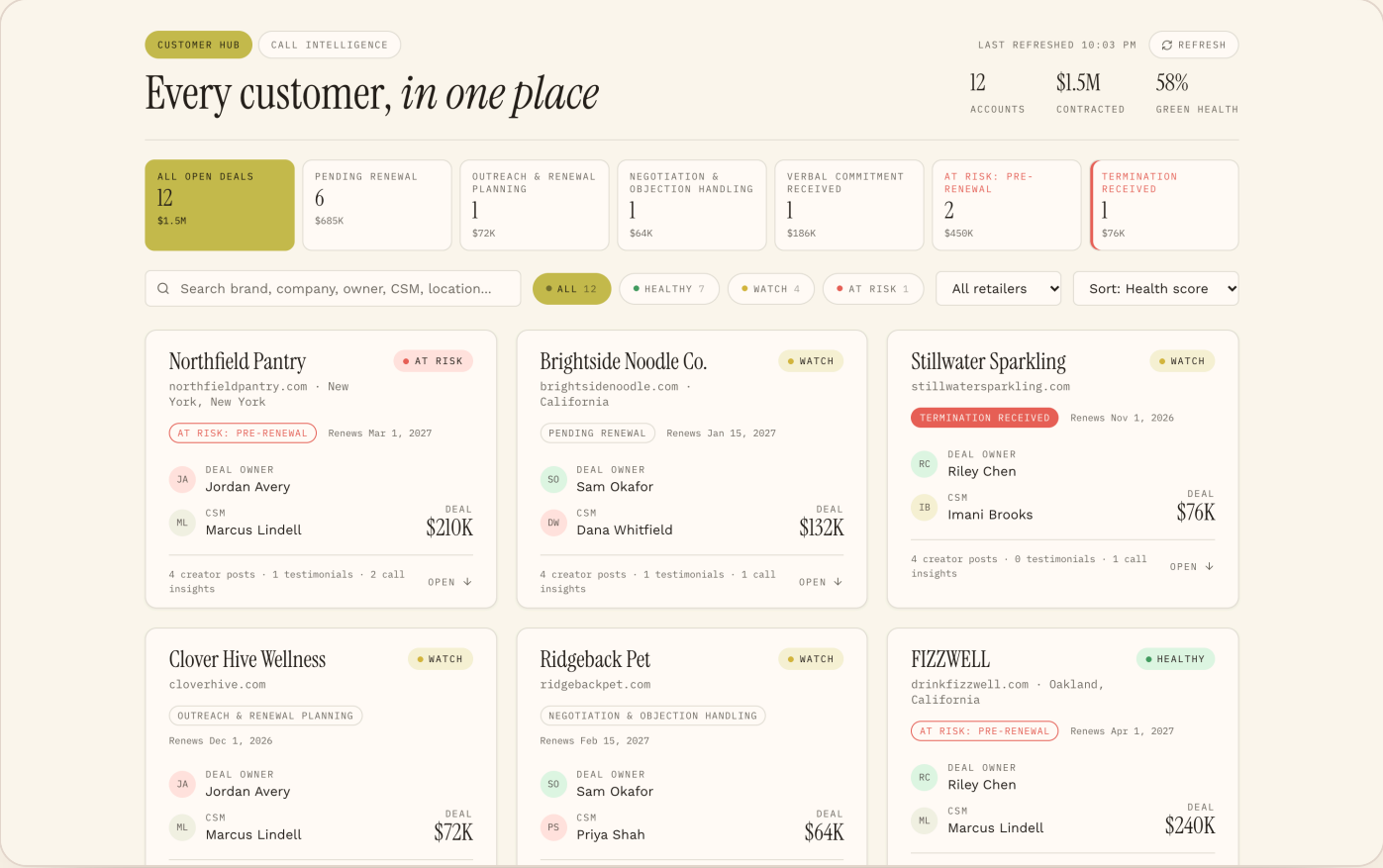
HUMMINGBIRDS · CUSTOMER SUCCESS · HUBSPOT

Every customer, and every call, *in one place.*

How we built Hummingbirds a live Customer Hub on top of HubSpot, with a Call Intelligence module beside it, inside their own Chipp account.



The Customer Hub board. Shown with sample data; brand and people names are invented.

CLIENT	BUILT FOR	BUILT ON	SPEED
Hummingbirds	The CEO and the customer success team	Chipp, reading from HubSpot	First preview in 4 days

THE CLIENT

A growing book of brands, *hard to see in one view.*

Hummingbirds is a creator marketing platform. It connects consumer brands with everyday creators to drive in-store product discovery. Its customer success team looks after a portfolio of brand accounts, and every one of them renews.

4 days
from kickoff to the first preview of the Customer Hub

15 days
from kickoff to Call Intelligence, live inside the hub

375
customer accounts on one live board

15 min
between HubSpot refreshes, with a manual refresh too

THE CHALLENGE

The data was all there. *It was just hard to see.*

Hummingbirds runs its customer relationships in HubSpot. One brand could have several deal cards: closed won, renewal year one, renewal year two. Health scores, renewal dates, owners, testimonials and churn signals sat on different records. Nobody had one view of the whole portfolio, so a question like "which renewals are at risk this quarter?" meant clicking through record after record.

Customer calls had the same problem. They were split across Attention and two people's Granola accounts. The CEO wanted a weekly pulse on what customers were saying: their sentiment, their words, their product requests. There was no single place to get it.

WHAT HUMMINGBIRDS ASKED FOR

One view of every customer.

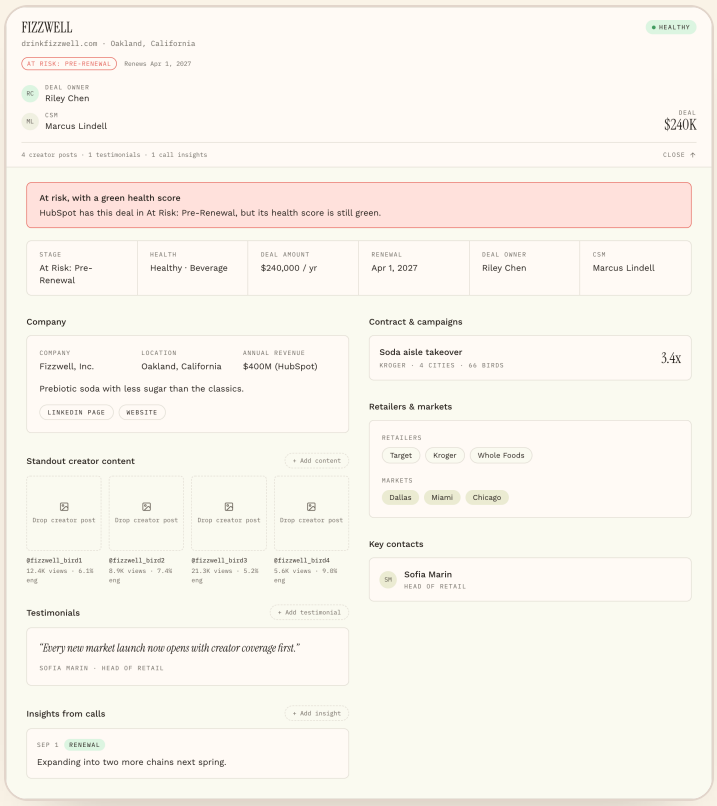
Health, renewals, owners and churn signals for the whole portfolio, live from HubSpot.

A pulse on every call.

Sentiment, quotes and product signals from customer calls, in the same place and ready for their AI agents.

WHAT WE BUILT

The Customer Hub: *one board, every account.*



One account, opened. The hub calls out a deal that HubSpot marks at risk while its health score is still green. Sample data.

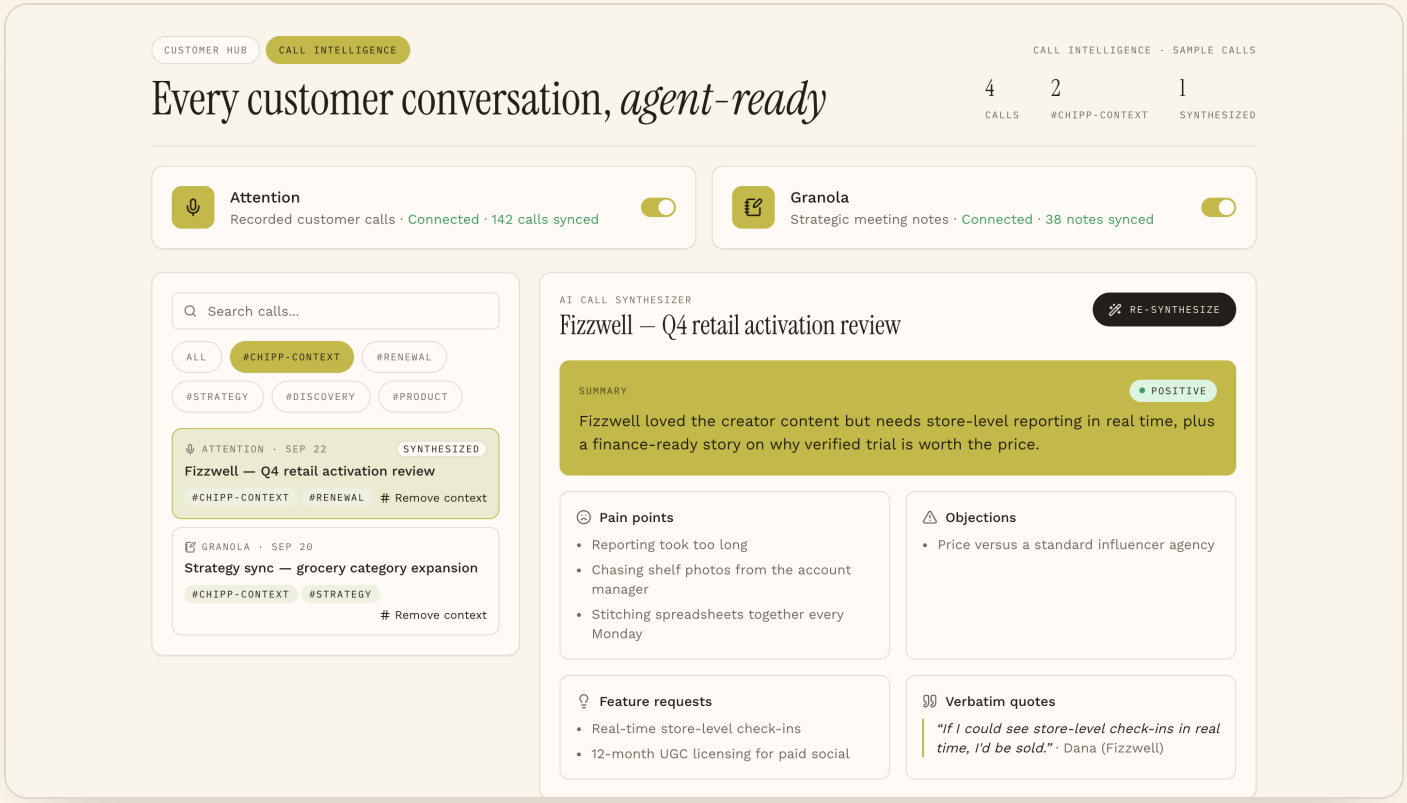
- **Every card answers the first questions.** Health, contracted value, deal owner and customer success manager, with search, health and retailer filters, and sorting.
- **The renewals pipeline at a glance.** Stage tiles run across the top, and one click filters the board to that stage.
- **Risk in words, not just colors.** A termination received, or a deal at risk while its health score is still green, gets a written callout.
- **The whole account in one place.** Company details and location, key contacts, campaigns, retailers and markets, creator content, testimonials and call insights.
- **Always current.** HubSpot syncs every 15 minutes, a refresh button forces a fresh read, and the board shows when it last refreshed.
- **Easy to share.** Every account has its own link, ready to drop into Slack.

HubSpot stays the source of truth. The hub only reads from HubSpot, so nobody can overwrite core CRM data from it. That was a deliberate choice. Two-way sync is a later step.

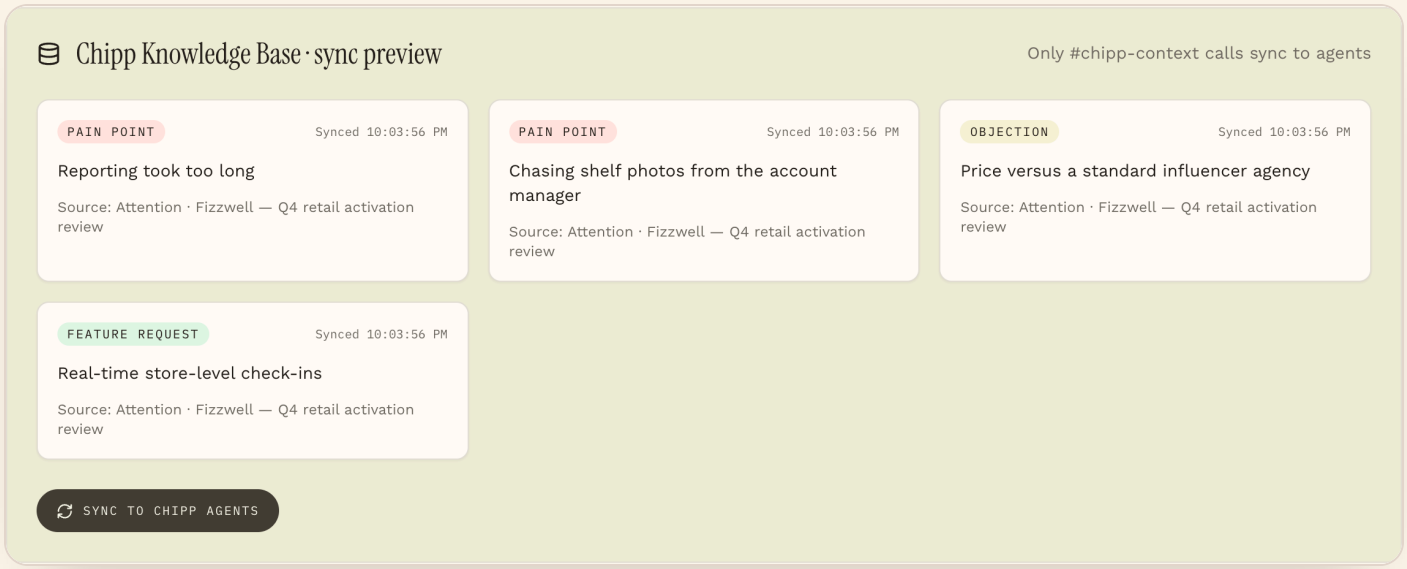
WHAT WE BUILT

Call Intelligence: *every call, agent-ready.*

A module beside the Customer Hub, in the same look, with a switcher between the two. It brings calls from Attention and Granola into one list, and a tag marks which calls should feed Hummingbirds' AI agents. The AI synthesizer is built and tested on sample calls; switching it on in production, with the live Attention and Granola connections, is the next step.



The AI call synthesizer turns a call into a summary, sentiment, pain points, objections, feature requests and verbatim quotes. Sample calls; brand and people names are invented.



Tagged calls become context cards, ready to sync to Hummingbirds' Chipp agents. Sample data.

HOW WE BUILT IT

Fast to see, *safe to run.*

Design first

We mocked up the board before writing production code, so Hummingbirds could react to something real instead of a spec.

Production on Chipp

Chipp's build agents built the data layer in a day: the HubSpot sync and the cache the board reads from. Then we brought the approved design across to the live app.

In their own account

The hub lives in Hummingbirds' own Chipp workspace. The software and the data stay theirs.

Feedback by Loom

The CEO recorded how Hummingbirds structures its deal cards. We mapped each field to the right card, then rebuilt the pipeline view around their real renewal stages.

Timeline

Day	Milestone
0	Kickoff. One view of customer health, renewals and calls. Sep 14
2	HubSpot sync and data layer built. Sep 16
4	First preview of the Customer Hub. Sep 18
8	Feedback session sets the next round of changes. Sep 22
14	Renewals pipeline rebuilt around Hummingbirds' deal stages. Sep 28
15	Call Intelligence module live inside the Customer Hub. Sep 29
21	Plan delivered to bring Attention and Granola notes into the hub, matched to each account. Oct 5

RESULTS

A board the team *keeps building on.*

- **One board for the whole portfolio.** All 375 customer accounts, live from HubSpot, with renewals by stage.
- **Risk you can read.** Terminations, and at-risk deals hiding behind a green health score, are called out so they don't wait for someone to notice.
- **The client builds on it.** About a month in, the CEO was reworking the dashboard's design herself in Chipp's builder.
- **The base for what's next.** Hummingbirds has since asked for the same approach for events and for go-to-market.

> *"The call intelligence is amazing from a UI perspective!!"*
>
> Emily Steele, CEO and co-founder, Hummingbirds

WHAT'S NEXT

- Bring in the AI notes Attention and Granola already write, matched to each account automatically.
- A one-click brief before every customer call, and renewal early warnings in Slack.
- The themes customers keep raising, sized by the revenue attached.



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