Churn Prevention and Support HubSpot Workflows.

This toolkit includes automated, CRM-powered workflows that B2B businesses can use to deliver proactive, scalable customer success and support. Each workflow aligns directly with the post-sale customer journey, helping teams reduce operational friction while increasing NPS, product adoption, and customer retention.

IPost-sale experience is mission-critical. Your enterprise clients expect:

- Reliable onboarding and quick time-to-value
- Proactive issue resolution before they escalate
- Real-time access to self-serve help and compliant support workflows
- Transparent reporting and visibility into their account health

Workflow 1: Customer Health Score Alerts

Example trigger: Contact's Customer Health Score drops below a set threshold (e.g., 55/100) based on usage, ticket volume, and NPS.

Steps:
1.Custom Score Setup
→ Use a calculated property like Customer Health Score or engagement indicator values.
2.Threshold Check
→ If score < 55 → trigger the workflow
→ Optional: Tier scores by Low, Moderate, Critical
3.Internal Alert
→ Notify CSM with contact profile, health score, and recent activity
4.Engagement Action
→ Send automated "We're here to help" email with CTA to book a health check
→ If no reply in 3 days, auto-assign task to CS rep
5.Status Update
→ Update custom property: Churn Risk = High
→ Add contact to re-engagement Smart List

HubSpot Tips:
1. Include scoring from CRM activity, product usage (via integration), and t NPS
2. Use health score segmentation in dashboards to monitor churn trends
3. Tag reasons for churn using a custom dropdown (e.g., product fit, missing features, onboarding friction)

Workflow 2: AI-Powered Support Deflection

Example trigger: Contact submits a support request via live chat or contact form (e.g., "Can't reset password," "Need help updating payment method").

Steps:

1. Intent Detection
   → Auto-tag ticket using HubSpot's AI or chatbot intent training (e.g., tag = "Account Access")
2. Knowledge Base Suggestion
   → Chatbot or sidebar displays top 2–3 articles from Help Centre based on tag
3. Fallback Logic
   → If the user doesn't click or reads article but stays confused:
   → Route to human agent queue
   → Attach AI-detected tag and context summary to ticket
4. Closed Ticket Analysis
   → If resolved via article alone → count as deflection
   → Update contact property: Deflected Issue = True

Tips:

1. Keep KB titles short and search-friendly (e.g., "How to update your payment method" vs. "Billing guide v4.3")
2. Use HubSpot's AI-generated ticket replies for quick human fallback
3. Track support deflection rate as a KPI:
   (Tickets resolved via KB / Total Support Inquiries) x 100

Our tips for your success:

- **Personalise your customer's support journey:** Use calculated properties and custom fields (like "Health Score" or "Time to Onboard").
- **Scale through automation:** Use automation in the areas that require scaling first, however always provide a clear human fallback
- **Create routes based ICPs or behaviours:** For example urgency and business value (e.g., "Enterprise Tier = High CS Priority")
- **Track customer behaviours:** Track deflection and recovery metrics to spot product friction and training gaps
- **Use different behaviour metrics:** Use NPS, CSAT, and feature usage as lifecycle triggers, not just support volume