

APPENDIX

Inventory and Checklist: Where do I go from here?

In order to win in the age of AI, meaningful customer connections are a must. But it's hard to put your best foot forward if you're not even sure how far you are on your journey.

Every business is at different stages of their question for customer connection. And that's okay! What matters is where you go from here.

By completing this checklist, you can not only get a sense of where you currently stand in regards to customer connection, but also know the actionable steps you can take to improve.

Remember, this self-assessment is designed to help you understand where you currently stand in your customer connection journey. Think of it as a jumping-off point for further exploration and improvement. Once you finish, you'll be able to look back on the advice given earlier in the playbook and start turning ideas into action.

Here's how it works

Each of the three sections includes self-graded questions related to how well you're currently connecting with your customers. **On a scale of 1 to 5, rank yourself with 1 being "Strongly Disagree," 3 being "Neutral," and 5 being "Strongly agree"**. Add up your scores at the end and see where you stand.

Discover

1. We have structured the content on our website in a clear, conversational, concise way so search and AI can ingest it. (1) (2) (3) (4) (5)
2. We have evolved our content strategy beyond text to include new formats especially short form video. (1) (2) (3) (4) (5)
3. We have begun to diversify content creation by working with influencers and communities. (1) (2) (3) (4) (5)
4. We have begun to leverage our knowledge of our customers to more successfully target our advertising message. (1) (2) (3) (4) (5)
5. We leverage HubSpot social, content, and advertising tools. (1) (2) (3) (4) (5)

Consider

1. We use bots powered by AI to serve personalized content tailored to the individual needs of each prospect during connection. (1) (2) (3) (4) (5)
2. We leverage multiple channels based on user preferences to optimize customer interactions and nurture leads. (1) (2) (3) (4) (5)
3. We incorporate AI in our content creation process to ensure we have the most relevant content for prospects. (1) (2) (3) (4) (5)
4. We leverage HubSpot features (i.e. SMS, bots) to optimize customer interactions and nurture leads throughout their journey. (1) (2) (3) (4) (5)

Buy

1. Through the power of AI, we give sales reps the tools to provide in-depth diagnoses and tailored consultations that solve problems for customers. (1) (2) (3) (4) (5)
2. We use AI tools to accelerate the buying process, delivering personalized experiences that forge stronger, longer relationships with customers. (1) (2) (3) (4) (5)
3. We give customers tools to determine the best products for them and buy those products on their own. (1) (2) (3) (4) (5)
4. We give customers tools to book time with and get information from sales reps. (1) (2) (3) (4) (5)
5. We leverage HubSpot features in Sales Hub & Commerce Hub to assist in the buying process. (1) (2) (3) (4) (5)

Use

1. Time to value is a metric that we measure and work to improve. 1 2 3 4 5
2. We use bots to deliver prompt support to our customers coupled with human assisted, personalized support to our customers, ensuring their satisfaction and success. 1 2 3 4 5
3. Through the power of AI, we give our support reps the tools to provide personalized assistance empowering our customers to succeed and delivering exceptional support experiences. 1 2 3 4 5
4. We use HubSpot features such as bots and knowledge base to drive usage of our products. 1 2 3 4 5

Now, add up your results.

0-30 Room to Improve

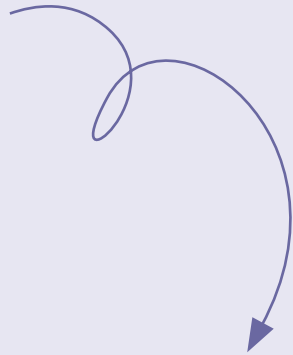
As it stands today, your customer connection framework could use some TLC.

31-59 Opportunity

You're on the right track, but you're still missing out on opportunities for enhanced customer connections.

60+ Budding Connector

You're on your way to building top-notch connections. Still, revisit strategies consistently and work with your teams to maintain momentum.



If you scored between 0-30...

Your results indicate that there is room for improvement. Don't panic — this is an exciting opportunity for growth and positive momentum! AI is such a newfound game-changer that there's still plenty of time to understand and integrate it to bolster your customer connections.

Here are three action items your business can move on today:

→ **Start Getting Personal**

The best customer connections are personal ones. Dive deep into understanding your customers' needs, preferences, and pain points. Use this valuable knowledge to tailor your interactions and communications. Whether it's through personalized emails, targeted messaging, or customized offers, show your customers that you truly understand and care about their unique journey by personalizing as many touch points as possible.

→ **Craft Compelling Content Experiences**

Elevate your content strategy to create captivating experiences that resonate with your audience. Embrace the art of storytelling to engage and inspire your customers. Don't sell to them — solve for them. Develop content that addresses their challenges, provides valuable insights, and sparks meaningful conversations. Leverage AI-powered tools to optimize your content creation process and maximize its impact. Avoid spamming prospective customers, and work to prioritize quality over quantity with your content.

→ **Foster Genuine Human Connections**

AI needs to be part of the larger gameplan, but never underestimate the power of human connection. Infuse your customer interactions with warmth, empathy, and authenticity. Encourage your team to actively listen, engage in meaningful conversations, and provide personalized support. Leverage technology as an enabler to enhance, not replace, the human touch, and train sellers to become trusted advisors and problem-solvers. Whether it's through live chat, personalized phone calls, or face-to-face interactions, let your customers feel valued and heard.

If you scored between 31-59...

Your results indicate that you're on your way to becoming a Connector. You have a lot of the critical foundational elements in place, and you're primed for growth. Now, it's time to make it happen.

Here are three action items your business can move on today:

- **Expand Your Efforts Across the Entire Customer Journey**
The numbers don't lie; companies that forge meaningful connections with customers at every touchpoint are the ones that come out on top. Start to map out each touchpoint, interaction, and potential pain point throughout the customer journey. Leverage the power of data and the tools available in HubSpot to gather insights and deliver personalized experiences at every stage. Taking this holistic approach to customer engagement can move you closer to becoming a Connector.

- **Strategically Balance Human-Driven and AI-Driven Tools**
Your business should be living at the corner of technology and authenticity. Lean on AI-powered tools like Content Assistant and ChatSpot to nurture leads, then bring in the human touch to personalize your deal and customer stages. Embrace this harmony, and you'll create impactful experiences, foster loyalty, and unlock new avenues for growth. Your customer journey should be where personalization meets scalability, and where automation enhances, but never replaces, the human element.

- **Embrace Multichannel Engagement**
Don't limit yourself to a single channel when connecting with your customers. Capitalize on the potential of multichannel engagement to meet them where they are. From social media and email marketing to live chat and beyond, make your presence felt across various touchpoints. By showing up and providing support across multiple channels, you'll expand your reach and create more opportunities for meaningful interactions.

If you scored 60 or higher...

Your results indicate that you've achieved remarkable success in connecting with your customers! However, you know that there's always room to improve. You're perfectly poised for the AI era, now it's about maintaining that success and remaining innovative and agile in the coming years. There are always opportunities to refine your strategies and take your customer connections to the next level.

Here are three action items your business can move on today:

→ **Dive Deeper Into Customer Data**

You and your customers get along great, but there's always valuable data waiting to be explored. Dive into your customer data to uncover deeper insights about their preferences, behaviors, and pain points. Analyze the most up-to-date patterns, trends, and correlations to gain a more comprehensive understanding of your audience. By staying on top of evolving customer data, you'll be well-positioned to cater to their changing needs.

→ **Embrace continuous optimization**

Even as a Budding Connector, there's always room to optimize and fine-tune your customer connection efforts. Leverage the power of A/B testing to experiment with different approaches and measure the impact. Test variations in messaging, content formats, and engagement channels to see what resonates best with your audience. Continuously analyze the results, learn from them, and refine your strategies accordingly. Remember, optimization is an ongoing process that can drive remarkable improvements over time.

→ **Act on insights and adapt**

The key to sustained success is not only gathering insights, but also acting on them. Use the valuable data you've collected to inform your decisions and adapt your strategies. Whether it's personalizing customer experiences, refining your content strategy, or enhancing your engagement channels, make proactive adjustments based on the insights you've gathered. By staying agile and responsive to your customers' evolving needs, you'll ensure that your business remains at the forefront of customer connection.

Let's Get Started

In your pursuit of better customer connections, you don't have to navigate the journey alone. Your dedicated Customer Success Manager at HubSpot is here to support and guide you every step of the way.

Together, we'll unlock the full potential of your business and create remarkable customer experiences that drive growth and success. Connect with your Customer Success Manager and let's embark on this exciting journey together.

