Role-Play Interview - Lead Customer Onboarding Specialist

Focus Areas: Managing Ambiguity, Customer-First Mentality, Teaching Ability & Technical Aptitude

Customer: [Hapana](#)

About the Interview

You will participate in a **role-play simulation** of a first customer meeting (**Kick-off Call**) as part of the interview process. This exercise is designed to assess your ability to guide a customer through ambiguity, identify key needs, and position onboarding as a strategic partnership aligned with business outcomes.

Format Overview (Approximately 45 minutes total):

- Role-Play Explanation by the interviewer– 5 minutes
- Role-Play (Kick-off Call) – 25 minutes
- Q&A with Interviewer – 10 minutes
- Buffer Time– 5 minutes

Role-Play Scenario

You've received a meeting request to conduct a Kick-off Call with **Hapana**, a new HubSpot customer. The onboarding period is **90 days**. The objective of this meeting is to assess Hapana's current situation, ask clarifying questions, and propose clear next steps to help them reach their goals.

Please do not contact Hapana directly or download content from their website.

About the Customer: Hapana

Website: https://www.hapana.com

Industry: Fitness and Wellness Technology

Experience with HubSpot: First-time implementation of a marketing automation platform

Current Activities: Manages content through an owned media blog and ad-hoc campaigns

Purchased HubSpot Products:

- Marketing Hub Professional (1,000 contacts)
- Sales Hub Professional (5 seats)
- HubSpot Free CRM

Sales Notes (Preliminary Context):

- Primary Goal: Acquire 20 new MQLs (Marketing Qualified Leads) per month
- Main Contact: Marketing Manager (only full-time marketing employee, supported by 2 interns)
- Contact Management: Approximately 500 contacts are currently stored in spreadsheets
- Sales Team: 2 inside sales reps, 2 field sales reps

Your Objective in the Kick-off Call

Guide the conversation to:

- Understand Hapana's marketing and sales workflows
- Clarify their lead management process
- Identify pain points, blockers, or gaps
- Propose tailored, actionable next steps for onboarding success
- Build trust and set the tone for a consultative, value-driven onboarding experience

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