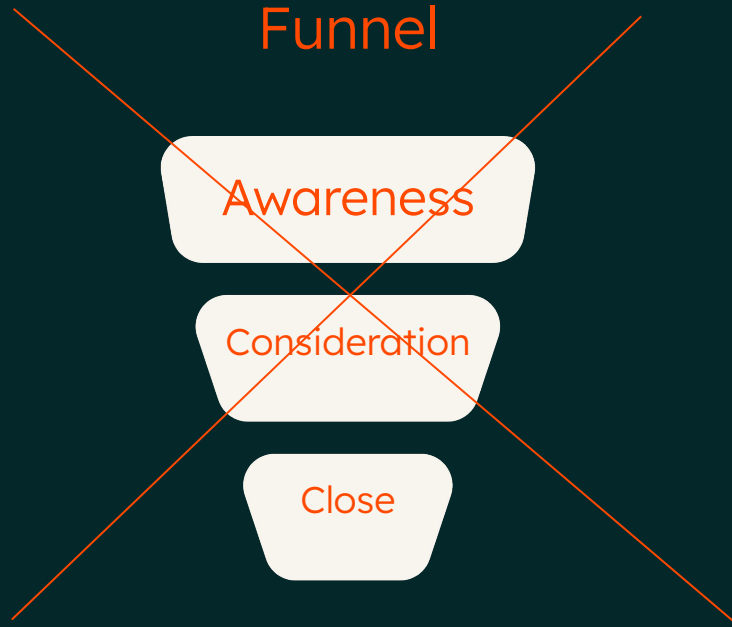
Step 1: Map Your Customer's Journey

Step 2: Team Alignment

Step 3: Measure Results

*Bonus:* AI-Powered Tools to Support  
Your Retention Campaigns (in each!)

# The Revenue Engine Mindset



# Marketing × Customer Success

The **Revenue Engine Mindset** means every stage of the customer lifecycle—especially post-sale—is an opportunity to generate more revenue, more value, and more advocates.

# Marketing's New Role

Marketing's role doesn't stop at the sale—it evolves into customer enablement, retention support, and revenue expansion.



How involved  
is Marketing  
post-sale?

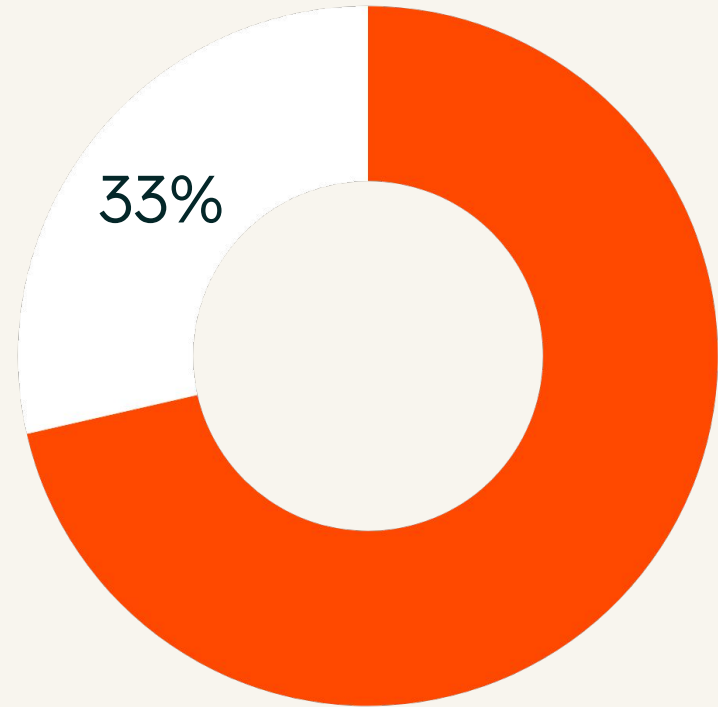
A. Not at all

B. Only for newsletters

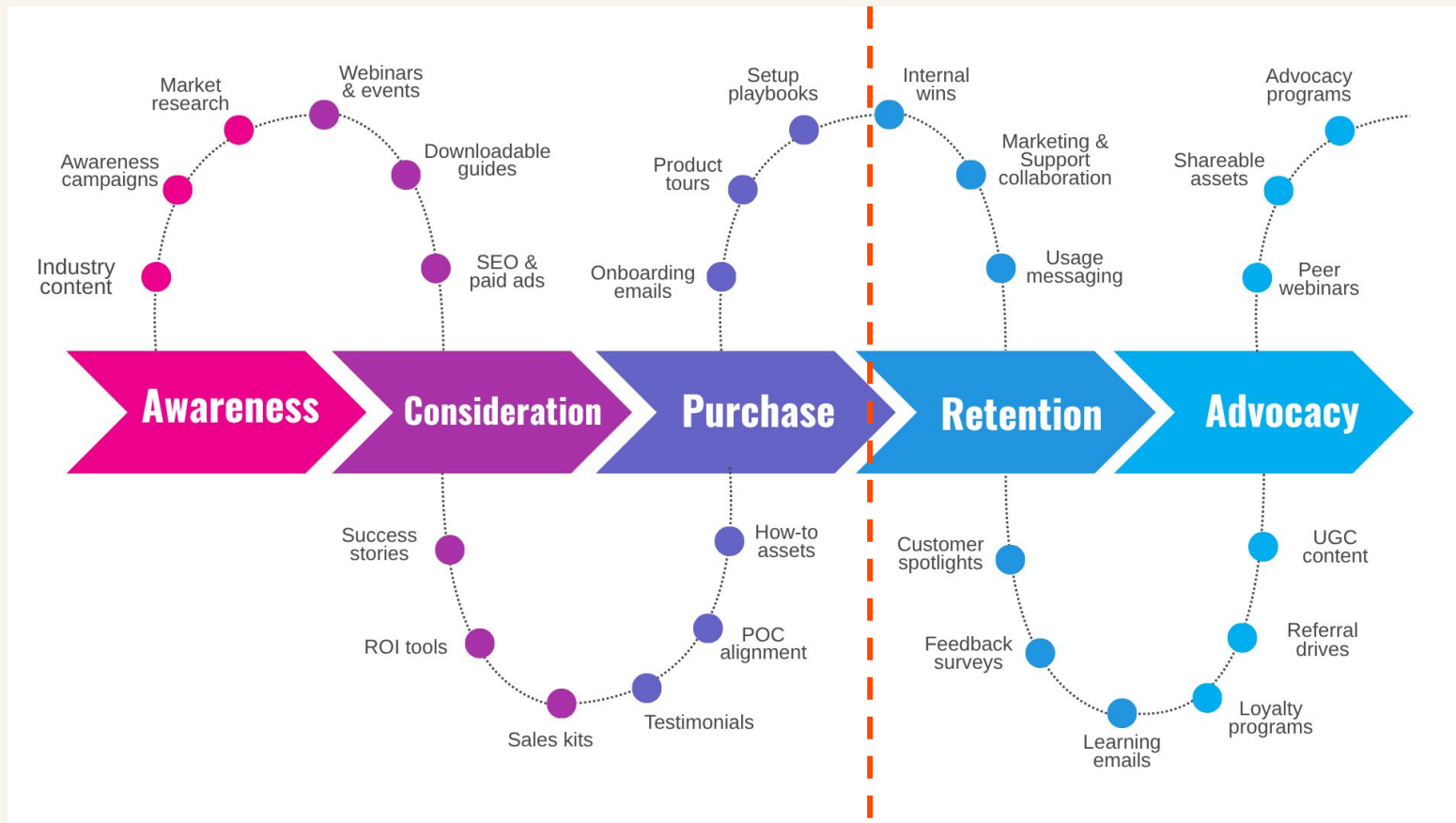
C. Dedicated  
lifecycle marketer

“Only about  $\frac{1}{3}$  -  $\frac{2}{5}$  of businesses actively measure or have formal customer retention strategies.”

*Source: SemRush*



# Before: Stops at Sale → After: Full Lifecycle



# Part 1: Map Your Customer Journey

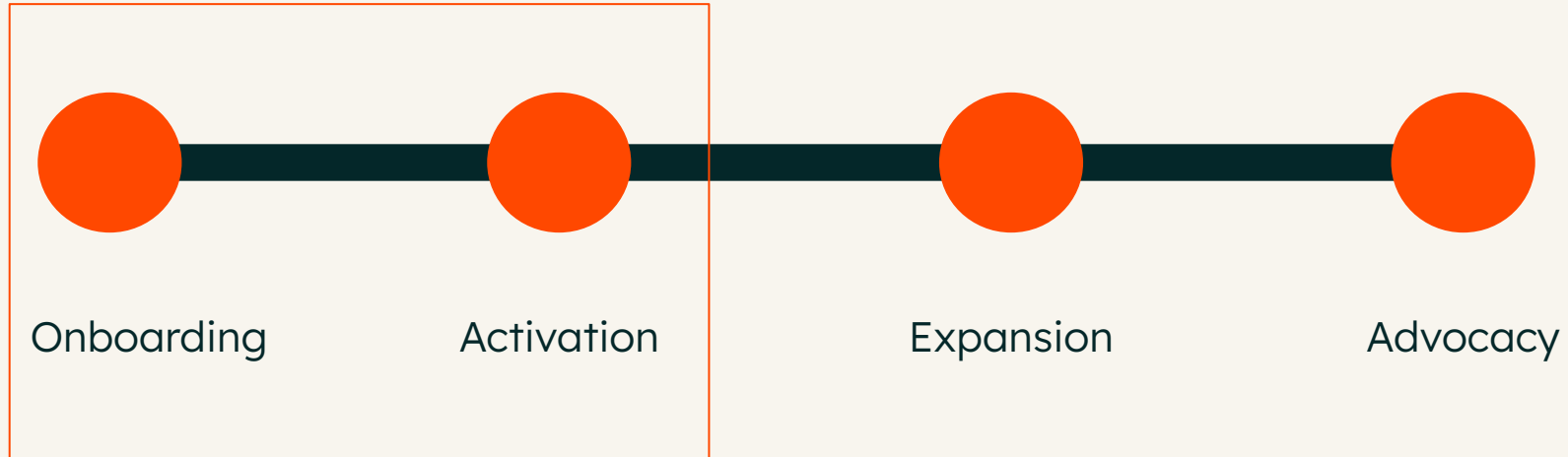


# Create This Table for Today's Exercises:

| <i>Journey Stage:</i>              | <b>Onboarding</b> | <b>Activation</b> | <b>Expansion</b> | <b>Advocacy</b> |
|------------------------------------|-------------------|-------------------|------------------|-----------------|
| <b>Marketing Touchpoints Today</b> |                   |                   |                  |                 |
| <b>New Ideas</b>                   |                   |                   |                  |                 |
| <b>Measurement</b>                 |                   |                   |                  |                 |
| <b>AI Tools to Consider</b>        |                   |                   |                  |                 |

# Audit: Your Customer Journey After the Sale

*How do your customers get started?*



# Joint Onboarding Example

CS delivers first  
value with  
Implementation  
Kickoff

Marketing sends  
advanced feature  
case study

**Result**  
Higher retention,  
early expansion

# What Does Activation Really Mean?

## **Definition**

The moment your customer experiences their first real win—ideally within 30 days.

## **Why It Matters**

Activation is where momentum starts. Without a first win, customers stall out or disengage.

## **Example:** Your First Few Hours at a 5-Star Hotel



Meet  
Hosts in  
Lobby for  
Check-in



Enter Room  
to Find  
Personalized  
Note and a  
Gift



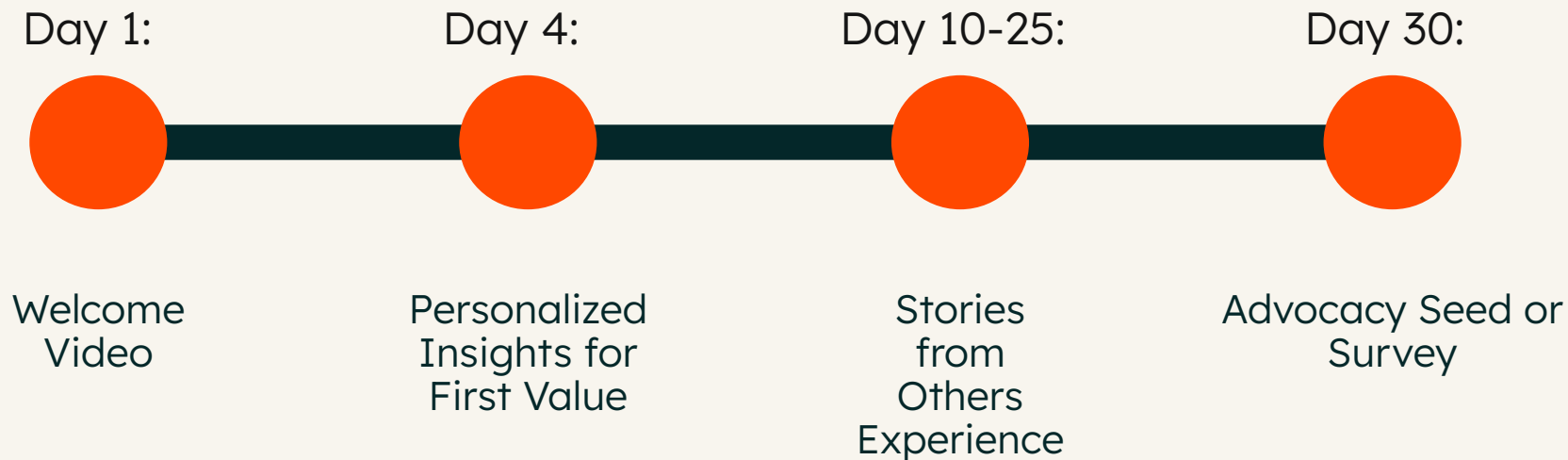
Call Room  
Service;  
Operator  
Greets You  
by Name



First sleep:  
Thoughtful touches  
like eye masks and  
noise machine  
bring you peace



# SaaS: First 30 Days is Critical



# Customer Agent for Personalized Activation



## Website Concierge

It greets them and answers common questions about your content or offerings.



## 24/7 Lead Generation

Because it's always on, the AI agent can capture inquiries and contact info from prospects even outside of business hours.



## Consistent Brand Experience

It's like an extension of your marketing team that maintains a consistent tone while providing useful info.



## Neighbor Share

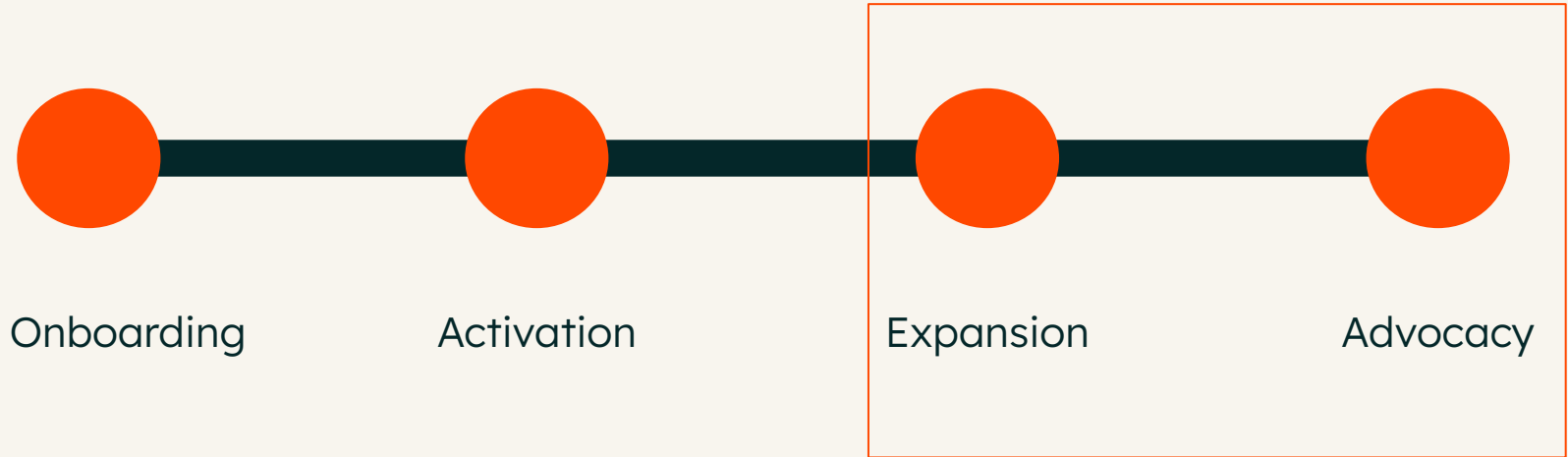
What's one thing you do  
during those first moments  
post-sale to drive  
long-term success?





# Audit: Your Customer Journey After the Sale

*How do you encourage growth?*



# Encouraging Expansion

## Definition

Increasing the revenue and value of a current customer relationship — turning satisfied customers into bigger, deeper partnerships.

## Why It Matters

- Cheaper than acquiring new customers.
- Boosts Net Revenue Retention (NRR).
- Strengthens customer stickiness through deeper product integration.



# Example: Expansion Behavior Unlocked

Event:



Hits  
Usage  
Milestone



Onsite  
Delight:  
Confetti on  
Log-in



Triggered  
Email:  
“Unlock  
More  
Capacity”



Sales  
Prompted  
to Reach  
Out

# Achieving Advocacy

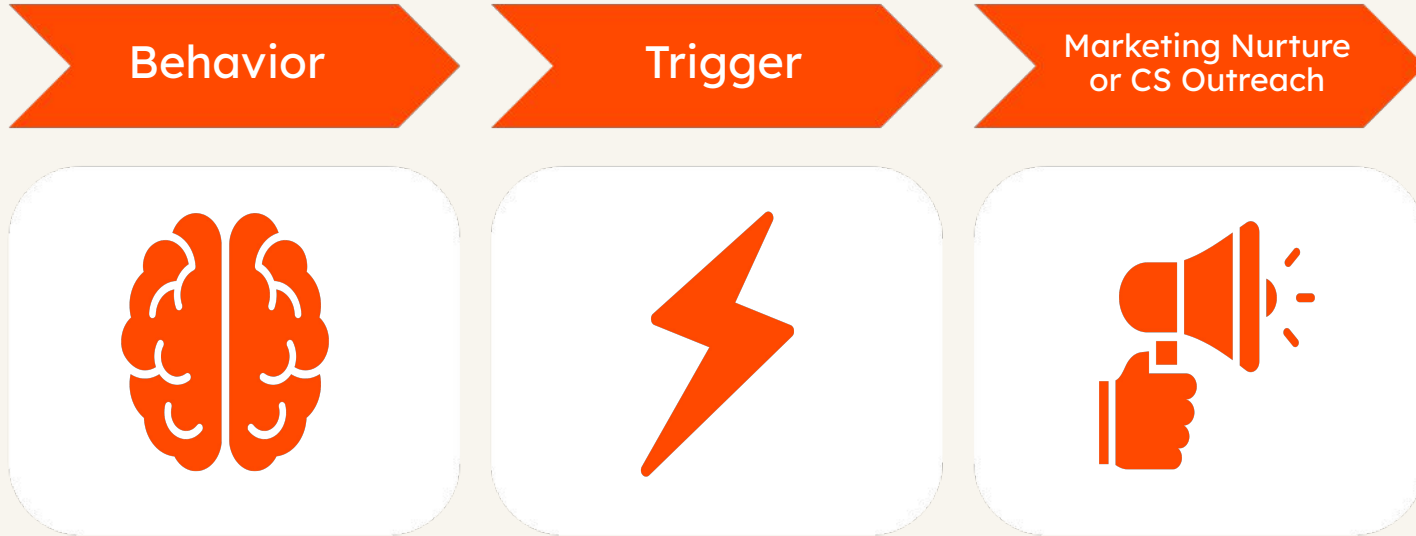
## Definition

Customers actively promote your brand because of their positive experiences

## Why It Matters

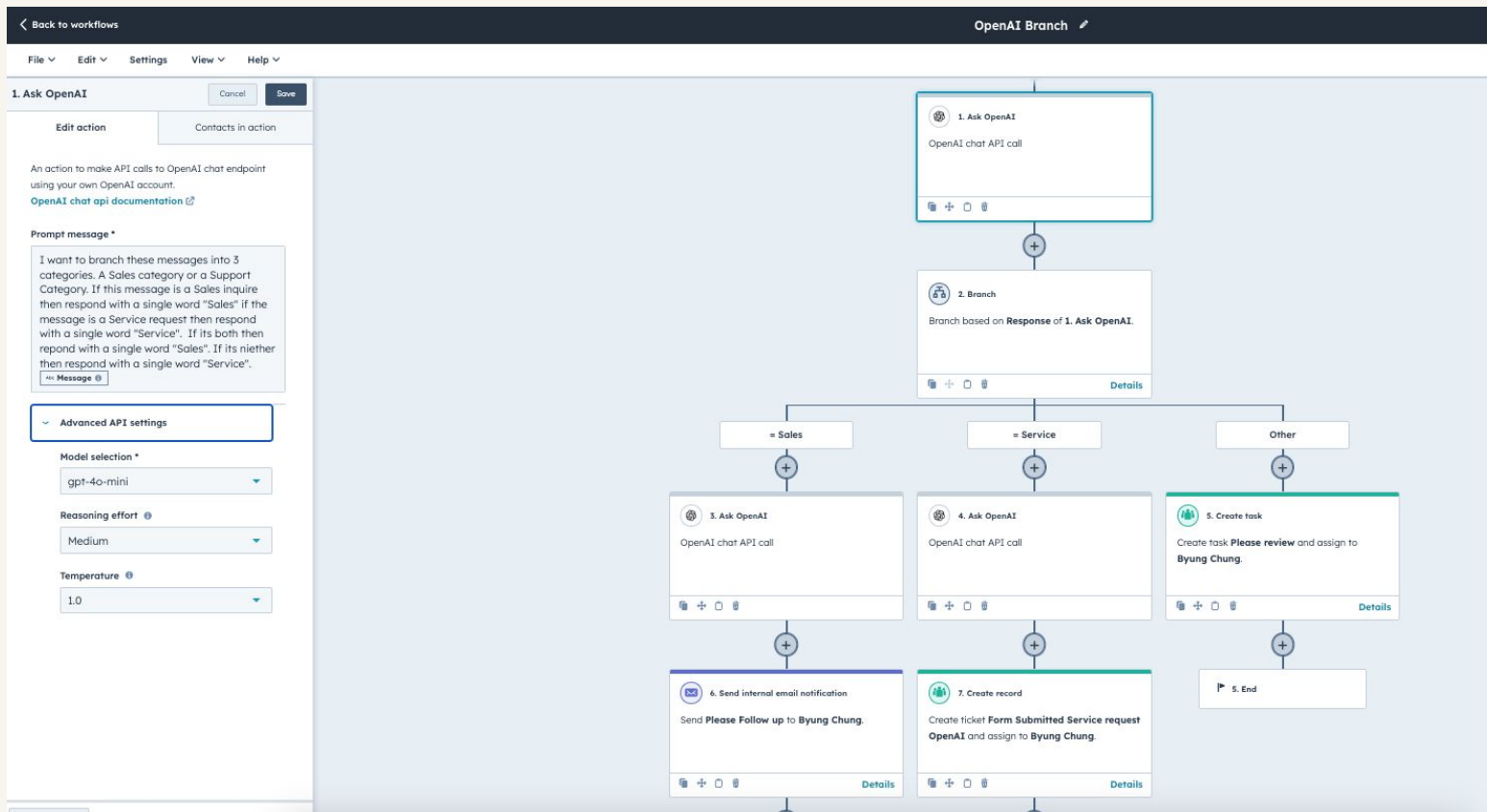
- Expands reach and credibility through trusted voices.
- Drives low-cost acquisition and upsell opportunities.
- Deepens emotional connection to your brand.

# Behavioral Triggers



Use AI to identify upsell-ready customers based on behavior, and push that data to Marketing.

# Use “Ask OpenAI” in Automations





## Action:

**Circle** one area in the customer lifecycle as your biggest opportunity to help Retain and Grow Customers

# Let's Get Creative!

| <i>Journey Stage:</i>              | <b>Onboarding</b>                                    | <b>Activation</b>                       | <b>Expansion</b>                             | <b>Advocacy</b>                         |
|------------------------------------|--|---|--|---|
| <b>Marketing Touchpoints Today</b> | Day 1: Celebration email<br>Day 4: Explanation video | Day 15...<br><br>When X milestone met.. | Day 90...<br><br>When X behavior exhibited.. | Day 45...<br><br>When X event occurs... |
| <b>New Ideas</b>                   |  |   |  |   |
| <b>Measurement</b>                 |  |   |  |   |
| <b>AI Tools to Consider</b>        |  |   |  |   |



# Slack's Unified Customer Journey: Marketing & Customer Success Partnership



## Onboarding



Customer Success guides new teams through workspace setup and onboarding webinars.

## Activation



Marketing sends targeted feature update newsletters and advanced use case webinars.

## Expansion



Marketing supports up-sell of premium plans with tailored campaigns based on usage data.

## Retention



Customer Success and Marketing collaborate to deliver personalized renewal reminders and satisfaction surveys.

### Key Points:

- Marketing nurtures users with educational content and case studies highlighting advanced features.
- Customer Success ensures customers realize early value and continuous adoption.
- Result: High customer retention rates and expanding subscription revenues.



# Apple's Integrated Customer Journey with Marketing-Driven Customer Experience



## Onboarding

## Activation

## Expansion

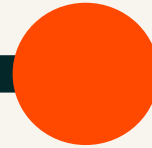
## Advocacy



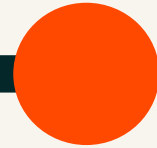
CS (Apple Genius Bar and tutorials) helps customers get familiar with device setup.



Marketing campaigns introduce new features and accessories post-purchase.



Marketing promotes AppleCare+ and complementary services (Apple Music, iCloud storage).

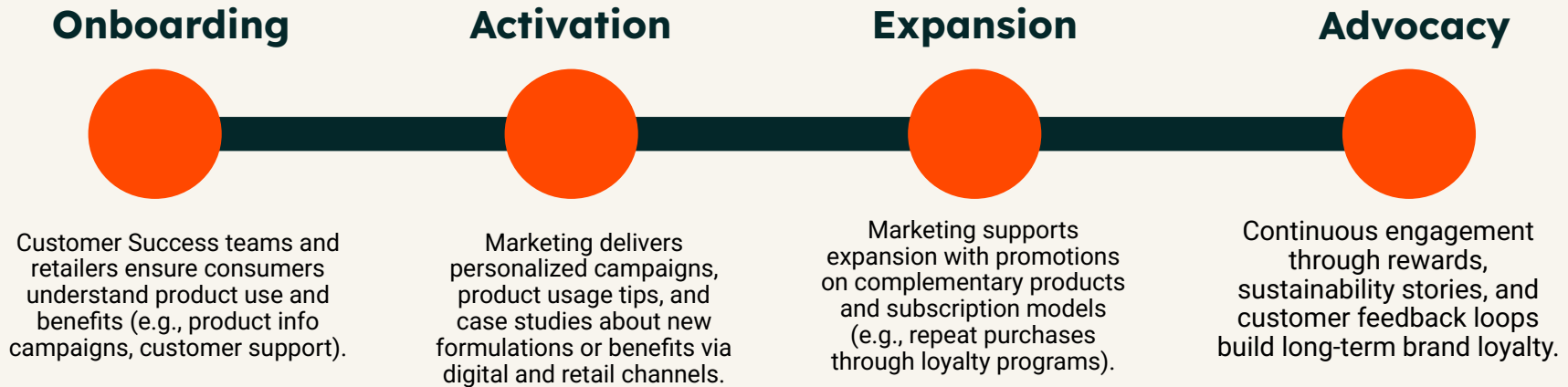


Ongoing marketing-driven loyalty programs (Apple One bundle) and product announcements nurture customer relationships.

### Key Points:

- Marketing supports CS by highlighting product ecosystems and upgrade paths.
- Customer Success delivers first-touch support setting users up for ongoing engagement.
- Apple's cohesive strategy drives strong customer loyalty and repeat purchases.

# Unilever's Integrated Customer Journey: Marketing & Customer Success in Consumer Goods



## Key Points:

- Unilever uses data-driven marketing to educate customers and deliver relevant product stories, supporting usage and satisfaction.
- CS and marketing collaborate to ensure consumers receive both help and inspiration for continued product adoption.
- Result: Increased consumer retention, repeat purchase rates, and enhanced brand loyalty in a competitive FMCG space.

Source [\(1\)](#)[\(2\)](#)



## Collaboration Time

Let's take **10 min** to work on some ideas. You can work quietly or with a neighbor.





## Audience Share

What's one idea you are  
*Most* Excited about so far?

# Part 2: Internal Insight & Alignment

# Internal Feedback Loop as Fuel

The tighter the loop, the faster you can improve retention and expansion.  
Allow Marketing Campaigns to flow across the org.



# Tools to Keep You Going





Where do you  
feel the loop  
breaks?

A. CS or Support capture valuable insights but they die in a spreadsheet

B. Campaigns run without collaboration with sales, support or product teams

C. Metrics across the organization aren't shared

# 3 High-Value Touchpoints to Close the Gap

## **People:**

Standing cross-functional meeting with a shared agenda (Voice of the Customer Meeting)

## **Process:**

Create agreed-upon capture mechanisms and responses to recurring customer signals

## **Tech:**

Centralize and automate insight sharing (i.e. unified CRM for marketing, sales and service without data silo)



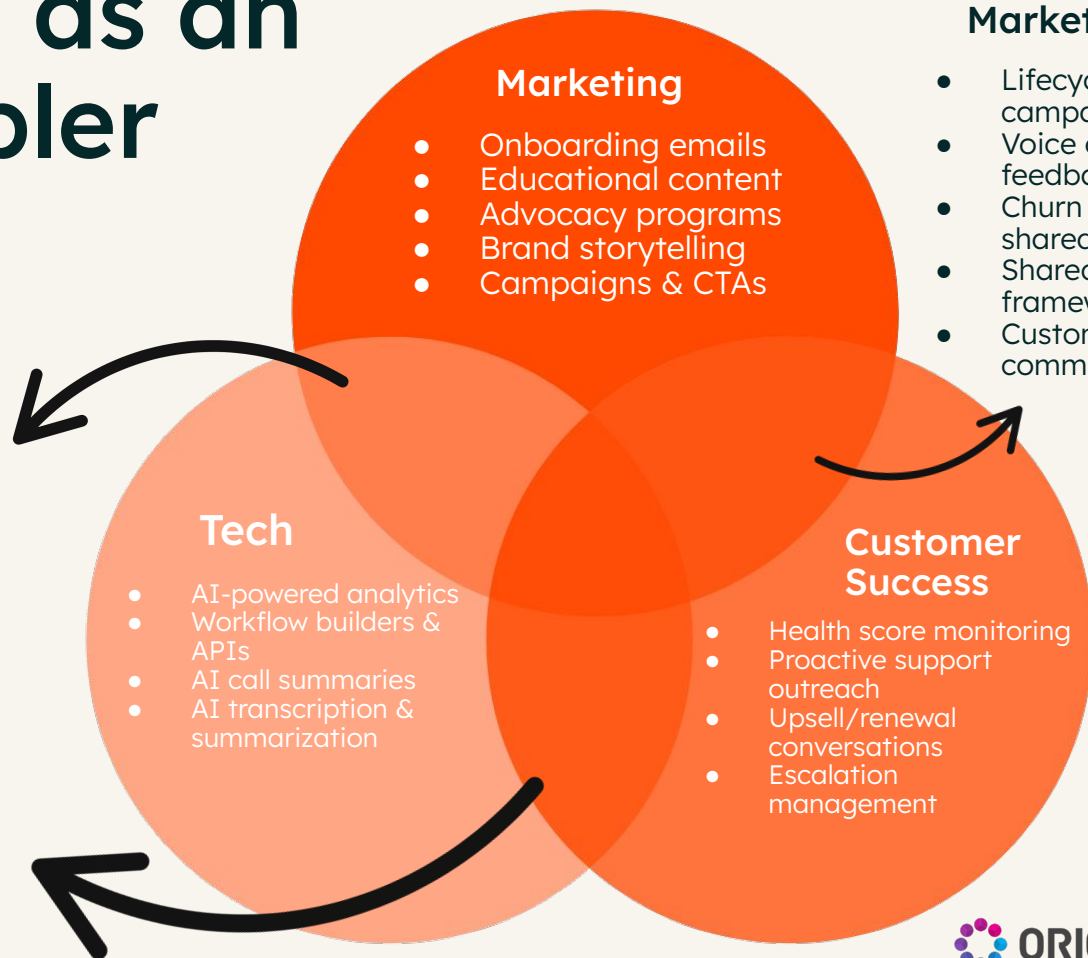
# Tech as an Enabler

## Tech + Marketing

- Usage-based marketing automation
- AI-driven segmentation
- Product usage insights to power messaging
- Behavior-triggered content
- In-app guidance via marketing

## CS + Tech

- Ticket deflection tools
- Risk alert triggers
- Support automation
- NPS-based workflows
- Workflow automations (post-sale)

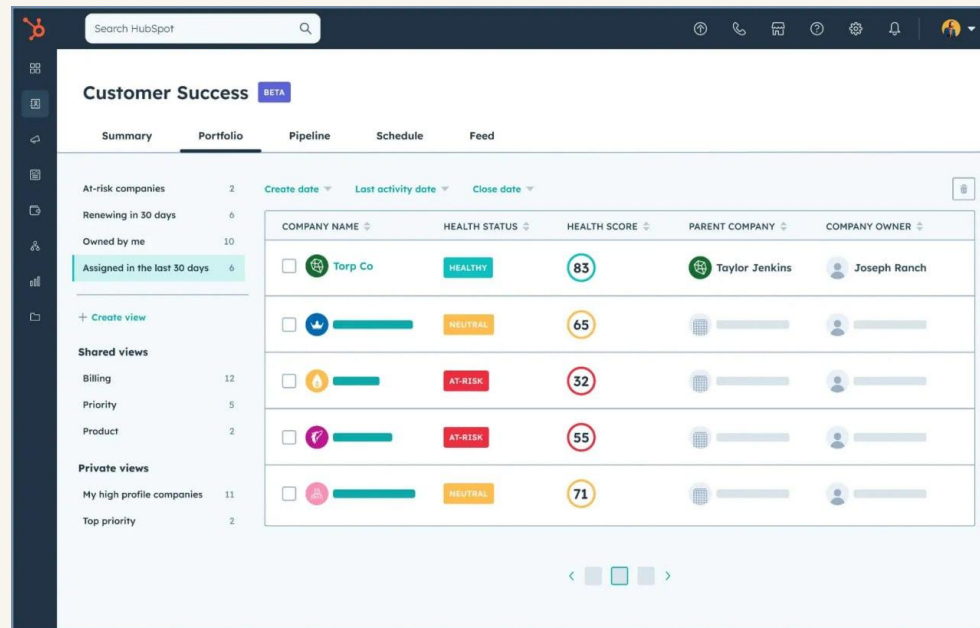


## Marketing + CS















- Lifecycle nurture campaigns
- Voice of customer feedback loop
- Churn reason feedback shared with marketing
- Shared onboarding frameworks
- Customer milestones comms



# Automate with a Customer Health Score



The screenshot shows the HubSpot Customer Success interface. The top navigation bar includes a search bar and various icons. The main header is 'Customer Success' with a 'BETA' tag. Below the header are tabs for 'Summary', 'Portfolio', 'Pipeline', 'Schedule', and 'Feed'. The 'Portfolio' tab is active, displaying a table of customer health scores. The table has columns for 'COMPANY NAME', 'HEALTH STATUS', 'HEALTH SCORE', 'PARENT COMPANY', and 'COMPANY OWNER'. The table lists five companies with their respective health scores and status indicators. The first company, 'Torp Co', has a 'HEALTHY' status and a score of 83. The second company has a 'NEUTRAL' status and a score of 65. The third company has an 'AT-RISK' status and a score of 32. The fourth company has an 'AT-RISK' status and a score of 55. The fifth company has a 'NEUTRAL' status and a score of 71. The table also includes filters for 'At-risk companies', 'Renewing in 30 days', 'Owned by me', and 'Assigned in the last 30 days'. There are also links for '+ Create view', 'Shared views', and 'Private views'.

| COMPANY NAME   | HEALTH STATUS | HEALTH SCORE | PARENT COMPANY   | COMPANY OWNER   |
|--|---------------|--------------|--|---|
| <input type="checkbox"/>  Torp Co | HEALTHY       | 83           |  Taylor Jenkins | Joseph Ranch  |
| <input type="checkbox"/>          | NEUTRAL       | 65           |                 |  |
| <input type="checkbox"/>          | AT-RISK       | 32           |                 |  |
| <input type="checkbox"/>          | AT-RISK       | 55           |                 |  |
| <input type="checkbox"/>          | NEUTRAL       | 71           |                 |  |

HubSpot triggers retention workflows when product usage dips or NPS drops.

Write down one simple action you can take in each category to better align your teams around retention and revenue.



## People

“Monthly Voice of the Customer meeting”



## Process

“Work with Product to identify key usage milestones and draft corresponding actions”



## Tech

“Set up customer health score in HubSpot”



# Part 3: Measuring Success

(no pun intended)

| Stage             | Significance  | Actions   | Leading Indicators<br>(Early Signals)   | Lagging Indicators<br>(Outcomes)  |
|-------------------|---|---|---|---|
| <b>Onboarding</b> | Maintain momentum from sales and ensure smooth transition into first value. | Implement a clear, automated onboarding workflow; ensure all customer context is captured and shared; coordinate early marketing touchpoints. | % onboarding plans completed<br><br>Time-to-kickoff call<br>Engagement with onboarding campaigns        | Time-to-first-value<br><br>Onboarding completion rate<br><br>Drop-off before activation |
| <b>Activation</b> | First 10–30 days are critical for creating engaged, successful customers.   | Clearly communicate milestones; provide proactive resources; coordinate marketing and CS messaging to drive usage.                            | % reaching activation milestone<br><br>Feature adoption rates<br><br>Engagement with activation content | Onboarding success score<br>Product adoption %<br><br>Early NPS or CSAT                 |

| Stage            | Significance  | Actions  | Leading Indicators (Early Signals)  | Lagging Indicators (Outcomes)  |
|------------------|---|--|---|--|
| <b>Expansion</b> | A happy, successful customer is more likely to adopt additional products or services. | Use behavioral triggers to present upsell/cross-sell offers; highlight advanced use cases; connect customers with other teams. | Engagement with expansion content<br><br>Click-to-conversion on upsell offers<br><br>Expansion opportunity pipeline created | Expansion revenue<br>Average order value increase<br>Multi-product adoption %  |
| <b>Advocacy</b>  | Loyal customers can amplify your brand and influence new sales.                       | Launch and promote advocacy programs; request testimonials, reviews, and referrals; share success stories.                     | Advocacy program participation<br><br># of referrals generated<br><br>Social engagement with advocacy content               | New customers acquired via advocacy<br>Volume of advocacy assets (case studies, testimonials)<br><br>Advocacy-driven revenue |



# OpenAI + Claude with HubSpot for Deep Research

## Purpose

Turn your CRM and marketing data into actionable intelligence that informs both *measurement* and *next-step campaign strategy*.

## Why Use AI for Deep Research:

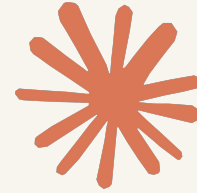
- Detect patterns and signals across massive datasets
- Combine marketing + CS data to reveal the true impact of campaigns on retention and expansion
- Generate new campaign ideas based on customer behavior and feedback
- Save hours on manual data crunching

## When to Use OpenAI vs. Claude:



### OpenAI

Strong at precise, structured output, great for API-driven HubSpot workflows and quick, iterative analysis.



### Claude

Handles massive datasets (large CSVs, transcripts, exports) in a single prompt; excels at summarizing nuanced feedback and detecting complex patterns.

# Prompt Playbook:

|                                      | Open AI  | Claude   |
|--------------------------------------|--|--|
| <b>Campaign Performance Analysis</b> | “From HubSpot campaign report data, identify the top 3 customer segments with the highest conversion-to-upgrade rate in the last quarter. Suggest 2 retention-focused campaigns for each segment.” | “Analyze this HubSpot export of campaign performance by segment. Highlight which cohorts drive the most expansion revenue and summarize their common engagement patterns.” |
| <b>Voice of Customer Insights</b>    | “From NPS comments in HubSpot, group feedback into 5 key themes and suggest one marketing action per theme.”   | “From NPS and CSAT comments in HubSpot, Identify the top sentiment trends and potential risks, with example customer quotes for each.”                                     |

# Prompt Playbook:

|                                      | Open AI  | Claude  |
|--------------------------------------|--|---|
| <b>Retention Risk Detection</b>      | “Find accounts with 20%+ drop in usage over 60 days and low marketing engagement. Suggest personalized win-back campaigns.”        | “From this HubSpot activity export, identify at-risk customers by low product use, poor engagement, or negative support notes. Suggest retention plays by customer tier.” |
| <b>Advocacy Opportunity Spotting</b> | “List customers with NPS 9–10, high adoption, and recent positive feedback. Suggest 3 ways to feature them in advocacy marketing.” | “Review this HubSpot dataset for customers meeting our advocacy profile. Recommend potential stories, case studies, or referral incentives.”                              |

# Put Your Action Plan in Motion!

# Yours Should Look Like This:

|                                    | Onboarding  | Activation  | Expansion   | Advocacy  |
|------------------------------------|---|---|---|---|
| <b>Marketing Touchpoints Today</b> | Day 1: Celebration email<br>Day 4: Explanation video                                    | Day 15: "What's Next" email   | Day 90: Upgrade offer                                       | Day 45: Customer spotlight                                |
| <b>New Ideas</b>                   | Role-specific video tutorial drip first 14 days   | Milestone-triggered on-demand webinars                              | In-app cross-sell pop-ups                                   | Invite to customer council or referral program            |
| <b>Measurement</b>                 | % new customers engaging with onboarding content<br><br>Increase in early product usage | Conversion to key activation milestone<br><br>Feature adoption rate | % of customers upgrading<br><br>Expansion revenue generated | # of referrals<br><br>Advocacy program participation rate |
| <b>AI Tools to Consider</b>        | HubSpot Workflows + ChatGPT for tailored copy   | HubSpot Custom Events + AI analytics for milestone tracking         | Predictive analytics in HubSpot + AI-based segmentation     | AI-assisted NPS/sentiment analysis to identify advocates  |

# The 5x Transformation: Your Next 30-days

**Audit** – Circle your biggest post-sale gaps and opportunities (Onboarding, Activation, Expansion, Advocacy).

**Align** – Stand up a cross-functional VOC meeting, set a shared agenda, and centralize insight sharing.

**Activate** – Launch your first post-sale marketing campaign based on CS insight.

**Measure & Iterate** – Track CX metrics + marketing outcomes, and use AI to spot next-step opportunities.

*Run it once. Learn. Scale.*

# Keep in Touch!

Thu • Sep 4 • 1:30pm - 2:15pm PT

## DEBATE: AI or Human: Ultimate Customer Retention Showdown

Welcome to the most electrifying debate in customer success! In this game-show style panel, our expert panelists will go head-to-head to defend their positions on AI vs. human-powered customer retention strategies. From the burning question "Will AI take over customer success?" to "Are CS teams even worth it?" we're digging deep into the future of revenue retention. The stakes are high! After each round, YOU (the...



Jeff Whitlock, Daniel Zarick, Samantha Anderson, Kim Hacker



[sam@origin63.com](mailto:sam@origin63.com)



[www.Origin63.com](http://www.Origin63.com)



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