Simple Strat

STREAMLINED CLIENT ONBOARDING —

Client Onboarding with HubSpot's Services Object

The Challenge

The client's onboarding process was chaotic and difficult to manage across product lines. They faced:

- Fragmented tracking across multiple ticket pipelines, making reporting and management nearly impossible
- Onboardings tied to the support system, creating confusion between new client setups and ongoing support requests
- No clear way to track repeat onboardings when existing customers switched products or re-engaged
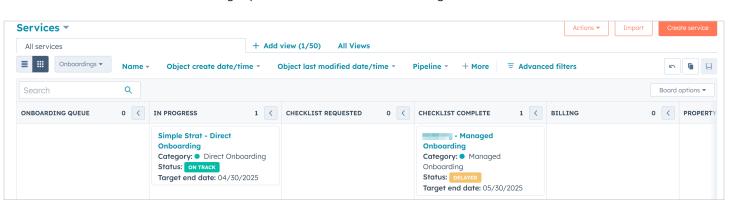
The Solution

We implemented HubSpot's new Services object to create a dedicated onboarding pipeline, completely separate from support workflows. This allowed the team to automatically trigger the right onboarding path based on the products sold and track each instance clearly from start to finish.

The Impact

The client can now:

- See and manage every onboarding as its own record, no matter how many times a customer comes through
- Eliminate confusion between onboarding and support, improving internal clarity and accountability
- Generate accurate, real-time onboarding reports without workarounds
- Save time by triggering onboarding automatically based on sales data
- Deliver a more consistent onboarding experience for both new and returning clients

The Details

Industry:
B2B SaaS

Business Area:
Client Success
Implementation

Tools Used:
- Service Object
- Deal Line Items
- Workflows
- Dashboards