



Rachael's Ink, LLC.

Migration to Help Desk & Launch of Customer Agent ✨

Case Study

Rachael's Ink, LLC led the migration of HubSpot's Inbox to Help Desk for the Functional Movement Systems (FMS) team.



OBJECTIVES

The customer success team at FMS has been using Inbox in HubSpot, but wanted to implement HubSpot's Customer Agent (AI) into their workflow and open the door for faster responses to support repetitive customer needs 24/7. Migrating to the Help Desk was part of this initiative to make customer support inquiries more visible and to free up the Customer Support person's time by using AI.



Ticket Resolution
Time in Hours
BEFORE



NOW



SOLUTIONS

- Map their customer support and sales handoff workflows.
- Benchmark Key Performance Indicators (KPIs) before and after implementation to measure success.
- Fully migrate the Inbox and communication channels to the Help Desk to improve visibility.
- Advise and train team members on the new and reduced actions they'll need to manage.
- Implement automated workflows where it made sense, dependent upon the inquiry reason.
- Provide the AI Customer Agent with all necessary content on FMS and common Customer Support needs.

AT A GLANCE

CHALLENGES

- Identifying when a human agent is needed
- Learning to trust the AI Customer Agent responses and how to manage information
- Access to all communication channels in one place
- Learn to use the new Help Desk tools

OUTCOMES

- Faster response times to customer inquiries
- Improved overall average ticket response times
- Visibility into actual workload
- Prioritization & triage of customer needs
- Tracking of SLAs
- Maintain or improve CES scores and Agent solutions feedback
- Freed time to focus on more impactful tasks
- Improved customer lifetime value

Operational Efficiency

Whether you're a support team of one or one hundred, managing inquiries and tasks that require personal attention, detailed investigation, or direct assistance can be difficult. Implementing an AI assistant to handle repetitive inquiries can greatly enhance operational efficiency. At FMS, there is already a strong emphasis on customer care; therefore, the challenge lies not in motivating the team to improve but in equipping the Customer Support team to effectively utilize the tools and resources at their disposal.

Improved Support & Routing Workflows

A small support team can be mighty when the right tools and workflows are in place. To reduce friction and speed up resolution, the support experience was redesigned with automation and clear ownership at the core.

- Topic-based categories automatically route inquiries to the appropriate team
- No middle person is required to review or manually hand off requests
- Sales-related inquiries are automatically identified and routed to Sales
- AI handles initial triage and resolution where possible
- When AI cannot resolve an issue, human agents are immediately notified and can:
 - Jump into the live chat and take over the conversation
 - Continue the conversation asynchronously via the Help Desk when the customer or agent is offline

Results of Streamlined Workflows

This streamlined workflow delivers:

- The right person involved at the right time
- Faster response times so customers feel heard
- Reduced manual triage and fewer hand-offs
- Smooth, automated sales handoff when leads appear
- More time for Customer Support to focus on complex issues and higher-value work
- Better visibility into workload and performance over time

● BENEFITS

Unified Workspace

HubSpot is designed for all teams across the business. The Help Desk allows customer support teams to have the same visibility, trackability, and aligned customer outcomes, while opening up visibility to cross-functional teams.

Enhanced Context & Automation

FMS mostly responds to existing customer inquiries. However, they do receive sales-related inquiries periodically. With a small team, **automation is key** to quickly passing leads to the appropriate individual. With Help Desk, these tickets are automatically created and categorized, and a workflow is triggered that assigns tasks and emails leads.

OVERALL METRICS

Customer Support at FMS

Comparing key metrics before and after implementation shows where we've improved and where opportunities remain.

The metrics considered:

- Count of tickets each in the period
- Count of tickets by Source*
- Count of tickets by Category*
- Ticket First Response Average Time
- Ticket Average Response Time by Source
- Ticket Average Time to Close
- CES Score Average for Period
- Time in the ticket pipeline stage

These metrics were chosen because they are standard Support KPIs and reveal how effectively FMS is serving customers.

Baseline KPIs before migration and implementation:

- Avg Count of tickets each month: 229
- Ticket First Response Average Time: 17.6 hrs
- Ticket Average Time to Close: 8.5 Days
- CES Score Average for Period: 6.38
- Time in the ticket pipeline stage:
 - New: 17 Hours
 - Waiting on Contact: 5.6 Days
 - Waiting on Us: 5.5 hours
 - Waiting on Internal Escalation: 12 Days

These are the key metrics we selected to measure success and give the Customer Support team a clear baseline for ongoing tracking.

Going forward, FMS can:

- Monitor these metrics regularly
- Set SMART goals aligned with Customer Success targets
- Reduce support-related frustration and increase retention

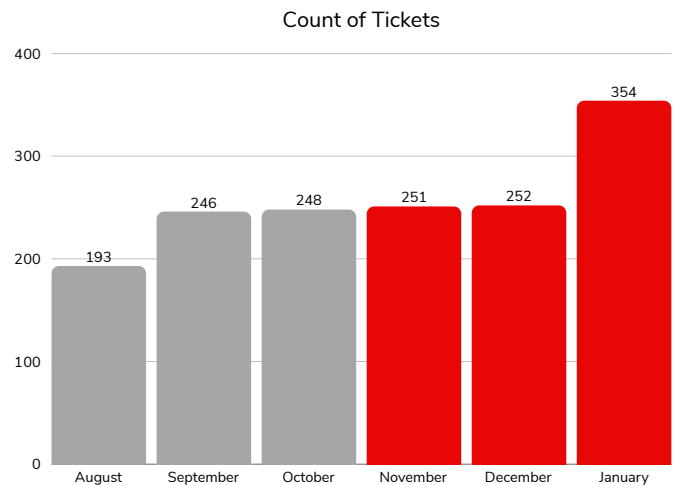
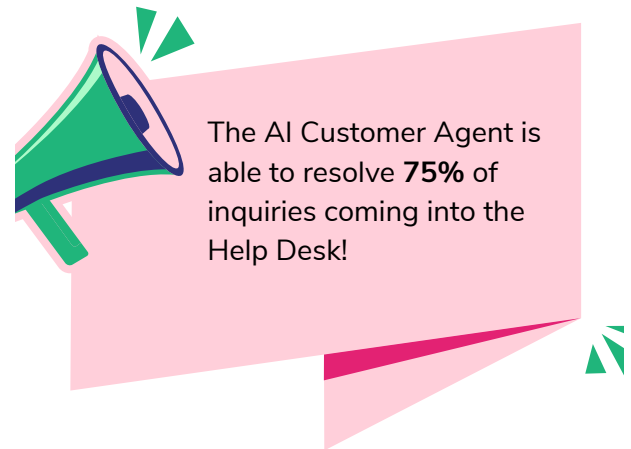
With the Breeze Assistant, FMS can also analyze results and uncover opportunities for improvement that may have been overlooked or previously unmeasured.

As part of this project, we also defined initial standardized SLAs. These will serve as a starting point and will be refined over time.

In the pages that follow, we will:

- Walk through the baseline metrics
- Show the results of the metrics at the end of the first 90 days

Asterisk indicates the data can be found in the appendix. It was not relevant to the results of the Case Study, but is valuable information for the Customer Support team to evaluate.



Baseline: Aug – Oct: Avg Count of Tickets: 229 monthly

Because tickets were created only when an issue required more than one response, the **true ticket volume is unknown**. Most tickets came from email, with some submitted via forms.

Results: Nov. – Jan: Avg Count of Tickets: 285 monthly

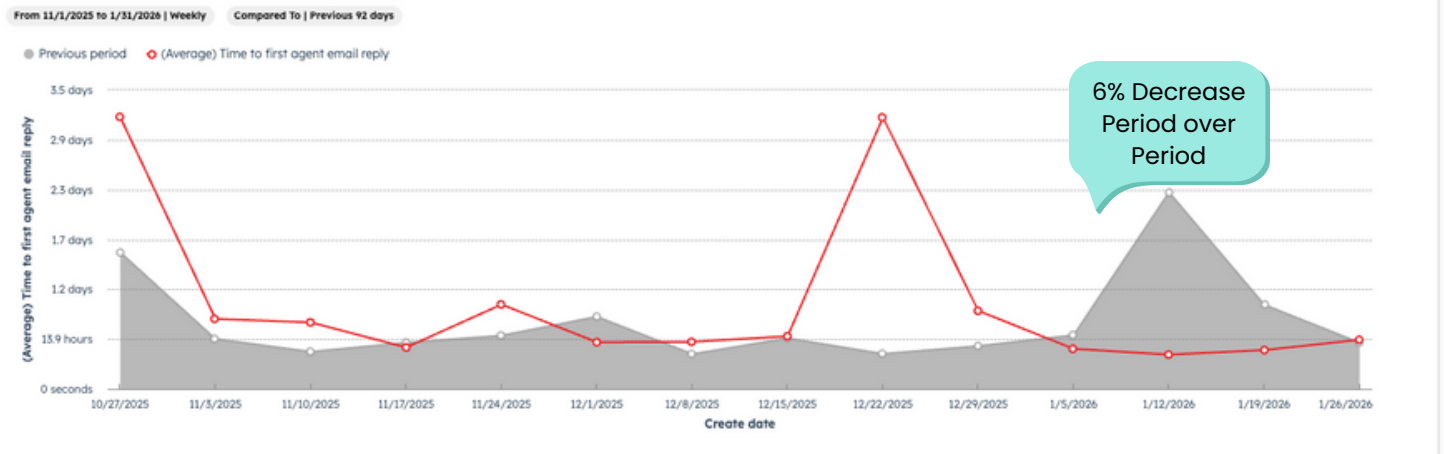
November's results were affected by a major US holiday, when the team was offline and support was unavailable for several days. The AI Customer Agent was first implemented the week of November 10, then briefly paused for refinement before being reactivated the following week.

December's data was similarly impacted by the Christmas and New Year's holidays, when both the team and the AI Customer Agent were offline. Once the team was fully back online and the AI Customer Agent was consistently running, **ticket volume increased significantly** because all Customer Support inquiries were being captured as tickets from every channel: AI chat, support form submissions, and support email.

OUTCOMES METRICS & EXPLANATIONS

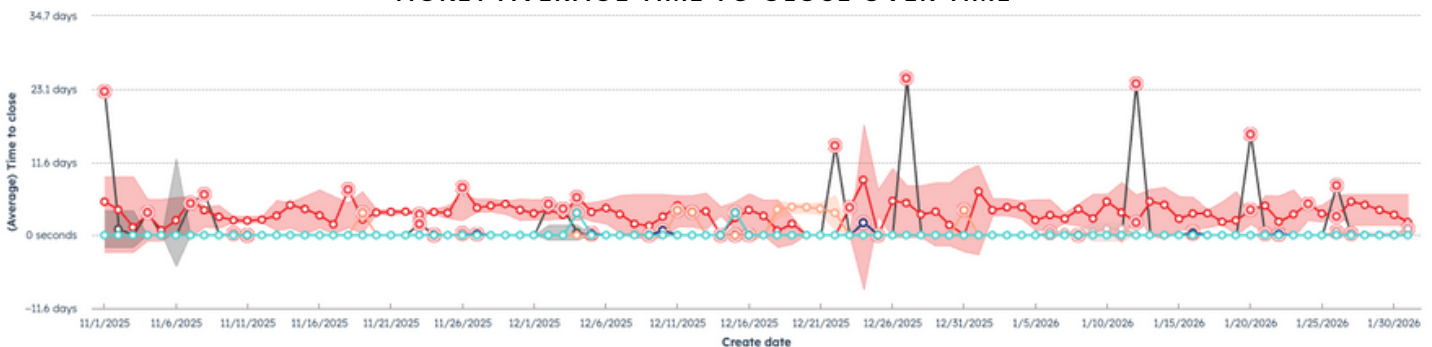
The data is measured in 90-day periods, since our implementation did not fall during a typical calendar quarter, we measured in the 90-day period that allowed us to measure before and after implementation. In some cases, we evaluate week over week data to understand where anomalies lie and if it is something to be fixed.

AVERAGE TIME TO FIRST AGENT EMAIL REPLY



This red data point line in this chart shows the average time to first agent email reply in hours by week. This line is representative of the timeline when the AI Customer Agent was active in conjunction with the Customer Support team. The October 27th data point is prior to implementation. You can see a clear bump the week of Christmas, with smaller bumps the week of Thanksgiving in November and the week of New Year's. If we were to draw a trendline, we would see a decrease overall. The Average time in the period prior (Aug-Oct) was 17.6 hours. The average time in the period during initial implementation was 16.4 hours, a 6% decrease.

TICKET AVERAGE TIME TO CLOSE OVER TIME



Human-owned tickets show a **healthy consolidation around a 2–5 day resolution band**. The Customer Support team saw a **57% decrease** in the average number of close days over the period. This is great news! We're solving customer issue inquiries faster. On average, the AI Customer Agent closes tickets in under 8 hours!

Note: Longer-running tickets appear as isolated spikes rather than a pattern, and they are typically falling where we would expect.



57% Decrease



OUTCOMES METRICS & EXPLANATIONS

Let's take a deeper dive into the AI Customer Agent metrics. This is a brand new implementation.

Impact

AI CUSTOMER AGENT IMPACT SUMMARY

In the last 90 days Compared To | Previous 90 days

CONVERSATIONS HANDLED ⓘ

154

▲ +153

CONVERSATIONS RESOLVED ⓘ

108

▲ +107

RESOLUTION RATE ⓘ

70%

▼ -30%

TIME TO RESOLUTION ⓘ

9 hr

▼ 16 hr

DEFLECTION RATE ⓘ

53%

▼ -47%

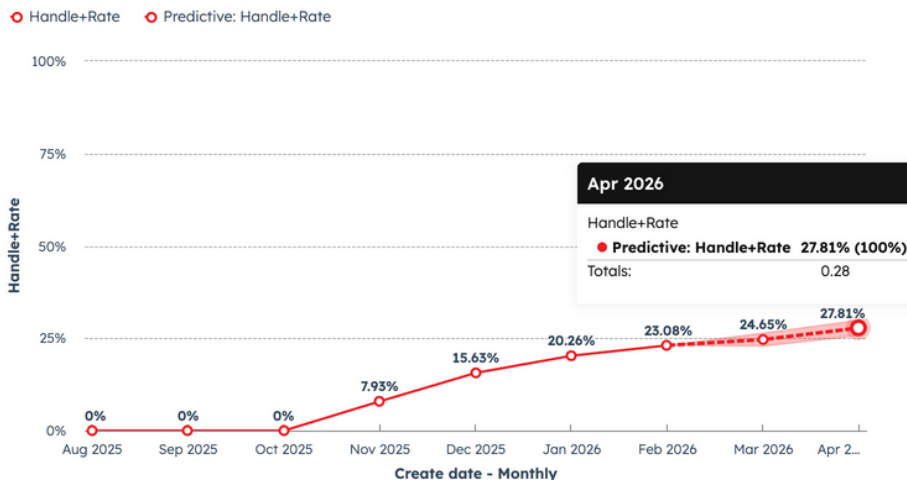
POSITIVE VISITOR FEEDBACK ⓘ

25

▲ +25

You can clearly see the impact the AI Customer Agent is having on the FMS team! In the first 90 days, it has handled 154 conversations, resolving 108, for a **70% resolution rate**! Time to resolution dropped from 24 hours down to nine — a **16-hour decrease**! Ultimately, 53% of the conversations were deflected by the AI Customer Agent. Of the people who responded with 👍 (thumbs up) or 👎 (thumbs down), 25 indicated a helpful response was provided.

AI CUSTOMER AGENT HANDLE RATE

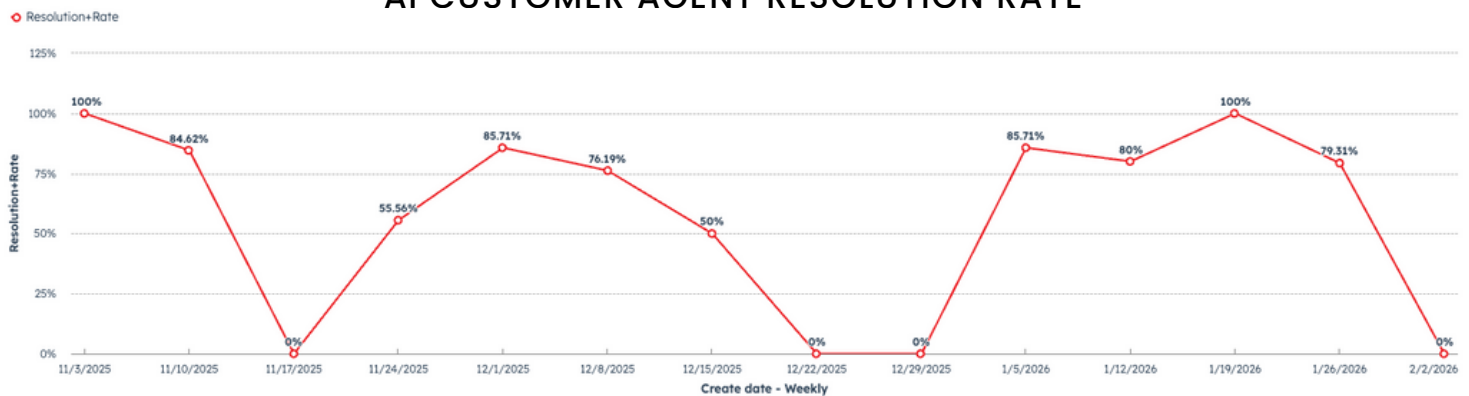


As each month passes, the AI Customer Agent Handle rate steadily increases. This is the desired result. Based on this data, HubSpot's Breeze Assistant predicts this rate will continue to climb in the coming months.

The AI Customer Agent identifies knowledge gaps, so the Support team can teach it appropriate responses, making it better able to handle more issues.

The FMS Customer Support team reports they are now able to spend time on higher-priority issues and address concerns that require a human response.

AI CUSTOMER AGENT RESOLUTION RATE

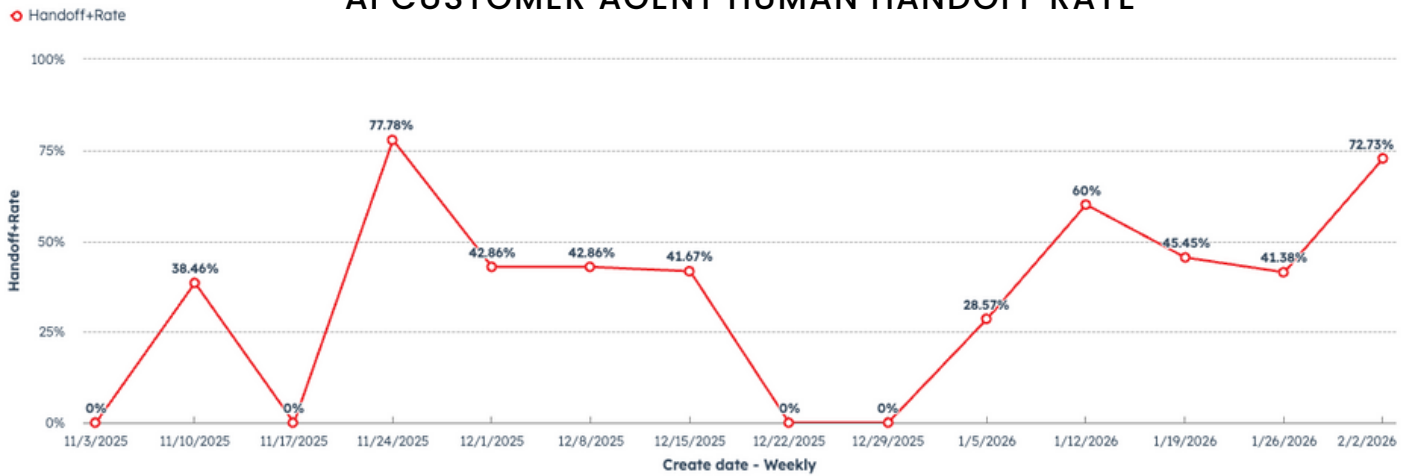


The AI agent has an **average resolution rate of 57%**, successfully resolving over half of customer interactions, which indicates significant value by minimizing human involvement. The report also notes that AI achieved a **perfect 100% resolution rate** in some weeks, demonstrating its effectiveness and potential to consistently deliver high-quality automated support.

OUTCOMES METRICS & EXPLANATIONS

Let's take a deeper dive into the AI Customer Agent metrics.

AI CUSTOMER AGENT HUMAN HANDOFF RATE



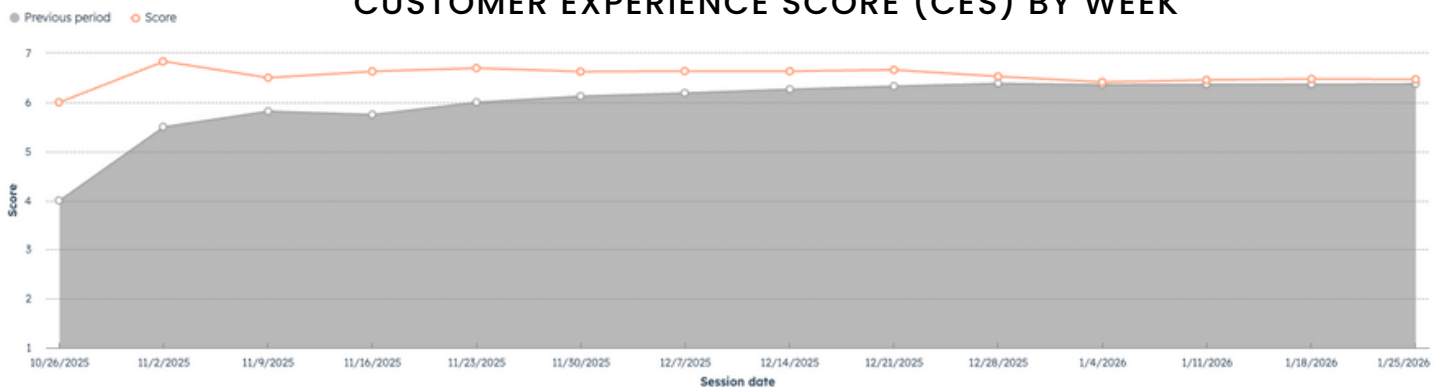
The average handoff rate over the analyzed period is 35%, indicating that the AI agent is independently resolving the majority of conversations. This demonstrates strong agent performance and effective automation, reducing the need for human intervention and freeing up valuable team resources.

What about the Customer?

Why are we doing all of this work? Yes, we want to free up time for the FMS Customer Success team to handle more complex tasks and business initiatives, but none of this matters if the Customer's experience is not at the same high-standard they've come to expect from the FMS team.

Following each Customer Support inquiry, a CES Survey (Customer Experience Survey) is sent to FMS customers. This is a measurement of how easy the customer found it to get their inquiry resolved.

CUSTOMER EXPERIENCE SCORE (CES) BY WEEK



FMS's CES Score Average for the Period was 6.47 (1.41% increase). The CES score scale ranges from 1 (the hardest experience) to 7 (the easiest experience). Prior to the migration to Help Desk and the implementation of the AI Customer Agent, the FMS teams' CES scores were strong. The implementation only improved that score.

● APPENDIX & RESOURCES

The following data is a short summarization of the data points we highlighted in this case study. There are other metrics we are evaluating as a component of standardizing the Key Performance Indicators (KPIs) and Service Level Agreements (SLAs) for Customer Success at FMS. These are metrics we encourage all our customers using Service Hub with HubSpot to use.

Results Summary after 90 Days of implementation:

- Avg count of tickets monthly: 285
- Count of tickets by Source
 - Email: 400
 - Form: 303
 - Chat: 154
- Ticket First Response Average Time: 16.4 hrs (6% decrease)
- Ticket Average Response Time by Source
 - Chat: 7.1 hrs
 - Email: 17.9 hrs
 - Form: 17.2 hrs
- Ticket Average Time to Close: 7.3 Days
 - Support Person: 3.7 Days (57% decrease)
 - Customer Agent: 7.8 hours
- CES Score Average for Period: 6.47 (1.41% increase)
- Time in Ticket pipeline status
 - Avg Latest Time in New: 14 hours
 - Avg Latest Time in Waiting on Contact: 2.4 days
 - Avg Latest Time in Waiting on Us: 7.7 hours
 - Avg Latest Time in Escalation: 3 Days

Resources

[HubSpot AI Customer Agent Analytics Definitions](#). Here are some we referred to in this case study; you can find the complete list at the link.

- **Handle rate over time:** percentage of conversations handled by the customer agent. This included both those conversations resolved by the customer agent as well as those escalated to a human agent.
- **Resolutions:** conversations fully resolved by the customer agent, without any involvement from a human agent. A conversation is considered resolved if all of the following criteria are met:
 - The conversation includes at least one reply from the customer agent that referenced a content source or performed an action.
 - The visitor did not request a transfer to a human agent.
 - The visitor did not give negative feedback to the last customer agent response.
 - The resolution status is evaluated and set 72 hours after the last customer agent response. Subsequent actions, such as messages from a live agent, a transfer request, or negative feedback, will not change the resolution status. Consequently, resolution rate data for the current week will show a lag due to this 72-hour evaluation window.
- **Resolution rate over time:** percentage of conversations fully resolved by the customer agent without human handoff, shown over time. A high resolution rate indicates the customer agent is successfully resolving customer queries without needing to be reassigned to a live agent.
- **Deflection rate over time:** percentage of conversations handled by the customer agent only, without any involvement from a human agent.
- **Deflections over time:** count of conversations deflected by the customer agent without human handoff, shown over time.
- **Human handoff rate over time:** percentage of conversations escalated from the customer agent to a human agent, shown over time.