

# 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.

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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!

01

02

03

04

05



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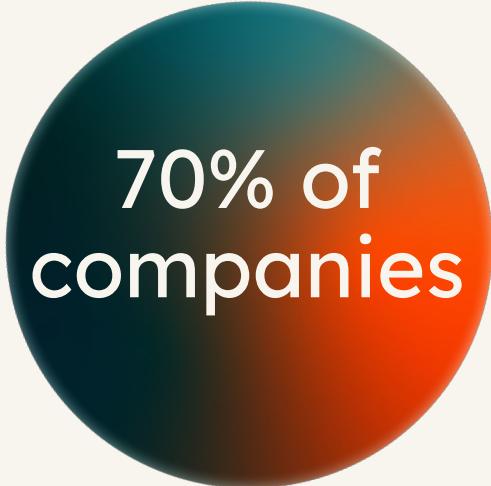
IN 25

# 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)



ORIGIN 63

IN 25

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, Vitality, 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

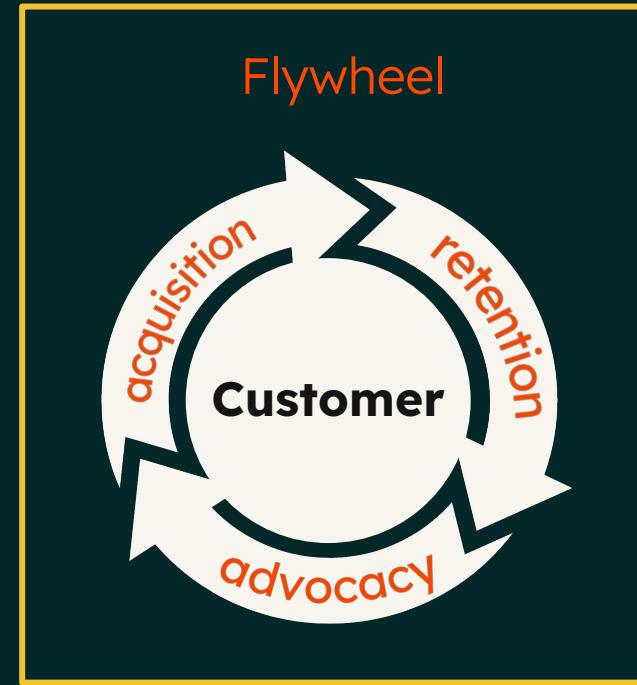
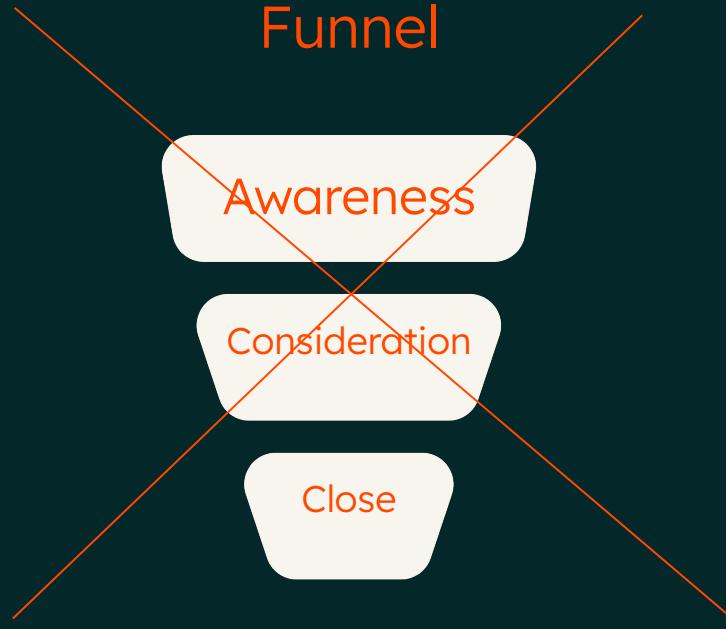
Step 1: Map Your Customer's Journey

Step 2: Team Alignment

Step 3: Measure Results

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

# The Revenue Engine Mindset



# Marketing x 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?

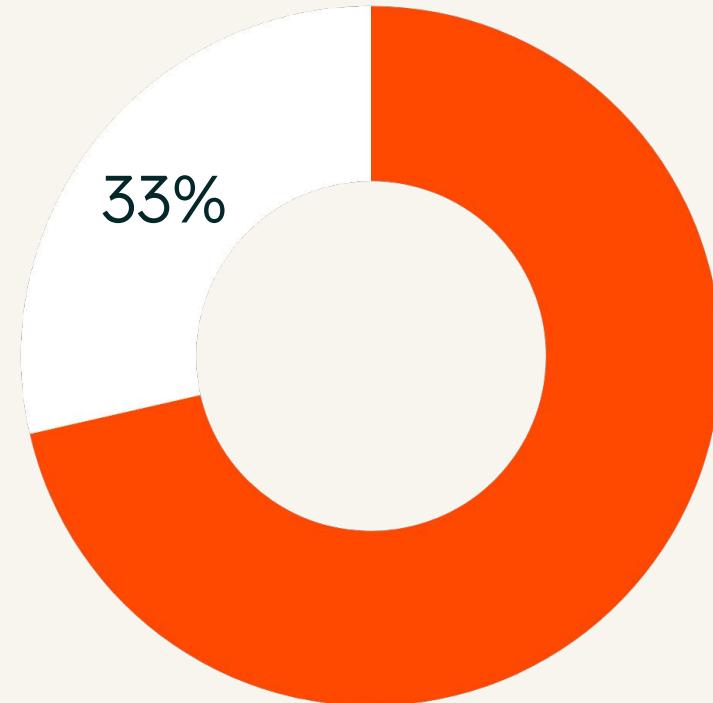
A. Not at all

B. Only for newsletters

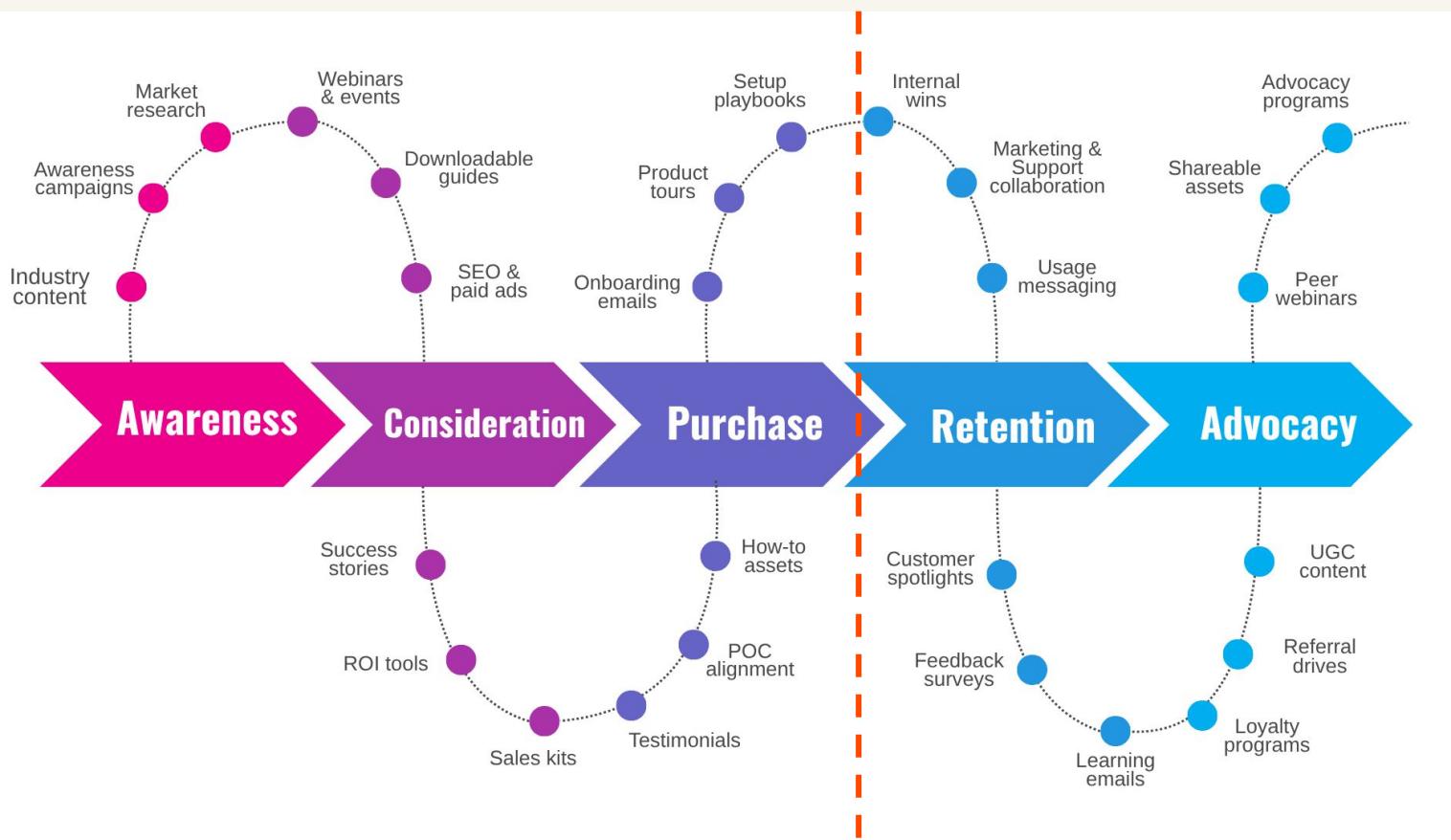
C. Dedicated  
lifecycle marketer

“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



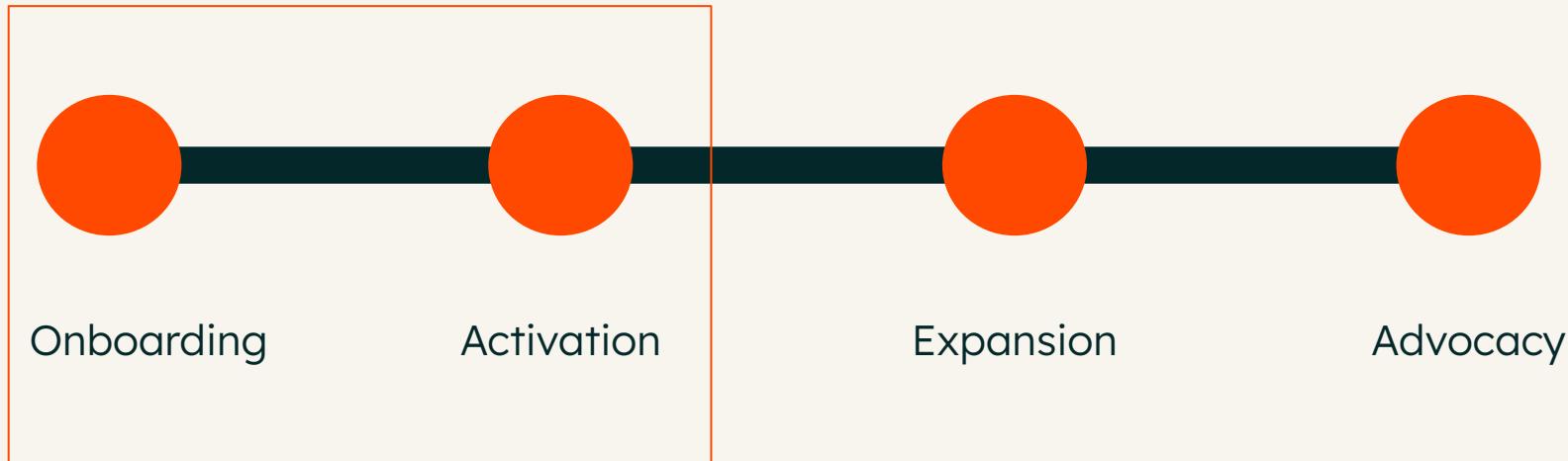
# Part 1: Map Your Customer Journey

# 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

**Result**  
Higher retention, early expansion

Marketing sends advanced feature case study

# What Does Activation Really Mean?

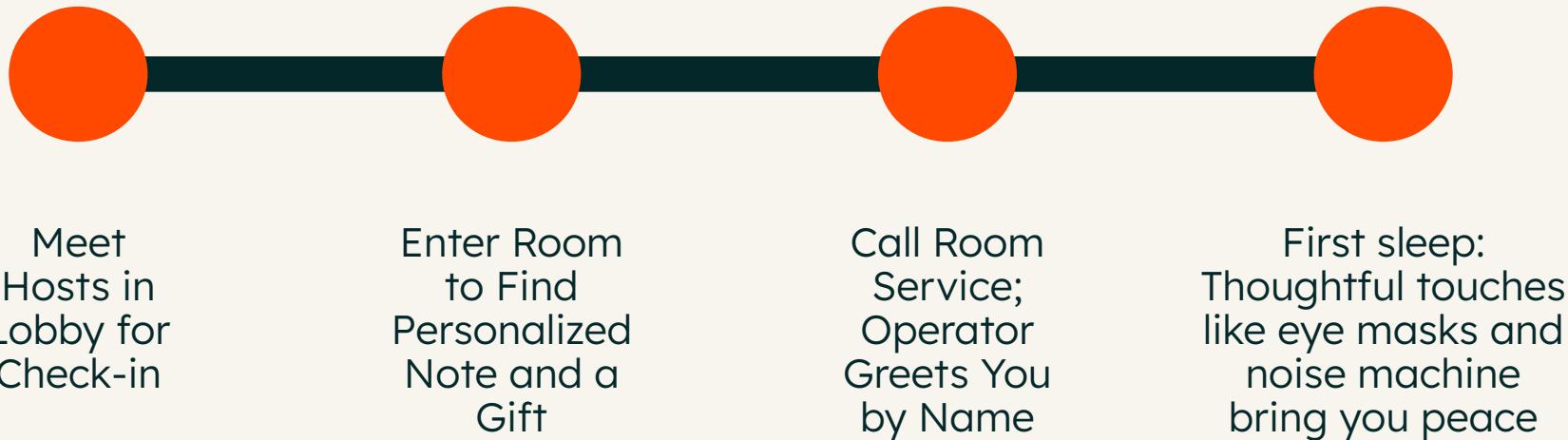
## **Definition**

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

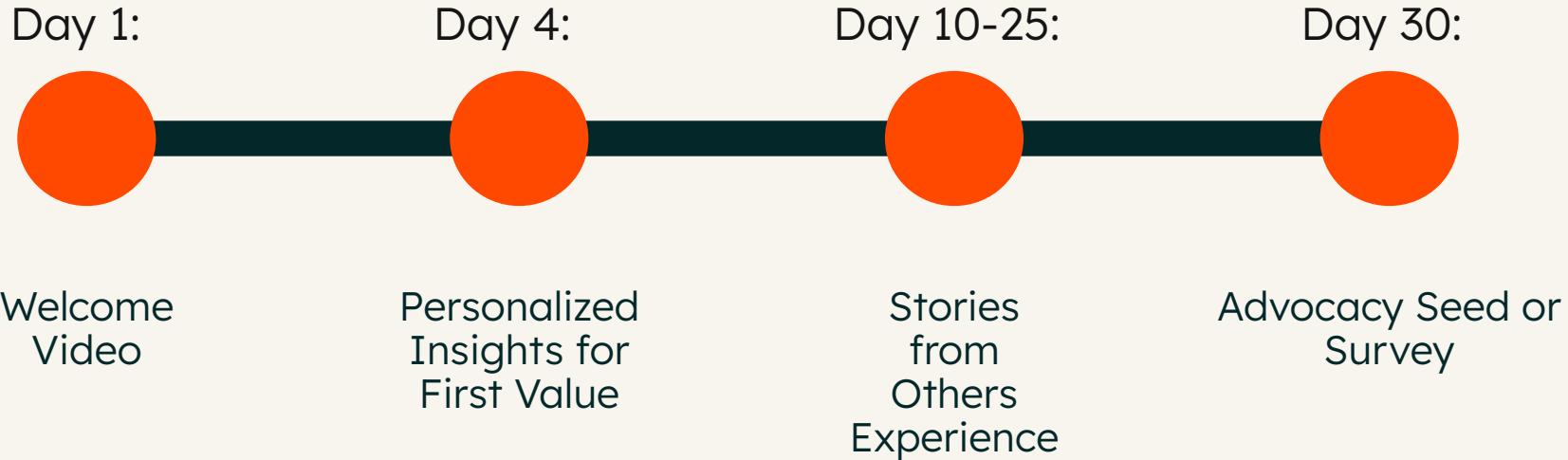
## **Why It Matters**

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

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



# 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.

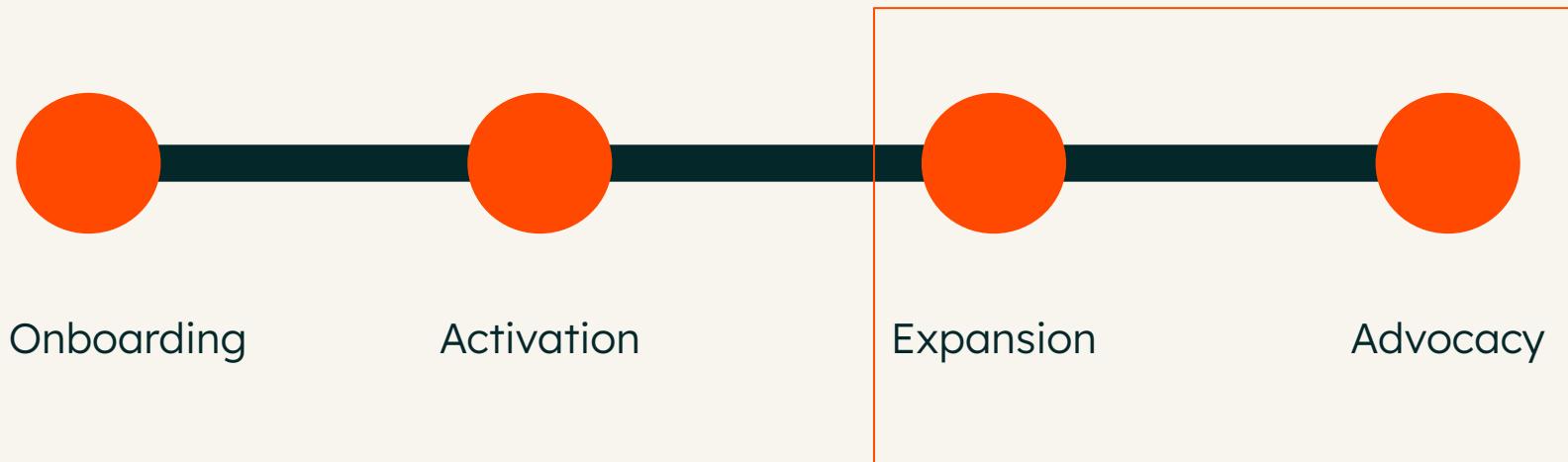


## Neighbor Share

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

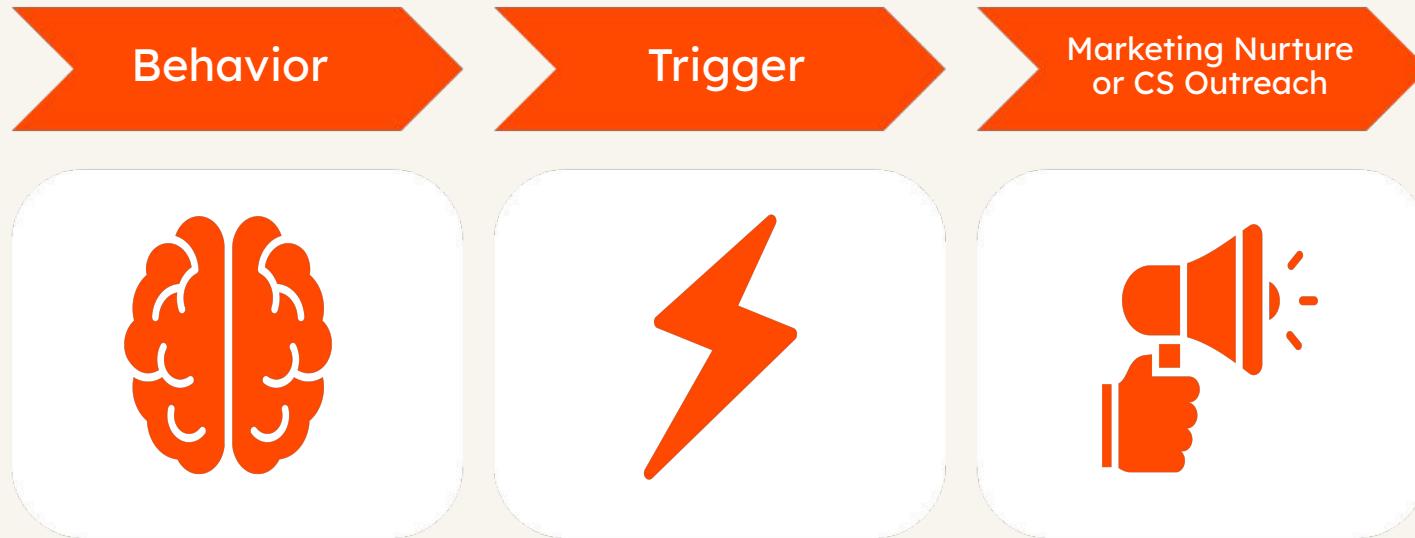
## **Definition**

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

Back to workflows

OpenAI Branch

File ▾ Edit ▾ Settings View ▾ Help ▾

1. Ask OpenAI

Cancel Save

Edit action Contacts in action

An action to make API calls to OpenAI chat endpoint using your own OpenAI account.

[OpenAI chat api documentation](#)

Prompt message \*

I want to branch these messages into 3 categories. A Sales category or a Support Category. If this message is a Sales inquire then respond with a single word "Sales" If the message is a Service request then respond with a single word "Service". If its both then respond with a single word "Sales". If its neither then respond with a single word "Service".

[Ask Message](#)

Advanced API settings

Model selection \*

gpt-4o-mini

Reasoning effort \*

Medium

Temperature \*

1.0

OpenAI Branch

```
graph TD; A[1. Ask OpenAI] --> B[2. Branch]; B --> C[= Sales]; B --> D[= Service]; B --> E[Other]; C --> F[3. Ask OpenAI]; D --> G[4. Ask OpenAI]; E --> H[5. Create task]; H --> I[6. Send internal email notification]; D --> J[7. Create record]; J --> K[5. End]
```

1. Ask OpenAI

OpenAI chat API call

2. Branch

Branch based on Response of 1. Ask OpenAI.

3. Ask OpenAI

OpenAI chat API call

4. Ask OpenAI

OpenAI chat API call

5. Create task

Create task Please review and assign to Byung Chung.

6. Send internal email notification

Send Please Follow up to Byung Chung.

7. Create record

Create ticket Form Submitted Service request OpenAI and assign to Byung Chung.

5. End



## Action:

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

# Let's Get Creative!

<b>Journey Stage:</b>	<b>Onboarding</b>	<b>Activation</b>	<b>Expansion</b>	<b>Advocacy</b>
<b>Marketing Touchpoints Today</b>	Day 1: Celebration email Day 4: Explanation video	Day 15... When X milestone met..	Day 90... When X behavior exhibited..	Day 45... 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

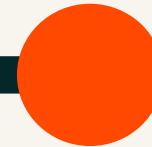


## Onboarding



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

## Activation



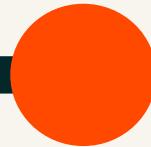
Marketing sends targeted feature update newsletters and advanced use case webinars.

## 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

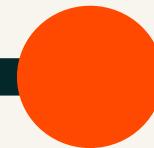


## Onboarding



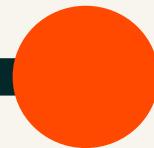
CS (Apple Genius Bar and tutorials) helps customers get familiar with device setup.

## Activation



Marketing campaigns introduce new features and accessories post-purchase.

## Expansion



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

## Advocacy



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

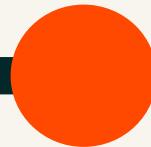


## Onboarding



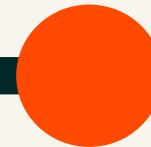
Customer Success teams and retailers ensure consumers understand product use and benefits (e.g., product info campaigns, customer support).

## Activation



Marketing delivers personalized campaigns, product usage tips, and case studies about new formulations or benefits via digital and retail channels.

## Expansion



Marketing supports expansion with promotions on complementary products and subscription models (e.g., repeat purchases through loyalty programs).

## Advocacy



Continuous engagement through rewards, sustainability stories, and customer feedback loops build long-term brand loyalty.

### 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.



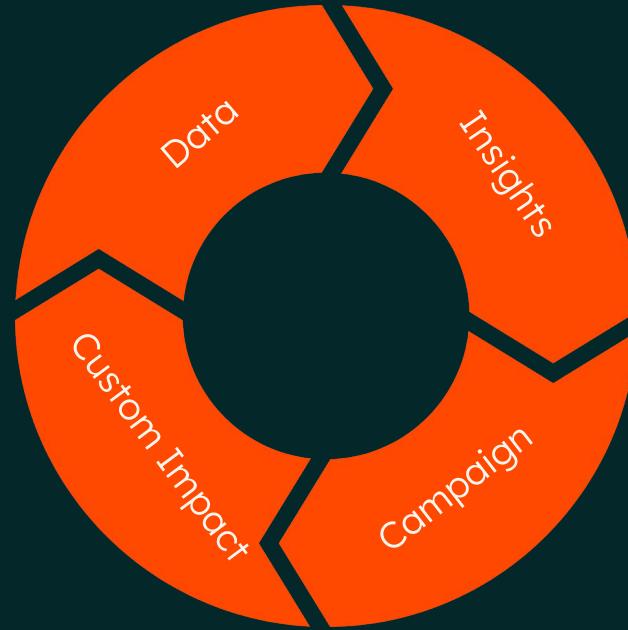
## Audience Share

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



# Common Alignment Gaps

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)



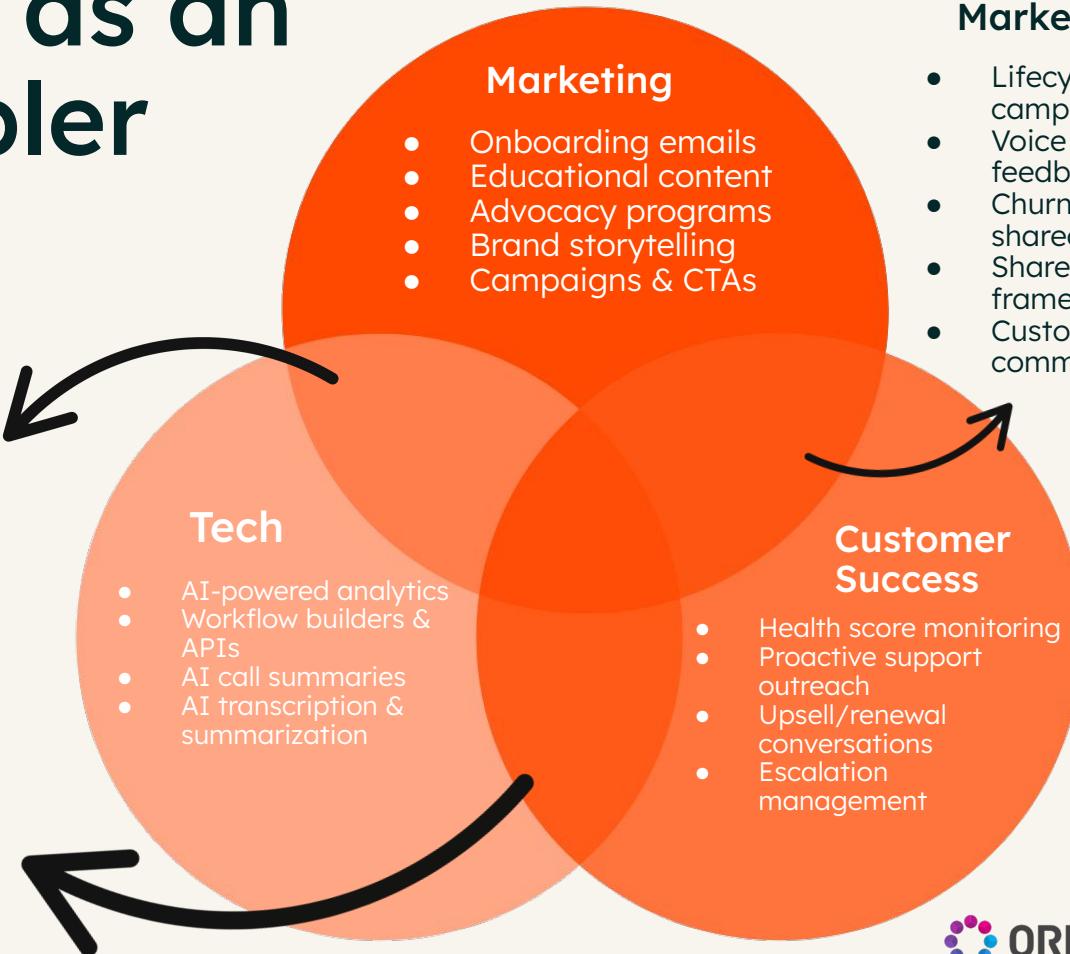
# Tech as an Enabler

## 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

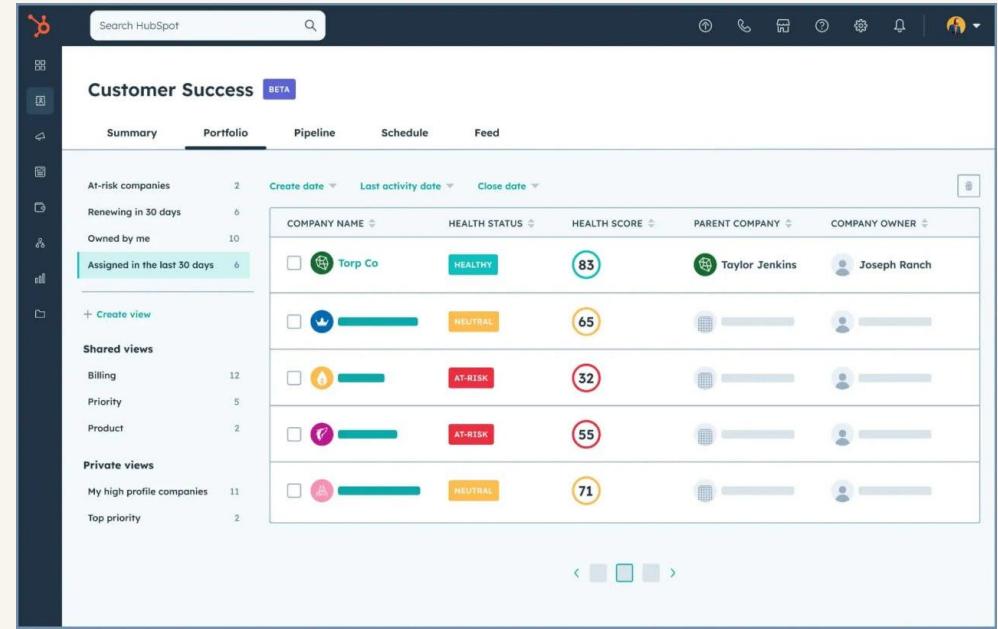
- Ticket deflection tools
- Risk alert triggers
- Support automation
- NPS-based workflows
- Workflow automations (post-sale)



## 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 dashboard in BETA mode. The main interface includes a search bar, a navigation bar with icons for user, phone, file, help, gear, and notifications, and a user profile icon. The dashboard has tabs for Summary, Portfolio (selected), Pipeline, Schedule, and Feed. On the left, there are sections for 'At-risk companies' (2), 'Renewing in 30 days' (6), 'Owned by me' (10), and 'Assigned in the last 30 days' (6). Below these are 'Shared views' for Billing (12), Priority (5), and Product (2), and 'Private views' for 'My high profile companies' (11) and 'Top priority' (2). The central area displays a table of companies with their health scores. The columns are: COMPANY NAME, HEALTH STATUS, HEALTH SCORE, PARENT COMPANY, and COMPANY OWNER. The table shows 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		

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 (Early Signals)	Lagging Indicators (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  Time-to-kickoff call Engagement with onboarding campaigns	Time-to-first-value  Onboarding completion rate  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  Feature adoption rates  Engagement with activation content	Onboarding success score Product adoption %  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  Click-to-conversion on upsell offers  Expansion opportunity pipeline created	Expansion revenue Average order value increase 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  # of referrals generated  Social engagement with advocacy content	New customers acquired via advocacy Volume of advocacy assets (case studies, testimonials)  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>	<p>“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.”</p>	<p>“Analyze this HubSpot export of campaign performance by segment. Highlight which cohorts drive the most expansion revenue and summarize their common engagement patterns.”</p>
<b>Voice of Customer Insights</b>	<p>“From NPS comments in HubSpot, group feedback into 5 key themes and suggest one marketing action per theme.”</p>	<p>“From NPS and CSAT comments in HubSpot, Identify the top sentiment trends and potential risks, with example customer quotes for each.”</p>

# Prompt Playbook:

	Open AI	Claude
<b>Retention Risk Detection</b>	<p>“Find accounts with 20%+ drop in usage over 60 days and low marketing engagement. Suggest personalized win-back campaigns.”</p>	<p>“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.”</p>
<b>Advocacy Opportunity Spotting</b>	<p>“List customers with NPS 9–10, high adoption, and recent positive feedback. Suggest 3 ways to feature them in advocacy marketing.”</p>	<p>“Review this HubSpot dataset for customers meeting our advocacy profile. Recommend potential stories, case studies, or referral incentives.”</p>



# Put Your Action Plan in Motion!

# Yours Should Look Like This:

	Onboarding	Activation	Expansion	Advocacy
<b>Marketing Touchpoints Today</b>	Day 1: Celebration email 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  Increase in early product usage	Conversion to key activation milestone  Feature adoption rate	% of customers upgrading  Expansion revenue generated	# of referrals  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

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Thank you!