Modgility

Service Hub Onboarding Checklist with Step-by-Step Instructions

Pre-Onboarding
(Before Starting Service Hub Setup)

Define Service Goals:

Step-by-Step Instructions:

1. Review your company's overall objectives and identify how the Service Hub will contribute to achieving them.
2. Determine the key service metrics to track (e.g., first response time, customer satisfaction).
3. Set SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals for each identified metric.

Example:

- Specific: Reduce first response time by 30%
- Measurable: Track response time through HubSpot's analytics
- Achievable: Based on historical data and team capacity
- Relevant: Aligns with company's overall customer satisfaction objective
- Time-bound: Within the next 3 months

Gather Required Information:

Step-by-Step Instructions:

1. Collect any existing service process documentation (e.g., flowcharts, diagrams, written descriptions).

2. Identify key stakeholders and their roles in the service process (e.g., support agents, team leads, customer success managers).
3. Document the current service process, including any pain points or areas for improvement.

Example:
Existing service process documentation: [Insert document links or attachments]
Key stakeholders and roles:

- Support Agents: John, Jane, Bob
- Team Leads: Mike, Emily
- Customer Success Managers: David, Sophia

Service Hub Setup (Configure Service Tools and Processes)

Configure Service Dashboard:

Step-by-Step Instructions:

1. Log in to your HubSpot account and navigate to the Service Dashboard.
2. Click on "Customize Dashboard" and select the desired dashboard template.
3. Add dashboard cards for each key service metric (e.g., first response time, customer satisfaction).

Example:

- Dashboard Template: "Service Performance"
- Dashboard Cards:
- First Response Time (FRT)
- Customer Satisfaction (CSAT)

Set Up Ticketing System:

Step-by-Step Instructions:

1. Navigate to Settings > Service > Ticketing.
2. Click on "Create a Ticket Pipeline" and select the desired pipeline template.
3. Define and configure ticket pipeline stages (e.g., New, In Progress, Resolved).

Example:
Pipeline Template: "Standard Ticket Pipeline"
Pipeline Stages:

- New
- In Progress
- Resolved
- Closed

Service Hub Optimization (After Initial Setup)

Set Up Service Automation Workflows:

Step-by-Step Instructions:

1. Navigate to Workflows > Create a Workflow.
2. Select the workflow trigger (e.g., "When a new ticket is created").
3. Configure workflow actions (e.g., "Assign the ticket to a support agent").

Example:
Workflow Trigger: "When a new ticket is created"
Workflow Actions:

- Assign the ticket to a support agent
- Send a notification to the customer

Enable Service Analytics and Reporting:

Step-by-Step Instructions:

1. Navigate to Analytics > Service.
2. Select the desired service analytics dashboard.
3. Configure dashboard filters to display relevant data.

Example:
Service Analytics Dashboard: "Service Performance"
Dashboard Filters:

- By support agent
- By ticket category