A BEHIND THE SCENE VIEW OF HUBSPOT'S PRODUCT-LED ONBOARDING (PLO)

Product Led Hub

RESEARCH & AUTHORSHIP

DESPINA EXADAKTYLOU
FOUNDER & CEO PRODUCT-LED GROWTH HUB

PRODUCT-LED GROWTH STUDY HubSpot

FOREWORD

FOREWORD

FOREWORD

FOREWORD

FOREWORD

Upon the release of our comprehensive **Product-Led Growth research** and the introduction of Product-Led onboarding (PLO) as a business framework, the term seems to become all the more popular across the SaaS industry.

So far, we've analyzed how PLO affects SaaS organizations PLG levels but we never actually mentioned how our research led us there. Its contents prove that, if nothing else, Product-Led Onboarding becomes the number one PLG denominator in more ways than originally anticipated.

SaaS organizations, need to either deliver a data-driven framework driving customers down the customer lifecycle or be lost in obscurity. This Product-Led Growth study proves that Product-Led Onboarding (PLO) practices are already in effect. As a matter of fact, product-led driven organizations like Hubspot contributed a lot,to the formulation of the PLO term as we know it.

We would like to give special credits to Hubspot's team members who contributed to this ProductLed Growth study that required the conduction of six unique interviews.

Despina Exadaktylou
Founder & CEO Product-Led Growth Hub

WHAT IS PRODUCT-LED ONBOARDING?

Product-Led onboarding (PLO) ™ is a set of data-driven product engagements that consider users' behavioral notions and proficiency. As a strategy, it avoids random feature introduction to users.

PLO exploits historic data and considers users’ proficiency levels when exploring a product for the first time. Contextual guidance substitutes its main pillar and enables organizations to double down on product experience and users’ workflow early on.

The term was coined by ReinventGrowth in the research publication "The State of Product-Led Experience" in April 2019.

DISCLAIMER

This case study refers to growth techniques that were in effect during the summer period of 2018. There is a case those tactics are no longer part of Hubspot's product-led onboarding strategy.

ATTRIBUTION GUIDELINES

At ReinventGrowth, we believe research is the best way to provide insights about the fast paced ever-changing SaaS landscape.

Feel free to distribute and use this study in your own content and republish any findings with the caveat of providing ReinventGrowth as the source of the original research.

If you would like to learn more about Product-Led Growth practices we regularly share more insights, on product management, onboarding, growth and SaaS practices on our blog.

RESEARCH & AUTHORSHIP

Despina Exadaktylou Founder & CEO Product-Led Growth Hub

TABLE OF CONTENTS

TABLE OF CONTENTS
TABLE OF CONTENTS
TABLE OF CONTENTS

TABLE OF CONTENTS

INTRODUCTION

INTRODUCTION
INTRODUCTION
INTRODUCTION
INTRODUCTION

INTRODUCTION

If you are into SaaS even for a minute, you don't need to be aware of Hubspot's product-led growth strategy to understand that it substitutes an innovator for the industry.

Since its establishment by Brian Halligan and Dharmesh Shah, Hubspot's practices have been adopted, analyzed and mentioned in tens of publications.It would be at least inaccurate to claim that Hubspot's, onboarding practices can be described in a single case study.

During our research in Product-Led Growth practices, we thoroughly examined most aspects of the unicorn's product-led onboarding strategy.

Including how its onboarding activations affect its customers, users, and sales partners' performance.

We would like to give special credits to Hubspot's onboarding team that helped us compile this study, which its needs entailed the conduction of six unique interviews .

FORMER ONBOARDING
FORMER ONBOARDING
FORMER ONBOARDING
FORMER ONBOARDING

The formulation of Hubspot's product-led onboarding strategy entails many experiments and structural changes. Onboarding is anticipated internally as a work in progress and as with any other part of its business strategy, ongoing optimization is a given.

The former onboarding approach was executed by the implementation specialist (IS) team which is now responsible for the professional onboarding services. At the time, the IS team did not use Hubspot to onboard customers but a third-party management tool. The tool was utilized to set customer's goals, hold them accountable and upload the required educational content.

The strategy was effective but in the long run, customers had to familiarize themselves with two tools instead of one. To deal with that situation Projects, a custom management tool, was created and eventually replaced the third party solution.

The former onboarding was in effect up until a while ago when Hubspot was not executing a product-led growth strategy yet. Back then, the marketing platform was the major selling point. A product with a longer sales cycle, applying to high trajectory customers, who expect to be treated by customer-facing departments.

Fast forward to now, where the CRM constitutes Hubspot's fundamental solution.

This shift happened because the product growth team realized that customers' were using the marketing platform essentially as a CRM- a place where users can store contacts, create relationships and engage with them over time. A shift that seems to be paying off since the service counts thousands of monthly sign-ups.

PLO FUNDAMENTALS

PLO FUNDAMENTALS
PLO FUNDAMENTALS
PLO FUNDAMENTALS
PLO FUNDAMENTALS

PRODUCT-LED ONBOARDING FUNDAMENTALS

Being the driver behind user experience, Product-Led Onboarding directly affects product experience along with the delivery of a PLG strategy. Regardless of the industry served or if buyers are managed by customer-facing teams, onboarding can either eliminate time-to-value (TTV) or lead to churn. There is no in-between.

Hubspot is aware of that and as an organization with multiple solutions under its nest, its first rule of thumb is to invest in experimentation and product-led onboarding practices optimization.

The unicorn attracts and retains millions of users annually. Its targeted industry is the mid-market but due to its prevalence, its customer base also includes SMBs and enterprise organizations.

The first characteristic following Hubspot's product-led onboarding strategy is the countless self-serve resources. Their plethora includes access to Hubspot’s communities on and infinite material in the form of articles or videos.

While live chat, CRM automated flows, tooltips, walkthroughs, product tours, personalized welcome messages, in-app tutorials, Net Promoter Score (NPS) and progress bars, on the other hand, are just some of the exhaustive product-led onboarding tactics used.

User education is synonymous with the unicorn's product-led onboarding activations. In general and unlike many people's beliefs there is not a definitive answer, as to when and where in-app tactics should be placed. Simply because users' behavior per segment differs dramatically. The product growth group runs all kinds of experiments based on feedback that originates from research, support tickets or the customer-facing teams.

So, there is a case that tooltips are used while someone performs a task since they have proved to be useful when users are in the middle of a task and may pause to understand features' capabilities. The focus behind any pattern is not on the technique used, but to whether or not it follows users' notions contextually.

MAKING PRODUCT-LED ONBOARDING AN INTENTIONAL EFFORT

Being an innovator in its core, Hubspot anticipates that for a successful product-led onboarding strategy to be delivered it has to become is an intentional effort across an organization. Simply because it spans across multiple departments, including professional services, customer success, marketing, and product.

As within most large organizations the difficulty lies in creating alignment across those departments since it is difficult to find a common growth metric, that will act as a common point of reference.

There is a case that one department may be looking at the number of calls or churn and another at retention or adoption. Metrics that are related, but at the end of the day they are not the same.

This challenge follows any organization trying to be product-led driven, beyond just involving the product and engineering teams and striving to create alignment by building into the concept of where the product is now versus where it might be in the future.

At the time of the survey, the formulation & culture of the product team includes product groups within which there were many small and autonomous teams. Something that allows task ownership, quick iteration, and decision making.

For example, the product growth group had a team focused on acquisition, onboarding, retention, and monetization. The group included user researchers, product analysts, and marketers that acted as shared resources. At the same time, each of the individual teams was constituted by a triad (product manager, UX designer, tech lead) and software engineers.

THE PRODUCT-LED ONBOARDING MISSION

At the time of the survey, the product growth team's mission was twofold. The first part entailed enabling users to adopt and configure the CRM. The second included the evaluation of the platform's service and marketing free offerings that require a different form of adoption.H

Honing into the fundamentals of a product-led onboarding strategy, the conceptual understanding of the product is always a matter under consideration. The team's main focus on the matter is divided into:

1. The investigation of daily core actions users need to perform day one
2. Enabling users to figure out how to make sense out of the marketing and service hub by setting triggers in-app.
3. Involve the tactical tasks' optimization in order to enable users to evaluate key features and embrace adoption.
4. The ultimate goal is to combine both the conceptual and tactical tasks based on different user segments while serving them in the best way possible, by considering their role, context of usage and the challenges they encounter.

MARKETING PERSONAS VS. USER ROLES

How can product-led onboarding be tailored to follow users' notions is a rather big discussion. For product teams to get there, they need to first anticipate the differences following each user role.

In Hubspot's instance, the product growth team employs many ways to excel in this task but essentially it tries to acknowledge user behavior in and out of the product.

In regards to the CRM, different marketing personas are considered like marketers, business owners, sales reps or team leaders.

Regardless of the users' business role, within their organization, the team assesses the roles in the product itself, along with their responsibilities and goals, to prioritize product-led onboarding tasks and outcomes.

The team complements its knowledge, in regards to personas' evolution, via infinite user research that helps to eliminate gaps in relation to context of usage. There is the acknowledgment that those personas are both growing and affected by market changes and it is imperative internally to assess those factors, in order to excel product-led onboarding delivery.

For example, what a marketer knew five years ago is not necessarily what is following his job description now. Marketers have become more technical and there are new personas emerging as Hubspot's products evolve.

The Service Hub introduced a while ago, was launched because of the feedback derived from the user research team. This feedback arose from fieldwork and user interviews that were conducted to better understand their needs and concerns.

PERSONAS & USER SEGMENTATION

At the end of the day, those personas are prospects entering the platform from many different paths. When it comes to their segmentation there are a lot of ways the marketing and product growth teams deal with that task.

One of them is to segment the various landing and sign up pages to discover users' intent based on which Hubspot solution or specific tool, the advertising content is referring to. In that way the track of volume is estimated and what kind of leverage the marketing team has overall.

The second criterion constitutes the user's business role and the workflow following him. The scope here is to see if users' daily tasks can help the product team reach specific conclusions, in regards to the entire product-led onboarding process. While the overall actions taken within the product generally appeal to the individual versus team dynamic.

PERSONAS & USER SEGMENTATION

Although that method seemed to be working for a while, at the end of the day user testing proved that those questions were more confusing than originally anticipated. In the end, users weren't exactly sure what they should accomplish or thought that each answer would direct them to a different CRM mode.

Eventually, the product growth team got rid of the question and used the knowledge derived from onboarding itself, putting in that way the "burden" on users to identify what they try to accomplish. Something that in the end highlighted the tasks that users needed to achieve.

On the bright side, the research uncovered the product-language fit, eliminated gaps in regards to features' positioning and helped, in the long run, to increase new users' proficiency levels.

THE JTBD RESEARCH FORMAT

Despite the fact that Hubspot did not share with us the exact research format, the JTBD framework used, incorporated the following characteristics:

SWITCH INTERVIEWS

Switch interviews is a technique used to understand why someone realized a purchase. When used to investigate end-users behavior, it examines the milestone events and triggers that impact the journey of switching from an old solution to a new one. While in the long run it is being examined how these milestones affected customers' decision-making process.

FIELD STUDIES

Field studies are the most applicable method for collecting data about users' needs and product requirements via observation and a series of interviews.

In those studies data about task flows, inefficiencies, along with users' organizational and physical environment are collected.

DIARY STUDIES

Diary studies is a research method used to collect qualitative data about user behavior, activities, and experiences over time. In a diary study, data is self-reported by participants over an extended period of time, varying from a few days to a month or longer.

CONTEXTUAL ENQUIRY

Contextual enquiry is a research method used to understand users' decision-making process when adopting a new product by asking them questions that embraced that decision.

PARTICIPATORY DESIGN

Participatory design is an approach actively involving all stakeholders in the design process to ensure that the result meets their needs.

TIMELINE TO PURCHASE

The timeline to purchase maps users' progression throughout the buyer journey when switching from an old to a new solution by considering event triggers and milestones in the decision-making process. When using this technique product growth teams can visualize factors keeping users to an existing solution and those forcing them to adopt a new one.

FORCES OF PROGRESS

The forces of progress are tools used to map out contributing factors that will make a user lean towards maintaining the status quo or developing a new behavior.

PRODUCT-LED ONBOARDING FLOWS SEGMENTATION

FORCES OF PROGRESS

Back to the Product-Led onboarding strategy's specifics, a question that may resonate at this point is: How many onboarding flows a service encompassing so many personas and user roles entails?

While the word infinite may be the first that comes to mind, the truth is that only a few two segments and onboarding flows are prioritized. Mostly because the team needs to assess if their approach is deriving the expected results at an experimentation level.

One main point of focus is sales representatives and managers, as there's a lot of volume and they have great potential to grow within the service. Even if users sign up for the free CRM features in the beginning and decide to take another turn, later on, the main onboarding flow will not change.

The solution's Product-Led Onboarding strategy is around the product and aims to highlight actions and content that resonate with users.

So, while specific base role actions are prioritized, features or functionalities are not hidden in order to allow users to evolve within it.

Regarding those actions prioritization, as with any other product-led organization, they are defined by the product itself. If for example, the team wants to assess for which solution the user is a PQL for, it monitors product data. Eg. If the user is writing emails or creating landing pages he would most probably be a fit for the marketing hub.

QUALITATIVE &. QUANTITATIVE FEEDBACK ALIGNMENT

The team also combines quantitative data with qualitative feedback they receive from the user success coaches or other consultants. Sample feedback entails what questions users ask in terms of setting up or their existing projects along with conversations they are having

Further on, and after both forms of feedback are analyzed the growth team derives various conclusions. One good example might be users creating their first landing page or creating their first contact within the first seven days are being successful and retained well downstream. After the team examines all those factors ends up with a list of core actions that need to be performed in each hub.

The whole process, however, does not come without its challenges. As with many products incorporating multiple value points, the main issue is not to frontload multiple actions upon the first activation.

Because it could be a list of twenty items and they would all be correct, but users' capacity does not entail the execution of so many actions within a limited time frame.

PLO BEST PRACTICES

PLO BEST PRACTICES
PLO BEST PRACTICES
PLO BEST PRACTICES
PLO BEST PRACTICES
PLO BEST PRACTICES

As mentioned earlier the product team's structure includes product groups or families within which there are many small and autonomous teams. The product growth group is focused on acquisition, onboarding, retention, and monetization and in this context, the UX researchers work on those tasks along with the rest team members.

In regards to product-led onboarding and the parts affecting UX, the researchers look at users' behavior first and then zoom out to have a look at their holistic experience. The complexity following three unique products, connected with each other via infinite paths cannot be described easily. It is fairly easy for internal teams to get lost in silos, quantitative data, and procedures incorporating how these products work together.

PRODUCT-LED ONBOARDING & CONTEXT OF USAGE ALIGNMENT

A common challenge for large organizations is to lose track of the outcomes following user behavior. In Hubspot's instance, the onboarding team functions as the connective tissue between those departments. The team understands the connection across all products by anticipating context of usage, which equates to users' motivations and goals asides from the product itself.

A while ago, the team realized customer visits in an effort to build empathy and understand better users' workflows.

Unlike customers relying on customer-facing teams to successfully onboard, freemium's users rely on the product to get the job done. Thus, it was imperative for the team to fill in the blanks when it comes to their day-to-day working routine and challenges.

This is just a mere example though. The onboarding team constantly develops principles and values around product-led onboarding itself by investigating areas where users struggle or usability needs to be embraced.

SETTING THE GROUND OF PRODUCT-LED ONBOARDING PRINCIPLES

Before conducting any investigation the steps followed by the UX researcher incorporate:

1. Identification of Three unique user segments that need to be explored, along with their own flavors and variations.
2. Where user experience bottlenecks lie, how successful users look like and the content they need to capitalize upon before deciding where to take action on those findings.
3. Define which actions (asides from product usability) the user needs to realize to become successful.

Exemplary questions following the research are:

- What does a marketer or a sales manager need to do to be successful with Hubspot?
- Which are the educational material required to educate users and via which methods should the knowledge be acquired?

After all, questions have been answered the product team leverages the Implementation Specialists' feedback, which works very closely with the onboarding team to identify success points. The UX researcher might also hear how the IS team walks customers through calls and understand why they signed up or the communication language.

Once the success paths are mapped the next steps incorporate how to insert those actions into the product itself. There are so many different tactics in terms of how a user needs to learn and especially if we consider the variety of different roles within the solution.

Following this logic, the team is being proactive and use product data to identify patterns early on set up along with the behavior characterizing each user role. If for example, a marketer signs up via a specific landing page, he answers questions associated with his goals and then contextual guidance is provided.

It is wise to mention at this point, that the user needs to understand the product on multiple levels to get the most out of its capabilities and features.

The first is the macro level which incorporates understanding the solution and tools' variety. While the second is the mid-level understanding stage, which enables users to anticipate how those tools work together.

PRODUCT-LED ONBOARDING: THE HUMAN ASPECT

The User Success Coaching team constitutes the human aspect of Hubspot's self-serve onboarding approach. The team was created to provide support, setup, implementation and next steps to free users likely to become HubSpot customers. Those users are differentiated by their companies' size, industry and other related info that can be gathered from their corporate domains.

THE USC TEAM'S MISSION

The mission of a customer success coach (CSC) is to help users activate, find value from the very beginning and become better customers who retain longer. A CSC serves users via 30 minute scheduled calls, the in-app chat and weekly webinars across timezones.

The team positions a meeting opportunity via:

1. Auto-prospecting emails from Sales
2. In product CTAs within the help widget or as a response to a failed task
3. Sales reps. who invite users to adopt, set up or understand the product prior to purchase.

- On-demand technical help since free users don't have access to phone support.

Every user is treated equally in terms of time and attention. Prior to any call users answer the open question “What are you looking to accomplish with HubSpot?” in order for the CSC to know the call’s nature. On top of that the CSC checks individually prior to any call:

1. The account’s activity, to draw results from passive feedback.
2. The user’s record within the database to check if prior communication has taken place
3. The prospective organization’s website to check its services and digital presence

During the call, the CSC tries to understand the output users need from Hubspot’s toolset, anything in regards to cost and how the product can be used in daily tasks.

The priority is to uncover business needs and determine the content and the onboarding activities that need to be prioritized. In case the goals of the user are not clear a sales or marketing funnel is utilized for prospects, in order for questions to be asked from both parties around the current pain points.

THE ONBOARDING EDUCATIONAL MATERIAL

Regarding the educational material, they can include role-specific or role agnostic email onboarding sequences and product engagements. Since the call duration is only 30 minutes, the required “pre-work” material based on user feedback has been sent beforehand, to help users have a head start when setting up an account.

Alternatively, the diagnosis and next steps happen during and after the call. The USC sends everything from specific written instructions to custom made videos for next steps or agnostic written instructions from the knowledge base. In case the user purchases a plan a complimentary 30 minutes call to setup is offered.

Lastly, after any call, the team looks at larger metrics to assess user activation and adoption.

PRODUCT-LED UX RESEARCH

PRODUCT-LED UX RESEARCH
PRODUCT-LED UX RESEARCH
PRODUCT-LED UX RESEARCH

One of the reasons the UX team has grown rapidly the last years is the growing need to assess customer and user feedback. It would be actually rare for the organization to make a product decision without taking feedback into consideration.

Of course, there are multiple factors examined before it is defined how a UX research would be conducted. The research forms vary depending on the goals that need to be achieved, the insights that need to be derived and the constraints following them.

The researchers' main focus is the biggest risks associated with adoption and how they are being defined by user experience. The research methods vary from interviews to user behavior or product data analysis and prototype testing with customers. That being said, at the end of the day, context dictates which research method is best to derive the required feedback.

FEEDBACK PRIORITIZATION

Feedback prioritization is also determined by context, in regards to what the team is working on and what needs to be fixed. First in terms of like aside from research, by considering what needs to be built and secondly by having the engineering team focus on what has a major impact based on business goals. So, depending on the project in question impact may focus on improving activation, retention or revenue.

From there onwards it's a matter of finding how to provide the right answers based on the questions that need to be answered. For example, if the 1st-week retention is really bad the product manager syncs with the UX researcher and asks to conduct research based on specific behavior patterns. Following that, the researcher establishes if the specific issue exists with every user or just with a specific user role.

Moving forward, a product analyst brings more qualitative data on the table to help shape usage patterns and the researcher decides to either derive passive feedback or conduct a diary study. In the latter instance, the participants document their experience over the course of a week and then analysis follows the generated data.

USER EXPERIENCE (UX) FRICTION POINTS

In general, a successful UX means quick wins by the side of the user. Internally this is framed within the limits of helping users achieve their goals. Sometimes their progress can take a while. So, while the 'quick wins' are necessary in regards to what the team can deliver, the most impactful ones are those solving complex problems.

Additionally, instead of only assessing how they help users see incremental progress over time, the teams consider how they feel when they encounter the product.

- Can the journey map their experience and emotions?
- Are there times where users feel pain or anxiety? If so, what can be done to alleviate those things?

Are just some of the questions following the UX researcher's daily workflow. On a more broad level though, it all comes down to understanding and empathizing with users' needs by:

- Creating personas profiles at least in a high level (realistic user personas)
- Acknowledging the reason users started using the product and what they want to achieve.
- When and in what context the product is being used
- What expectations users have when adopting the product
- How can the product meet or exceed those expectations

In conclusion, while there is not one-size-fits-all user experience, the UX research team assesses similar criteria like those described above and uses certain tools to determine what is the right approach to understand user concerns.

IDENTIFYING FRICTION POINTS

To identify the friction points, the product growth team capitalizes on different mechanisms like:

- **Product Usage Metrics**: Identification of key flows and funnels to assess adoption and overall usability. (Do users start off on a page and then drop off before completing a key action?)
- **NPS**: Net Promoter Score assessment, to discover which segments the UX Research team can leverage to better anticipate current pain points.
- **Support Feedback**: Analysis of support tickets for each product area is revised to understand the pains lying under them.
- **UX Research**: By leveraging different UX research methods, the team uncovers areas where users get stuck when it comes to discoverability and usability.

In the end, all of those mechanisms are ways to identify where problems occur. Ultimately though, it requires partnering with the UX Research team (or a subject matter expert) to go beyond the what & where and determine why something is happening and how to fix it.

ASSESSING PRODUCT-LED EXPERIENCE

When it comes to assessing UI & UX outcomes, the emphasis is given in the areas the user perceives as valuable. Product-Led Onboarding, as with any other strategy can incorporate many vanity metrics associated with activation, user engagement, and retention that can define success in the wrong way.

Hubspot's case does not differ from any other product incorporating multiple value points, but any product experience metric is taken under consideration before it is marked as indicative.

For example, since new users need three months approximately to be fully onboarded, first-week retention may not be the metric required to assess feature adoption.

What the product growth team defines as critical when it comes to activation is what customers perceive as valuable and how the product helps them become successful.

To better visualize users' routes within Hubspot, we should consider that they have more than one activation stage to experience. The first is when they sign up and realize initial value and the second when the user actually makes the product part of its daily workflow. This is the sole reason why internal teams make sure that activation as a definition is first rooted in customer values.

CONSISTENT UX
CONSISTENT UX
CONSISTENT UX
CONSISTENT UX

The redesign embraced the brand's promise and eliminated inconsistencies lying inside the UI - due to visibility issues the organizational structure had at the time. The product team's structure gives the benefit of moving quickly on product developments and to respond in a timely manner to customers' needs but this does not come without its challenges.

After all, alignment across 40+ product teams that constantly build and ship changes requires an ongoing effort. This is why the need it was imminent to connect everyone around one centralized design system and reassure that a unified customer experience was delivered.

The redesign's results were marvelous. The UX team now has on its disposal HubSpot Canvas, a design system that incorporates a set of core principles put together by a nominated group of designers inside HubSpot.

The values incorporated into those principles :

- Clear: The design helps users do the next right thing through feature prioritization, visual hierarchy, and contextual awareness.
- Human: The design is humanizing the experience across cultures.
- Inbound: Reinforcement of the inbound methodology's message and meaning. The design makes the inbound path clear to users and helps them comprehend why is the right thing to do.
- **Integrated:** Simplification of user experience by creating a unified system that is streamlined, efficient and is being offered to enable users to achieve greatness.
- **Collaborative**: The design enables users to work seamlessly with their teams.
- **Unified design language**: Which ensures design consistency across the board and was built with Hubspot's principles in mind.

Those mechanisms help ensure that Hubspot is providing an intuitive, consistent, and delightful experience for its users in complete alignment with its product design principles.

EXTENDING PLO

EXTENDING PLO

EXTENDING PLO

EXTENDING PLO

EXTENDING PLO

Hubspot partnership programs are literally the product's extension as they onboard thousands of end-users annually. The programs are divided into four parts, all of them sharing similarities but also having different structures, separate teams, roles, responsibilities, and ways to measure success.

For the needs of this publication, the sales partnership's program onboarding was examined which unlike the others, where executives follow up and proceed requests, a partner can get up and running within the same hour.

Essentially, the sales partnership program follows the same logic as the core product's onboarding. Most importantly, as with any other part of Hubspot's onboarding process, understanding partners' goals and objectives and how success looks like for them is the first thing taken into consideration.

The sign-up incorporates similar steps someone follows to subscribe to Hubspot, like filling up a form with business and services details. Furthermore, for the onboarding process three additional steps are required:

- Leads registration to HubSpot CRM where a video provides guidance and upon its completion, a partner is instantly activated. (Task duration: 5 mins)
- License purchase and software demo completion. (Task duration: 10 mins)
- Call arrangement with a sales partner manager. (Task duration: 30 mins)

IDENTIFYING FRICTION POINTS

What is unique with the sales partnership program is that the core product is used indeed as a relationship management tool. As soon as someone is accepted, there is immediate access to tools and features helping partners be successful.

From there and onwards the onboarding kicks in and partners have access to self-serve online videos and guides along with automated email flows over the course of the next few months. While at the same time, they are able to speak with a customer success executive if required.

Historically Hubspot's partnership programs have been reliant on the human element to onboard new partners. As a company that onboards thousands of partners, Hubspot knows first hand that there are many things at stake for their onboarding to be successful.

This counts twice when big organizations come at play since the procedures are critical in determining success and the addressable universe is getting wider when everything goes as expected. The ultimate goal is the formation of a long term business relationship going forward and partners to become the product's evangelists, by bringing more customers along.

IDENTIFYING FRICTION POINTS

The shift towards product-led growth, made Hubspot reconsider how to reduce friction and human dependency steps, its users encounter when they try and buy the software. While organizations try to facilitate the changes Product-Led Growth brings on the table, Hubspot has already managed to extend those learnings beyond its core offering and disrupt again the traditional course of SaaS business practices.

In general, for the majority of organizations partnerships and human relationships go hand in hand. Hubspot puts that under consideration and questions whether or not that's the case. Not because as an organization diminishes the power personal bonding between the two parties has. On the contrary, it wants to offer them the ability to do things on their own terms without being forced into friction points.

Following a data-driven mindset, the monitoring performance is also defined by NPS and usage results, since those metrics are historically associated with the value partners see when collaborating with Hubspot. Essentially, partners are held accountable for driving a certain amount of usage as part of the program and the team reassures that they're actually helping onboard their customers.

Internally there is an aspiration to make onboarding 90-100% automated, while at the time of our research that amount was around 60-70%. The team is not completely there yet, as there is always a segment that needs to form a personal relationship, before partnering up.

So, while the vendor encourages partners to do everything self-serve it also presents the ability to speak with an expert or upgrade into the agency program, which offers a higher level of service and dedicated human interaction.

PARTNERS EDUCATION

The first thing Hubspot did upon the sales partnership program launch was to survey the organizations fitting the ideal partners' profile. One thing the research brought into light was that in their majority those organizations struggled with scaling their business.

Having those findings into mind, the onboarding was created under the philosophy of helping organizations transition from project work to a reliable retainer revenue around Hubspot's software.

As a matter of fact, most subjected partners are aware of the software’s capabilities, something that presents opportunities to capitalize upon that knowledge. The usual case scenario is partners to be familiar with using one tool and the onboarding team helping them see opportunities on how they can be successful.

PARTNERS EDUCATION RESOURCES BREAKDOWN

On a macro level, partners' education is around Hubspot's pricing and packaging services solutions which actually have nothing to do with the software itself. The advice partners need is on business practices, rather than a task that needs to be completed into the software.

Hubspot is aware of that and deploys different onboarding processes for partners and their customers. When the latter are onboarded everything is put through the lens of protecting partners' interests and this is directly related to the processes delivered.

Regarding the educational material provided an exhaustive resources page outlines what is offered to any subjected partner. In short, its content contains courses, trainings, and certifications on:

- Expanding Sales Services Offerings
- Packaging
- Pricing services
- Lead generation
- Team training on product and service practices
- Sales enablement.

For organizations that touch base with Hubspot for the first time guidance on initial client implementation, is essential and there is an option to work alongside a consultant. While at the same time the support team is available 24/7 without any additional cost.

PROFESSIONAL SERVICES ONBOARDING

PROFESSIONAL SERVICES ONBOARDING
PROFESSIONAL SERVICES ONBOARDING
PROFESSIONAL SERVICES ONBOARDING
PROFESSIONAL SERVICES ONBOARDING

While HubSpot's bread and butter is mid-market organizations, its wide variety of tools and solutions also attracts the enterprise.

The vendor always prioritizes how medium-sized companies are 100% aware that they can grow within the service. The product-growth team acknowledges that organizations starting to use a system don't wish to move to another solution and puts a lot of work and energy into that area.

In regards to enterprise onboarding two factors are prioritized:

1. Product developments as there is a lot of focus on what features enterprise customers should use. In general, those features incorporate advanced optimization and automation, something reflected in Hubspot's web strategy and positioning as well.
2. The variety of paid onboarding services for any customer willing to get additional strategy consulting and guidance

When it comes to the latter the implementation specialists team, tries to match each point of contact to customers' skill level and technical needs. Specifically, each team member goes through internal training and pass advanced certifications to ensure that customers can be managed and that a specific skill set is developed. The same level of experience and training is also matched for the customer's other points of contact internally, such as CSMs.

THE ONBOARDING PROCESS

The professional services onboarding process is divided into four parts:

Pre-Kickoff

Whereas the Implementation Specialist conducts initial research into what tools the customer has purchased and how the organization generates revenue.

The research also incorporates anything in regards:

1. Key messages and branding points
2. The current state of inbound practices
3. The organization's end-users' experience
4. Social media strategy assessment to understand the engagement frequency along with the company's tone and goals.
5. Identification of any technical requirements. Sample tools to execute that procedure are extensions, like Builtwith, that derive insights in regards to analytics codes and the CMS used. If for example, the customer has HubSpot analytics or similar solutions that is a sign to assess proficiency in marketing automation.
6. Custom tools employment, since it infers how advanced the technical team is.

From there and onwards the IS gets a head start into the guidance customers need and drives the conversations a little bit deeper during calls.

THE ONBOARDING KICKOFF CALL

This stage covers some of the discovery results and digs into customers' expertise, necessary integrations, timelines, and goals. Goals constitute a huge part of this call to ensure that the IS has a clear direction going forward.

CONSULTING ONBOARDING CALLS

Based on the goals and timelines outlined on the onboarding kickoff call, the consulting calls focus on specific tactics and strategies. The first round tends to be technical to reassure that the customer's organization uses the tools properly. While future calls pivot into more strategic discussions focused on long-term goals.

TRANSITION CALL

At the end of the onboarding period, the transition call is realized where achievements, outstanding items, and goals are discussed. Whereas the next point of contact, a Customer Success Manager, steps in as a long-term strategic advisor for the account.

An assessment of customers' activities prior to handing any account over to customer success takes place and the IS evaluates the value points the account is expected to hit by the end of the onboarding. Examples can be the launch of an inbound campaign and its result's evaluation.

The onboarding aims to ensure that both customer and internal goals have been reached.

If this is not the case then the transition call goes a little bit different and it will concern roadblocks that were uncovered while customers' timeline is rectified. Occasionally this could mean that the customer will not graduate from the onboarding program, that a slight extension might take place, or that another team will take over.

DATA MIGRATION PROCEDURES

During customer meetings, the implementation specialist maps out the current state of the existing automation tools and introduces the required terminology. In case the customer is migrating CRMs the onboarding incorporates how accounts are managed with Hubspot and associated resources.

From that point forward, the customer takes ownership of actually migrating the data or building any custom integration, and the IS remains a resource to consult on any roadblocks.

BARRIERS TO ENTRY

When it comes to enterprise customers, speed to implement is the casual hassle to consider. End users workflows usually incorporate multiple systems and organizations are looking forward to a clean slate when adopting a new solution.

The Implementation Specialist needs to outpace customers in terms of resources and next steps. In general, migrating from different systems requires lots of planning and understanding.

Especially in areas regarding where HubSpot fits exactly into customers' toolset and strategy along with how existing tactics and data can migrate intelligently into the product.

Another point to consider is users' proficiency since there is no absolute on how to train thousands of employees and at the same time, the time-to-value needs to be as short as possible.

CUSTOMERS EDUCATION

When it comes to the educational resources provided the human component, an implementation specialist, is a resource used at any time.

The IS team employs at all onboardings, a series of templated projects leveraged to get customers set up quickly. The projects are modular checklists allowing collaboration between the two parties. While at the same time they can be tailored to fit customers' goals, during the 90-day project plan, while holding them accountable.

Obviously, those checklists change over time but they give the capability to kind of plug and play with resources, guidelines, and timelines. For example, the “Get started with HubSpot” guide incorporates all the required tactics like and drives the conversation between the two parties, while empowering customers to move at their own pace.

Another example is the lesson plans, which are shorter snippets of video walking users through various strategies or the rich content on best practices across Hubspot's blogs, academy, and certifications.

PRODUCT VS HUMAN-ASSISTED ONBOARDING

In regards to whether or not the product-led era embraces the enterprise industry to become self-served, there is not one answer fits all. Typically it varies by industry. If an organization is tech-savvy it tends to need more customizations but it tends to be more self-served, build its own custom integration or define a problem-solving process.

Whereas a traditional marketing-led organization tends to be more change adverse and requests more guidance. That doesn't mean, however, that change when reasoning is provided will not proceed.

THE PRODUCT ROADMAP

THE PRODUCT ROADMAP
THE PRODUCT ROADMAP
THE PRODUCT ROADMAP
THE PRODUCT ROADMAP

Being a product-led organization in its core, Hubspot’s product roadmap priorities are influenced a lot from customer feedback and user experience outcomes. As with most SaaS organizations, the roadmap also incorporates the solution’s vision but it is ingrained within the organization’s DNA, to include both factors and understand how they complement each other.

Figuring out what a user is trying to say behind the lines is not an easy task and Hubspot is not facing different challenges from an average SaaS organization. Its secret sauce lies in the product organization's structure, understanding customers’ use cases, and problem areas while streamlining product driven initiatives at the same time.

ENTERPRISE VS. SELF-SERVE CUSTOMERS

Enterprise customers usually have sophisticated problems due to their teams' size while smaller organizations may need the product to be more simplified. This is exactly the point where competing tensions come into play and the structure of the product organization becomes critical, since different people may “fight” for points like this in a healthy way.

The product organization’s structure is having the Marketing, Sales and Services hub divided into separate product teams looking into how marketers are doing versus how sales executives and users on the services side behave.

The focus narrows down to understanding what those people care about along with the amount of usage coming from each plan.

ROADMAP INTAKES

A common tension in product development is whether to build more enterprise features or focus on existing products’ usability. Being a common trade-off for many organizations of Hubspot's size, the investment into customer feedback and NPS uncovered that even small and medium-sized companies want to know if they are able to grow by using the solution. This exact sentiment led the organization to release more enterprise-level improvements during 2018.

During onboarding, the IS team is on the front line in regards to features and UX improvement requests. The team inquires more about customers' thought processes on how they approach a problem along with overall usability.

In case a roadblock occurs and a turnaround does not come in handy, feedback is passed to the product team via an internal idea-sharing network, regardless of the plan type customers belong to. While, during all developments, the IS and product growth team has a pretty close-knit line of communication.

PRODUCT ROADMAP UX PRIORITIES

In terms of UX priorities now, the product organization is not striving for a specific UX ratio since many changes are shipped daily. Instead, it tries to determine how UX delivery will impact the value users derive regardless if those changes & improvements concern existing features (bug fixing & UX changes) or new releases.

FEATURE REQUESTS VS. PRODUCT VISION

At the end of the day, the product team looks at whether or not a use case aligns with Hubspot's value proposition along with the company's mission and the overarching long-term mission of the product (Product Vision). The product team also looks for those requests prevalence, or how big of a roadblock they constitute for users.

In case those points align custom reach out to customers takes place to further understand expectations and research is conducted to examine if those requests should be added to the roadmap.

The product-growth team would get a head start by reaching out to enterprise customers since they tend to be a bit more tech-savvy. Alternatively, the IS put customers into a beta environment and opens a line of communication with the product manager conducting the research.

THE PLG FACTOR

THE PLG FACTOR
THE PLG FACTOR
THE PLG FACTOR
THE PLG FACTOR

There are simply not enough tactics we could mention, on how the inbound unicorn reaches the targeted growth levels. The majority of its users may refer to its stellar educational resources or the plethora of free tools provided. While others might mention the customer-facing teams' expertise. All those factors are spot on, but if we have to narrow them down to one, capitalization on retention would be the winner.

For Hubspot, activation predicts retention and is being used as an early indicator of ongoing usage. In terms of what causes the various drop-offs, the product growth team came to the conclusion that they fall under a couple of different case scenarios like:

1. Users entering the solution but not interested in using the service. Since the organization adopted a product-led growth approach and the freemium was introduced, the barriers to entry diminished and traffic spiked. So, this is definitely one important cohort to consider.
2. The internal buy-in from buyers
3. The high intent group, which constitutes the greatest opportunity for the product growth team. The challenge here is the learning curve's elimination since it is not unusual for users to reach initial value but eventually familiarize themselves with the solution's capabilities by following their own pace.

Throughout the years' many changes succeeded one another when it comes to adoption and retention. The struggle, for any solution of this size, is to embed learnings in a way that makes the most sense for users and balance expectations in regards to when they should learn from the product or a human.

PRODUCT-LED GROWTH METRIC: BREADTH OF USE

An activation metric that predicts retention for Hubspot is team activation levels. Team activation, also known as breadth of use, is a Product-Led Growth metric that helps product managers realize the extent a product is being used on an account level. It monitors account health and helps PMs proactively manage churn.

Breadth of use, essentially predicts usage. Hubspot's product growth team acknowledges that and monitors this metric on a weekly basis to realize the extent users derive value out of product features (depth of use). Internally team activation correlates with the solution’s long term success and constitutes Hubspot’s north star metric as well.

The restless product team constantly seeks ways to measure activation and tries to look at success metrics even beyond usage. Something easier said than done, as success means different things for different organizations.

The customer health score is one of those metrics since associated both with usage and the Product-Led Onboarding strategy ROI.

A data analyst worked on the CH score and analyzed behavioral trends following champion users along with the different factors affecting it.

The last factor impacting retention levels is the formation of a personal relationship with customers that seals a good business relationship going forward. For Hubspot, and any other solution serving millions of users, however, the scale of economics does not allow one to one interaction with every user.

On the other side of the spectrum, the work of the success coaching team helps both with activation and retention but also pools feedback that can feed internal organizations and especially the product team which constantly strives to tailor product experience.

KEY TAKEAWAYS

KEY TAKEAWAYS

KEY TAKEAWAYS

KEY TAKEAWAYS

KEY TAKEAWAYS

Being a leader that has been evangelized by an entire industry is not a random outcome. Hubspot manages to achieve the desired growth levels mostly by acknowledging that onboarding is key to delivering stellar customer experience. No matter the customer segment.

Even beyond that, Hubspot knows that investing in one aspect of its onboarding strategy is not enough. It should become an intentional effort across the organization and keeps evolving itself with the same pace customer needs do.

Investment in product data analysis, infinite research and experimentation is only the top of the iceberg when it comes to the unicorn's product-led growth outcomes. At the end of day, its practices pass a very loud message: Product-Led organizations must put the customer in the middle of every decision.

They need to declare war in friction by making context of usage and its assessment an integral part of their onboarding strategy. Even beyond that organizations need to acknowledge that business and product benchmarks may constitute a basis to assess day-to-day usage but in the end there is no panacea as to what depicts product's superpowers.

Make sure to collect the data that represent end-users desired outcomes. Embrace customer feedback by making it the extension of every iteration and experiment delivered.

Streamline activation and retention metrics and deploy data-driven product engagements that embrace the jobs need to be done.

Prepare the ground to deliver a Product-Led Onboarding strategy that will not just complement product activations. But will eliminate TTV to value, retain and expand accounts seamlessly across the customer lifecycle. Try not to forget, customer experience is fluid and your onboarding strategy's mission is to follow its notions to the very end.

A BEHIND THE SCENE VIEW OF HUBSPOT'S PRODUCT-LED ONBOARDING

Product Led Hub®

PRODUCT-LED GROWTH STUDY HubSpot