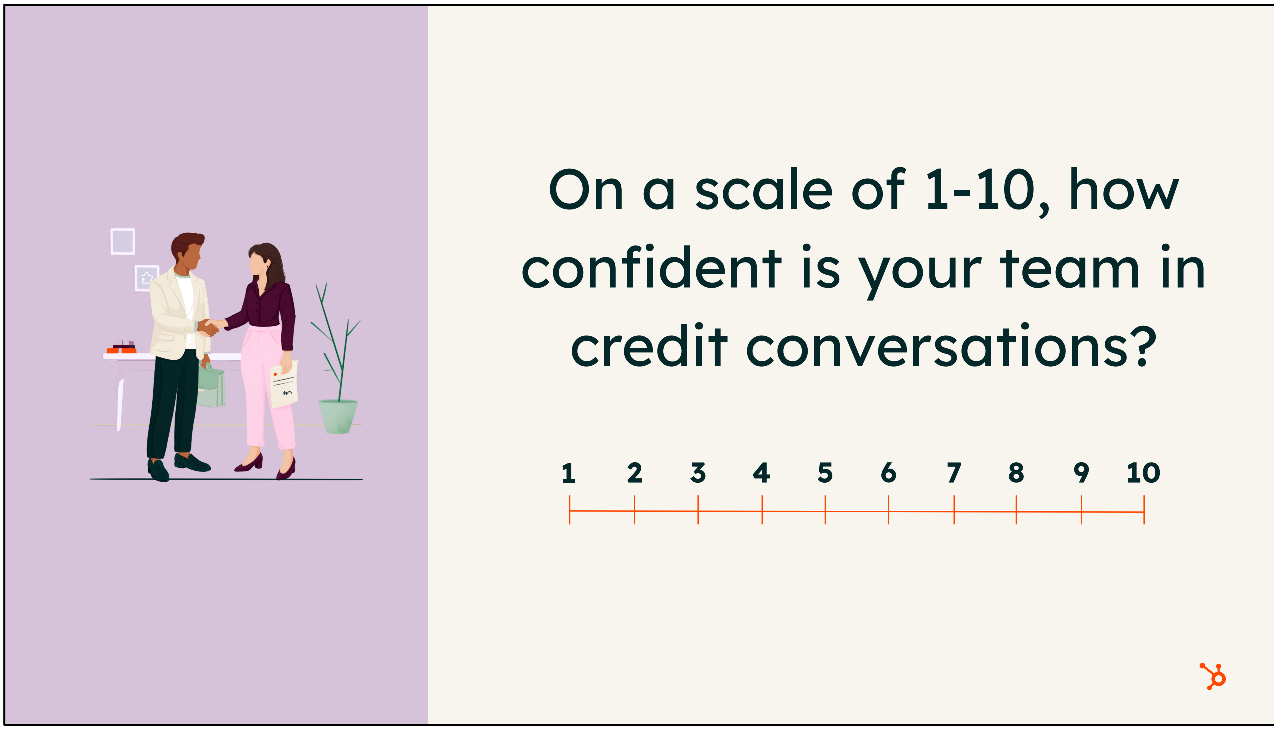
Credits & Value Communication.

Support Manager Connect Session

HubSpot

💬 **SAY:** Welcome everyone! Today we're focusing on one of the most critical skills for your Support teams: handling credits conversations with confidence and clarity.



⏰ **TIME: 3 mins**

💬 **SAY:** Welcome everyone! Let's start with our quick check-in. On a scale of 1–10, how confident is your team in credits conversations right now?

I'm seeing answers from **[Note the range of responses]**, which tells me we have varied comfort levels in the room

What's In It For You

- **Master the Framework**
  Lead with clarity & education (not technical jargon)
- **Build Coaching Confidence**
  Spot missed education moments + make your teams credits experts
- **Strengthen Results**
  Turn confusion into understanding and reduce repeat tickets

⏰ **TIME: 3 mins**

💬 **SAY:** Before we dive in, let's talk about what you'll gain from today.

You'll **master the framework** that helps you position clarity and customer education—not just technical explanations.

You'll **build confidence** coaching your teams to spot education moments and make them credits experts who can resolve confusion quickly.

And you'll **strengthen results** by turning confusion into understanding, which reduces repeat tickets and escalations.

That's how we make credits conversations a strength, not a pain point.

This session is part of Winning the AI Turn—Month 2 focuses on credits mastery. Last month we covered Customer Agents; now we're building on that foundation. Credits positioning is a Rock activity—non-negotiable for customer success and support efficiency.

We'll work through the credits framework together:

- Lead with clarity and customer education, not technical jargon
- Connect credits directly to customer usage patterns and pain points
- Frame credits as an investment in AI transformation, not an additional cost
- Help customers understand their consumption so they can plan effectively

name.]"

Ticket Review

⏰ **TIME: 1 min**

💬 **SAY:** Now that we've reviewed the framework, it's time to apply it. You'll analyze real Support tickets using your Coaching Analysis Toolkit to spot what's working and where reps can improve their credits explanations.

Coaching Analysis Toolkit

Discovery & Connection

- Where did the customer express confusion about credits or billing?
- What misconceptions did the customer have about how credits work?

Positioning & Articulation

- How did the rep position credits: consumption model or business enabler?
- What specific clarity or education points did the rep use (or miss)?

Tools & Objection Handling

- When should the rep have introduced the credits calculator?
- How could the rep have reframed credits objections more effectively?

Coaching Strategy

- What's the #1 skill gap to address with this rep?
- What specific customer example would make great practice?

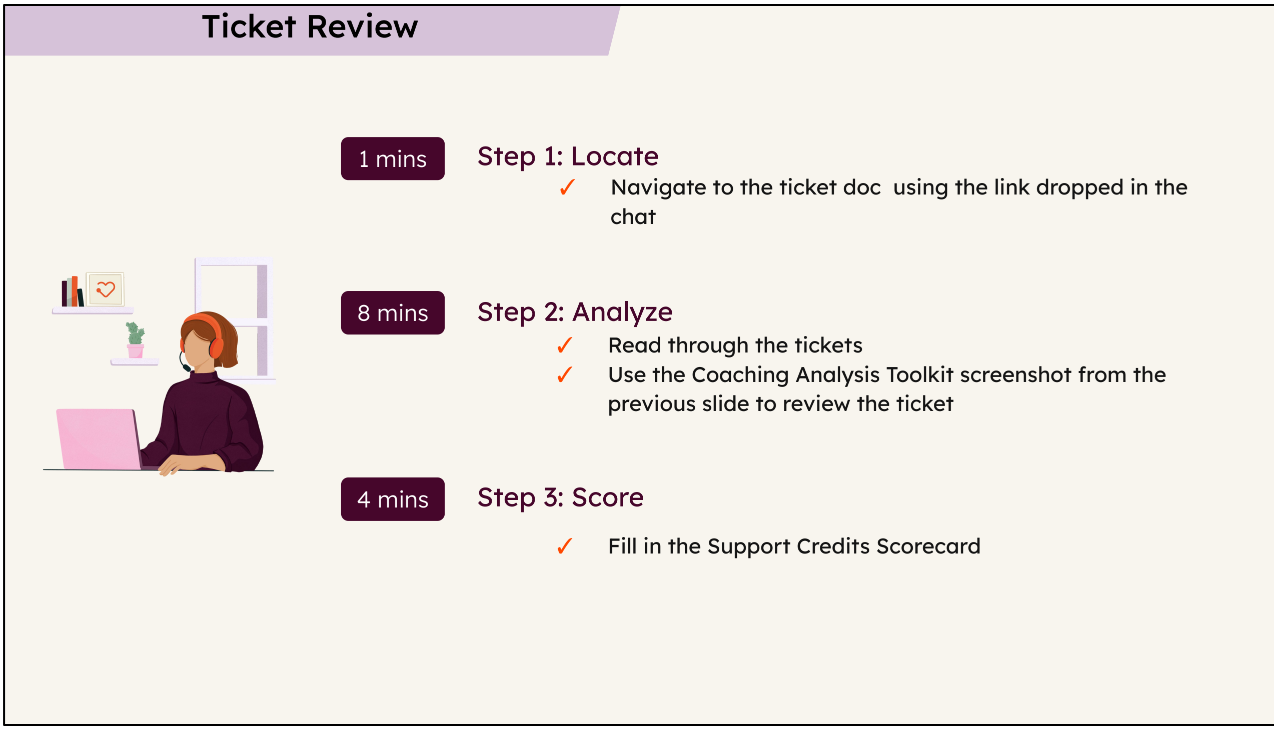
Screenshot this slide!

⏰ **TIME: 2 mins**

🗣️ **SAY:⏰ TIME: 2 mins**

💬 **SAY:** These questions will guide your coaching analysis. You don't need to answer all of them, just focus on the ones that feel most relevant. Go ahead and take a screenshot now, you'll want this open during your review work.

[Visual check: SAY Give me a 👍 reaction—or a thumbs up on camera—once you've got the resource.]



⏰ **TIME: 13 mins (1 + 8 + 4)**

💬 **SAY:** You can leave your camera on for accountability or go camera off to focus for this activity.

1️⃣Open the ticket doc for your team: https://docs.google.com/document/d/1v7Kksq3_XP0uzDrc-MAr3Ye3vZfnV0TkDl42mp1kIB4/edit?tab=t.0

📌 **FACILITATOR: Insert ticket folder link here**

2️⃣Read through the ticket interactions and refer back to the questions you screenshotted on the previous slide. Think about those as you read.

3️⃣Then, fill out the Support Credits Scorecard for that ticket.

[DROP THIS LINK IN THE CHAT] - https://docs.google.com/document/d/1q4gDOFQKkOQEcR-exmE_az7unxmFbFaX94PI_gJ_cnA/edit?usp=sharing

I'll give you a two-minute warning before we wrap up.

🎬 **DO:** During this activity, use a timer to track progress. When there are two minutes remaining, **SAY:** Alright everyone, we've got about two minutes left in this activity. Go ahead and finish your scorecard and get ready to rejoin the group.

What Did We Discover?

🔍 Reps using jargon vs. plain language explanations?

🧮 Missed calculator demonstrations?

🛡️ Defensive vs. educational responses?

🎯 Technical vs. customer-focused explanations?

⏰ **TIME: 5 mins**

💬 **SAY:**

"Let's talk about what you noticed in those tickets. Come off mute or put in the chat what stood out to you."

Common answers may include:

- "Reps explaining mechanics vs. helping customers understand their usage"
- "Calculator introduced too late - 4 groups mentioned this"
- "Concerns treated as complaints vs. education opportunities"

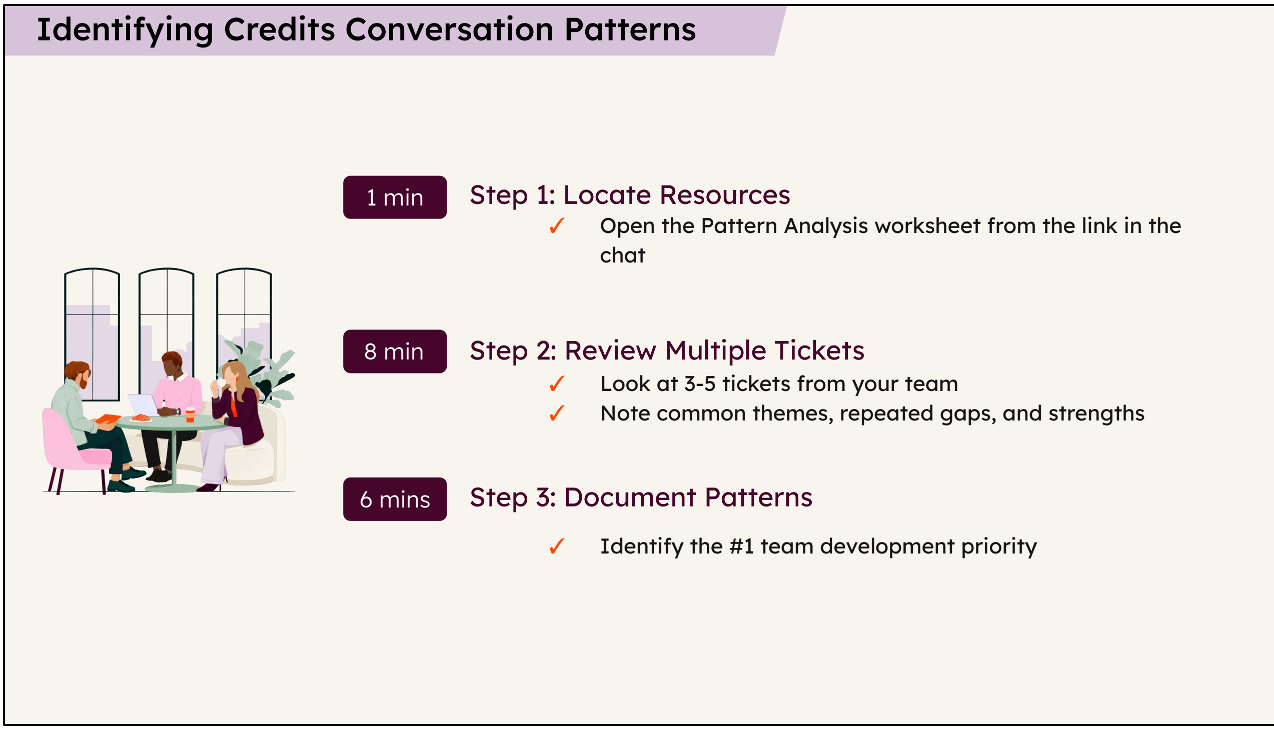
SAY: The pattern I'm seeing is that [topic] has come up repeatedly. That's our development priority. I'm dropping this doc link in chat now for your reference.

📌 **FACILITATOR: Drop relevant support documentation link here**

From Ticket Reviews to Pattern Analysis

⏰ **TIME: 1 min**

💬 **SAY:** We've reviewed individual tickets. Now let's zoom out and look at patterns across multiple tickets to identify team-wide coaching opportunities.



⏰ **TIME: 15 mins (1 + 8 + 6)**

💬 **SAY:** Now we're going to look beyond individual performance to identify team patterns.

Here's how it will work:

1️⃣First, open the Pattern Analysis worksheet I've just dropped in the chat.

🎬 **DO: Drop this link in the chat:**
https://docs.google.com/document/d/11AhR3-TNsYhO-9REnj6PDzMWv8AQqoPOt50JEPsI4JI/copy?usp=sharing

📌 **FACILITATOR: Insert Pattern Analysis worksheet link here**

2️⃣Review 3-5 credits-related tickets from your team. You're looking for:

- What misconceptions come up repeatedly?
- What explanation approaches work consistently?
- Where do multiple reps struggle?
- What education opportunities are we missing?

3️⃣Identify your #1 team development priority and discuss with the group

This pattern analysis is what separates reactive coaching from strategic coaching. Instead of addressing one-off issues, you're identifying systemic gaps that need

💬**SAY:** Alright everyone, we've got about two minutes left. Go ahead and finish documenting your patterns and identifying your top priority.

Pattern Analysis Debrief

👍 2 - 3 Groups share their top patterns

🧠 Identify common themes across teams

🛠️ Capture priorities for skills practice?

⏰ **TIME: 5 mins**

💬 **SAY:** Let's hear what patterns you discovered. I want to hear from 2-3 managers about the most significant pattern you identified—not every detail, just the one thing that stood out as your team's biggest development opportunity.

[Call on 2-3 participants]

What pattern did you identify as your #1 priority? What makes this significant for your team?

[After shares]

LISTEN FOR:

- Repeated misconceptions about how credits work
- Inconsistent use of the calculator
- Defensive language when customers express concerns
- Missing proactive education in responses
- Overuse of technical jargon

💬 **SAY:** The themes I'm hearing are [summarize common patterns]. These become

Roleplay Practice

⏰ **TIME: 1 min**

💬 **SAY:** Now we're going to put it all together with some roleplay practice where you'll coach a rep through a real credits scenario.

Credits Coaching Roleplay: Practice with Purpose

Practice coaching a rep through real objections using the approved reframe and ROI framework.

Roles

- **Coach**: Lead the conversation. Practice guiding a rep through a tough credits objection.
- **Rep:** Sharing a challenge they faced on a recent ticket.
- **Observer**: Use the 2×2 Scorecard to note one thing done well and one opportunity to improve.

⏱️ 15 minutes total

1. Align on roles and pick your objection (2 mins)
2. Run the roleplay (8 mins total – swap if time allows)
3. Give feedback using 2×2 feedback (5 mins)

⏰ **TIME: 2 mins**

💬 **SAY:** Before we jump into roleplay, let's make sure everyone's clear on the setup.

I'm going to send you into breakout rooms where you'll work in trios, each person with a specific role:

- **Coach:** guides the rep through addressing a credits concern from a customer ticket.
- **Rep:** shares a challenging ticket scenario they've faced.
- **Observer:** tracks what's working and what could improve using the 2×2 feedback guide.

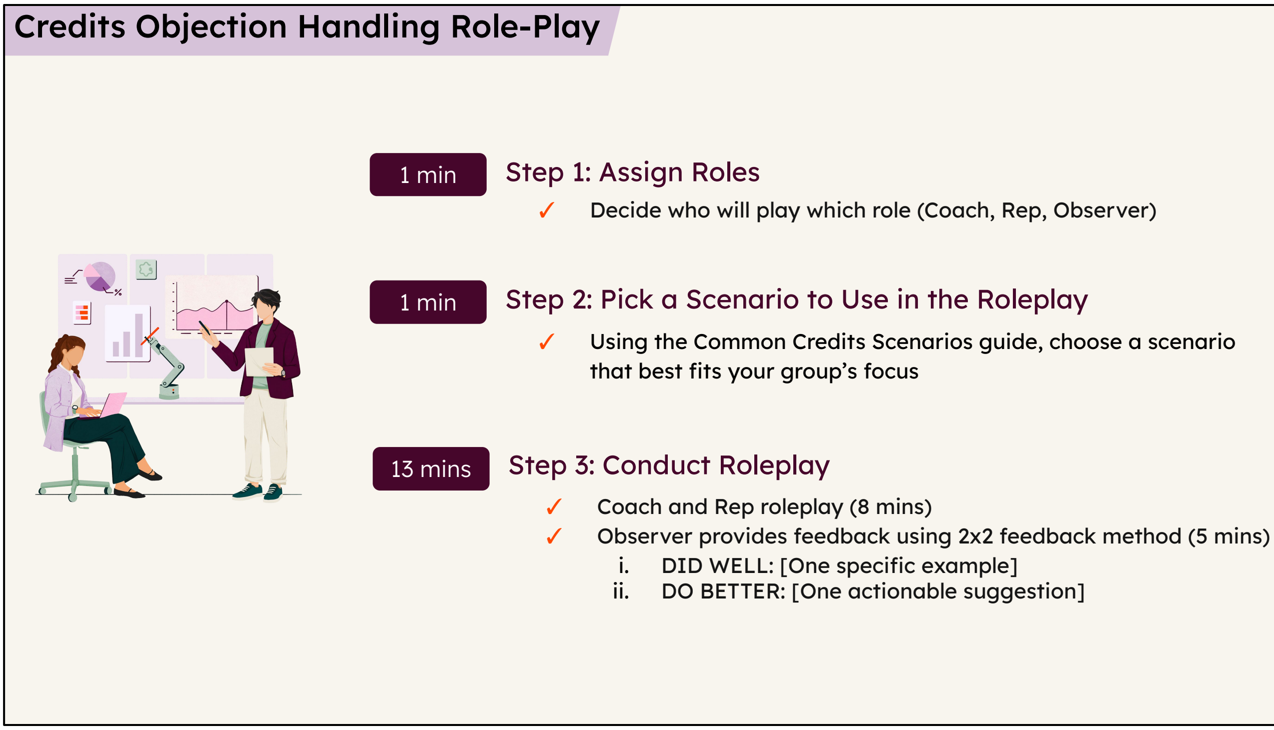
Your goal is to practice turning customer confusion into customer understanding.

You'll have 15 minutes total: two minutes to assign roles and pick a scenario, eight minutes for the practice, and five minutes for feedback.

Once we're back, I'll ask a few groups to share their top takeaway.

In the chat, I'm going to paste a link to the resource that will help you navigate this activity.

🎬 **DO: Drop this link in the chat: 📌 FACILITATOR: Insert Credits Roleplay Guide link here**



⏰ **TIME: 15 mins**

💬 **SAY:** Before we head into the breakout rooms, remember that as we coach our reps, the goal isn't to defend credits—it's to educate customers so they understand and can plan effectively.

Coaches, focus on guiding reps toward clarity and education framing. Observers, look for plain language explanations and proactive use of the calculator.

🎬 **DO:**

- Drop the scenario guide in the chat - https://docs.google.com/document/d/1mmDXv6ti3N3-c8jEUudZCl2srS0zQscCplXTYV-ZuR4/edit?usp=sharing
- Send participants into breakout rooms (no more than 3 per room).
- Optional: Screen share this slide to the breakout rooms.
- Use the broadcast message feature to alert them when there are 2 mins remaining. At the end of the session it takes 60 seconds to close the breakout rooms, when there is 1 minute remaining select close breakout rooms
- Monitor for any rooms where someone might be alone and re-assign as needed.

Roleplay Debrief

🙋🏽‍♀️ 2-3 groups share examples of addressing customer concerns

🔍 Identify patterns

📝 Capture common themes for skills practice

⏰ **TIME: 5 mins**

💬 **SAY:**

"Let's come back and share what you discovered about handling credits conversations.

[Call on 2-3 participants or groups]

What scenario did you practice? How did the education approach work? What made the difference between confusion and clarity?"

[After shares]

"Did others notice similar patterns? Common challenges in explaining credits clearly?"

👂 **LISTEN FOR:**

- Reps using technical language vs. plain explanations
- Missed opportunities to demonstrate the calculator
- Not addressing the root of customer confusion
- Generic explanations vs. usage-specific guidance

💬 **SAY:** The themes I'm hearing are [summarize]. These become your coaching focus areas moving forward. Notice how several of you mentioned [common theme]—this is exactly what we need to address in team training.

⏰ **TIME: 2–3 mins**

📌 **Facilitator Note:** Drop these links in the chat:

- Survey Link: https://www.surveymonkey.com/r/275QQWM
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🗣️ **SAY (closing):**
Thank you all for leaning in today. The work you did here—analyzing, planning, and practicing—will pay off in your next coaching conversation. We'll see you in the next session.

Thank You