

CASE STUDY

HubSpot Service Hub Integration: Unifying Customer Data for B2C Service Excellence

Overview

This case study demonstrates how Systems Plus partnered with a large U.S.-based B2C service provider to enhance its customer service operations using HubSpot Service Hub. The client faced challenges such as fragmented data, operational inefficiencies, and inconsistent service quality. By integrating HubSpot with tools like UJET for call management and Hightouch for data synchronization between Snowflake and HubSpot, Systems Plus helped streamline the customer service process, improve operational efficiency, and create a scalable solution for future growth.

Challenges

The client, managing tens of thousands of customer interactions monthly, encountered several operational challenges:

1. Fragmented Data Across Teams

Customer data was spread across multiple systems, creating silos between service, RevOps, and analytics teams. This fragmentation hindered the ability to deliver consistent service and made it difficult to collaborate effectively.

2. High Call Volume and Limited Context

With a high volume of calls, service agents lacked real-time access to customer histories, which led to longer call times and inconsistent service.

3. Limited Data Integration and Inefficient Pipelines

The existing tools had limited integration capabilities, resulting in inefficient data flow between platforms and a lack of comprehensive customer insights.

4. Reactive Customer Service Model

The disconnected data systems made it challenging to track customer trends or identify proactive support opportunities, leading to missed chances to address issues before they escalated.



Solution: HubSpot Service Hub Implementation

Systems Plus implemented a comprehensive solution, integrating HubSpot Service Hub with other tools to enhance customer support efficiency, provide real-time data, and foster collaboration across teams.



1. Unified Customer Support Database

HubSpot Service Hub was implemented as the central platform, consolidating customer data into a unified database. This gave service agents real-time access to customer profiles, enabling more personalized and efficient support.



3. Enhanced Customer Insights with Hightouch

A reverse ETL process using Hightouch was set up to sync Snowflake's enriched data directly into HubSpot. This integration gave service agents valuable insights into customer behavior, such as activity scores and purchase histories, improving the quality of support.



5. Collaboration Between Service and RevOps Teams

By centralizing all customer data in HubSpot, Systems Plus helped align the service and RevOps teams. Both teams had a consistent view of customer interactions, ensuring smoother handoffs and a unified approach to customer engagement.



2. Seamless Data Integration

Systems Plus developed private apps to enable secure ETL and reverse ETL processes between HubSpot and Snowflake. This ensured data flowed smoothly between platforms, providing agents with timely insights into customer activities and transactions.



4. Real-Time Call Management with UJET

The integration of UJET, a cloud-based contact center solution, allowed service agents to manage calls directly from HubSpot. Call logs were automatically updated, and agents gained access to complete customer histories, improving first-contact resolution and reducing call handling times.



6. Automated Workflows and Custom Ticketing

HubSpot's workflow automation was configured to route and prioritize tickets based on urgency and customer history, reducing response times and ensuring faster issue resolution. Custom ticket properties helped classify requests for better follow-up and analysis.

Implementation Roadmap

The four-month implementation plan was executed in structured phases to ensure minimal disruption:

- Phase 1: Data Migration and HubSpot Customization**
Systems Plus migrated customer data into HubSpot, customizing the CRM and Service Hub features to meet specific needs like ticketing customization.
- Phase 2: API Development for Data Synchronization**
Private apps were developed for secure data transfer between HubSpot and Snowflake. Hightouch was integrated to enable reverse ETL, ensuring data consistency across platforms.
- Phase 3: UJET Integration for Real-Time Call Management**
UJET was integrated with HubSpot, allowing service agents to manage calls with instant access to customer data, improving call efficiency.
- Phase 4: Cross-Team Training and Dashboard Customization**
Service and RevOps teams were trained on HubSpot's features, and custom dashboards were created to monitor customer interactions, trends, and support metrics.
- Phase 5: Ongoing Monitoring and Optimization**
After launch, Systems Plus monitored performance metrics, optimized workflows, and continuously improved the service operations based on customer feedback and analytics.

Results and Key Benefits

The HubSpot Service Hub implementation led to significant improvements in operational efficiency and customer service:



1. Improved Customer Service Efficiency

Automated workflows and ticket categorization reduced ticket resolution times by 35%, resulting in faster, more personalized responses and higher customer satisfaction.



2. Enhanced Data Visibility and Collaboration

The integration of HubSpot with Snowflake and UJET improved data access for both service and RevOps teams. This cross-team visibility led to a 25% increase in operational efficiency, as teams were able to collaborate more effectively and deliver consistent service.



3. Faster Call Handling and Higher First-Contact Resolution

Real-time call management through UJET cut call handling times by 20%, while improved access to customer histories led to higher first-contact resolution rates.



4. Proactive Customer Insights

With enhanced analytics and insights from HubSpot and Snowflake, the client was able to track customer trends, identify issues earlier, and implement proactive support strategies.



5. Scalable Infrastructure for Growth

The solution established a reliable, scalable data pipeline between HubSpot and Snowflake, ensuring that the infrastructure could support future growth and keep customer data accurate and accessible.



Conclusion

Systems Plus successfully helped the client optimize its customer service operations with HubSpot Service Hub, UJET, and Hightouch. The implementation created a centralized, data-driven support system, improving efficiency, collaboration, and customer satisfaction. This case study showcases how integrating advanced tools with HubSpot Service Hub can streamline operations and provide scalable solutions for long-term growth in customer service.

Founded in 1987 by Mr. Nikunj Jhaveri, Systems+ offers a comprehensive suite of IT services, including Managed GIC services, DevOps, Cloud Consulting, Development and integration support, and SOC/NOC services. We specialize in serving global clients across various sectors such as (but not limited to) Retail, FMCG, Logistics, Manufacturing, and Financial Services. Our approach to service delivery ensures maximum business agility through the integration of cutting-edge technology with legacy systems. As industry leaders in building managed Global In-house Centers (mGICs), we've successfully set up over 25 active mGICs, ensuring cost-efficient, high-quality solutions, and simplifying the offshore journey for our clients.

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