Simple Strat

INSTANT INSIGHTS INTO CLIENT SATISFACTION —

Creating an Easy System for Automated Client Feedback in HubSpot

The Challenge

With frequent client meetings for onboarding, delivery, and success updates, our client—a digital advertising agency—wanted more timely insights into how well these calls were resonating from the client's perspective. They faced:

- **Limited visibility into client satisfaction** post-meeting, risking unaddressed concerns or gaps in the customer experience
- **Missed opportunities to collect feedback** and improve client-facing processes based on real-time feedback
- **A lack of structured follow-up** that could ensure the team consistently met client expectations across each stage of their engagement

The Solution

We built a feedback survey automation system within HubSpot. Now, whenever a client meeting is marked as completed, HubSpot triggers a survey to be sent if the client's lifecycle stage is set to "customer/client." This survey collects valuable insights on call preparedness, agenda coverage, and overall client satisfaction—empowering the client with instant feedback after each meeting.

The Impact

The client now has a structured process for continuous improvement and quality assurance. They can:

- Capture actionable feedback immediately after each meeting, allowing for rapid response to client needs or concerns
- Strengthen client relationships by showing commitment to listening and improving their service
- Increase the effectiveness of their customer success team by identifying patterns or areas for improvement based on real client insights

The Details

Industry:
Digital Advertising

Business Area:
Customer Success

Tools Used:
- Feedback Surveys
- Workflows
- Meetings
- Lifecycle Stages