

Welcome to Vonazon's Webinar

MASTER HUBSPOT'S FALL UPDATES: ACTIONABLE INSIGHTS FROM INBOUND 2024

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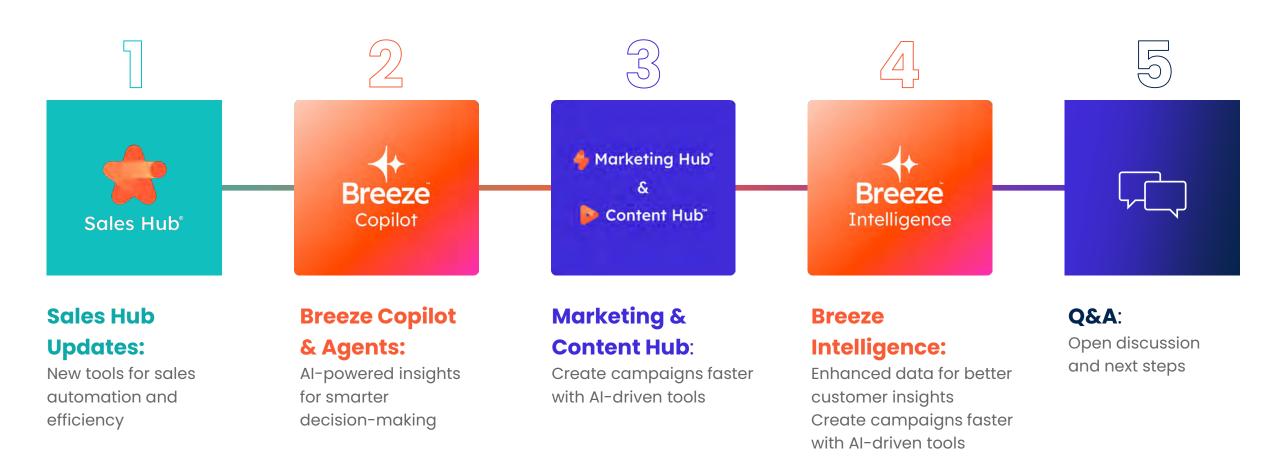
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AGENDA

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MEET YOUR SPEAKERS





SHANNON BRADY HubSpot Onboarding Specialist

DEREK REYNOLDS Sales & Marketing Implementation Manager

MILES ENGLAND HubSpot Onboarding Manager & Director of Partnerships



TYLER TAIT Senior Marketing Automation Specialist



SALES HUB UPDATES



Sales Hub®

Pipeline automation tools to streamline sales processes



Improved deal tracking and reporting for better insights



New features to close deals faster and more efficiently



AI-powered forecasting for smarter decision-making



Sale<u>s Hub</u>

Set up rules for deal pipelines

To manage how users can create and move deals through a pipeline, Super Admins can set rules for their deal pipelines. The following rules can currently be enforced for each individual pipeline:

- Set stages where new deals can be created.
- Restrict skipping stages in the pipeline.
- Restrict moving deals backwards in the pipeline.
- Limit who can edit deals in certain stages in the pipeline.
- Set up an approval process for deals in the pipeline (Sales Hub Enterprise only).



SALES HUB LIVE DEMO

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Configure	Pipeline Rules 《극	Automate	Deal tags						
te: These rules d	to not apply when creating	g or editing deals via	pipeline automo	ation nor	to super	admins c	or users with p	ermissie	on to edit property settings.
PIPELINE RULES	5			STAGE	5				
Limit deal cre	ation to specific stages								
Users can only	create a new deal in the s	elected stages.							
Restrict deals	from skipping stages			All Sto	nes				
Users can only	move a deal to the stage	following its current s	tage.	All bio	ges				
Restrict deals	from moving backward	s							
Users can only	move a deal forward in a	pipeline.							
Control deal e	diting access								
Limit who can e	edit deals moved to select	stages.							
Add approval	process for deals 🛛								
Deals will requir	re approval once they rea	ch an annoual stage							

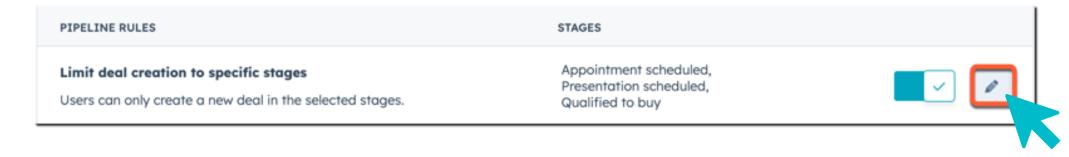
To set up rules:

- I. In your HubSpot account, **click the settings settings icon** in the top navigation bar.
- 2. In the left sidebar menu, navigate to Objects > Deals.
- 3. Navigate to the **Pipelines tab**.
- 4. Click the **Select a pipeline** dropdown menu, then select the pipeline for which you want to set rules.
- 5. At the bottom, click the **Pipeline Rules** tab.
- 6. In each row, toggle the **switch on to apply the rule.**
- 7. Depending on the rule, customize the settings





SALES HUB LIVE DEMO



Edit or turn off pipeline rules:

- 1. In your HubSpot account, click the **settings icon** in the top navigation bar.
- 2. In the left sidebar menu, navigate to **Objects > Deals.**
- 3. Navigate to the **Pipelines** tab.
- 4. Click the **Select a pipeline** dropdown menu, then select the pipeline for which you want to set rules.
- 5. At the bottom, click the **Pipeline Rules** tab.
- 6. To edit an existing rule, click the **edit icon** in the rule's row. Make your changes in the right panel, then click **Save**.
- 7. To turn off a rule, click to toggle the switch off. In the dialog box, click **Delete pipeline rule** to confirm.



What is Breeze Copilot?

Breeze Copilot is an AI assistant integrated throughout HubSpot's interface. It helps with tasks like drafting emails, summarizing data, and providing insights.







Real-time suggestions for customer interactions



Automate routine tasks with ease



Agents available for personalized experiences

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Breeze Copilot

How to Access Breeze Copilot

- . Log into your HubSpot account.
- 2. Look for a sidebar or icon labeled "Copilot" or "AI Assistant"
 - it often looks like a chat bubble or AI symbol.
- 3. You can access Copilot from various areas including contact records, email composer, and dashboard views.

① Upgrade	Explore Spotlight: 200+ upda	ates 🖄 🐁 📅 🕐 🕸	🕽 🛛 🔶 Copilot 🔹 💿 Vonazon Demo Account 👻
Activities	Intelligence		Summarizing Interactions with Chots + X
1 ts TE DATE I 8:27 AM PDT	LIFECYCLE STAGE Leod	LAST ACTIVITY DATE 09/24/2024 12:01 PM PDT	Copilot Hit I'm Copilot, yaur new AI-powered collaborator! I can answer questions about your HubSpot data, and even carry out tasks for you. Let me show you how I work
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ound email from	Donotreply test	Sep 24, 2024 at 12:01 PM PDT	Copilot
			Recently, Southern California Edison sent an email on September 24, 2024 , titled "In a High Fire Risk
		+ Add	(Type a message
	Q Association label + C	ontact owner + More +	(Research competitors)
		EMAIL	(Prepare for meeting with company) (All prompts →)
reply test		donotreply@email.sce.com	AI-generated content may be maccurate. See terms ()

Copilot

Using Breeze Copilot

- Click on the Copilot icon to open the Al assistant sidebar.
- 2. Type your request in natural language. For example:
 - "Summarize recent interactions with [Company Name]"
 - "Draft a follow-up email to [Contact Name] about our last meeting"
- 3. Copilot will generate a response based on your CRM data and request.
- 4. Review and edit the Copilot's output as needed.

Breeze

BREEZE COPILOT

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	Companies Actions *	Overview Activities Intelligence		Summarizing Interactions with _ (Chats + X
	Southern California Edison email.sce.com 2 * +1 626-302-0008 *	Data highlights CREATE DATE LIFECVCLE STAGE 09/26/2024 8:27 AM PDT Lead	LAST ACTIVITY DATE 09/24/2024 12:01 PM PDT	Draft an email introducing our new product to Southern California Edison Copilot Subject: Introducing Our Latest Product for Southern California Edison
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Å al	Company domain name email.sce.com Industry 0	> 🔀 Inbound email from Donotreply test	Sep 24. 2024 at 12:01 PM PDT	product that I believe could significantly benefit Southern California Edison. Designed with experienced consumers in mind, it offers innovative solutions tailored to enhance efficiency
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*	City @ Rosemead	Donotreply test	EMAIL donotreply@emoil.sce.com	(Prepare for meeting with company) (All prompts →) All-generated content may be inaccurate. See terms 0
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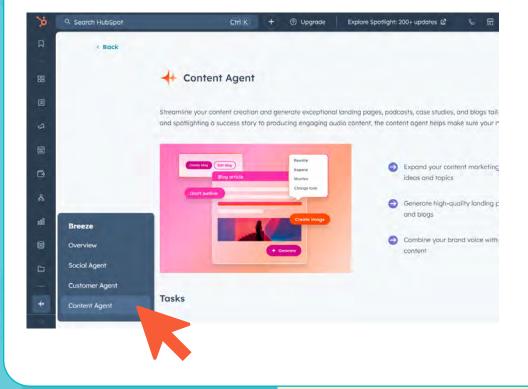
Practice Exercise

- Try asking Copilot to
 "Draft an email introducing our new product to [Customer Name]".
- 2. Review the output and make any necessary edits.



What are Breeze Agents?

Breeze Agents are specialized AI tools for specific tasks. Let's cover each one...



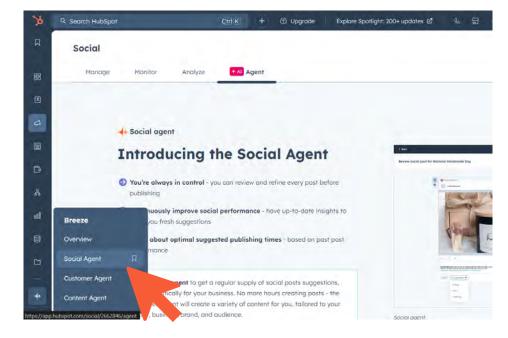
Agents

Content Agent

- I. Navigate to the Content or Marketing hub in HubSpot.
- 2. Look for a "Content Agent" or "AI Content Creator" option.
- 3. Select the type of content you want to create (blog post, landing page, etc.).
- 4. Provide a brief description or topic for your content.
- 5. The agent will generate a draft based on your input and CRM data.
- 6. Review and edit the generated content as needed.

+ Breeze Agents

BREEZE AGENTS



Social Media Agent

- 1. Go to the Social Media section in HubSpot.
- 2. Find the "AI Assistant" or "Social Media Agent" option.
- 3. Choose the social platforms you want to post to.
- 4. Provide a brief description of what you want to post about.
- 5. The agent will suggest post content and optimal posting times.
- 6. Review, edit, and schedule the posts as desired.

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Agents

Prospecting Agent

- 1. In the Sales Hub, look for a "Prospecting Assistant" or similar option.
- 2. Input criteria for the types of leads you're looking for.
- 3. The agent will identify potential leads and draft personalized outreach messages.
- 4. Review the suggestions and customize as needed before sending.



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+ Customer Agent Overview Content	Performance Channels Agent Profile	Preview
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Customer Agent

- 1. In the Service Hub, find the "Customer Support Al" or similar feature.
- 2. Set up the agent with your FAQ and common customer queries.
- 3. The agent can now handle routine inquiries automatically.
- 4. For complex issues, it will escalate to a human agent with context.



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	+ Add talking point				

Practice Exercise

- Use the Content Agent to draft a blog post about your industry.
- 2. Then, use the Social Media Agent to create a week's worth of posts promoting this blog content.



Conclusion

Remember, these AI tools are here to assist and enhance your work, not replace human judgment. Always review and refine the AI-generated content to ensure it aligns with your brand voice and specific needs.

MARKETING & CONTEN' HUB UPDATES

Marketing Hub & Dontent Hub^{**}



Al-powered content creation tools



Enhanced campaign management and performance tracking



Create and deploy campaigns faster than ever

Marketing Hub^{*} & Content H<u>ub^{*}</u>

MARKETING & CONTENT HUB LIVE DEMO

Generate images			×
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Navigate to: Content » Remix

Watch AI-powered content creation in action

Navigate to: Reports » Reports » Custom Reports

- Manage campaigns with real-time performance tracking
- Deploy campaigns faster and smarter

BREEZE INTELLIGENCE



What is Breeze Intelligence?

Breeze Intelligence enhances your CRM data with Aldriven insights, including data enrichment, buyer intent tracking, and form optimization.

BREEZE INTELLIGENCE





Enrich data from over 200 million contacts & company profiles



Track buyer intent directly through website interactions



Improve conversion rates with form-shortening capabilities



Make data-driven decisions faster and more effectively

Breeze Intelligence

BREEZE INTELLIGENCE LIVE DEMO

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Data Enrichment

- 1. Navigate to a contact or company record in your CRM.
- 2. Look for an "Enrich" or "Intelligence" button.
- 3. Click this button to automatically fill in missing information like industry, company size, or job titles.

Breeze Intelligence

BREEZE INTELLIGENCE LIVE DEMO

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High-fit companies visiting your website		
	• • •	— • •
0	••••••	View companies >>

Buyer Intent

- 1. Go to the Reports or Analytics section of HubSpot.
- 2. Find the "Buyer Intent" or "Intelligence" tab.
- 3. Set up criteria for what constitutes high intent (e.g., visiting pricing pages, multiple site visits).
- 4. The system will now flag highintent leads for your sales team.

Breeze Intelligence

BREEZE INTELLIGENCE LIVE DEMO

< Companies		Overview	Activities					
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		Activity	Notes	Emails	Calls	Tasks	Meetings	
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Industry	Customize prop							
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Annual revenue		February 202	4					
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City								
State/ Region								
Postal code							_	
Phone number								

Practice Exercise

- 1. Enrich data for 5 of your contacts and review the new information added.
- 2. Then, set up a basic buyer intent rule to track visits to your pricing page.

PERSONALIZATION & SEGMENTATION

Personalization and Segmentation for Targeted Outreach



Use data enrichment to create detailed customer profiles.



Segment your audience based on behavior, demographics, and more.



Personalize campaigns to deliver the right message at the right time.



ADDITIONAL HUBSPOT TOOLS

New HubSpot Tools to Streamline Operations

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Multi-Step Forms:

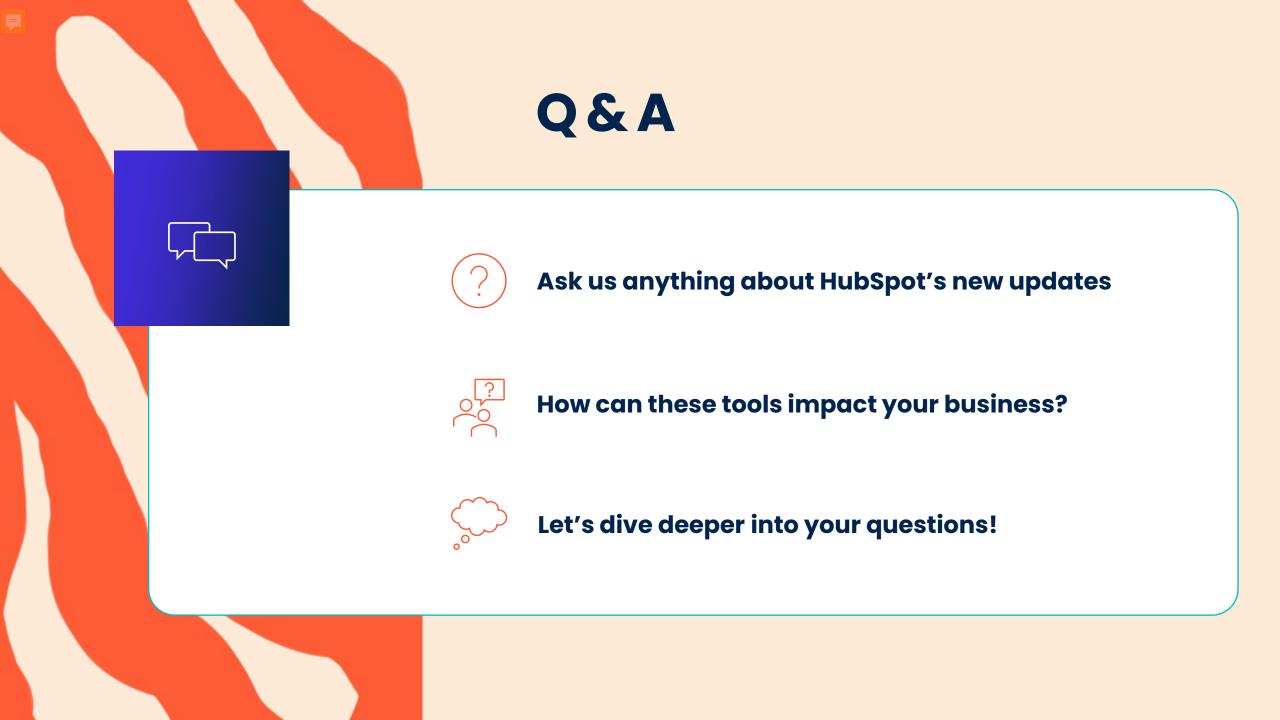
Create dynamic forms that

improve user experience.

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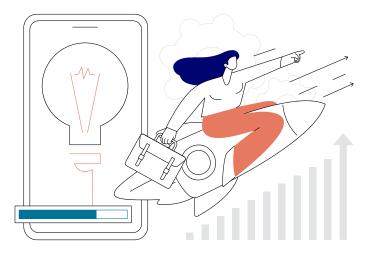
Extended Data Sets for Reporting: Access advanced reporting capabilities in Pro tiers.

Objects Library: Build custom objects for lists, services, and more.



NEXT STEPS

THANK YOU



Want to see how these updates can work for your business?

Request a personalized demo or consultation with our team!

Contact us: info@vonazon.com

Visit: www.vonazon.com

QUESTIONS? THANK YOU!

