

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

•	Date entered Customer stage More than 30 days ago	Criteria
0	Start from scratch Set your own enrollment criteria	Recent meeting completed date is known
da l	Static lists Existing marketing lists	Lifecycle stage is any of Client
		Estimated recipients 0

The Details

Industry: Digital Advertising

Business Area: Customer Success

Tools Used:

- Feedback Surveys
- Workflows
- Meetings
- Lifecycle Stages

Events that will trigger this workflow:	
Has completed change • Meeting outo Completed	: Meeting outcome
Contacts will re-e	nroll into this workflow.
Ô	Show details
	(+)
1. Edit record Set Recent meeting date this action was a	completed date to the executed.

