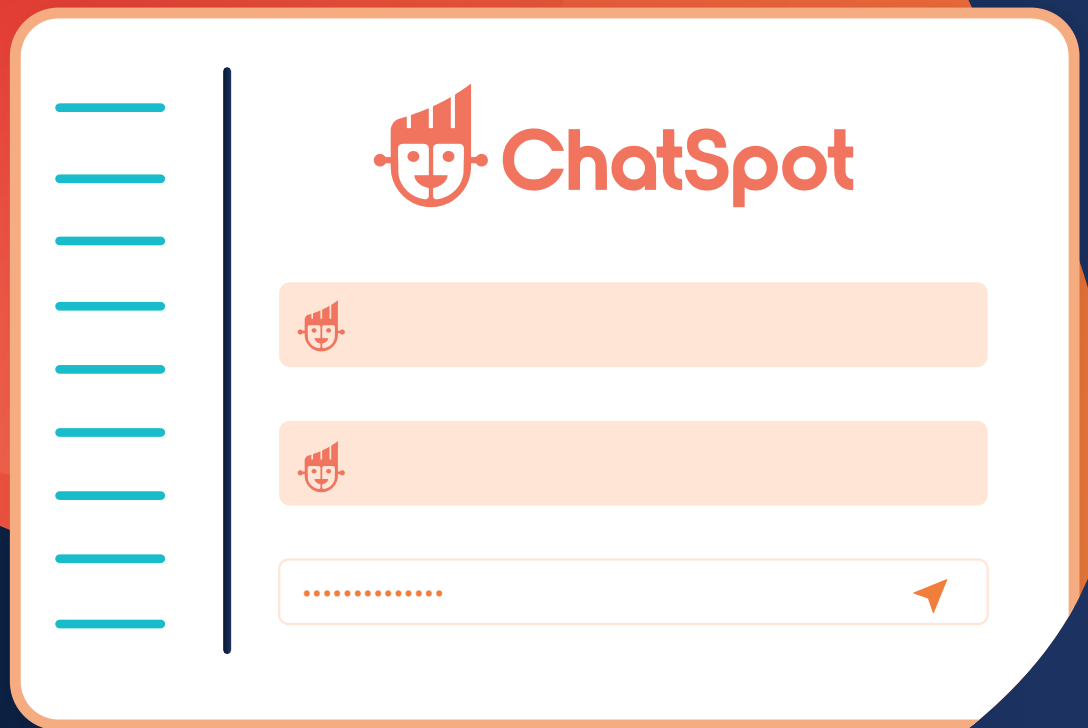# ChatSpot
GUIDEBOOK

HubSpot has again proven its commitment to marketing, sales, and customer service by rolling out the newest A.I. tool, ChatSpot.

ChatSpot

vonazon

INTRODUCING
CHATSPOT

As an industry leader, HubSpot has again proven its commitment to streamlining marketing and sales by pulling them into the modern age with ChatSpot. But what exactly *is* ChatSpot? If you're not sure, don't worry. We're going to take you through the ins and outs of ChatSpot, explore some common use cases, and explain how you can use it to revolutionize your business.

1,000's
OF HUBSPOT USERS

When all is said and done, we're confident you'll want to join the **THOUSANDS of HubSpot users who've started utilizing ChatSpot** since it was released on March 8th, 2023.

ChatSpot was initially developed as the brainchild of Dharmesh Shah, Co-founder and CTO of HubSpot, to improve operational efficiency. After you've completed the installation process, simply enter a prompt and the tool uses natural language processing to understand and respond to inquiries. It is important to emphasize that ChatSpot is still in Alpha, so the app is still learning and evolving every day.

CHATSPOT IS AN **AI-POWERED TOOL DESIGNED TO HELP USERS EASILY NAVIGATE HUBSPOT CRM** WITH A RESPONSIVE CHAT INTERFACE.

Natural Language Query **+** ChatSpot **=** Completed Task

↓

INTEGRATIONS & KEYWORD SEARCHES

ChatGPT   HubSpot CRM   Dall*E 2   Google Docs

Using the power of ChatGPT, **ChatSpot receives your command and scours your HubSpot CRM data and Google Docs to give you customized responses.** ChatSpot allows you to **instantly add new contacts and companies** to your CRM, **create marketing, sales, and customer service reports**, **draft personalized sales emails**, and more—all within your HubSpot CRM.

WHAT IS CHATSPOT AND HOW DOES IT WORK?

Dharmesh Shah first envisioned ChatSpot almost a decade ago when the world was first starting to dip its toes into AI-centric technology. Unfortunately, AI tools at the time weren't sophisticated enough to make Dharmesh's vision of a more efficient CRM a reality. But you can only hold back a good idea for so long, and Dharmesh kept ChatSpot brewing in the background until his time finally came. With the treasure trove that has been the rise of advanced AI-driven tools such as ChatGPT and DALL·E 2, technology was where it needed to be for developing HubSpot's competitive software solution.

HubSpot then **capitalized on this opportunity to build a flexible and fully versatile app** using an advantage other CRM vendors couldn't compete against within this market. This was to **integrate a natural language chat interface onto any software.**
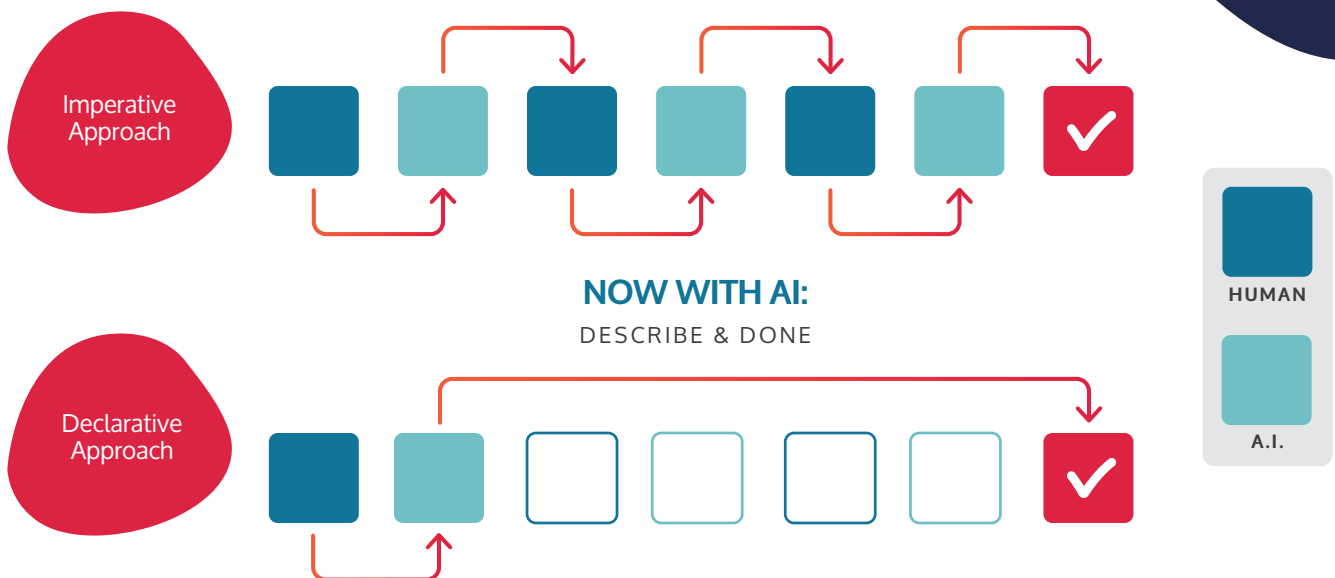
LOOK AT IT FROM THIS PERSPECTIVE:

Typically, most computer programs are designed using an **imperative approach**. That means you issue instructions to the computer by entering commands, such as clicks and drags. Like a series of falling dominos, one action triggers a program to launch the next activity, and so on. With this approach, users are forced to wait until the last domino falls before receiving their outcome. Instead, ChatSpot uses the **declarative approach** to bypass these actions and jump straight to the final domino, giving users results in a fraction of the time.

SOFTWARE THEN:
POINT & CLICK

Imperative Approach

NOW WITH AI:
DESCRIBE & DONE

Declarative Approach

HUMAN

A.I.

UTILIZING CHATSPOT TO
ELEVATE YOUR BUSINESS

At its core, ChatSpot is a CRM app that sales and marketing professionals can integrate with their existing HubSpot features to optimize productivity.

By using AI to remove cluttered log entries, update contact lists, and erase duplicate files, you can stay on top of data cleansing without wasting time on manual processes. **ChatSpot can even be integrated into your content strategy by scanning your database to produce SEO suggestions tailor-made for engaging with new leads.** ChatSpot's AI algorithms also allow for easy imports by effortlessly transferring your current contact and company data between spreadsheets.

Now that we've examined how ChatSpot can be used to speed up your HubSpot CRM, let's explore how it can improve your productivity:

CONTENT CREATION

AI-driven tools empower content creators to produce attention-grabbing content with the click of a button. ChatSpot content can vary between blogs generated from specific prompts, images created using DALL·E 2, or follow-up emails in response to previous client interactions. Enter the natural language query into the system, set parameters for what you want, and then sit back and watch. Always make sure to perform due diligence by verifying all sourced information and rewriting sections to make the content your own. Remember, ChatSpot is a tool, not a replacement for content creators.

STRONGER USER ENGAGEMENT

ChatSpot can analyze every interaction you've ever had with a customer and construct a personalized experience for them. What tone do they prefer? When is the best time to reach them? Did they comment on a blog in the past? These factors help boost customer engagement by personalizing interactions, paving the way for higher conversion rates and revenue.

COST-SAVING SOLUTIONS

By automating repetitive tasks that generally take hours to complete, such as keyword research or editing workflows, employees are free to focus on activities that drive business growth. ChatSpot reduces the need for unnecessary resources and manual processes, helping lower overall costs.

DATA-DRIVEN INSIGHTS

Due to ChatSpot's ability to integrate your HubSpot CRM, compiling summaries and reports across several sales or marketing systems can now be distilled down to a single command prompt. ChatSpot can then convert those reports into Google Slides for business presentations. With access to reliable data in real-time, the time it takes for a company to make informed decisions is cut in half.

BETTER COMMUNICATION

ChatSpot's natural language interface makes it easy for customers to communicate issues across HubSpot CRMs, creating more efficient interactions.

what keywords is figma.com buying

08:49 am

KEYWORD	POSITION	SEARCH VOLUME	CPC
figma	1	246,000	$1.18
ux design	1	49,500	$3.23
mind map	1	33,100	$2.44

MARKET RESEARCH

Few things are more frustrating than going into a client interaction with lousy data. That's why ChatSpot streamlines the process by assembling a complete picture of a lead. Piece by piece, your AI tool will surface the lead's website, social media profiles, and other details to prepare your sales reps. ChatSpot can also help you react to your competitors by granting quick insights into their decision-making processes. For instance, if you enter the natural language prompt *"lookup what pay-per-click keywords a company is buying."* ChatSpot produces a list of keywords that the company has bought, providing a glimpse into its recent marketing strategies.

GETTING STARTED WITH CHATSPOT

When getting started, head to the ChatSpot page on HubSpot's website to sign up. After joining, you can connect your HubSpot account to ChatSpot directly or connect your Google account. Head to the "Chat" function and enter your own prompt or utilize the **suggested prompts.** Once you've done that, you're ready to begin using ChatSpot.

One last note before diving in:

It's important to remember that AI is a rapidly evolving technology that poses several legal, security, and privacy issues. Use good judgment when using the app and always review your local data privacy laws and regulations before sharing information. Learn more about ChatSpot and HubSpot terms and conditions here.
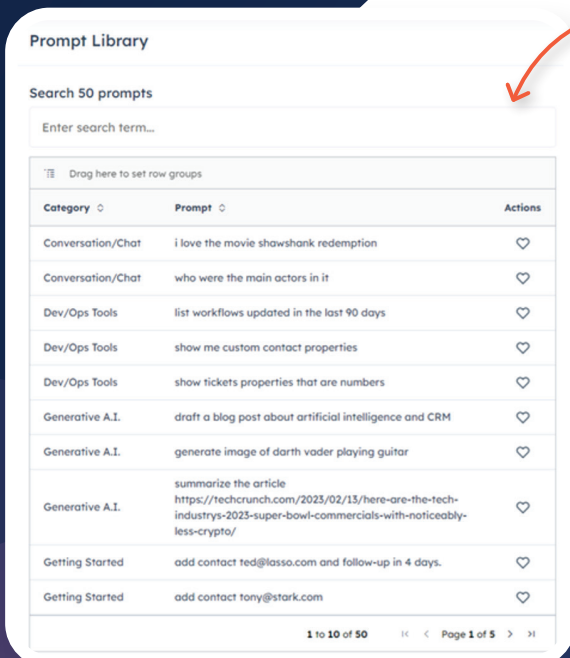
SUGGESTED PROMPTS

The "Suggested Prompts" dropdown offers pre-written prompts for common questions or issues that users may have. Always remember to edit responses with your personalized messaging to avoid sounding repetitive or inconsistent with your branded content.

PROMPT LIBRARY

The prompt library is a collection of pre-built chat prompts that help sales and marketing teams find answers fast. The library comes fully loaded with dozens of custom prompts, perfect for getting started with the app.
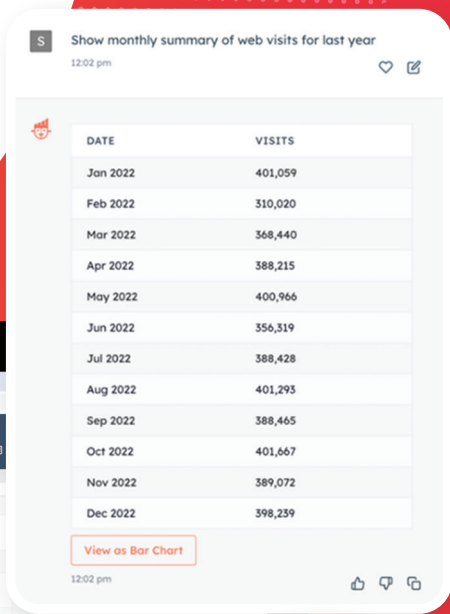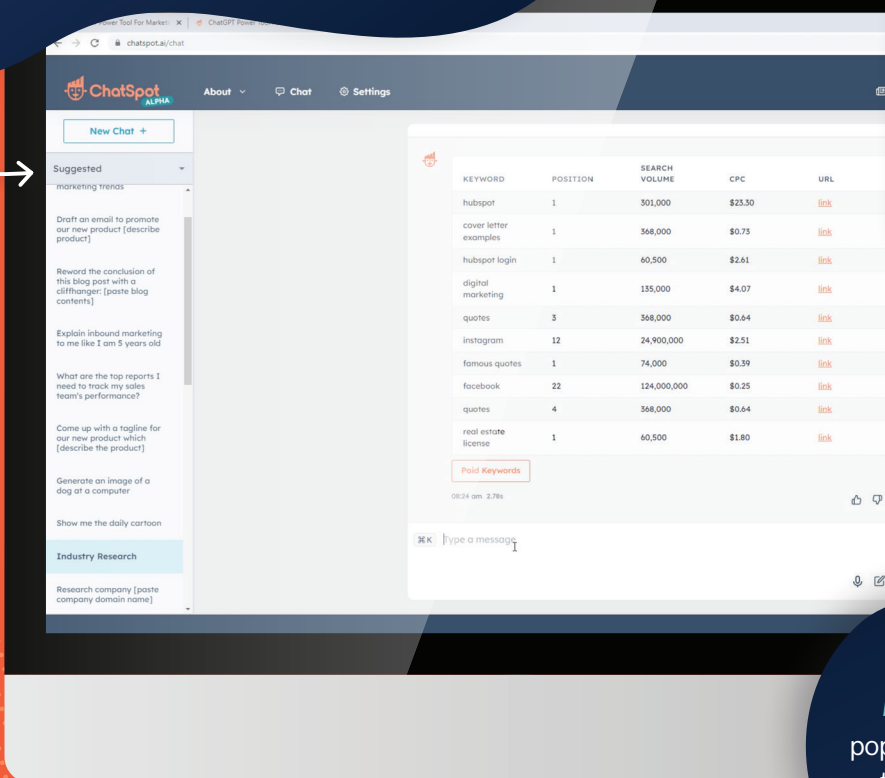
MARKETING **HUB**

ChatSpot has the ability to streamline different aspects of your marketing efforts, including reporting, keyword research, and content creation. For ease of use, let's review them in that order:

1

Within ChatSpot scroll over to the **"suggested prompts"** section on the left, then move down until you find the **"marketing"** option. From there, select your desired prompt. Let's assume you picked **"show monthly summary for web visits last year."**

2

HubSpot will **populate a marketing report with different dates and recorded visits within seconds,** which you can then convert into a bar chart should you wish. Now that "marketing" is open, **enter the prompt,** *"what keywords is hubspot.com ranking for?"* This will instantly populate high-value keywords for HubSpot. From there, you will see these criteria appear for specific keywords the site currently ranks for online: position, search volume, CPC, and URL links.
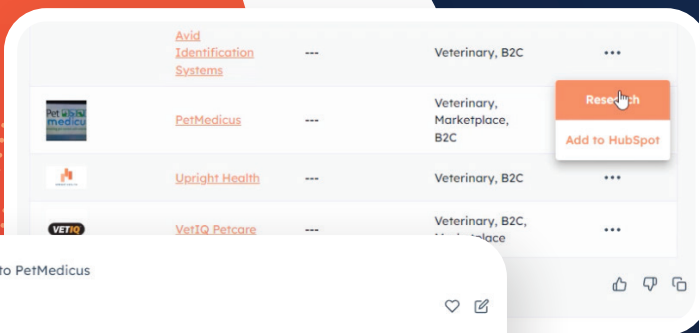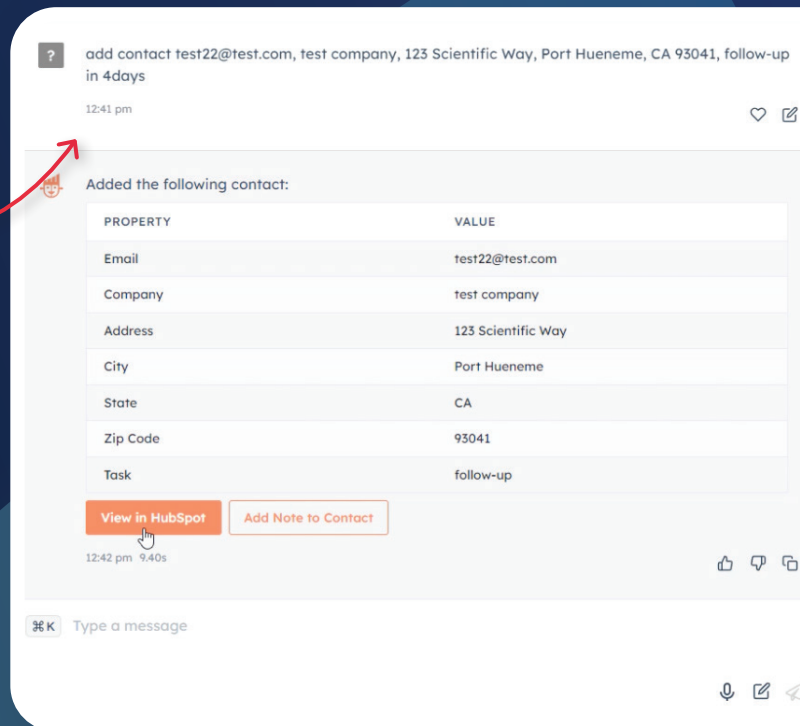
3

Now, enter the prompt, *"draft post about the impact of generative A.I. on Instagram marketing."* ChatSpot will then produce an entire blog, complete with a specific title. From there, you'll need to customize the blog by editing the prompt with how long you want the piece to be, the style, the tone, etc. Finally, click "Post to HubSpot" or "Save as Google Doc" to edit it further. Every piece of content needs a good thumbnail image, and ChatSpot will create one for you. Simply enter a new prompt, say, *"generate image of retro phone,"* and let the AI go to work. Once you pick from the series of images ChatSpot created, you can save it, upload it to HubSpot, or even adjust it around a different style. The sky is the limit.
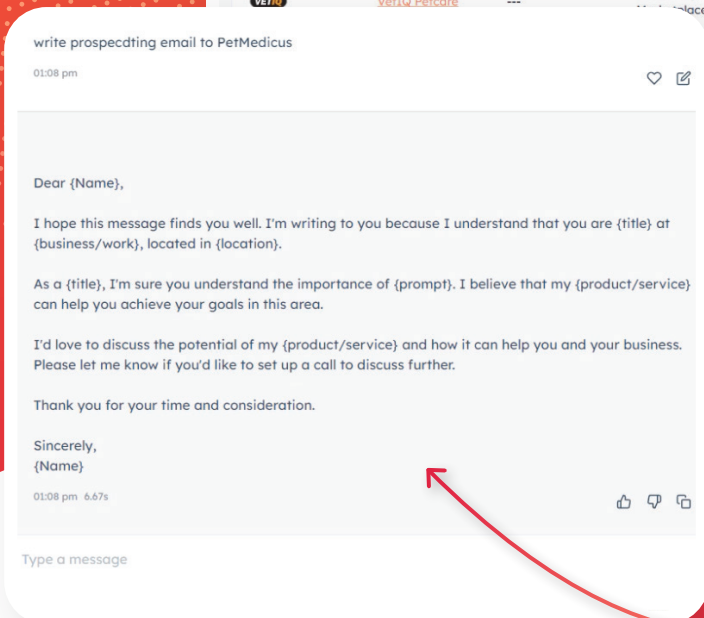
SALES **HUB**

Thanks to ChatSpot, you can streamline all those tedious sales and CRM tasks that usually take forever.

Need help accessing information in your database? Easy, enter the prompt *"how many contacts do I have"* and watch ChatSpot pull the exact number out for you. **What about adding a contact, company, or task to your database? Type in** *"add contact test22@test.com, test company, 123 Scientific Way, Port Hueneme CA 93041, follow-up in 4 days."* Not only will a contact record of that lead appear, but so will a HubSpot task with your chosen deadline.

add contact test22@test.com, test company, 123 Scientific Way, Port Hueneme, CA 93041, follow-up in 4days

12:41 pm

Added the following contact:

PROPERTY	VALUE
Email	test22@test.com
Company	test company
Address	123 Scientific Way
City	Port Hueneme
State	CA
Zip Code	93041
Task	follow-up

View in HubSpot   Add Note to Contact

12:42 pm 9.40s

⌘ K   Type a message

ChatSpot can also research potential prospects by including specific criteria. **All you have to do is enter things like size, location, number of employees, or revenue into ChatSpot, and it will populate a list of leads** that can be added to HubSpot.

Avid Identification Systems	---	Veterinary, B2C	...
PetMedicus	---	Veterinary, Marketplace, B2C	Research / Add to HubSpot
Upright Health	---	Veterinary, B2C	...
VetIQ Petcare	---	Veterinary, B2C, Marketplace	...

write prospecdting email to PetMedicus

01:08 pm

Dear {Name},

I hope this message finds you well. I'm writing to you because I understand that you are {title} at {business/work}, located in {location}.

As a {title}, I'm sure you understand the importance of {prompt}. I believe that my {product/service} can help you achieve your goals in this area.

I'd love to discuss the potential of my {product/service} and how it can help you and your business. Please let me know if you'd like to set up a call to discuss further.

Thank you for your time and consideration.

Sincerely,
{Name}

01:08 pm 6.67s

Type a message

From this list, **enter a prompt such as** *"write a prospecting email to selected business"* **and generate a prospecting email** that can be personalized for that list.

CMS HUB

Much like it does in Sales and Marketing Hub, ChatSpot allows users to fast-track the process of generating targeted content with your content management software.

1 Within CMS Hub, you can use AI tools to add precise amounts of personalization to your content. Suppose you type *"draft email to kevin@salescompany.com about trying out ChatSpot, the new AI from HubSpot."*

1

draft email to kevin@salescompany.com about trying out ChatSpot.ai the new A.I from HubSpot. One that helps you grow better.

01:32 pm

Pondering... Can't imagine a world before Caller ID.

2

01:32 pm

Dear {to_information.name},

I hope this message finds you well. I'm writing to you today because I wanted to share some exciting news about ChatSpot.ai, the new A.I from HubSpot that helps you grow better.

As a {to_information.title} in {to_information.location}, I'm sure you understand the importance of staying ahead of the curve when it comes to technology. ChatSpot.ai is the perfect tool to help you do just that. It uses advanced A.I to automate customer conversations, so you can focus on more important tasks.

I'm confident that ChatSpot.ai will be a great asset to your business. I'd love to discuss it further with you and answer any questions you may have.

Thank you for your time and I look forward to hearing from you soon.

Sincerely,

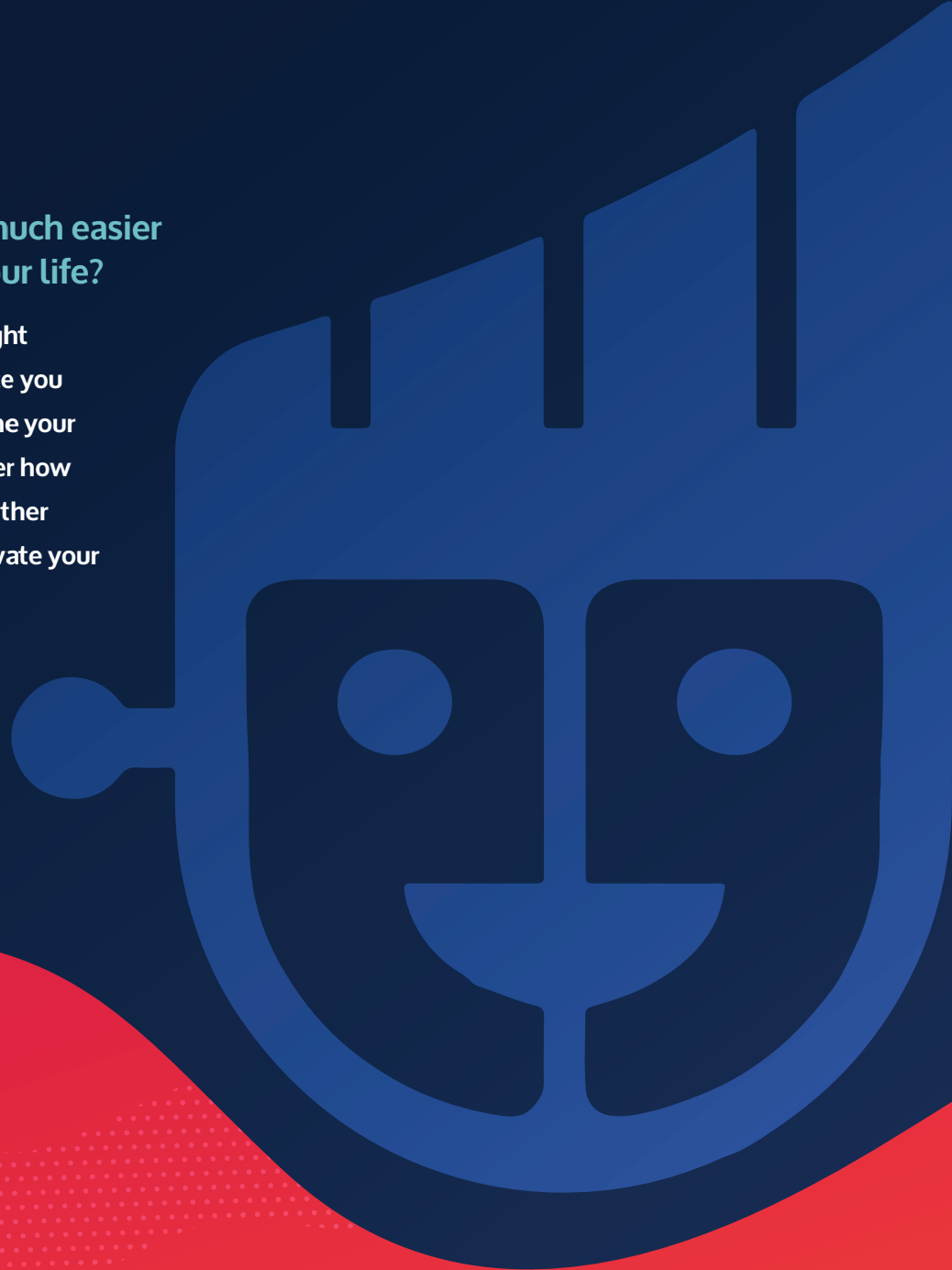{sender_information.name}

01:32 pm 12.67s

⌘K Type a message

2

In response, ChatSpot will begin pulling relevant data from your CRM, from the web, customer profiles, companies contacts, and anywhere else it can find useful information. **With this assembled data in hand, the AI will populate a first draft of an email, personalized to the specific lead and subject matter.**

CONCLUSION

Wasn't that fun seeing how much easier ChatSpot is going to make your life?

With how AI is rushing to market, it might feel like a lot to take in at once. But once you realize just how simple it is to streamline your operations with ChatSpot, you'll wonder how you ever got by without it. AI is just another tool to help increase efficiency and elevate your business. To us, that's a win-win.

vonazon

Want to start **improving your business with advanced AI tools like ChatSpot**, but lack the technical support to do so?

Contact our team of HubSpot professionals and skilled implementation specialists for a free ChatSpot consultation today.

BOOK YOUR FREE CONSULTATION TODAY!