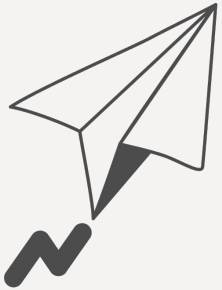
Redefining In-App Support:
A Proactive Strategy to Boost Engagement

Problem Statement
Customers are currently **operating with blind spots**. They can't deliver personalized experiences from **behavioral insights** inside our chat widget, which prevents them from moving beyond reactive support.

Role
Senior Product Designer

Key Achievement: Increased chatfow usage by 4 points and improved deflected tickets by 21%



OVERVIEW

HubSpot (Live Chat)

Challenge

Feature Adoption: A primary challenge was designing a new interface for our customers that challenged their current mental models. Educating and guiding users through an intuitive flow to target segments.

Team

Senior Product Designer (Myself), Product Manager, BE engineers, FE engineers

Scope/Constraints

The road to V1 faced a reduced scope. To deliver **immediate value, learn**, and better positions ourselves for success, we intentionally scoped our use cases to guided tours and checklists. These **features overlapped** both Customer Success and Customer Support use cases. Supported URLs were also scoped to HubSpot hosted domains.

Discovery

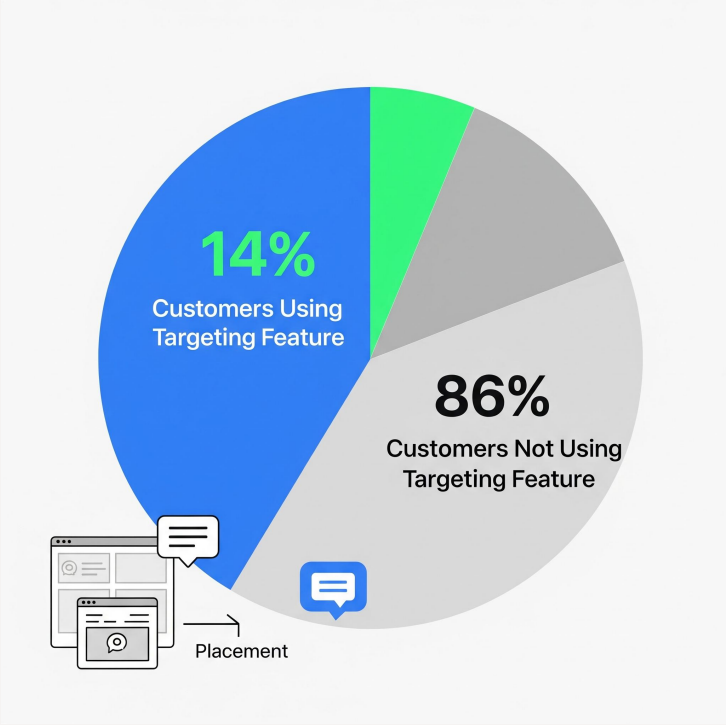
QUANTITATIVE ANALYSIS

Identifying Key Opportunities to Increase Live Chat Engagement

Collaboration: PM, UXR

An analysis of chatflow metrics revealed a significant opportunity: **only 14% of portals were utilizing targeting rules** for their chat widgets. This low adoption rate represented a clear avenue to improve customer retention and engagement.

To understand the qualitative story behind these numbers, I synthesized existing UXR research on our Service Hub customer personas and their daily workflows. I then ran 10 discovery calls with **Customer Support and Customer Success Managers**.



QUALITATIVE ANALYSIS

Understanding the Barriers to Proactive and Personalized Support

Collaboration: PM, UXR

Research Methodology & Objectives

To uncover the qualitative story behind the data, I conducted **10 in-depth interviews** with Service Hub customers. The primary goal was to understand the **specific barriers** preventing them from delivering proactive and personalized in-app support.

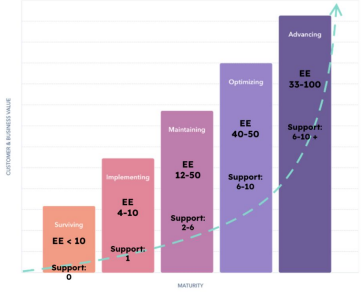
Key research objectives included:

- **Identifying Core Pain Points:** Pinpointing frustrations in the current in-app help experience, especially around personalization and contextual awareness.
- **Prioritizing for Impact:** Determining which potential features would most effectively reduce support tickets and increase feature adoption.
- **Validating Competitive Advantage:** Assessing how leveraging HubSpot's integrated CRM data could serve as a key market differentiator.

What do we know about CX teams of this size & industry?

1. Customer Support and Customer Success are distinct but overlapping roles.

There are 5 stages of Customer Support maturation (source).



According to an internal UX research, B2B SaaS companies typically start with the Customer Support function, but as they transition from the Implementing stage to the Maintaining stage, they recognize the need to informally incorporate proactive functions into the service team to meet customer demands. This function is typically called "Customer Success," and its role is to anticipate customer challenges and proactively provide solutions and answers to boost customer satisfaction, retention, and ultimately, revenue.

2. Customer Support and Success share a lot of overlapping responsibilities.

According to an internal UX research that surveyed 155 support professionals:

- 92% manage customer onboarding issues at least once a week
- 67% drive adoption of product/service by highlighting features
- 65% form connections between customer service and customer success
- 48% develop and deliver formal education or training to customers
- 39% communicate warranty policies and offerings

QUALITATIVE ANALYSIS

Validating Early Concepts with Customers

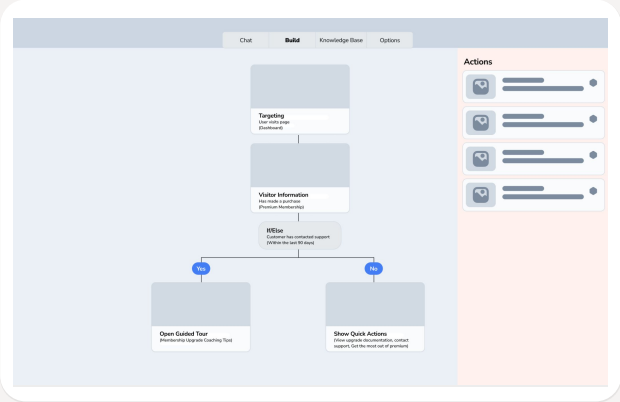
Collaboration: PM

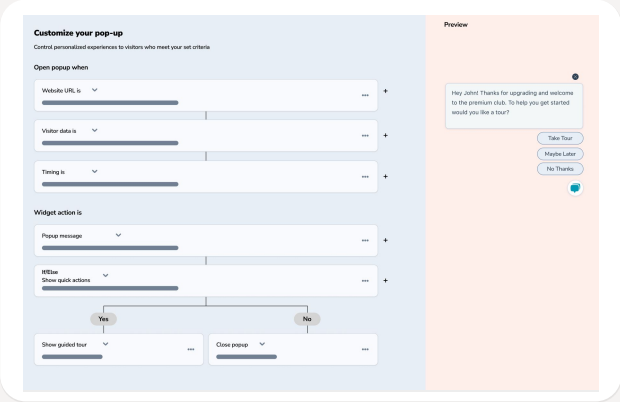
Key Findings from Lo-Fi Concept Testing

To maximize our research sessions, initial lo-fi concepts were shared with customers to validate our early hypotheses. Two key insights emerged:

- **Workflow Builder for Contextual Support:** This concept received a **mixed reception.** While some customers were enthusiastic about the ability to create branching logic for more tailored chatflows, others raised concerns that the **configuration could be too complex**, potentially creating more work for them.

- **Targeted, Journey-Based Popups:** This concept was strongly **validated**. Customers immediately saw the value in proactively engaging users at **specific moments** in their journey. They agreed this approach would be highly effective for reducing their reactive support volume and **improving low-touch** customer interactions.





COMPETITIVE ANALYSIS

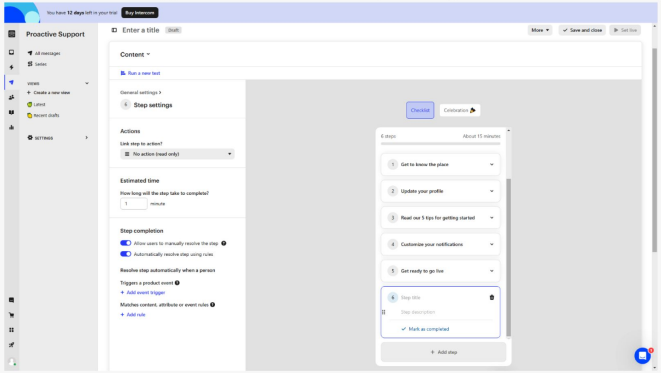
Competitive Landscape: Proactive In-App Support

To effectively position HubSpot in the market, I conducted a competitive analysis of the proactive in-app support landscape. The research **confirmed a critical hypothesis**: leading competitors are successfully **utilizing contextual popups layered on top of their chat widgets**.

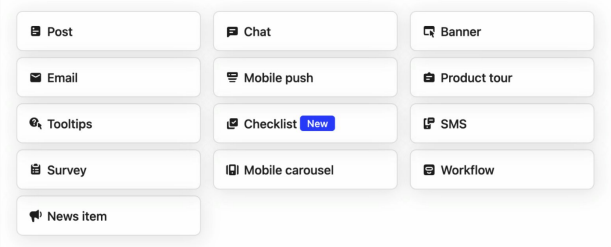
This analysis provided two key benefits. First, it **validated our proposed direction** by grounding it in established market best practices. Second, and more importantly, it illuminated a clear **opportunity for differentiation**: by leveraging HubSpot's deeply integrated **CRM data**, we can offer a level of personalization and contextual targeting that competitors cannot easily replicate.

Here's how you can use Intercom to create onboarding checklists:

- Intercom's no-code checklist builder lets you add tasks, add completion time estimates for users, and set the criteria for certain tasks to automatically be marked as completed. You can also add a seemingly unlimited number of tasks (our testing exceeded 100 tasks).



- **Automated Popups**: If you get the **Product Tours add-on ($199/month)**, then you'll be able to use Intercom's UI patterns to send in-app messages. These include announcements, banners, tooltips, and multi-step product tours. You can also send push notifications to mobile users.



RESEARCH SYNTHESIS

Key Themes from Customer Success & Support Managers

Collaboration: PM

Synthesizing a Multi-Faceted Research Strategy

To translate our raw data into an actionable strategy, I synthesized findings from three core research streams: **quantitative product metrics, qualitative customer interviews, and a competitive analysis**.

To accelerate the analysis of our qualitative data, I leveraged a **Google LLM Notebook**. By processing a range of inputs—including the **PRD, research plan, and full interview transcripts**—I could rapidly identify recurring patterns, critical pain points, and impactful user quotes.

In close collaboration with my Product Manager, we then integrated these AI-driven insights with our quantitative and competitive findings. This triangulation of data produced a comprehensive, **evidence-based understanding of the core user problems**, which was then shared with the broader product team to ensure strategic alignment.

Proactive Support

On average **70-80% of work** in Customer Success and Support is **reactive**. Both departments express a strong desire to be more proactive, but are hindered by reactive cases.

Customer Education

Research identified education as a unique area at the intersection of Customer Success and Customer Support. It focuses on **contextual support** to prevent tickets.

Lack of Personalization

Both personas struggle **synthesizing data** across multiple platforms. Manual and **scalable segmentation** is a major challenge, preventing targeted, context-aware communication.

WORKSHOP

Cross-Functional Workshop: Aligning on the Core Problem

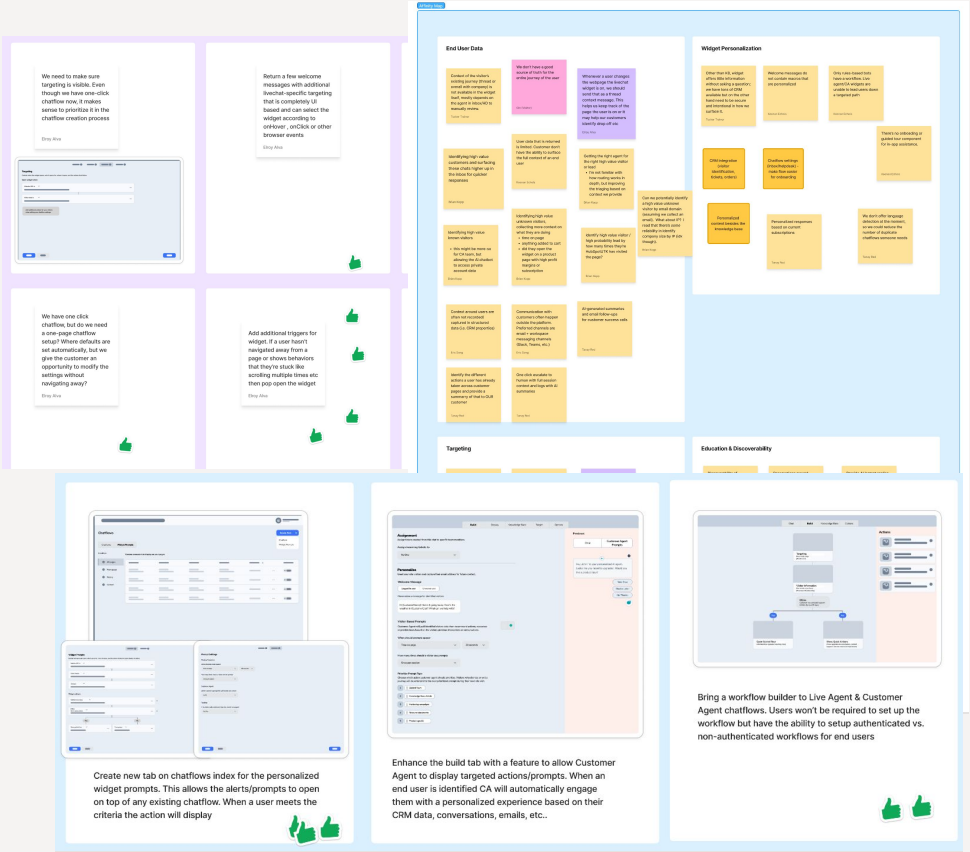
Collaboration: PM, FE/BE Eng

To ensure the entire team was aligned on a unified strategy, I facilitated a workshop with Product Management and Engineering. The primary objective was to **collaboratively define a single, core customer problem statement** to guide our work.

The workshop included several key activities:

Affinity Mapping: We synthesized pain points from customer research and our understanding of internal system limitations to build a shared map of the problem space.

Crazy 8's Ideation: Following the problem definition, we rapidly explored a wide range of potential solutions to encourage creative thinking.



PROBLEM STATEMENT

Our user core problem

Collaboration: PM,Eng

Customers are currently operating with blind spots. They can't **deliver personalized experiences from behavioral insights** inside our chat widget, which prevents them from moving beyond reactive support.

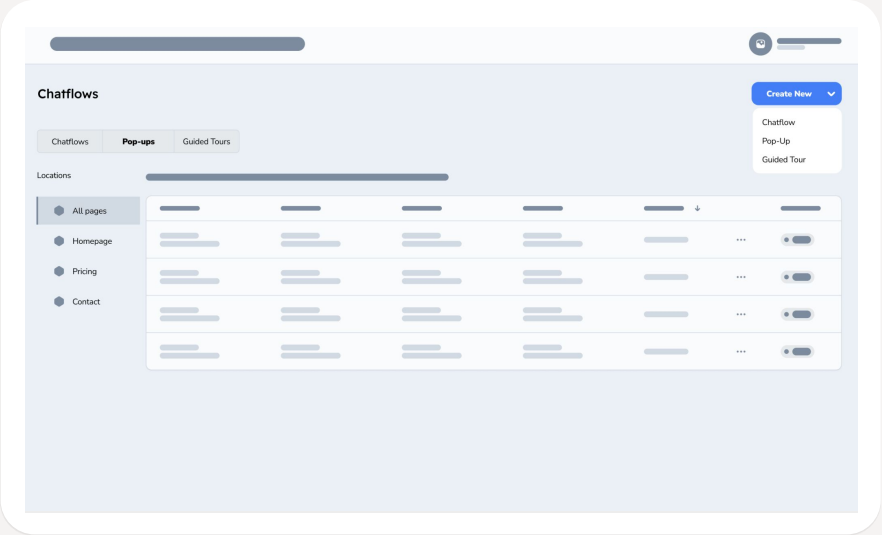
ALIGNMENT

Defining the V1 Solution: Focusing on Proactive Popups

Collaboration: PM, Eng

Based on direct customer feedback and the workshop, my contextual popup concept was strongly **validated as the most promising direction** for a V1. Users confirmed that the ability to **target users at specific points in their journey would provide immediate value** and help alleviate their reactive support volume.

As a result, I prioritized this solution for the initial design iterations. This approach was chosen not only for its strong user resonance but also for its **feasibility**. Compared to the **significant engineering investment** required for a new workflow builder, the popup experience offered a more **direct path to delivering value, gathering learnings**, and making a tangible impact quickly.



USE CASES

Defining and Prioritizing Core Use Cases

Collaboration: PM

Following the synthesis of our research and workshop data, I defined and documented the primary **use cases for our Customer Support and Customer Success personas**.

This document served as a key **strategic artifact**, creating a shared understanding of **user needs and aligning the team around a common vision**. Crucially, it provided a clear framework for **prioritization**, enabling us to agree on a focused scope for V1 and establish a **scalable roadmap for future iterations** designed to drive long-term engagement.

Overview

Live chat support has evolved from a reactive tool to a proactive, strategic channel for customer engagement. By leveraging a user's identity and behavior, support reps can anticipate their needs, provide personalized assistance, and significantly reduce the need for formal support tickets.

Here are some proactive use cases and best practices for live chat support reps, framed around anticipating and personalizing support for identified visitors.

Proactive Use Cases for Identified Visitors

These are based on real-time data and can be automated to trigger personalized messages.

- **Onboarding & Feature Adoption:**

  Feature Adoption
  - **Use Case:** A new user, identified by their login, has just spent five minutes on a specific feature's help page but hasn't used the feature yet.
  - **Proactive Action:** A chat message pops up: "Hi [User's First Name]! It looks like you're exploring our [Feature Name] feature. Is there anything I can help clarify or a quick tip I can show you to get started?"
  - **Ticket Deflection:** This prevents a potential "How do I use [Feature Name]?" ticket, as the user is guided directly to a solution or a live agent who can walk them through it.

  Onboarding
  - **Use Case:** A new user logs in for the first time or within their first 3 sessions.
  - **Proactive Action:** Proactively greet them with an onboarding checklist (e.g., "I noticed this is your first time here—would you like help setting up your account or walking through the key features?").
  - **Ticket Deflection:** Reduces tickets from new users who get stuck in early setup.

- **Context-Aware Feature Guidance:**
  - **Use Case:** An identified user visits a high-friction feature page (e.g., billing, integrations, or data import/export).

DESIGN BRIEF

Establishing the UX Strategy and Success Metrics

To bridge the gap between research and design, I developed a comprehensive UX Design Brief to serve as the team's strategic North Star.

This document articulated a clear vision and ensured alignment on our core objectives. It included:

- **The Core User Problem:** A concise statement defining the primary challenge we aimed to solve.
- **Key Design Principles:** A set of guiding principles to ensure our solutions remained user-centered and consistent.
- **The UX Vision:** A narrative describing the ideal future-state experience, directly addressing the pain points uncovered during research.

Defining and Measuring Success Based on the quantitative analysis, we aligned on the following key metrics to measure the impact of our solution:

- **Primary Metric:** Increase in overall Chatflow usage.
- **Secondary Metric:** Increase in the number of targeted Chatflows created.

Constraints/Omissions/Dependencies

Our current live chat functionality is constrained by its **limited user data for segmentation**, which prevents us from creating truly intelligent and customized experiences. To overcome this, we must **leverage our customers' CRM data** to enable a more robust and personalized approach to targeting.

There may be dependencies on how much end user context Customer Agent is able to deliver within chatflows. Resulting in a more manual approach to targeting within chatflows.

This strategic shift has the potential to **overhaul how we target all of our live chat and customer agent chatflows**. We should explore a new targeting workflow, one that draws inspiration from our rules-based bots, to create a more powerful and flexible system. Ultimately, this will empower our customers to deliver more relevant and effective chat experiences, driving better engagement and satisfaction.

Design goals

Customer outcomes

- Increased % of chatflows
- Increased adoption and engagement
- Increased % of portals utilizing crm, marketing and sales data within live chat

Assumptions / Hypotheses

Assumption / Hypotheses	Validation / risk management strategy
Admins seek a workflow within live chat that can target specific segments at specific times within their journey.	A select group of customers who meet our targeted personas will be selected for private beta for validation calls.

Design

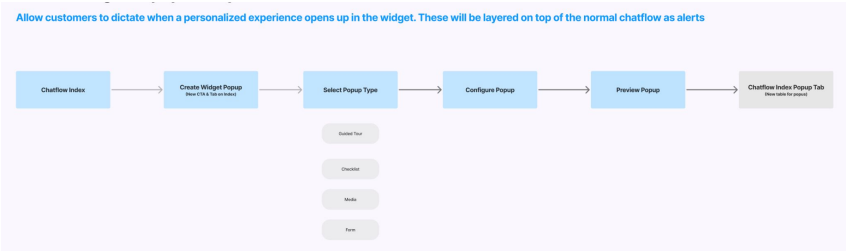
USER FLOWS

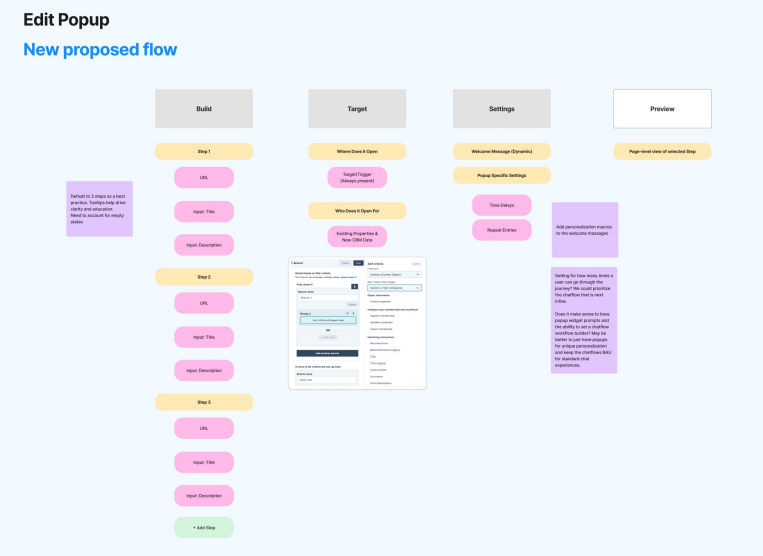
Designing the Core User Flow: Popup Configuration and IA

To define the information architecture (IA) and the end-to-end configuration experience, I designed and mapped out the core user flows.

A key strategic decision in this flow was to address the **poor discoverability of targeting rules**, a critical insight from both the quantitative and qualitative research. To solve this, I **intentionally surfaced** these rules within the initial **setup process**. This not only makes the feature more visible but also helps shape the user's **mental model around the importance of targeting** for all widget experiences.

To ensure **feasibility and identify potential constraints** early, these flows were shared and reviewed with the engineering team, **fostering collaboration** and clarifying technical edge cases before development began.



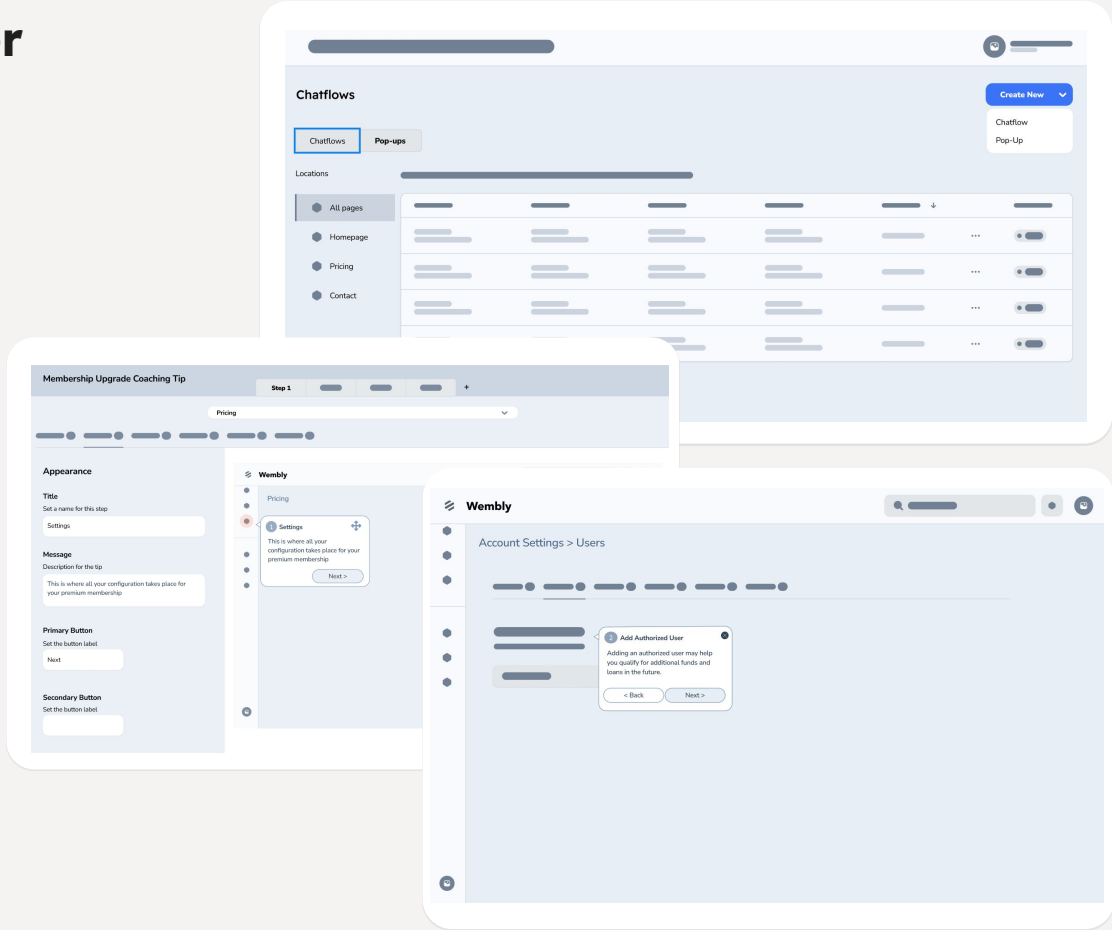


MID-FIS

Conceptualizing the Customer and End-User Experience

With a clear direction established, I moved into a phase of rapid mid-fi exploration to **validate our core hypothesis** with internal stakeholders.

The key concept was to design the **personalized popup as a distinct layer that complements**, rather than replaces, the existing chat widget. This approach gives our customers a powerful **new tool to target users anywhere in their journey, without disrupting or sacrificing the traditional, reactive support channel** that their end-users are already familiar with.

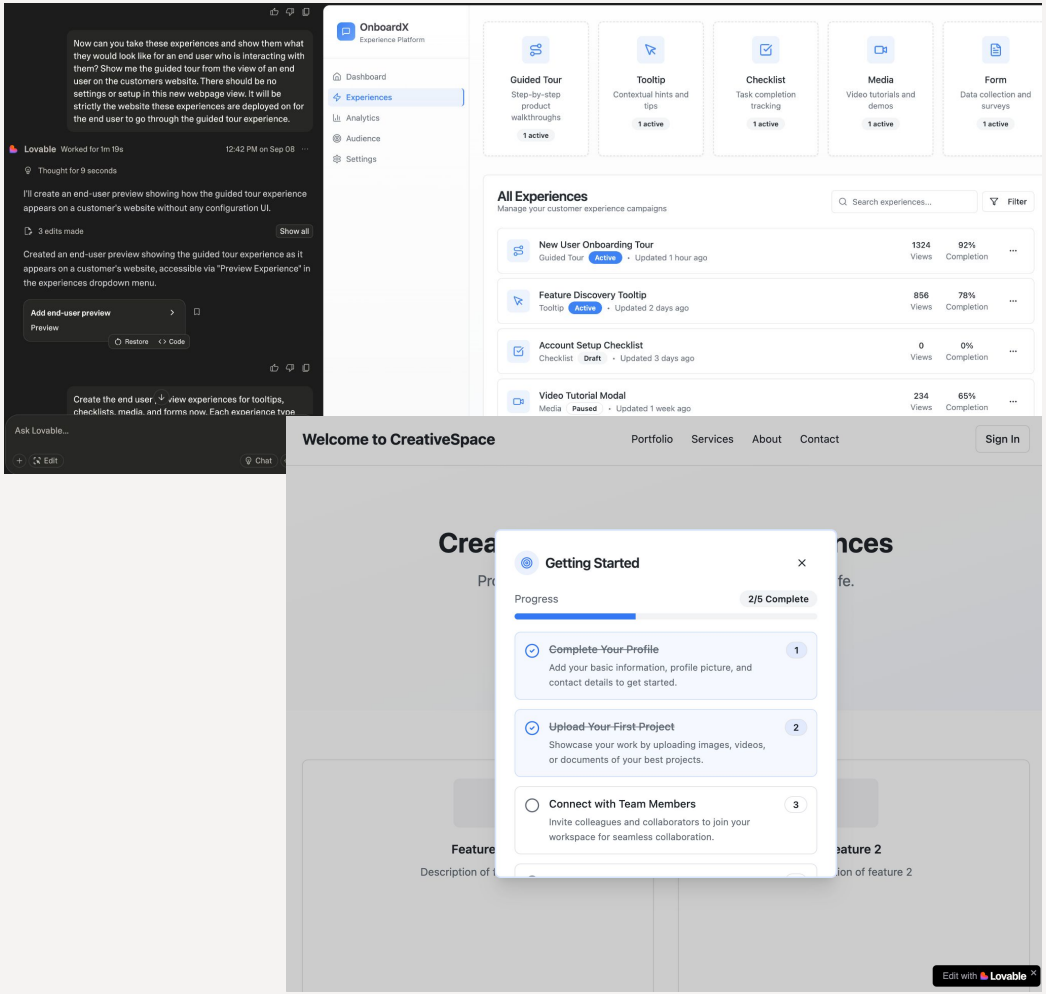


LOVABLE PROTOTYPE

Bringing the Vision to Life: High-Fidelity Prototyping

To provide the team and customers with a **tangible, interactive experience**, I developed a high-fidelity prototype using Lovable. This allowed me to **validate quickly without spending time manually laying out screens.**

This prototype translated the validated mid-fi concepts into a realistic representation of the final product. It was carefully crafted to **embody the UX vision** established during our initial discovery research, ensuring that the proposed solution remained **directly aligned with the core needs** and mental models of our customers.



Customer Views

PRIVATE BETA: INDEX PAGE (Customer View)

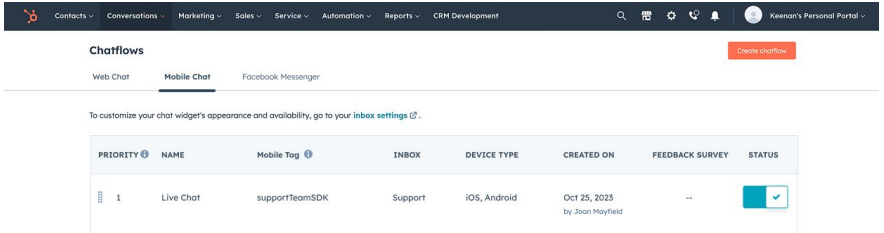
High-Fidelity Designs: A Central Hub for Proactive Engagement

The final high-fidelity designs introduce a dedicated section for "Popups" on the chat landing page, creating a **centralized and discoverable** home for this new proactive feature.

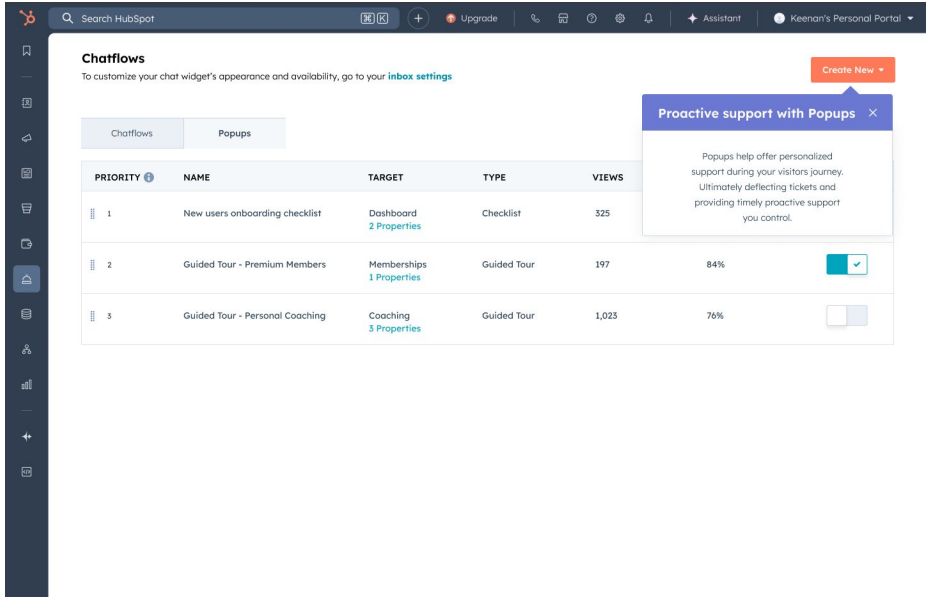
This new design serves two primary goals:

- **Provide a Management Hub:** It acts as the launching point for customers to create new popups and gain at-a-glance **insights** into how their existing ones are performing.
- **Drive User Adoption:** Recognizing this is a new pattern, the UI strategically incorporates **in-context coaching tips**. This helps to lower the learning curve, shape the user's mental model, and encourage best practices from day one.

OLD



NEW



PRIVATE BETA: SETUP (Customer View)

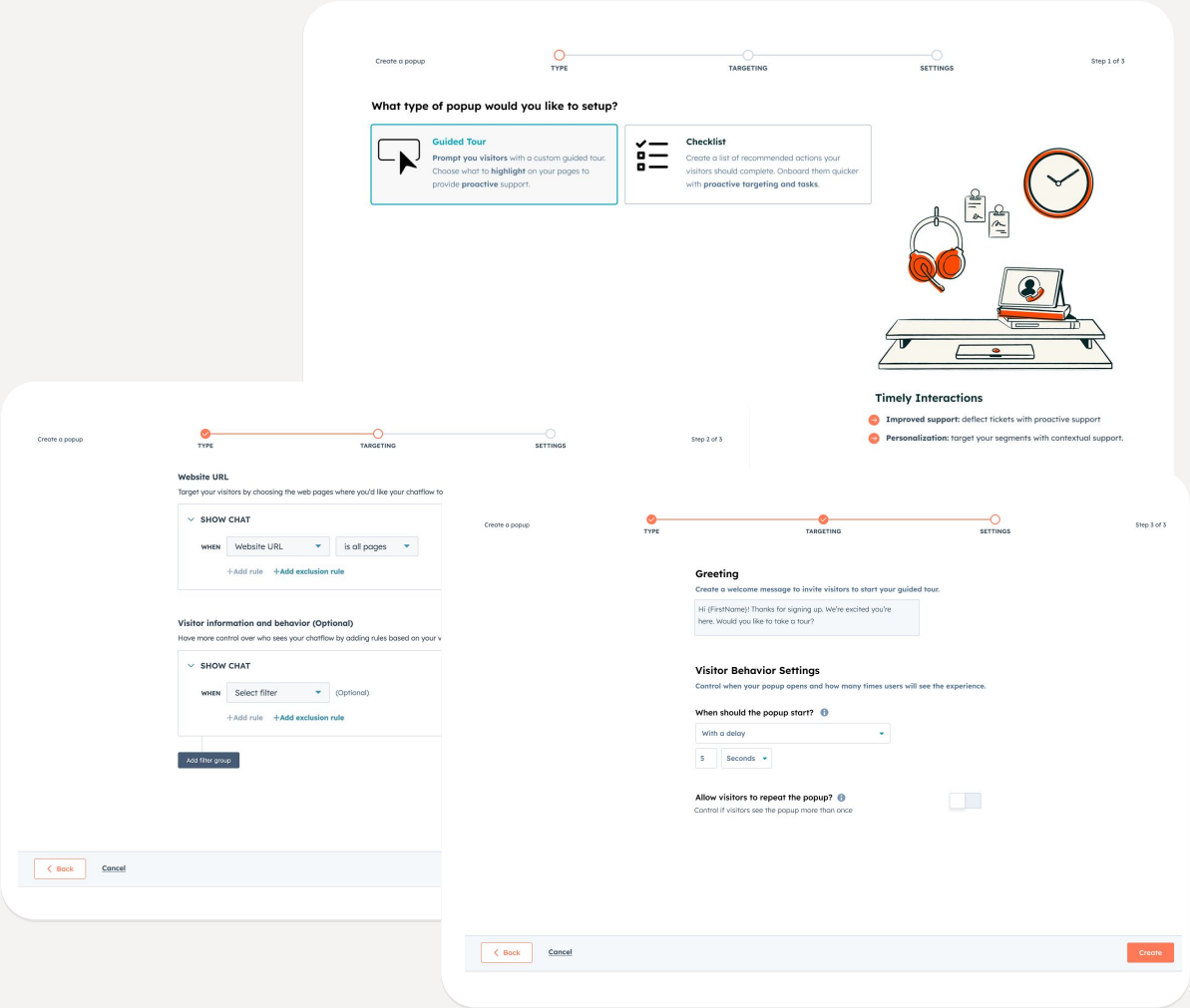
A Guided Three-Step Setup for Proactive Popups

I designed a streamlined, three-step setup process to help customers get their popups live as quickly as possible. The flow is intentionally **educational**, addressing a key insight from our research: the need for better visibility of our powerful targeting features.

Key decisions in this flow include:

- **Scoped Settings for V1:** To prevent user overwhelm, the initial settings are focused on the most critical use cases. This allows us to **learn from initial usage and iterate**, adding more robust controls in future versions based on user feedback.

- **Enhanced Targeting Capabilities:** In collaboration with the **segments team**, we integrated **additional CRM data** directly into the targeting options, providing users with the deep contextual control they needed.



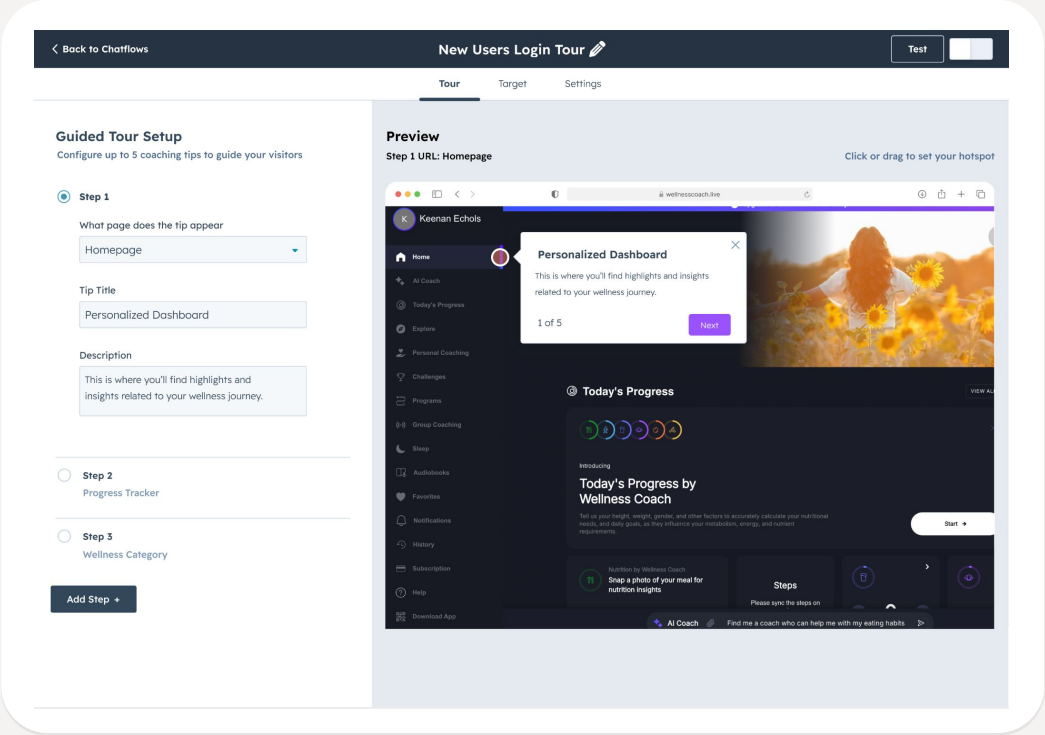
PRIVATE BETA: Guided Tour (Customer View)

Intuitive Configuration for Contextual Tours

To deliver immediate value and gather learnings quickly, the V1 of the configuration page was **strategically scoped to support websites hosted on HubSpot**, deferring the technical exploration required for external URLs to a future release.

The interface was designed to be highly intuitive, with a **clear visual hierarchy** that guides the user through the setup process. It **automatically** pulls in the customer's **HubSpot-hosted URLs to reduce manual input**.

A key feature is the **interactive preview**, which provides customers with complete transparency, allowing them to see exactly how their guided hotspots will appear to end-users in real-time.



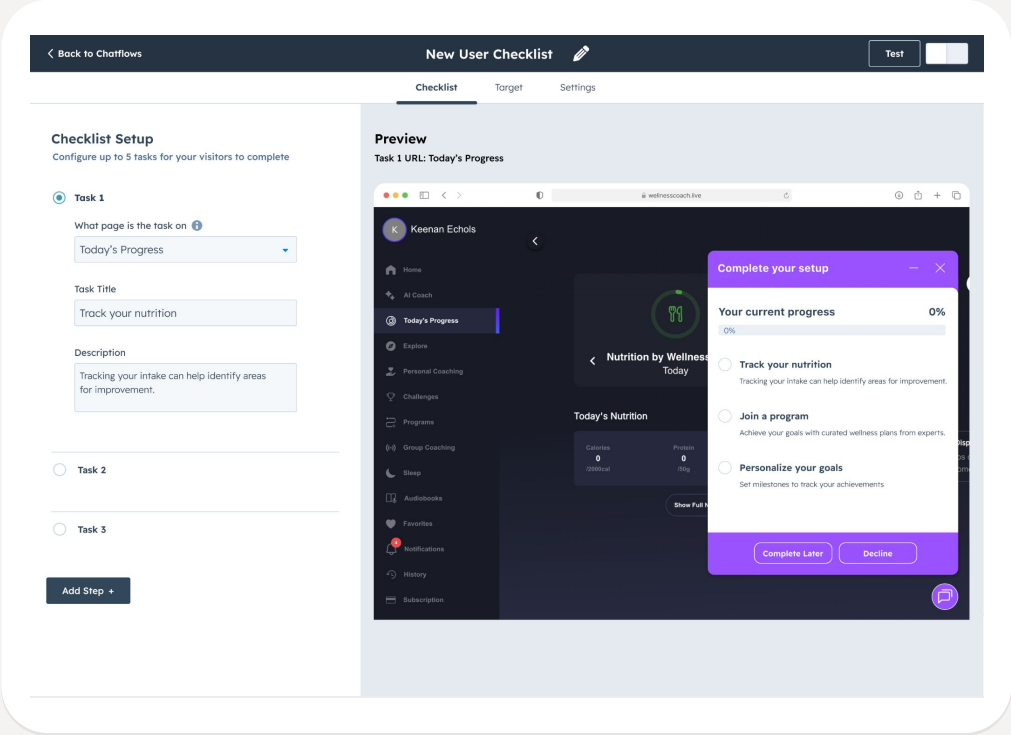
PRIVATE BETA: Checklists (Customer View)

Building a User Checklist: Configuration and Preview

The checklist configuration flow was designed with two core principles in mind:
consistency and clarity.

To create a familiar and predictable experience, the interface leverages existing components from the **HubSpot design library** and mirrors the layout of the Guided Tours setup. This consistency across different popup types **reduces the learning curve** for users.

To **minimize cognitive load**, the setup process is broken down into distinct, editable sections. This allows users to focus on one task at a time. As they configure each step, an interactive preview provides **real-time feedback**, offering full transparency into how the final checklist will appear to their end-users.



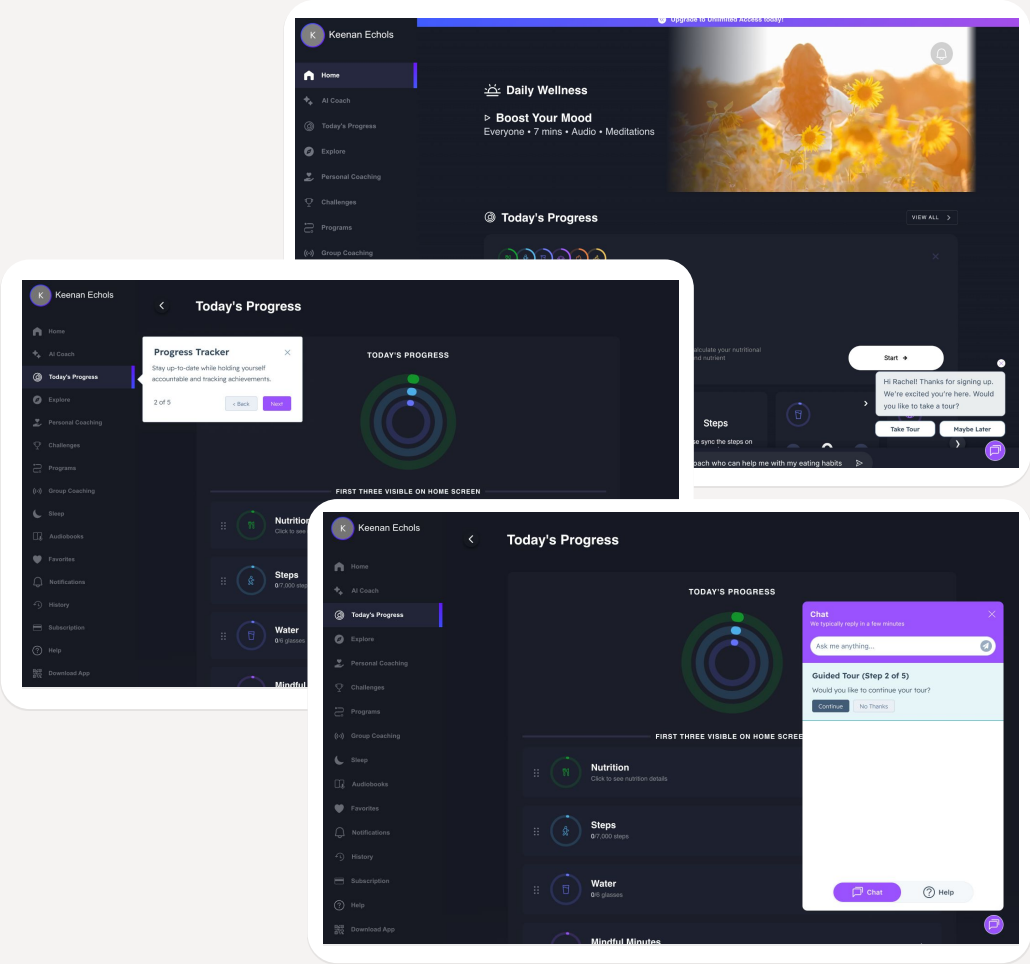
End User Views

PRIVATE BETA: Guided Tour (End User View)

The End-User Experience: A Seamless Guided Tour

The final designs empower our customers to deliver personalized, **context-aware** guided tours directly to their end-users. A critical piece of this new experience was designing a **resume interaction**, allowing an end-user to close the tour and **"view it later."**

This seemingly simple option introduced a crucial **new interaction pattern**: the popup needed to be intelligently **linked to the main chat widget**. This design decision ensures that if a user defers the tour, the opportunity isn't lost. They can access the contextual guidance later from the chat widget, guaranteeing a **seamless experience and preventing them from missing important information**.



Prototype

[Guided Tour Figma Prototype]

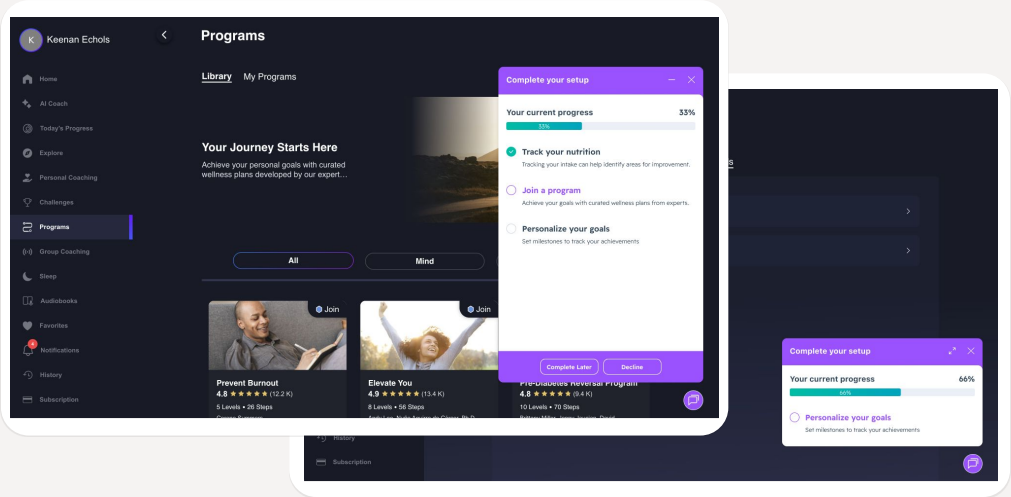
PRIVATE BETA: Checklist (End User View)

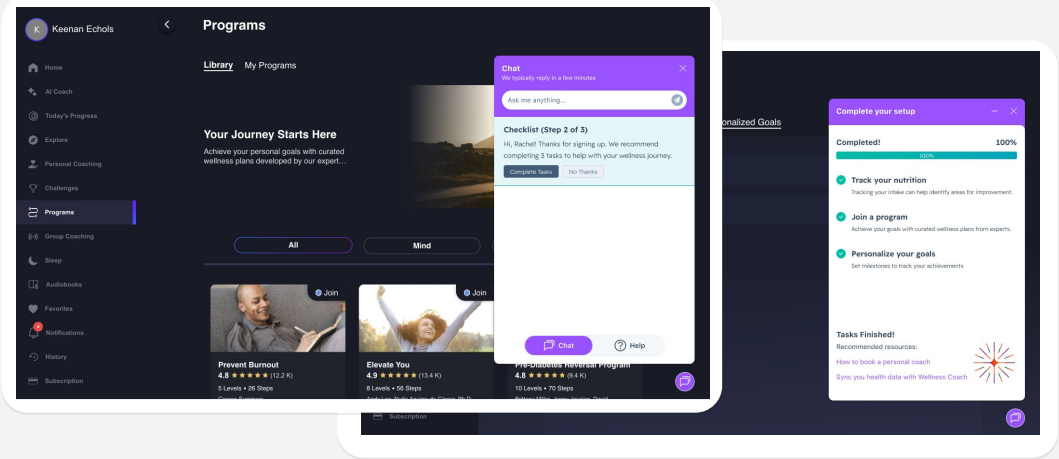
The End-User Experience: Interacting with Checklists

The checklist popup was designed to be a **flexible and non-disruptive guide**. Users have the option to minimize the checklist at any time, allowing them to focus on the main content of the page while keeping their current task visible.

To ensure the checklist is never lost, it **intelligently links back to the main chat widget**. If a user closes the popup, they can easily reopen it and resume their progress from the widget.

Additionally, I designed a static success screen upon checklist completion. This could be a customizable view in future enhancements. This presents an opportunity to further drive engagement by offering dynamic content or next steps.





Prototype

[Checklist Figma Prototype]

Results

Validating the Shift to Proactive Support: Key Results

The private beta validated our core hypothesis: empowering customers with precise targeting tools drives a fundamental shift in their support strategy. We saw a **4-point increase in the average number of chatflows per portal** as customers immediately grasped the power of proactive engagement.

Our customers were successfully able to move from a reactive support model to one of proactive assistance, as their **deflected tickets increased by 21%** within the first 30 days. This allowed them to proactively **solve user problems, drive engagement, and reduce the burden** on their support teams.

Learnings

KEY LEARNINGS

A Future Vision for Connected Personalization

A key insight from our private beta feedback was a strong customer desire for personalization that **extends beyond HubSpot's native CRM data**. This revealed an interest for a live chat experience that could integrate with **third-party systems** to deliver truly connected, contextual experiences.

This feedback has opened up a new **strategic direction** for the product, centered on how **different systems could communicate** within the chat experience. It raises new and exciting design challenges: What would the UI for configuring these external data calls look like? How would we seamlessly pull in and display that data for the end-user?

For example, we can now envision a future where a user completes an onboarding checklist and is immediately presented with a dynamic call-to-action from an external system, such as an option to purchase a product using their stored payment method.

Deeper Control Over Journey Logic and Targeting

Beta feedback revealed a clear opportunity to develop a more intelligent and dynamic system for managing the end-user's journey.

- **Intelligent Journey Settings:** Customers questioned how to best manage the frequency and priority of popups over time. This highlights the need to move beyond a simple 48-hour cooldown and explore more **sophisticated controls** for settings and user journey logic, ensuring users receive the right message at the right time without feeling overwhelmed.

- **Behavior-Driven Targeting:** A powerful theme emerged around creating a closed-loop system between proactive engagement and CRM data. Customers wanted to use actions—such as a user **completing a guided tour—as triggers** to automatically update their CRM data or **enroll that user in a new**, more targeted segment.

Future Roadmap

VISION DECK

Defining Our North Star: A Phased Approach to Proactive Support

Collaboration: PM

To align the team on a **long-term strategy**, I created a comprehensive Vision Deck that serves as our collective North Star. This document synthesizes all research, workshop outputs, and design explorations into a single, cohesive plan.

It outlines our **foundational use cases**, the prioritized product roadmap, and key design artifacts, ensuring **cross-team visibility and alignment** on our future direction. The deck explicitly defines our **strategy for delivering immediate value** while building towards a more **robust future state**.

V1 Focus: The Contextual Popup Our initial release will focus on the contextual popup experience, a solution that was strongly validated by users and offers the most direct path to delivering customer value and gathering in-market learnings.

Here are 3 opportunities within Live Chat

Trigger Based Workflows

Empower customers with greater **control** over the **personalized content** they show within different segments. This gives them the ability to directly influence what's most relevant, enhancing visitors experience and driving **stronger engagement**.

Contextual Knowledge Base

Empower customers to **proactively display relevant** articles to their visitors. This gives them the control to surface critical information at the **right time**, reducing the need for direct support interactions.

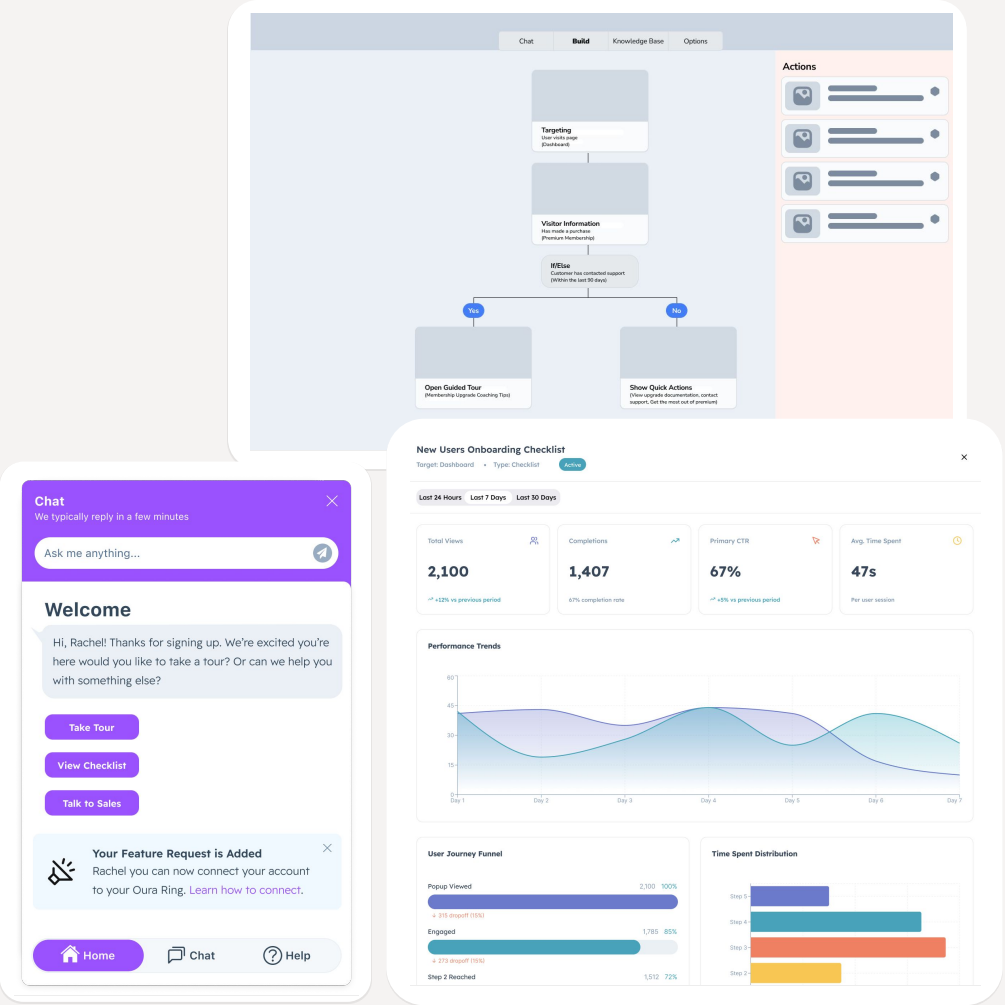
Widget Popups

Empower customers to **proactively guide** their visitors, providing **robust, immediate support** every step of the way. This ensures a smoother user journey, **reduces friction**, and ultimately drives greater product **adoption and satisfaction**.

Customers expect a fast and personalized support experience. 90% of customers rate an "immediate" response as essential or very important when they have a customer service question. (HubSpot). 63% of consumers expect businesses to know their unique needs and expectations, while 76% of B2B buyers expect the same thing (Salesforce).

POST MVP

Beyond V1: The Future Roadmap for Proactive Support

With the V1 foundation validated, the next step is to scale the platform to support even **more powerful and personalized proactive use cases**. I also identified three key opportunities to drive the **next wave** of value and adoption:

- **Intelligent Chat Workflows:** Expanding beyond popups to allow customers to apply smart targeting, logic, and branching workflows directly to their main chat widgets.
- **The Personalized Widget Dashboard:** Transforming the chat widget itself into a dynamic and intelligent hub, capable of surfacing tailored dashboards and actions for each end-user.
- **Advanced Performance Analytics:** Launching a robust analytics suite to give customers granular, actionable insights into how their proactive experiences are performing and driving business outcomes.