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IN24

Welcome to Vonazon's Webinar

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

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AGENDA

1

Sales Hub®

Sales Hub Updates:
New tools for sales automation and efficiency

2

Breeze™ Copilot

Breeze Copilot & Agents:
AI-powered insights for smarter decision-making

3

Marketing Hub® & Content Hub™

Marketing & Content Hub:
Create campaigns faster with AI-driven tools

4

Breeze™ Intelligence

Breeze Intelligence:
Enhanced data for better customer insights
Create campaigns faster with AI-driven tools

5

Q&A:
Open discussion and next steps

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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

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SALES HUB UPDATES

Sales Hub®

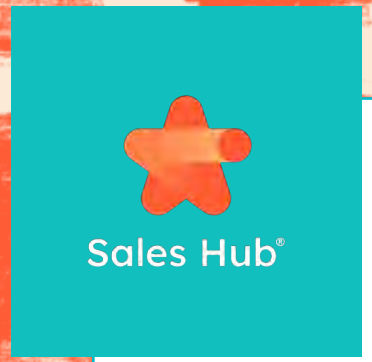
Pipeline automation tools to streamline sales processes

Improved deal tracking and reporting for better insights

New features to close deals faster and more efficiently

AI-powered forecasting for smarter decision-making

SALES HUB UPDATES

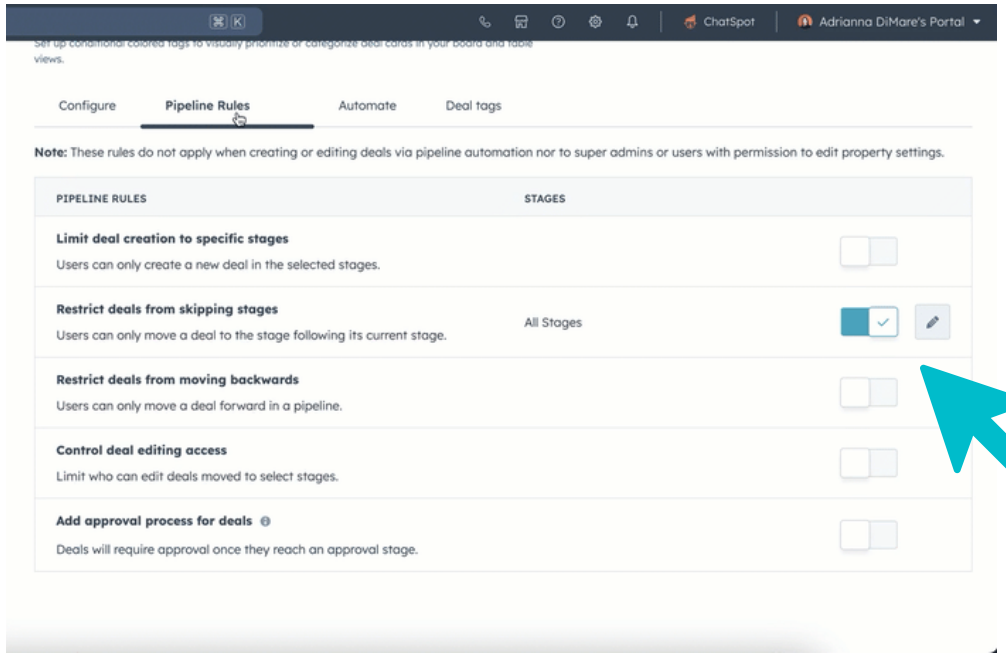


Set up rules for deal pipelines

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).

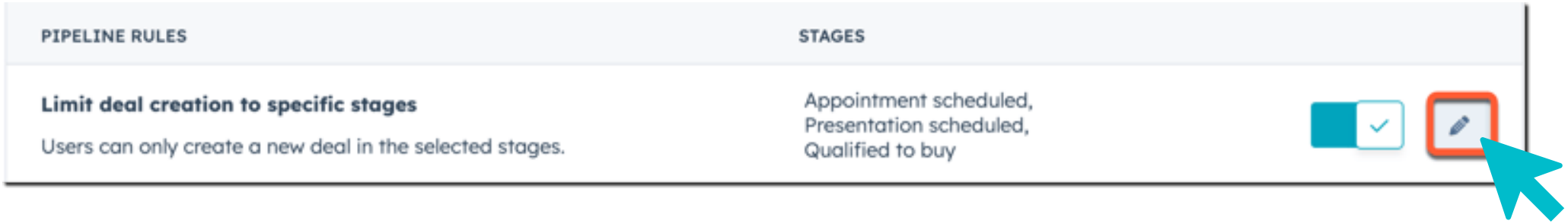
SALES HUB LIVE DEMO



To set up rules:

1. 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

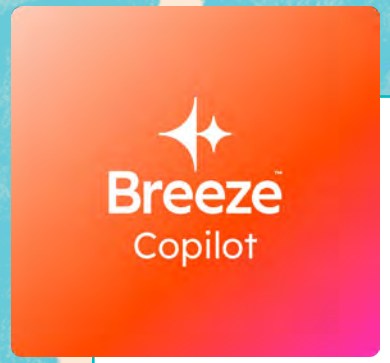
SALES HUB LIVE DEMO



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.

BREEZE COPILOT



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.

BREEZE COPILOT

Breeze Copilot

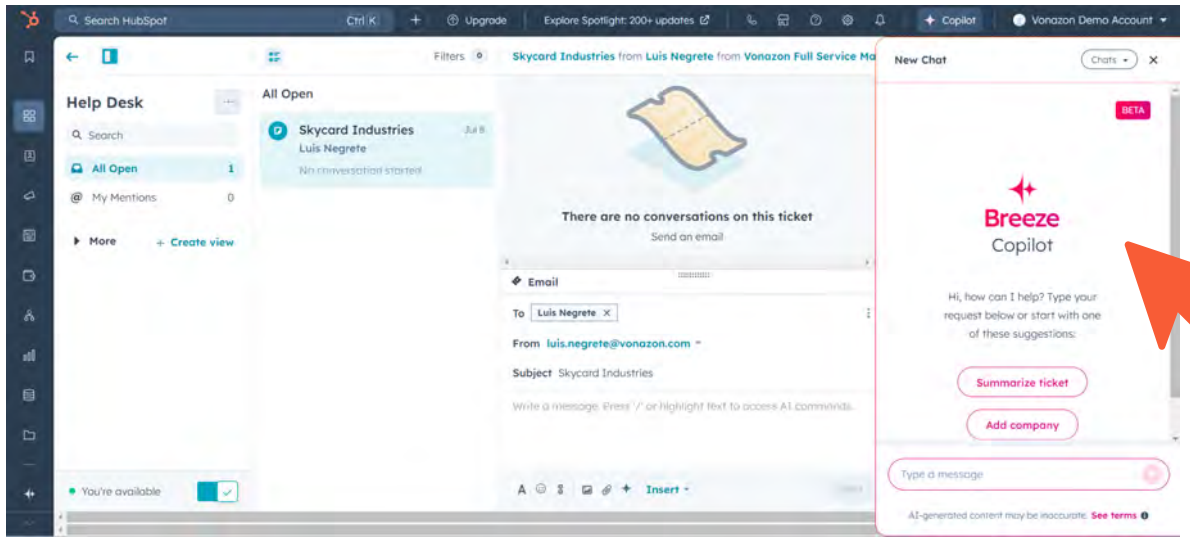
AI-driven insights to support smarter workflows

Real-time suggestions for customer interactions

Automate routine tasks with ease

Agents available for personalized experiences

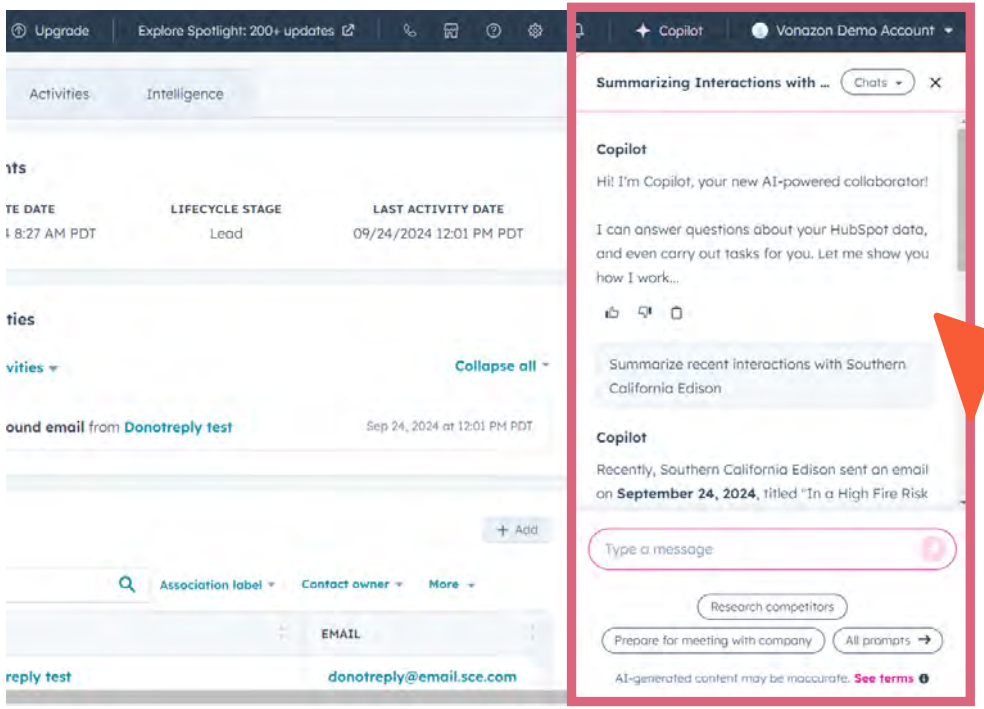
BREEZE COPILOT



How to Access Breeze Copilot

1. 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.

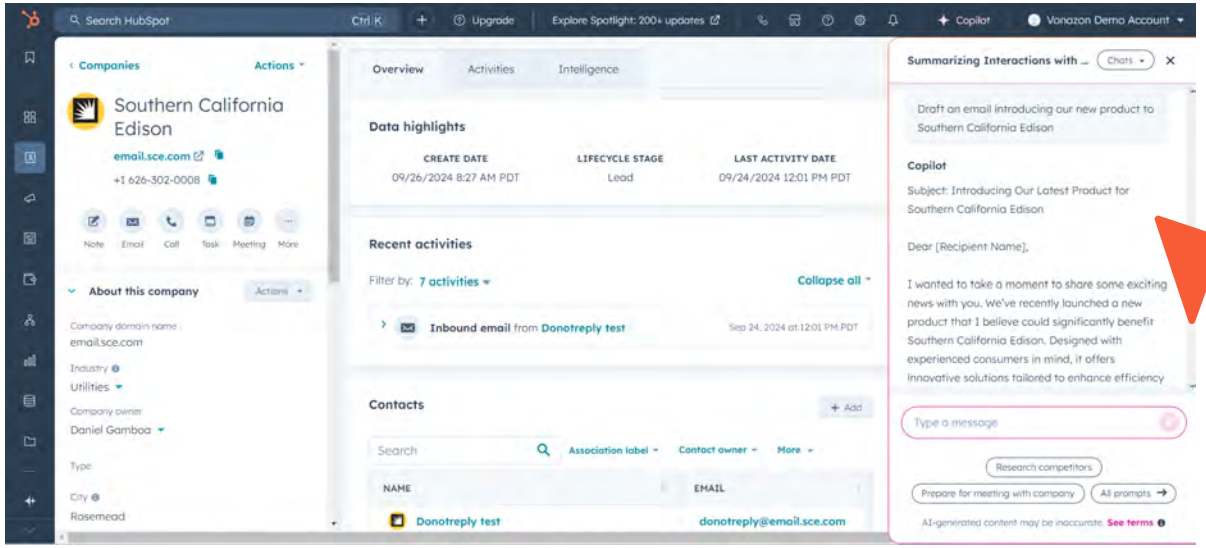
BREEZE COPILOT



Using Breeze Copilot

1. Click on the Copilot icon to open the AI 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 COPILOT



Practice Exercise

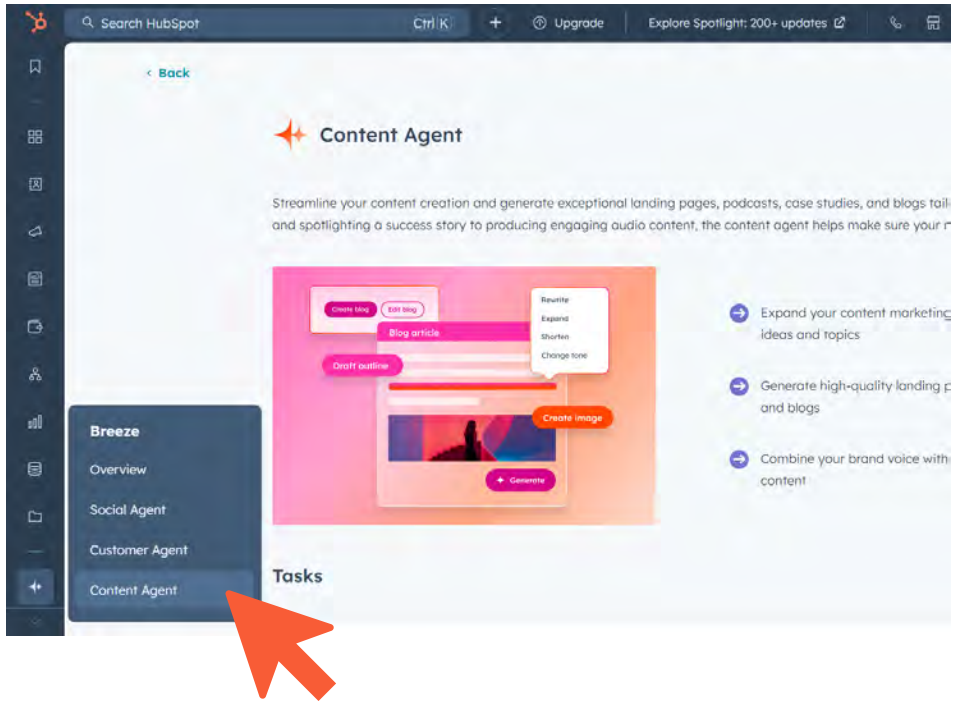
1. Try asking Copilot to **"Draft an email introducing our new product to [Customer Name]".**
2. Review the output and make any necessary edits.

BREEZE AGENTS

What are Breeze Agents?

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

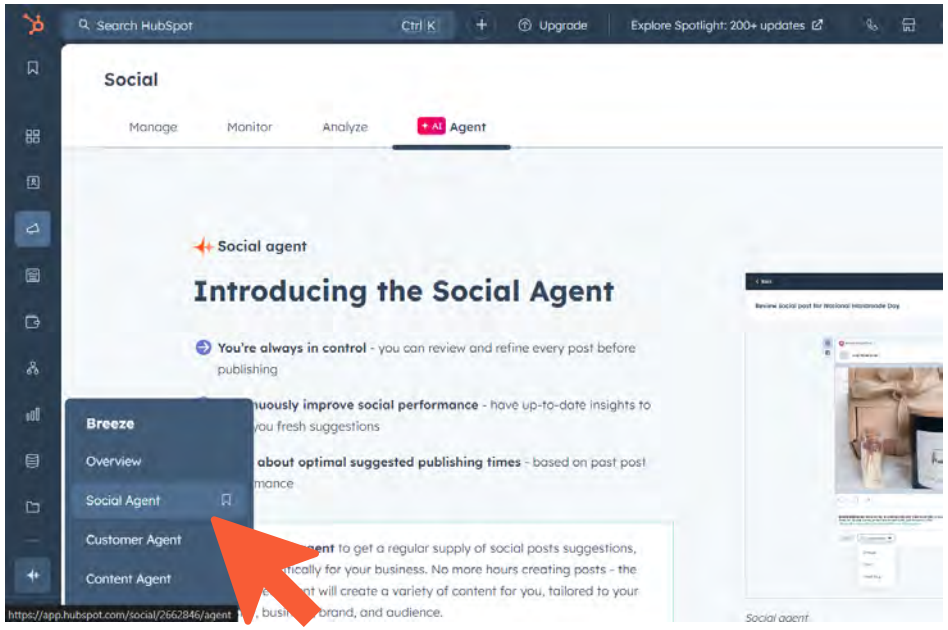
BREEZE AGENTS



Content Agent

1. 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.

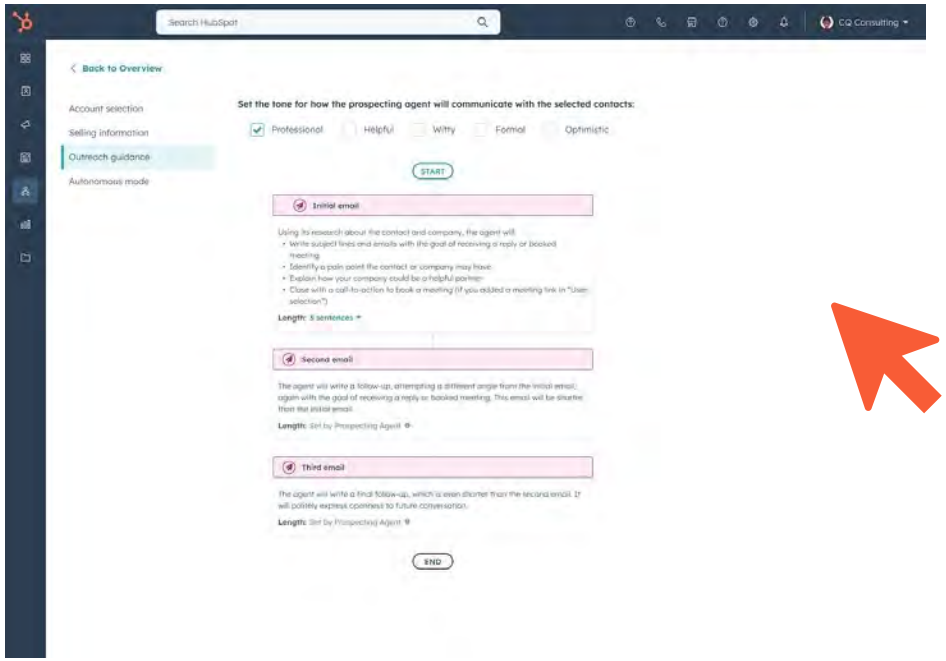
BREEZE AGENTS



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.

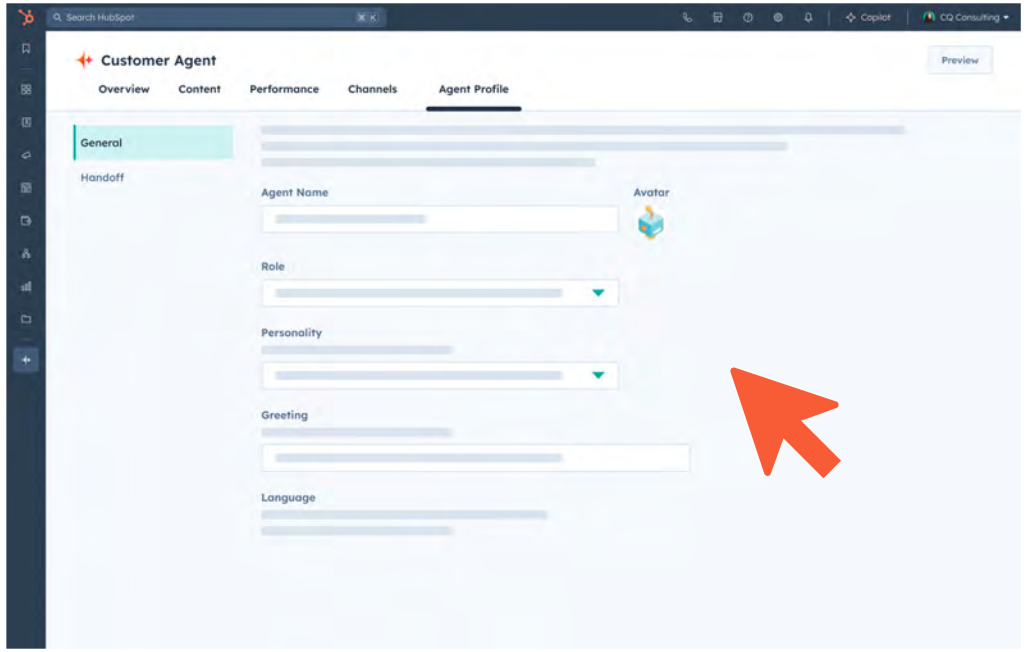
BREEZE AGENTS



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.

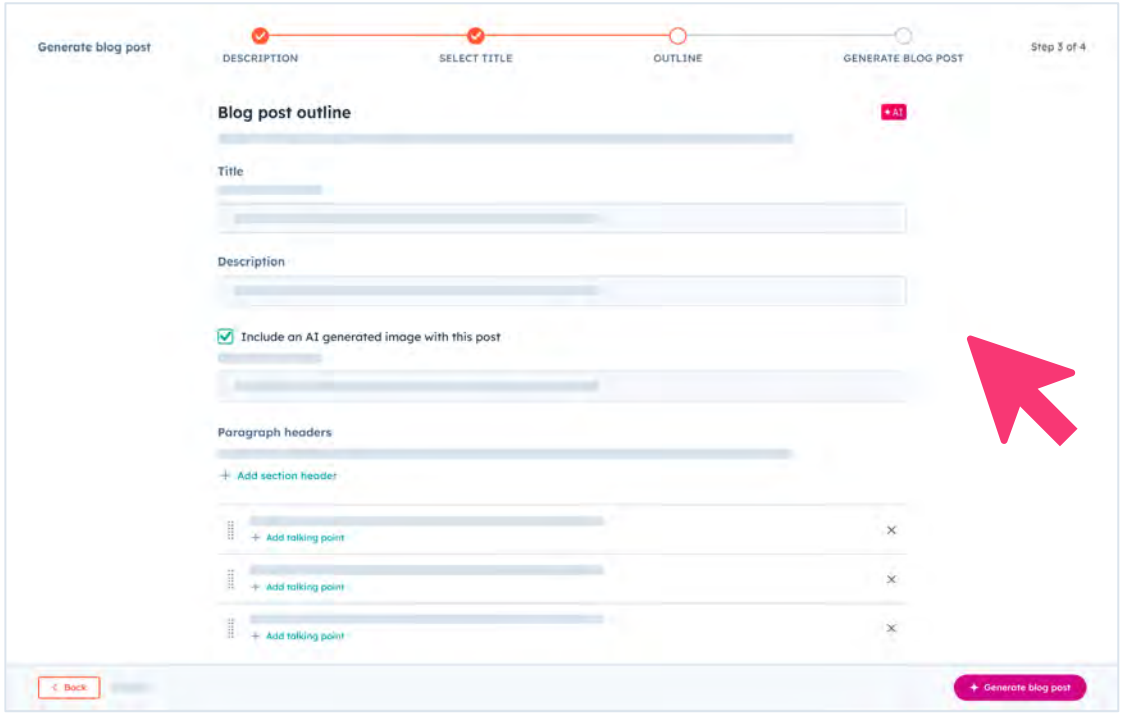
BREEZE AGENTS



Customer Agent

1. In the Service Hub, find the "Customer Support AI" 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.

BREEZE AGENTS



Practice Exercise

1. 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.

BREEZE AGENTS

Conclusion

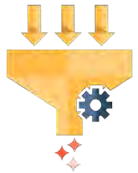
Remember, these AI tools are here to assist and enhance your work, not replace human judgment. Always review and refine the AI-generated content to ensure it aligns with your brand voice and specific needs.

MARKETING & CONTENT HUB UPDATES

Marketing Hub®
&
Content Hub™

AI-powered content creation tools

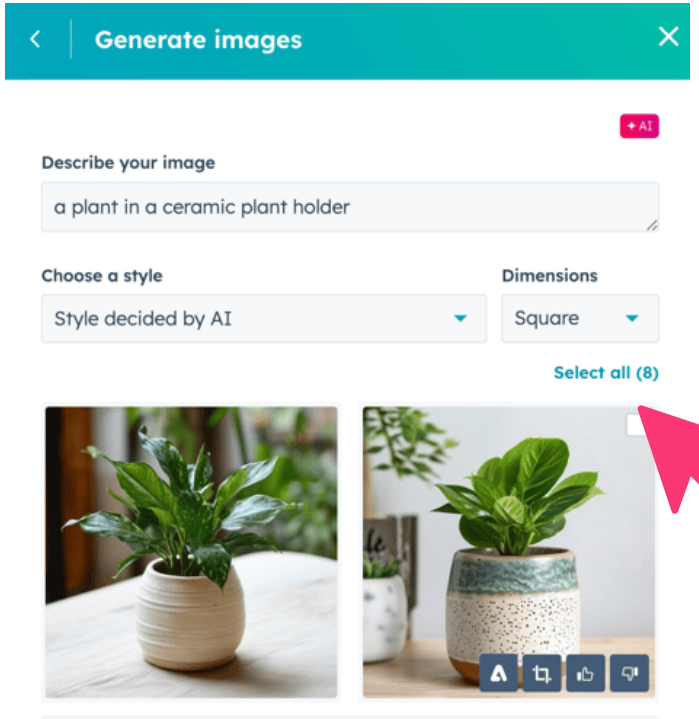
Enhanced campaign management and performance tracking



Create and deploy campaigns faster than ever

Marketing Hub
&
Content Hub

MARKETING & CONTENT HUB LIVE DEMO



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 AI-driven insights, including data enrichment, buyer intent tracking, and form optimization.

BREEZE INTELLIGENCE

Breeze Intelligence

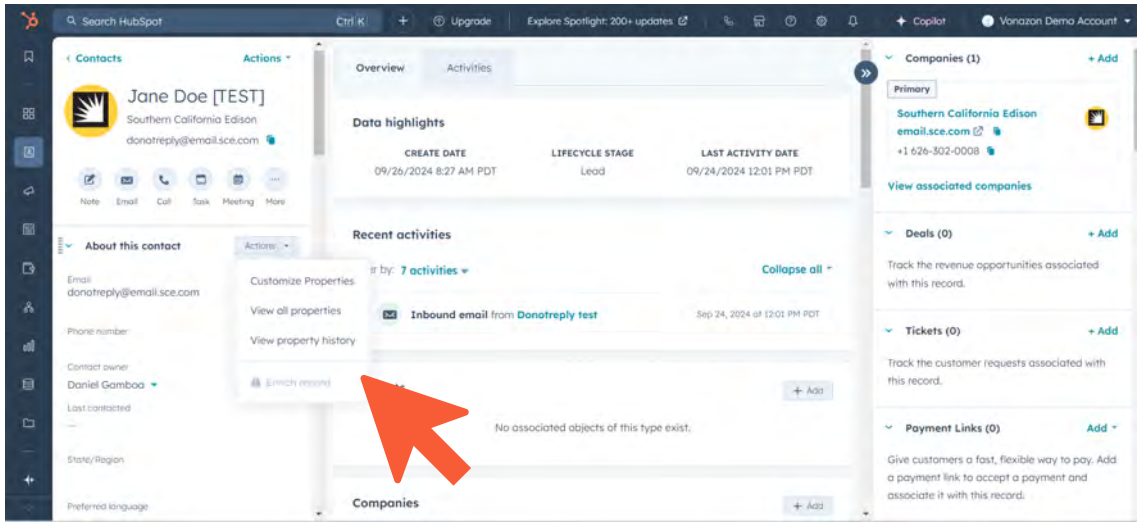
Enrich data from over 200 million contacts & company profiles

Track buyer intent directly through website interactions

Improve conversion rates with form-shortening capabilities

Make data-driven decisions faster and more effectively

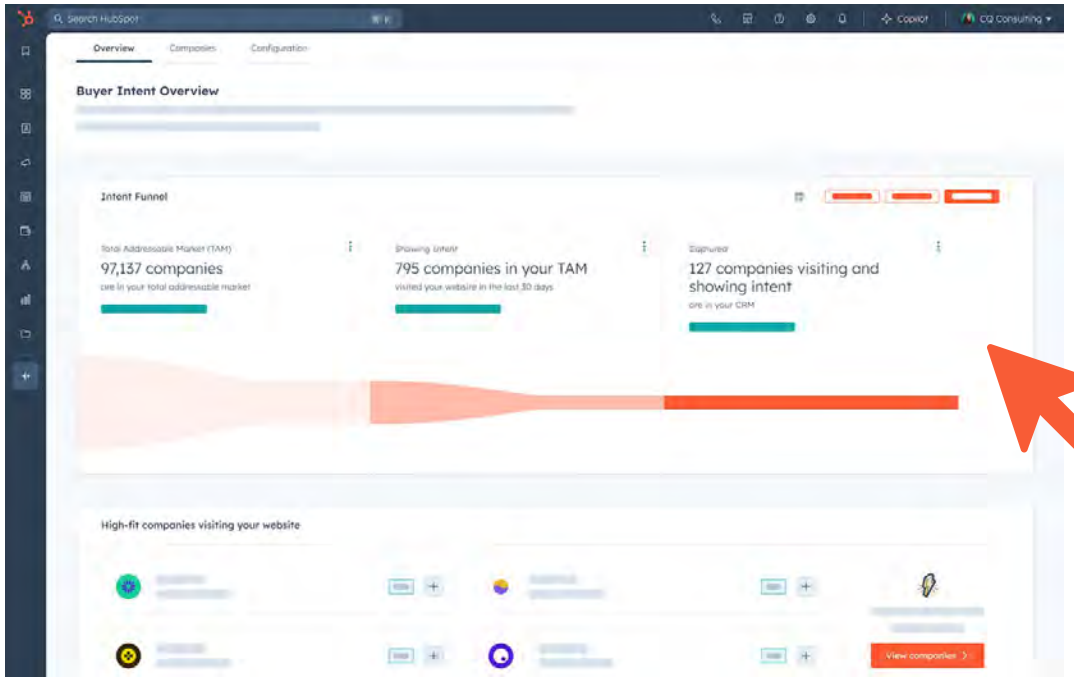
BREEZE INTELLIGENCE LIVE DEMO



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.

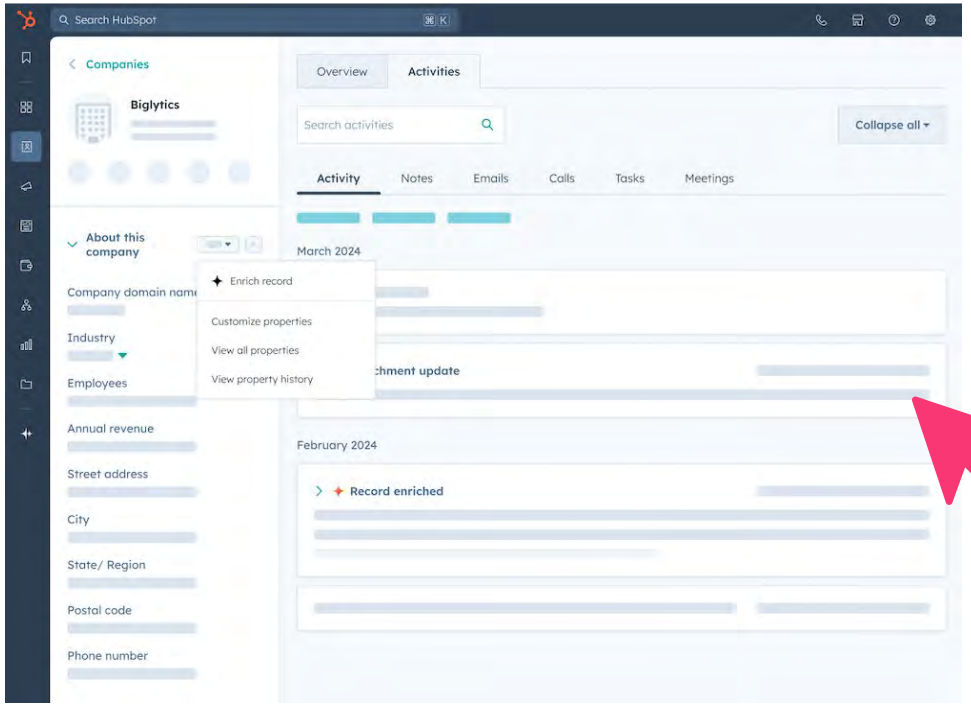
BREEZE INTELLIGENCE LIVE DEMO



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 high-intent leads for your sales team.

BREEZE INTELLIGENCE LIVE DEMO



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.

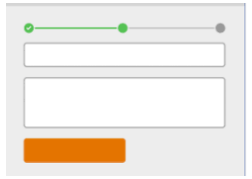
Segment your audience based on behavior, demographics, and more.

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

ADDITIONAL HUBSPOT TOOLS

New HubSpot Tools to Streamline Operations

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



Multi-Step Forms:
Create dynamic forms that improve user experience.

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

Q & A

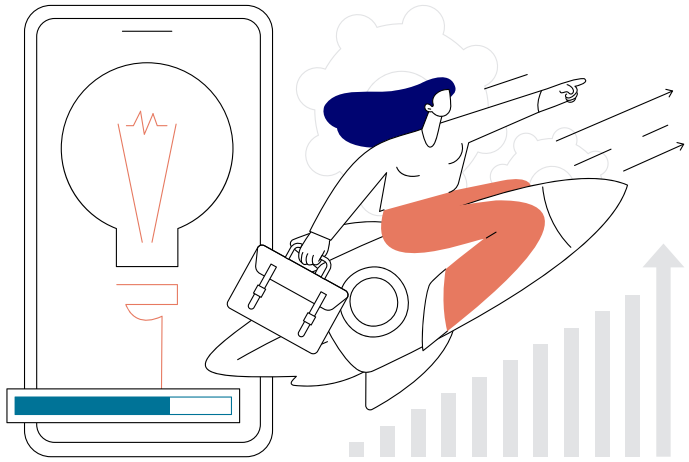
Ask us anything about HubSpot's new updates

How can these tools impact your business?

Let's dive deeper into your questions!

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!

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