



Unlocking Customer Delight with HubSpot Service Hub.

8 October 2025

HubSpot



* Do better. Be better.

SPITFIRE 

Introduction



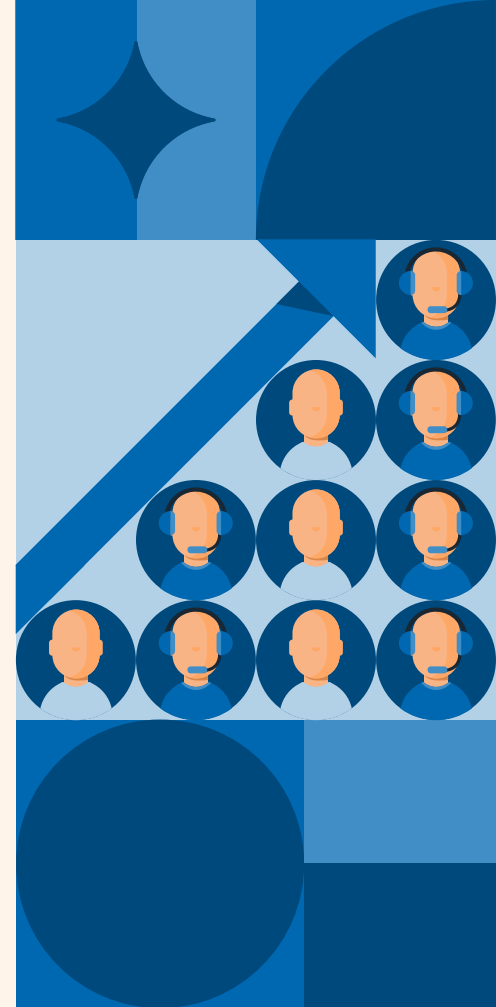
Dolly Jaiyeola
Principal Account Director | Africa
HubSpot

Agenda

- Service Hub Presentation
- Panel discussion
- Q&A

For the last decade, **customer service delivery** has relied on headcount.

It's been a **linear growth** formula - the more customers you earn, the more reps you hire to serve them.



The **Old** Way



More **Reps**
Headcount by default



Isolated **Tools**
Limited insights



Closing **Tickets**
Meeting expectations

Cost Center

Disrupted by:

- Low CSAT
- AI
- Evolving goals
- Incomplete customer profiles

The **New** Way



AI-Empowered **Reps**
Digital by design



Unified **Platform**
360 customer insights



Retain & Grow
Customers
Delivering value

Revenue Driver

Driven by:

- Retention & usage
- Increased simplicity
- Rep effectiveness
- Unified source of truth



Pain



Business Impact



The Solution

Customers expect faster support, but resources are flat.



Declining CSAT and support rep frustration.



Resolve issues 24/7 with **AI Chatbot**, optimize your support org with **advanced SLAs, skills-based routing**, and an **omnichannel help desk**.

CX tech is siloed, and the customer journey is fragmented.



Internal friction from too many sources of truth.



Provide **360 clarity** to your marketing, sales, and service teams through a **unified CRM**, and empower your reps with **AI-powered recommendations**.

It's hard to retain customers long-term.



Lost revenue from customers churning.



Grow proactively with the **customer success workspace**, and uncover insights to drive revenue expansion and **product usage**.



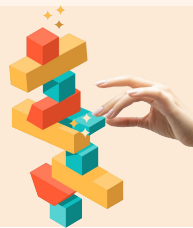
**Easy to use.
Easy to love.**



Leader on G2

A tool your teams
want to use

**Crafted,
not cobbled.**



Built on HubSpot

A Smart CRM that doesn't
require middleware

**Purpose-built
to scale and
grow.**



Built for CX Teams

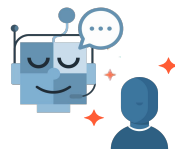
Empowering you with
software & Academy courses



Service Hub

It's AI-first, it's omnichannel, and it ushers in a new era of customer service.

With Service Hub, you can scale support, drive retention, and increase customer value - all in one place.



Scale support with AI

13x

Faster ticket resolution times



Drive proactive retention

83%

Experience increased retention

To win in this landscape, CX leaders must

...scale personalized service

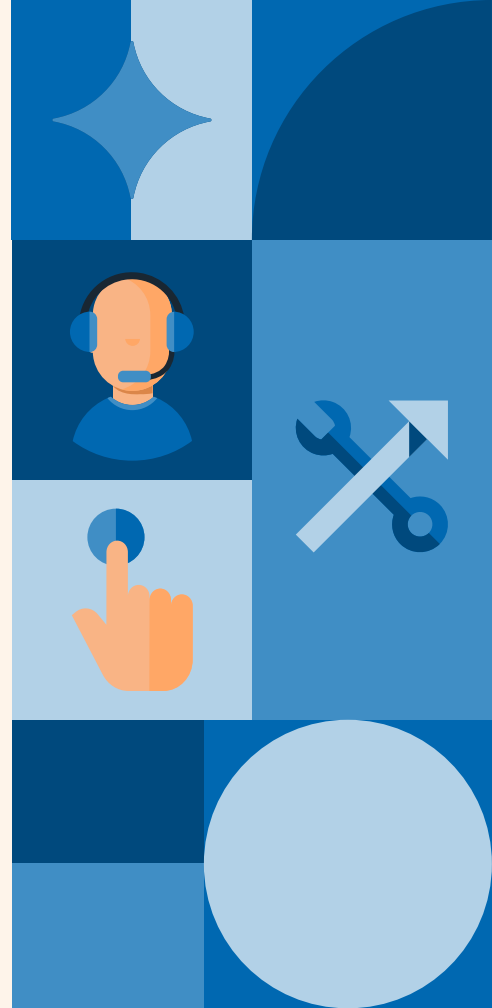
...across every channel

...while increasing retention



Service Hub

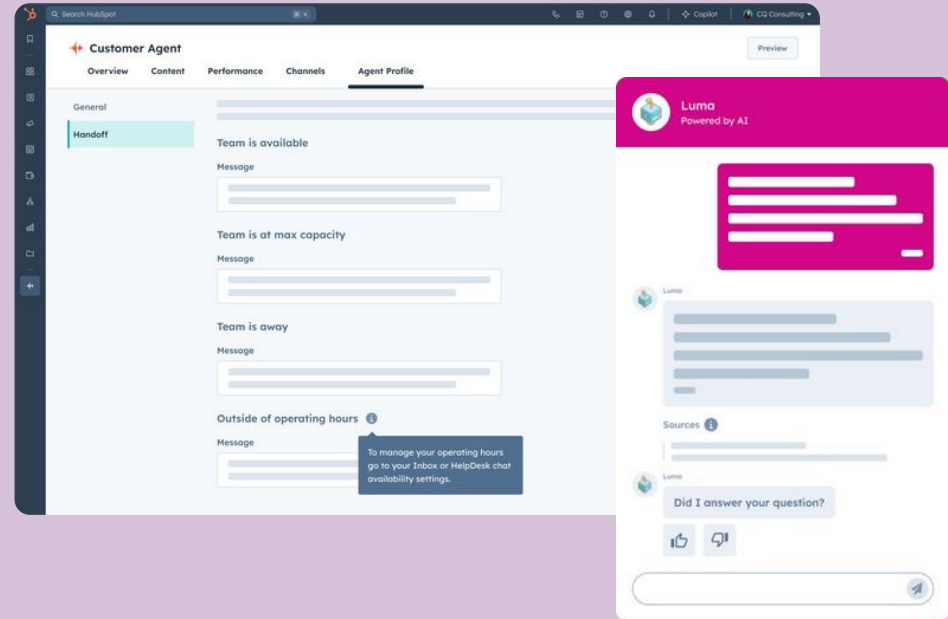
Features




SCALE SUPPORT

Breeze Customer Agent

Cut support volume, increase efficiency and resolve customer queries 24/7 with a GPT-powered AI Agent. Use your knowledge base, website, short answers, and PDFs as a repository of information, ensuring a safe and seamless AI-powered experience for your customers.



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 AI-Powered



SCALE SUPPORT

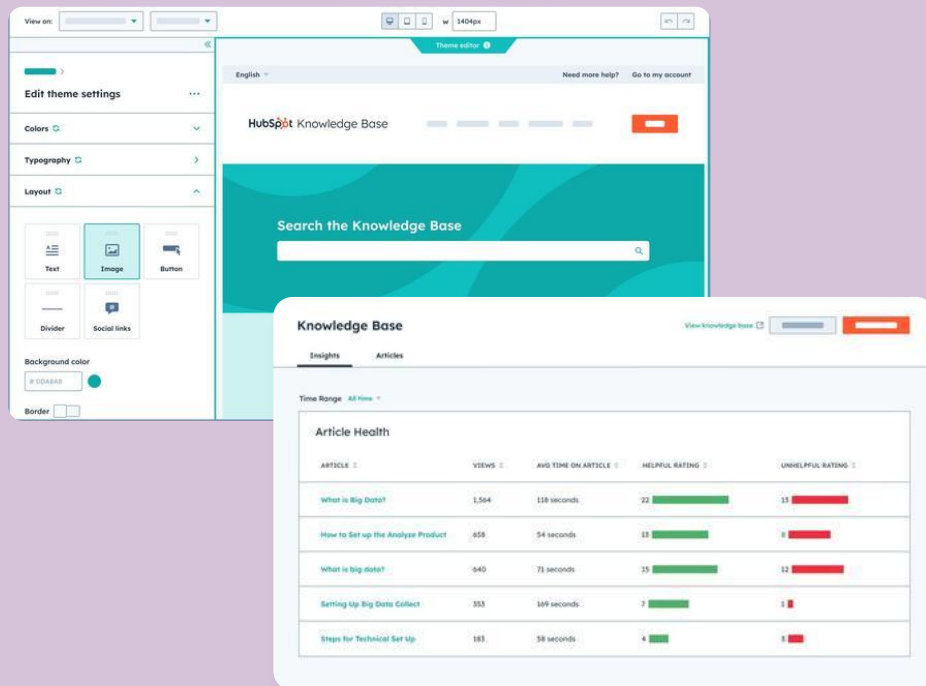
Knowledge Base

Help customers help themselves, reducing your number of support requests. Create up to 25* search optimized knowledge bases for your unique brand or audiences, filled with help articles, videos, and documentation. Collect feedback on articles and analyzes search patterns to improve your articles.

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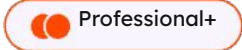
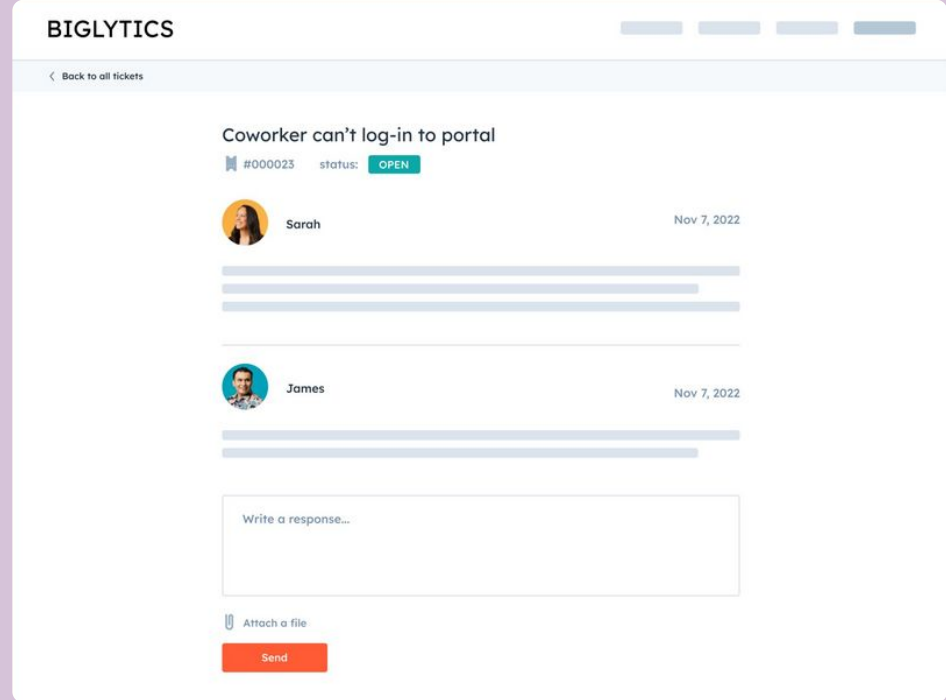
*Service Hub Enterprise only



SCALE SUPPORT

Customer Portal

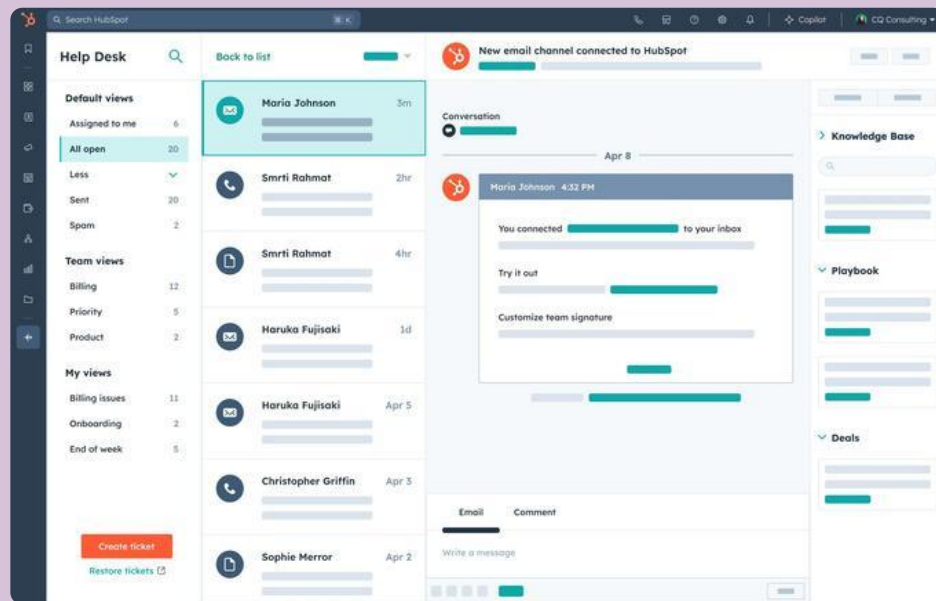
Your customers have more control over their customer service experience with a secure place to view, open, and reply to their support tickets.



SCALE SUPPORT

Help Desk

Scale support with the AI-powered Help Desk Workspace that connects your tickets and conversations all in one place. Drive personalized support on any channel, report on your progress against SLAs, and utilize the knowledge panel to empower 360 intelligence for your support reps.



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SCALE SUPPORT

Skills-Based Routing

Route tickets based on skill (language, tier, etc.) to ensure customers are connected with the right Agent the first time.

Account Defaults
Audit Log
Users & Teams
Product Updates NEW
Integrations
Marketplace Downloads
Tracking & Analytics
Privacy & Consent
Sandboxes
Security
Approvals
Routing
AI
Commerce NEW
Data Management
Properties
Object Library NEW
Objects
Translations

Routing

Rulesets
Skills
Capacity limits NEW

Ticket capacity limits

Manage the maximum number of open tickets in help desk for each user. A temporarily pause for users who are at full capacity. Only users with Servio limits. [Manage seats](#)

Filter by: All users

<input type="checkbox"/>	NAME	
<input type="checkbox"/>	Adriti Gulati agulati@hubspot.com	
<input type="checkbox"/>	Alex Arltan aarlant@hubspot.com	
<input type="checkbox"/>	Amber Bachiani abachiani@hubspot.com	
<input type="checkbox"/>	Andrew Shen ashen@hubspot.com	
<input type="checkbox"/>	Antoinette Hocba ahocba@hubspot.com	

Create routing rule

A new ticket from **hello-5@hubspothelpdeskdemo.hs-inbox.com** will trigger of of this ruleset.

Note: This rule will execute first. If one or more conditions are not met, the next rule will execute.

Rule name *

VIP Customers - French Canadian

- First, check if the ticket has all these properties

Ticket is associated to: **Any Company**
And associated Company has all of:
Annual revenue is greater than **15,000**

AND

Ticket is associated to: **Any Contact**
And associated Contact has all of:
Preferred language is any of **French - Canada**
- Then, if all the conditions above are met, assign to a specific user

Within these teams in help desk

Select teams

That has these skills

Main: **Français** X White glove X
- Otherwise, continue to next rule

Save and create next rule

Current ticket count: 1
2
Current ticket count: 0
3
Current ticket count: 0

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SCALE SUPPORT

Capacity Limits

Set capacity limits at the user level to balance distribution. Top Agents can handle more tickets while providing a manageable workload for new hires.

The screenshot displays the 'Availability Management' section of the Service Hub interface. On the left is a sidebar with navigation options: Settings, Your Preferences, Account Management, and various system settings. The main content area shows a table of users with their status and capacity. Above the table, there are filters for Users, User status, and Inboxes, all set to 'All'. A help text explains that user availability is linked to an inbox and directs users to the 'Users & Teams' page for general management.

USER	USER STATUS	CAPACITY
Adrii Gulati	Available	2/5 tickets
Alex Arnan	Available	4/5 tickets
Amber Bachlani	Available	1/1 ticket
Caitlyn Cimikoski	Available	1/5 tickets
Chris Bonas	Available	1/3 tickets
Dani Pardo	Available	2/5 tickets
Danny Vendrell	Available	3/2 tickets
Eric Hirsch	Available	11/6 tickets
Jenn De Mello	Available	3/3 tickets



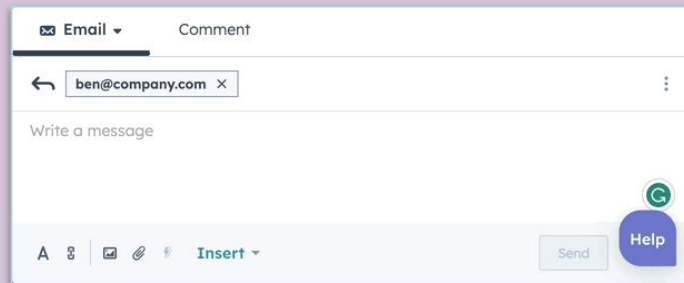
SCALE SUPPORT

Breeze Content Assistant

Automatic AI-generated ticket summaries help your team triage long threads quickly and move onto the next ticket faster. Plus, AI-powered reply recommendations based on ticket context speed up time-to-reply.

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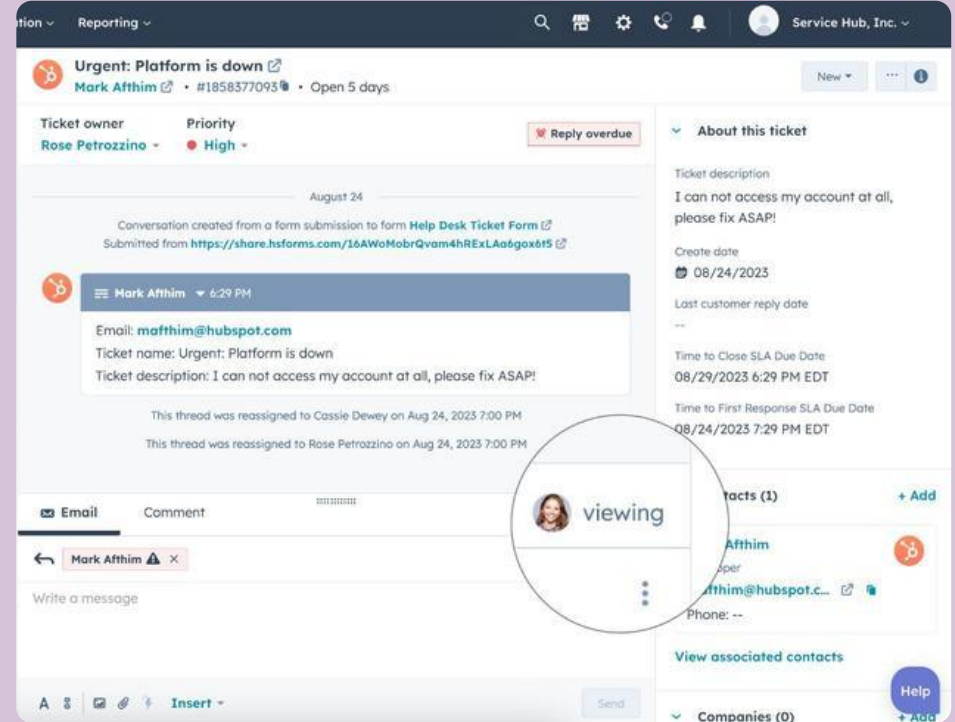
AI-Powered



SCALE SUPPORT

Agent Presence

Reduce duplicative work, and ensure multiple agents aren't working on the same ticket at the same time. With Agent Presence, support agents working out of Help Desk will see icons for other agents who are viewing the same ticket.



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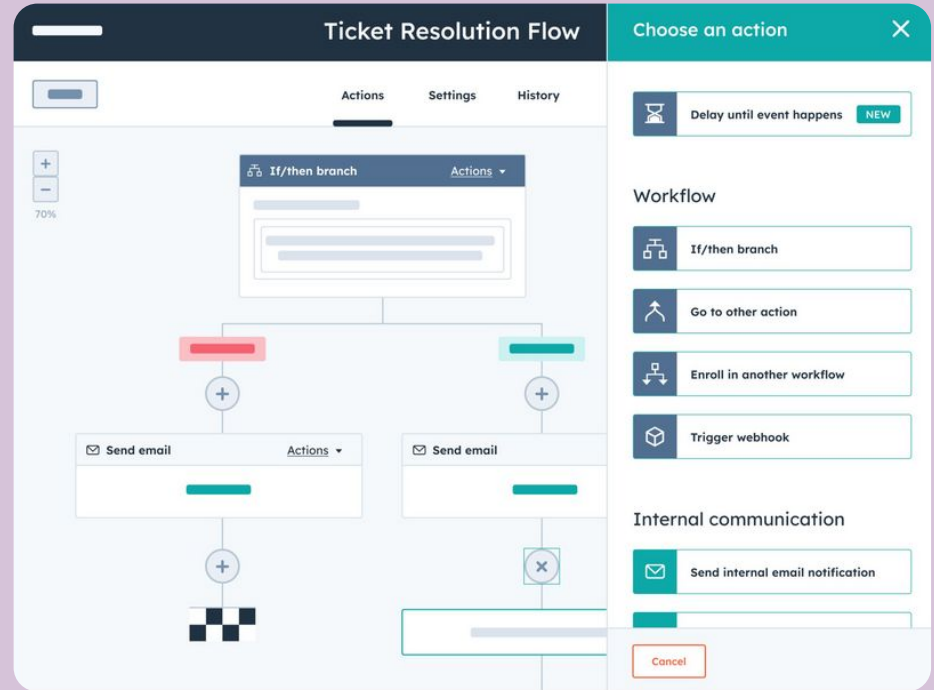
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SCALE SUPPORT

Ticket Automation

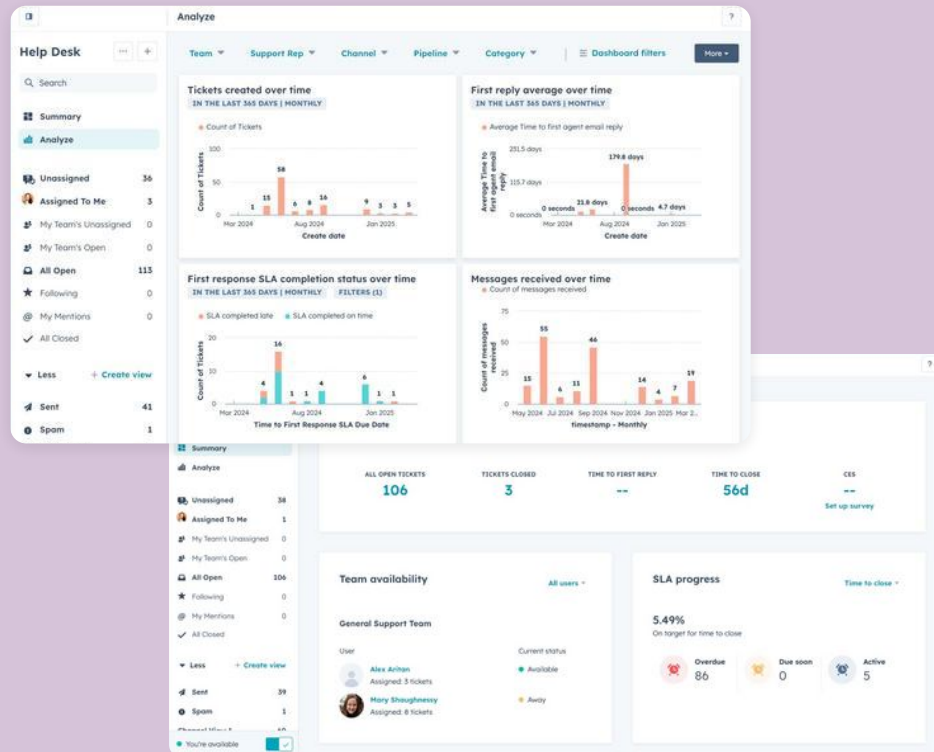
Help Desk has many of the essential automation features that support teams love, like automation based on status, customer or agent responses, ticket acknowledgement and closed ticket emails.



SCALE SUPPORT

Service Analytics

Uncover key insights from within the Help Desk with out-of-the-box reports that help you deliver service that is both efficient and authentic. Track your most important metrics with our service analytics: CSAT, average time to close ticket, chat wait time, and support volume.



84%

83%

experience increased CSAT

experience increased retention

Drive

Retention

Use our all-new Customer Success Workspace to keep your customers smiling from ear to ear.

Proactively manage your book of business with actionable insights, customer health scores, and real-time usage data.



Breeze Customer Health Agent

Create a customer retention plan with next best actions, recommended talking points, email templates, and more. Save CSMs time to retain and grow customers.

Beta

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Assess Acme.com Churn Risk

Export PDF Copy link

Visual Output

Retention Plan for At Risk Account

Next Best Actions

- 1. Immediate personalized outreach:** Directly email or call the key stakeholders, referencing previous conversations, and ask about their product experience.
- 2. Offer a value refresher session:** Proactively propose a meeting to review their current goals, share usage tips, or introduce any new product features.
- 3. Investigate contacts' engagement:** Review individual contacts for changes in activity or role, and attempt to reengage any previously active champions.

Recommended Talking Points

- "I've noticed it's been a while since we've connected—how have you been finding the platform lately?"
- "Many customers in your industry are leveraging **feature X**—are there areas where you think we could help maximize your value?"
- "We want to ensure your team is getting the most out of your investment—can you share what's working and what could be improved?"

Insightful Discovery Questions

- "Have there been any recent changes to your goals, workflow, or staffing that could impact your use of our platform?"
- "Are there obstacles or unmet needs that have reduced team engagement?"
- "How do you currently measure value from our product, and do you feel you're seeing the results you expected?"

Output

Assess Acme.com Churn Risk

Export PDF Copy link

Account Summary & Risk Status

Account Overview

Company ACME Industries

Industry Computer Software

Employees 1,000

Location 618 Franklin Street, Michigan City, IN, United States

Status Customer

Risk Grade

Risk Level At Risk

Primary Risk Driver Low-to-no recent engagement, inactivity on CRM touchpoints, absence of log-in data

Evidence & Findings

Recent Calls / Meetings No recent records found; attempts to retrieve activity by company failed

Support Tickets / Notes No open or recent tickets / notes; none accessible by company_id



AI-Powered



DRIVE RETENTION

Beta

Breeze Customer Handoff Agent

Ensure a seamless transition across the customer journey - with no detail left behind. The agent handles the information transfer so teams can focus on personalized customer engagements.

Star
ter+

Activities

Received user input: This is what we already have (acme.com, sales rep, Customer Success owner)

Analyzing provided handoff for additional CRM data and improvement opportunities

Creating review checklist for handoff report completeness and enrichment

CrmObjectSearch - to complete the requested operation

Researching company news for most recent updates since last report 2 sec

Evaluating news fetch error for ACME Industries recent news query

CrmObjectSummary - to complete the requested operation

What would you like to change?

ACME Account Ownership Handoff

Export PDF Copy link

- Deals & Contacts: No associated deals or contacts present for this account.

3. Opportunities & Challenges Opportunities:

- New or unresolved tickets highlight technical touchpoints that could create advocacy or improvement if resolved quickly.
- Large-scale account (1,000 employees, software sector) suggests room for expansion/upsell if product relevance is reinforced.
- Lingering tasks (not started) present a way to open fresh dialogue.

Challenges:

- No direct contacts mapped to this company in CRM, making contact mapping an urgent priority.
- Very limited engagement history beyond open tasks and basic ticketing activity - the account is at risk of disengagement if not proactively managed.
- Both call tasks are still not started, indicating potential for missed opportunities or a stall in relationship building.

4. Customer Sentiment & Quotes

- Direct Quotes: No direct customer quotes or explicit feedback available in CRM records or ticket notes.
- Sentiment (inferred): Responses have been passive, with engagement largely inbound regarding issues; current state is receptive but not invested.

5. External Context



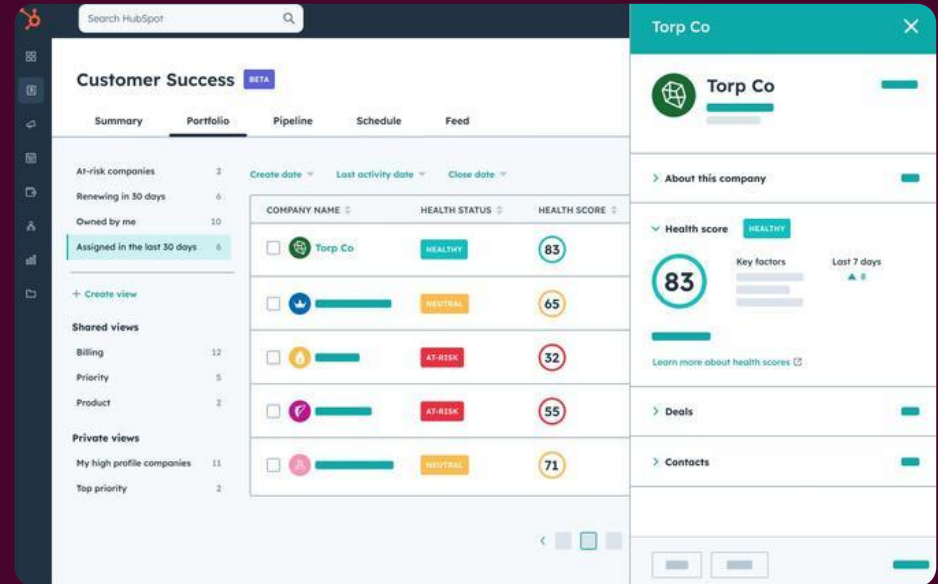
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DRIVE RETENTION

Customer Success Workspace

Drive proactive customer value and empower reps to manage their entire book of business in one place, with the new customer success workspace.



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DRIVE RETENTION

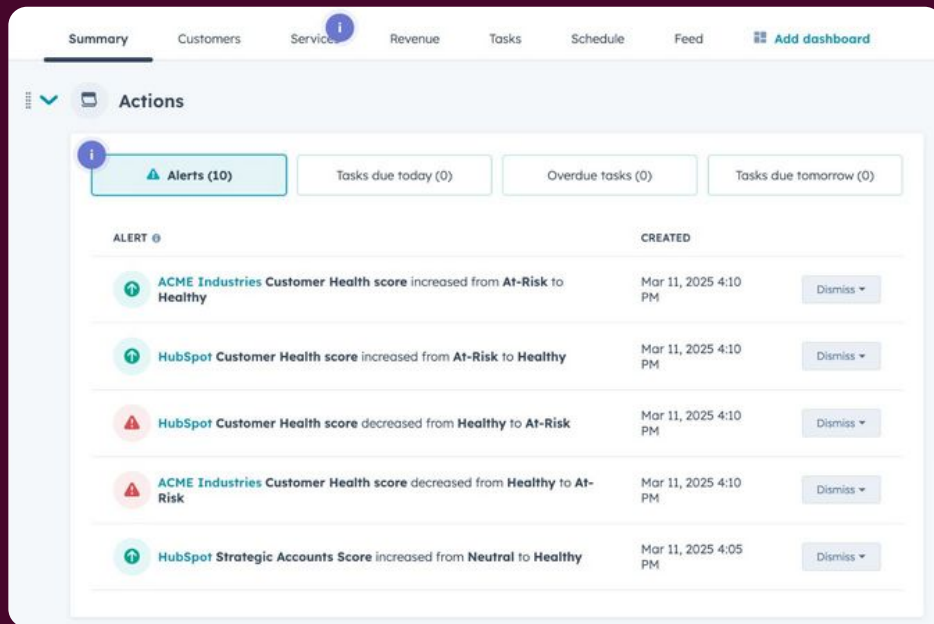
Health Score Alerts

Receive alerts when health scores change status, ensuring your team has real-time information to make decisions. Create a score based on a company, contact, or custom object.



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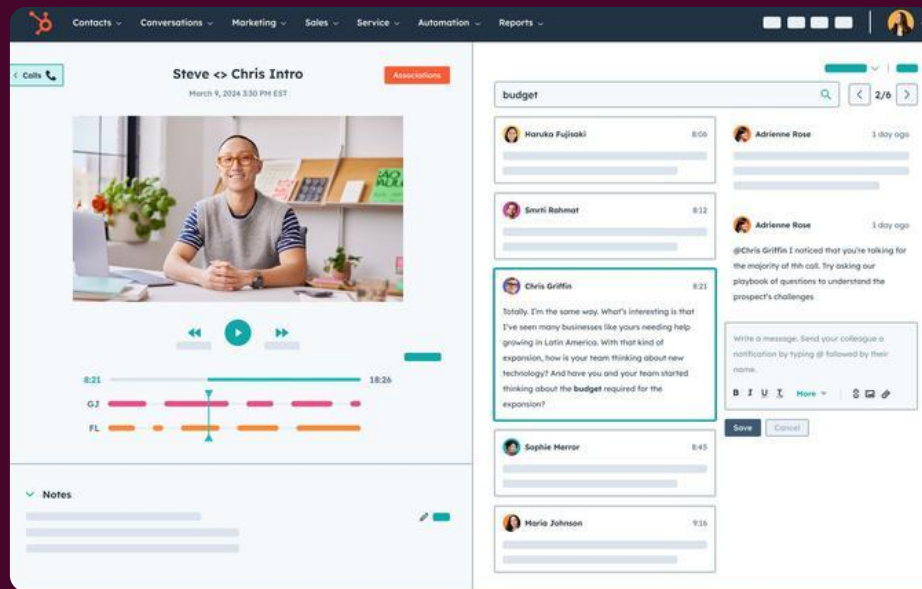
Seat Required



DRIVE RETENTION

Conversation Intelligence

Leverage AI to gain insight into contents of your calls. Automatically track terms of interest, and build reports based on call content. Apply Conversation Intelligence to your calls placed through HubSpot Calling, Zoom, JustCall, Kixie, and more.



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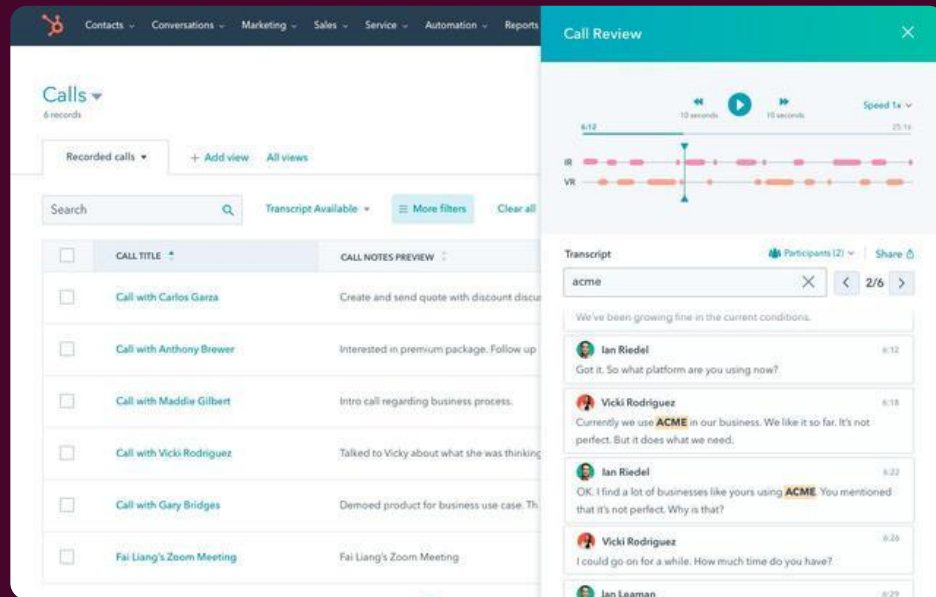
Seat Required



DRIVE RETENTION

Call Transcription & Coaching

Gain real-time insight into calls with automatic recording and transcription to help you coach your team and gain visibility into your customer conversations.



The screenshot displays the Service Hub interface. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main content area is divided into two sections. On the left, a 'Calls' section shows a list of 6 records. The table has columns for 'CALL TITLE' and 'CALL NOTES PREVIEW'. The right section, titled 'Call Review', provides a detailed view of a specific call. It includes a timeline with a play button and speed controls, a transcript of the conversation, and a list of participants.

CALL TITLE	CALL NOTES PREVIEW
Call with Carlos Garza	Create and send quote with discount disc
Call with Anthony Brower	Interested in premium package. Follow up
Call with Maddie Gilbert	Intro call regarding business process.
Call with Vicki Rodriguez	Talked to Vicki about what she was thinking
Call with Gary Bridges	Demoed product for business use case. Th
Fai Liang's Zoom Meeting	Fai Liang's Zoom Meeting

Call Review

Transcript

acme

We've been growing fine in the current conditions.

Ian Riedel: Got it. So what platform are you using now?

Vicki Rodriguez: Currently we use **ACME** in our business. We like it so far. It's not perfect. But it does what we need.

Ian Riedel: OK. I find a lot of businesses like yours using **ACME**. You mentioned that it's not perfect. Why is that?

Vicki Rodriguez: I could go on for a while. How much time do you have?

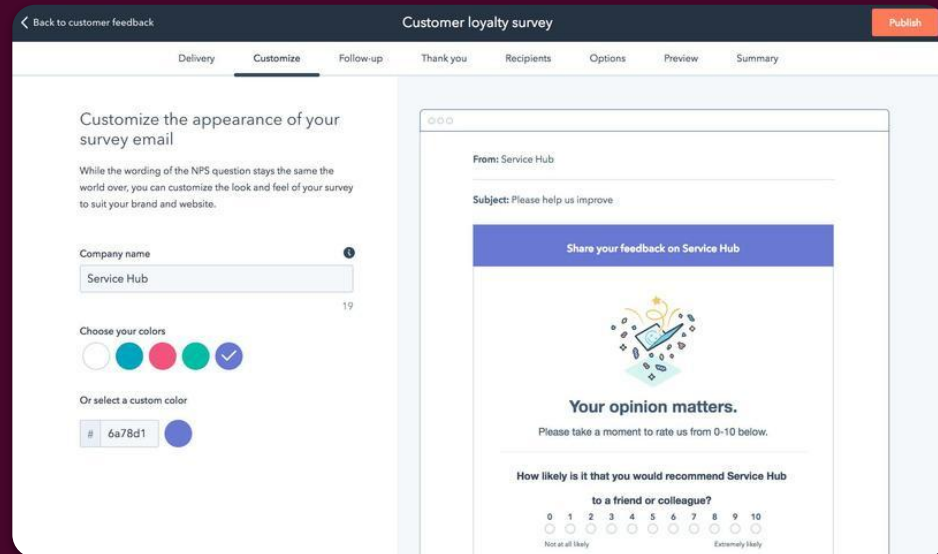
Ian Leaman



DRIVE RETENTION

Customer Feedback Surveys

Deploy pre-built feedback surveys that track key customer service KPIs (Net Promoter Score, Customer Experience Score, Customer Satisfaction) and follow up with customers automatically based on their response.



The screenshot shows the 'Customer loyalty survey' customization interface in Service Hub. The top navigation bar includes 'Back to customer feedback', 'Customer loyalty survey', and a 'Publish' button. Below the navigation bar are tabs for 'Delivery', 'Customize', 'Follow-up', 'Thank you', 'Recipients', 'Options', 'Preview', and 'Summary'. The 'Customize' tab is active, showing options to 'Customize the appearance of your survey email'. A text box explains: '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.' Below this, there is a 'Company name' field with 'Service Hub' entered. A 'Choose your colors' section shows four color swatches (white, teal, pink, green) with a checkmark on the green one. An 'Or select a custom color' section shows a hex code input with '# 6a78d1' and a blue color swatch. The right side of the interface shows a preview of the survey email. The email header includes 'From: Service Hub' and 'Subject: Please help us improve'. The main body of the email has a blue header with 'Share your feedback on Service Hub', an illustration of a laptop with a lightbulb, and the text 'Your opinion matters. Please take a moment to rate us from 0-10 below.' The survey question is 'How likely is it that you would recommend Service Hub to a friend or colleague?' with a rating scale from 0 to 10. The scale is labeled 'Not at all likely' at 0 and 'Extremely likely' at 10.



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DRIVE RETENTION

Custom Surveys

Tailor your survey to your business needs with a diverse array of question types and a customizable template. Send surveys via web link or email, then share insights with your teams so you can deepen customer relationships and improve retention.



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Build your survey

Add different question types or include previously used questions. You'll add a feedback property to each question to make sure answers are linked to contacts in your CRM. [Learn more](#)

> Previously used questions ⓘ

NEW

Question types



Rating



Sentiment



Radio



Checkboxes



Dropdown



Single-line text



Multi-line text



Number

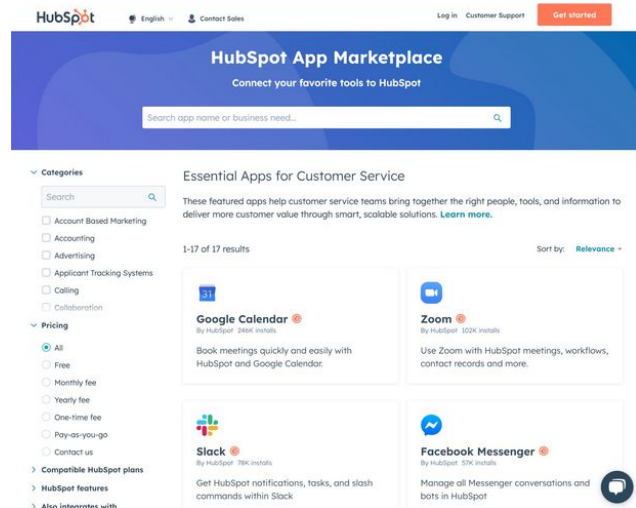


Date



HubSpot App Marketplace

Featuring essential apps to align your teams, tools, and data on a unified customer service, so you can connect with customers in an effective and meaningful way.



01

Aircall

Handle inbound customer calls with Aircall integration from the Help Desk Workspace.

02

WhatsApp

Manage WhatsApp conversations in HubSpot's shared inbox and automate personalized messages.

03

Amplitude

Get proactive customer insights with this improved integration that syncs product usage data with HubSpot.





NotebookLM Panel Discussion

Exploring the Future of Research & Writing

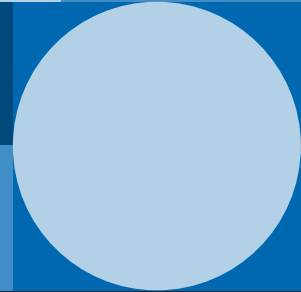


Host A
AI Research Lead

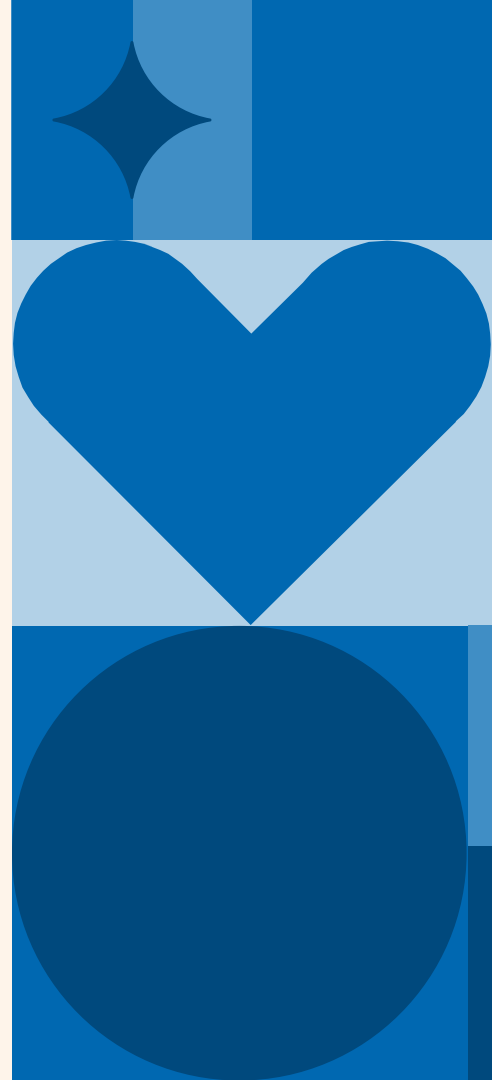


Host B: ResearCom -
Generative Writing Expert

Hosted by NotebookLM - Unlock New Insights



Q&A





Thank You

HubSpot



* Do better. Be better.

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