

Getting the Most Out of HubSpot's April 2024 Product Updates

SIMPLE STRAT
NEW & NOW SERIES

New & Now Series

What's NEW in HubSpot?

How can you drive results with these updates NOW?



Time to get excited...

1. User-based Workflows
2. Audiences
3. Predictive Deal Scoring
4. Custom Lead Properties
5. AI Chatbots

And MUCH MORE





Housekeeping

- Ask questions anytime in the Zoom Q&A - we'll answer them at the end
- The recording and slides will be sent within a day or two after the webinar
- Follow along with updates that don't apply to your license
 - A small upgrade could unlock a whole new world of growth!



Our team can help you:



Upgrade
HubSpot



Implement
Updates



Fix Your
HubSpot



Put HubSpot
to Work

at SimpleStrat.com/Consult



Tyler Samani-Sprunk

Cofounder & CMO @ Simple Strat
Cohost of HubSpot Hacks

All Hubs


What's New:


Improved Record Attachments Experience


- Live
- All Hubs
- All Tiers

▼ Attachments (3) Add ▼

Recently uploaded


 Contract.pdf (03/28/24) ×

 Order form.numbers (03/28/24) ×

 Inspiration photo.png (03/28/24) ×




View all attachments

Attachments
×

Search name and file type 

File type ▼
Source ▼

Add ▼

<input type="checkbox"/>	NAME	UPLOADED DATE	SOURCE	SIZE	TYPE
<input type="checkbox"/>	 Inspiration photo ↗	Mar 28, 2024 2:03 PM EDT	Manual upload ↗	17 KB	png
<input type="checkbox"/>	 Order form ↗	Mar 28, 2024 2:03 PM EDT	Manual upload ↗	137 KB	numb...
<input type="checkbox"/>	 Contract ↗	Mar 28, 2024 2:03 PM EDT	Manual upload ↗	44 KB	pdf

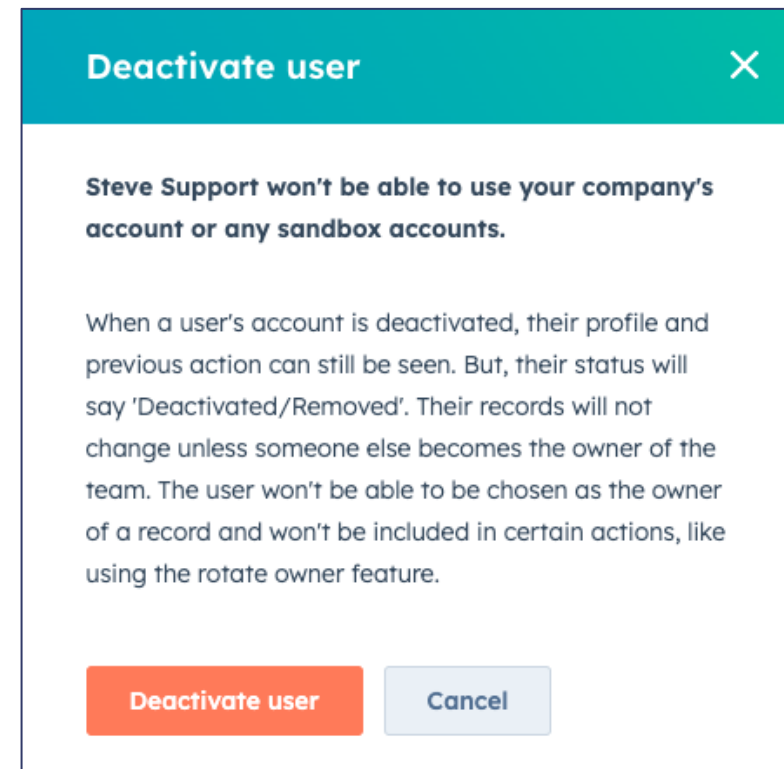
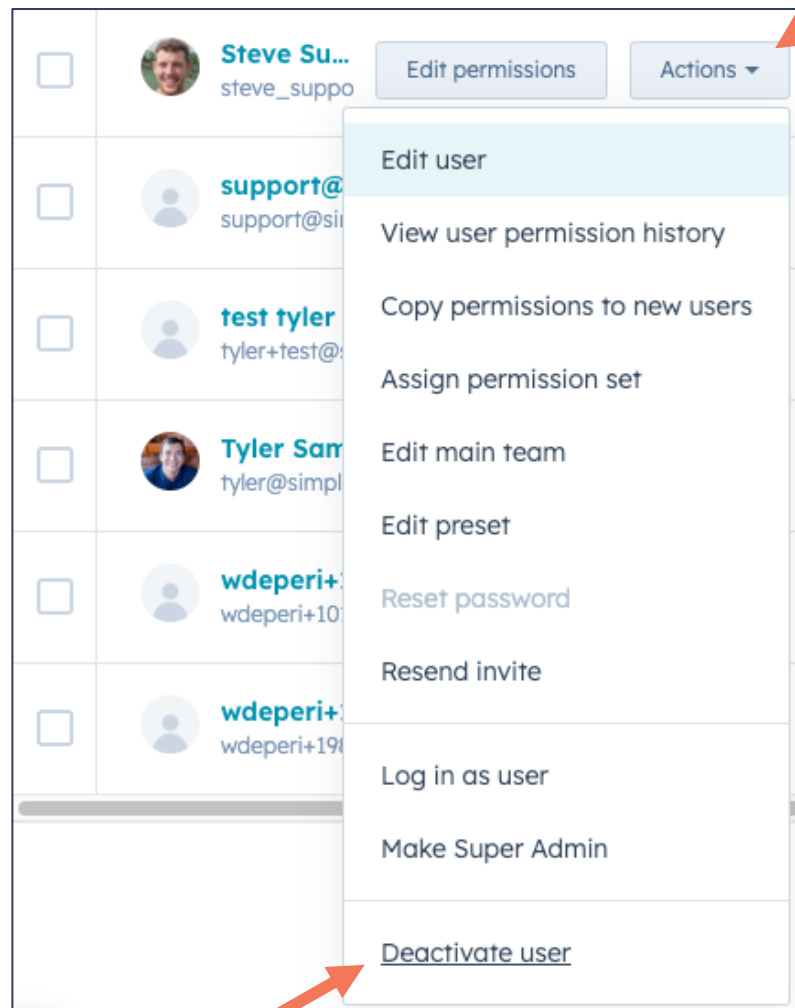
Total: 3
< Prev
1
Next >
10 per page ▼

Done

What's New:

User Deactivation Overhaul

- Live
- All Hubs
- All Tiers



What's New:

Email Reply Notifications

- Live
- All Hubs
- All Tiers


✓ Email

✉

NOTIFICATION TOPICS

Email reply
Get notified when a contact replies to an email sent from your personal email.

Today

 **REPLY** a few seconds ago

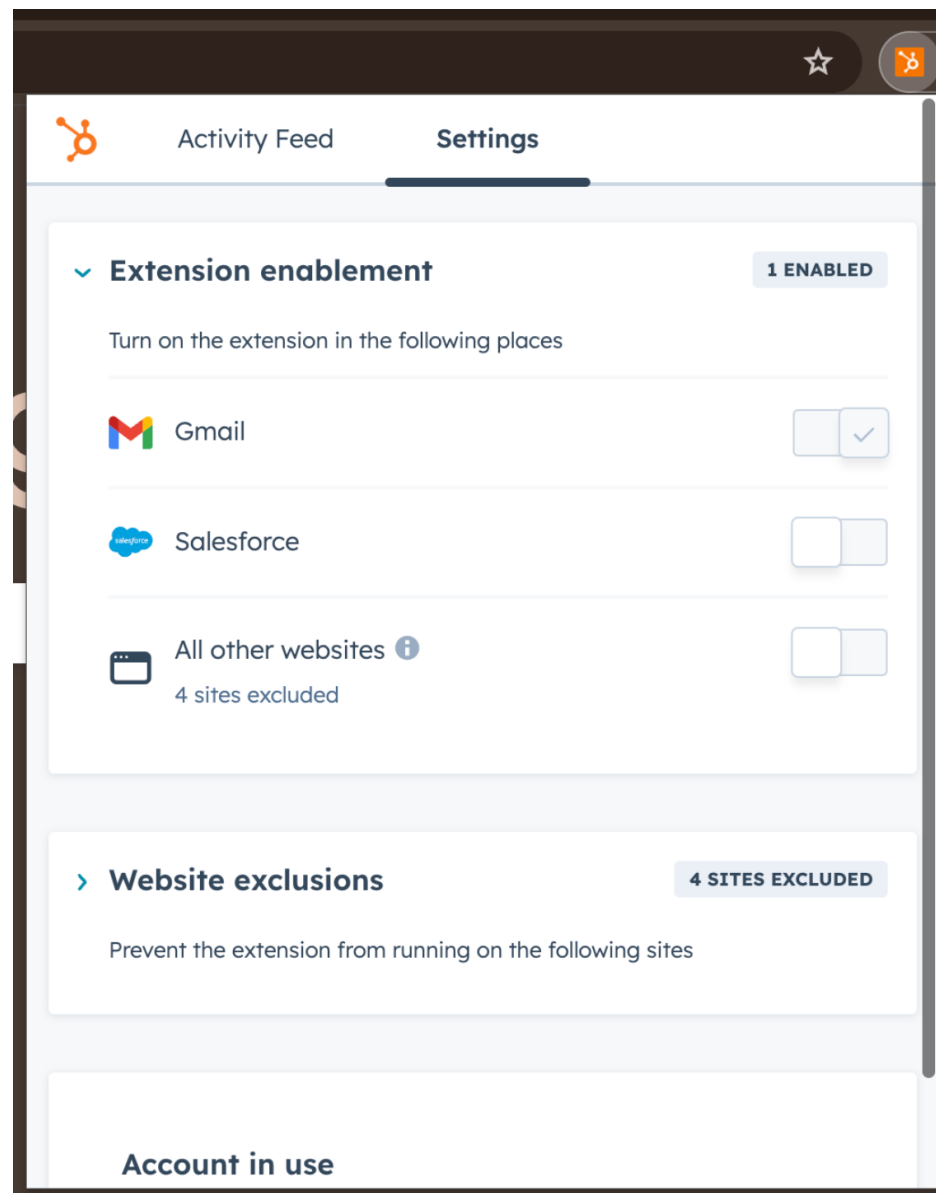
Test Contact replied to your email: Hi there!

New reply from Test Contact: Hi there!

What's New:

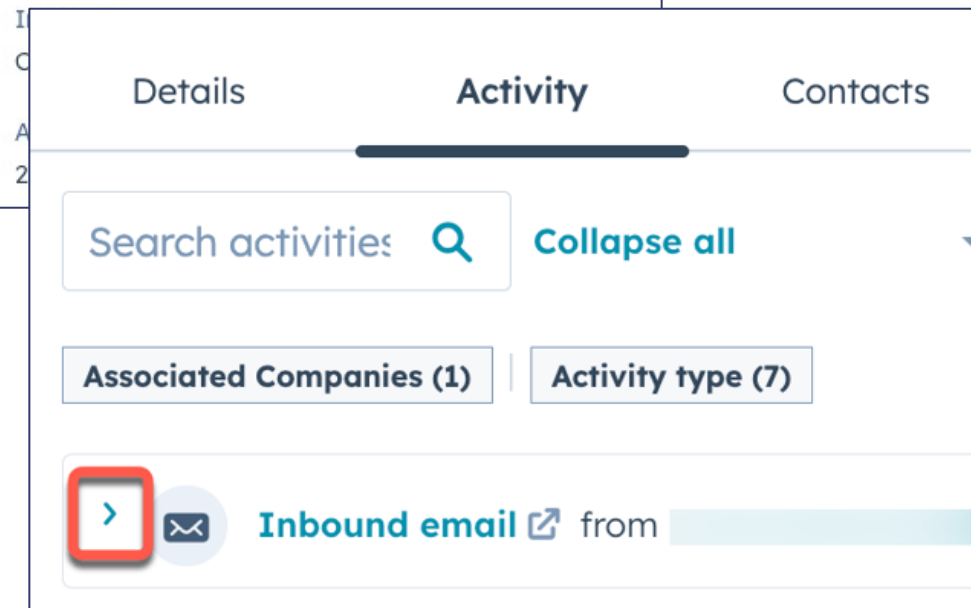
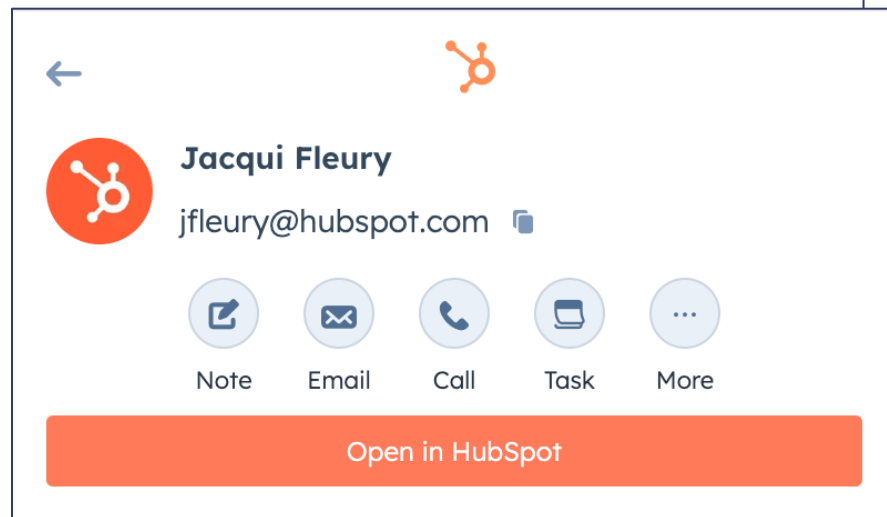
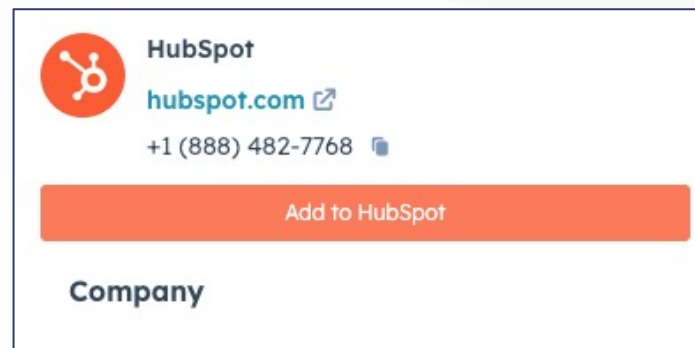
Use HubSpot Sales Chrome Extension Across the Web

- Private Beta
- All Hubs
- All Tiers



Use HubSpot Sales Extension Now: Research/Prospecting

- Request access to private beta
- Navigate to a company's website
- Create company records for new companies
- See past interactions from contacts at existing companies
- Engage known contacts (call, enroll in sequence, etc.)



What's New:

Configure Activity Association Defaults

- Private Beta
- All Hubs
- All Tiers

Activities

Email Log & Track
Associations
[View activities in the data model overview](#)

Configure the default experience when associating activities to the relevant records. Activities are associated with the record they were first logged on and any associated records. These activities will be visible in the timeline of the record. [Learn more](#)

Select an object

Contacts

Select activity type

Calls

Log activity to:

Associated Contacts

Log to none

Associated Companies

Log to Primary Company

Associated Deals

Log to 5 most recently associated

Associated Companies

Log to Primary Company DEFAULT

Log to none

Log to Primary Company DEFAULT

Log to all

Logging to all is limited to the 500 most recently associated records.

Log to 1 most recently associated

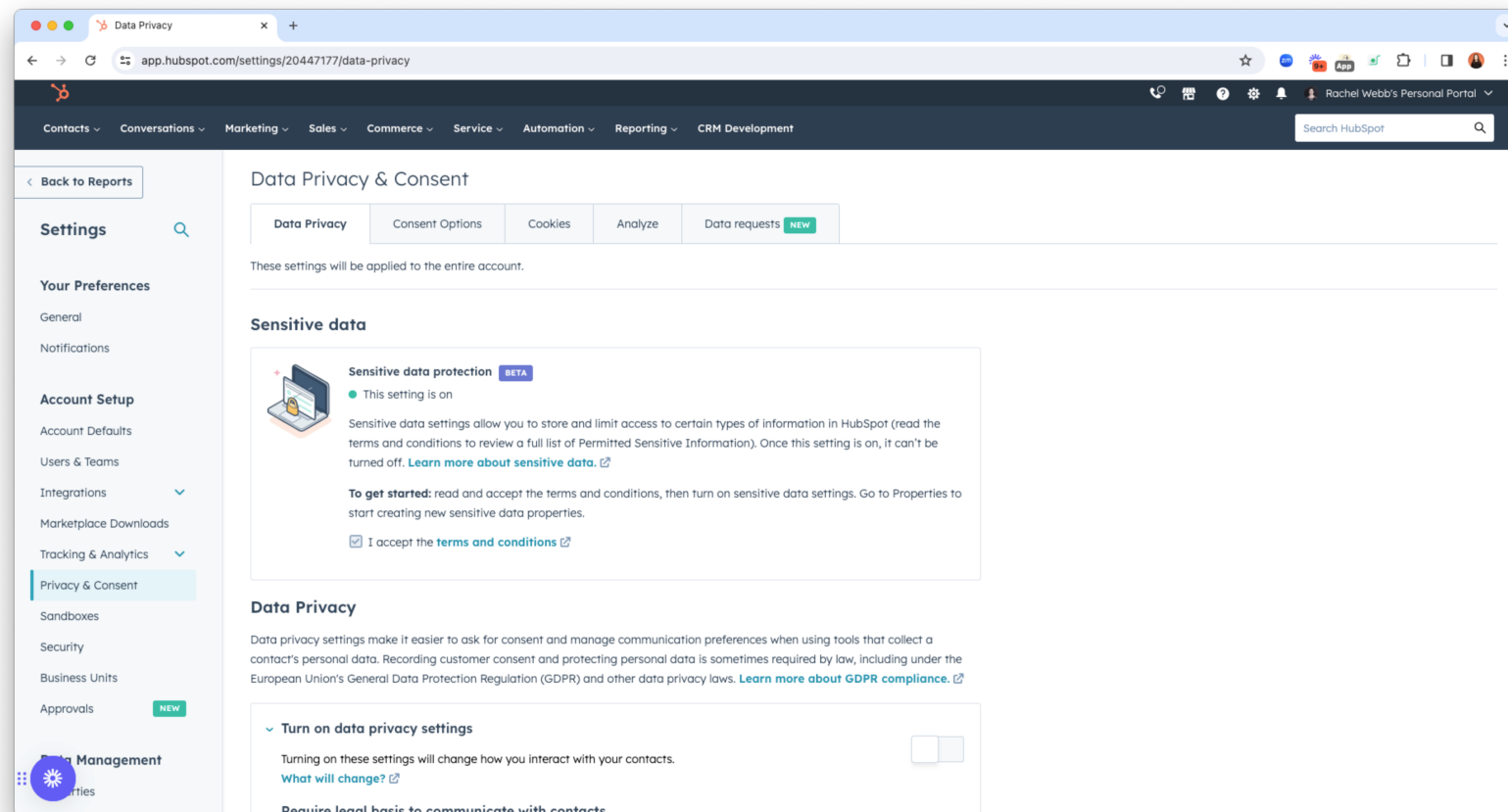
Use Association Defaults Now:

- Automatically associate activities to custom objects (Enterprise only)
- Sync activity association in same-object association setups
 - Households (contact-contact)
 - Renewal deals and/or upsells (deal-deal)
 - Parent and child companies (company-company)
- Log certain activity types to only deals or only tickets depending on whether they're used for sales or support
- Stop activity roll-up from contact to company if there are activity types you don't want to see on the company record

What's New:

Store Sensitive Data in HubSpot's Smart CRM

- Public Beta
- All Hubs
- Enterprise



legal.hubspot.com/sensitive-data-terms

Use Sensitive Data Storage Now:

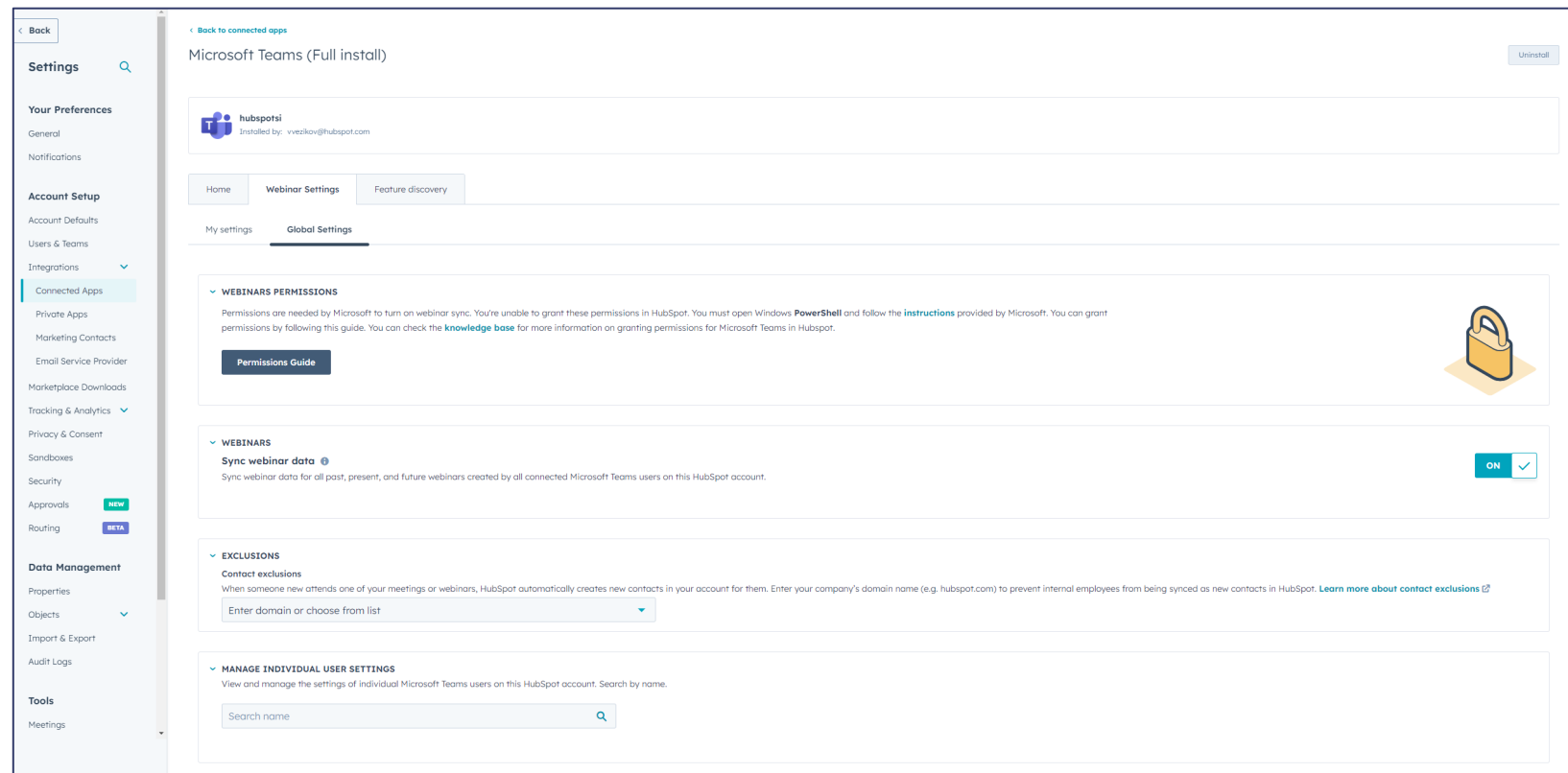
- Store last four digits of account or credit card info to assist with identity verification for phone support
- Store driver license numbers for fleet or delivery drivers
- Store immigration status on contacts for an immigration services firm (eg. law firm)

What's New:

Sync Microsoft Teams Webinars to HubSpot Marketing Events

- Public Beta
- All Hubs
- All Tiers

*This feature is only available to Microsoft Teams integration users



The screenshot shows the HubSpot settings interface for a Microsoft Teams (Full install) integration. The left sidebar contains a 'Settings' menu with categories like 'Your Preferences', 'Account Setup', 'Data Management', and 'Tools'. The main content area is titled 'Microsoft Teams (Full install)' and includes a 'Back to connected apps' link and an 'Uninstall' button. Below this, there's a section for 'My settings' with a 'Global Settings' tab selected. The 'Global Settings' section includes:

- WEBINARS PERMISSIONS:** A message stating that permissions are needed for webinar sync and a 'Permissions Guide' button.
- WEBINARS:** A toggle for 'Sync webinar data' which is currently turned 'ON'.
- EXCLUSIONS:** A section for 'Contact exclusions' with a dropdown menu to 'Enter domain or choose from list'.
- MANAGE INDIVIDUAL USER SETTINGS:** A section for managing individual user settings with a search bar.

Join Us Again Soon!

FLYWHEEL FUEL SERIES 🔥

Discover How to Use HubSpot and LinkedIn Together to Grow Your Pipeline

Wednesday, May 15
12pm CST / 1pm EST



PRESENTED BY
ALI SCHWANKE



THE NEW AND NOW SERIES 🚀

Getting the Most Out of HubSpot's May 2024 Product Updates

Wednesday, June 5, 2024
12pm CST / 1pm EST



PRESENTED BY
TYLER SAMANI-SPRUNK



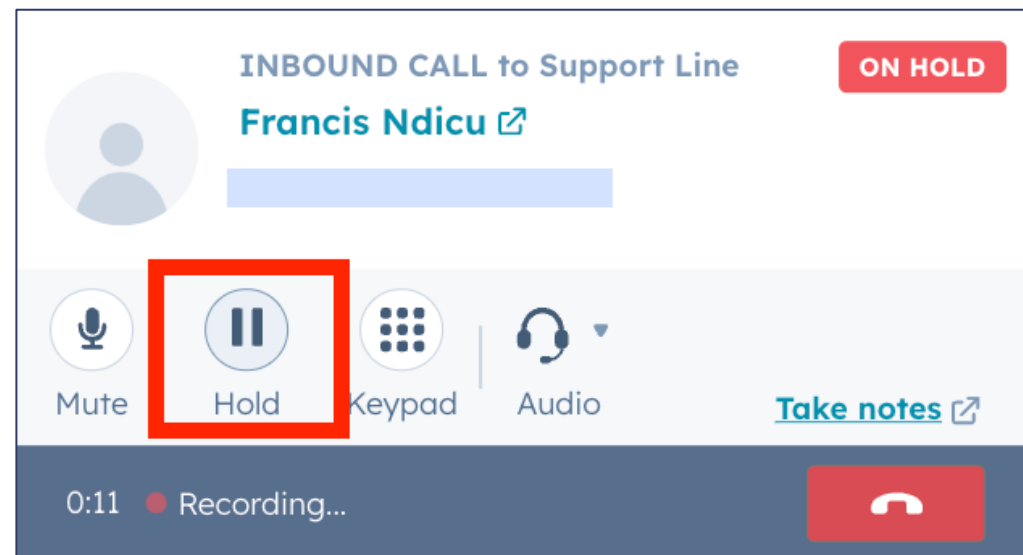
SimpleStrat.com/Webinars

Multi-Hub

What's New:

Place Inbound Calls on Hold







- Public Beta
- Sales & Service Hubs
- Starter, Professional & Enterprise



What's New:

Forecasting with Multicurrency

- Private Beta
- Sales & Service Hubs
- Professional & Enterprise

Sales				Demo Sales Pipeline	
GOAL	CLOSED WON	GAP	FORECAST SUBMISSION	OPEN PIPELINE	OPEN PIPELINE COVE...
€37K 2023	€24.6K	€12.4K	€7.5K	€6.4K	0.5X
NAME	GOAL ATTAINMENT	WEIGHTED PIPELINE	COVERAGE	PIPELINE	FORECAST SUBMI...
Sales 2023 total	 66% €24,556.00 of €37,000.00	€28,024.20	0.8x	€106.00 10 deals	€7,500.00
 Tyler Samani-Sprunk	 146% €19,031.00 of €13,000.00	€19,968.00	1.5x	€100.00 1 deal	€2,500.00 a year ago
 Will DePeri	 23% €5,525.00 of €24,000.00	€8,056.20	0.3x	€6.00 9 deals	€5,000.00 6 months ago
 Alexis Eaglin	— €0.00 No goals set	€0.00	—	€0.00 0 deals	—

What's New:

Weighted Rotation Option in Meeting Rotations

- Private Beta
- Sales & Service Hubs
- Professional & Enterprise




[← Back to rotations](#)

MM BDRs

Changes will reset booking counts. Changing weights, availability, distribution logic or adding new rotation

Any active member in the rotation will be chosen based on the number of meetings and weight they've been assigned.

Search for a member

WEIGHT	MEMBER
100% <input type="text" value="100%"/>	 Melissa Parham mparham@hubspot.com
50% <input type="text" value="50%"/>	 Melinda Nelson menelson@hubspot.com
100% <input type="text" value="100%"/>	 Melvin Par mparham+1@hubspot.com

Use Weighted Meeting Rotations Now:

- Give new sales reps fewer meetings while they get up to speed
- Reward high performers with more meetings
- Give fewer meetings to team members with other responsibilities

What's New:

AI Assistant to Build Workflow Actions

- Public Beta
- Marketing, Operations, Sales & Service Hubs
- Professional & Enterprise

Edit with AI

Cancel

Add new actions with AI

Describe actions to add to the end of this workflow.

[See examples](#)

Wait 7 days, then send the "Welcome" email to the customer. Then, send a Slack notification to the account manager.

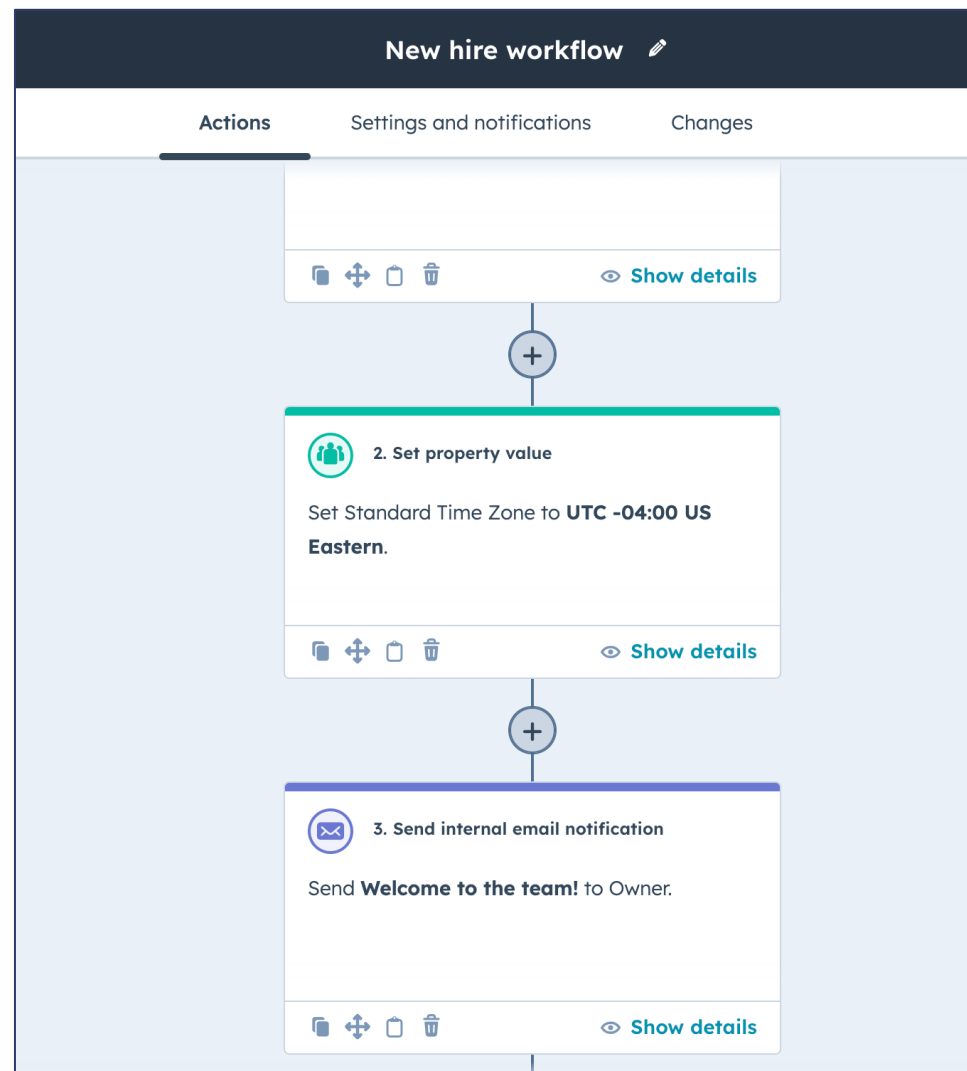
When you choose "Generate actions," the suggested actions will be added to the end of your workflow. You'll still be able to make changes or delete the actions.

◆ Generate actions

What's New:

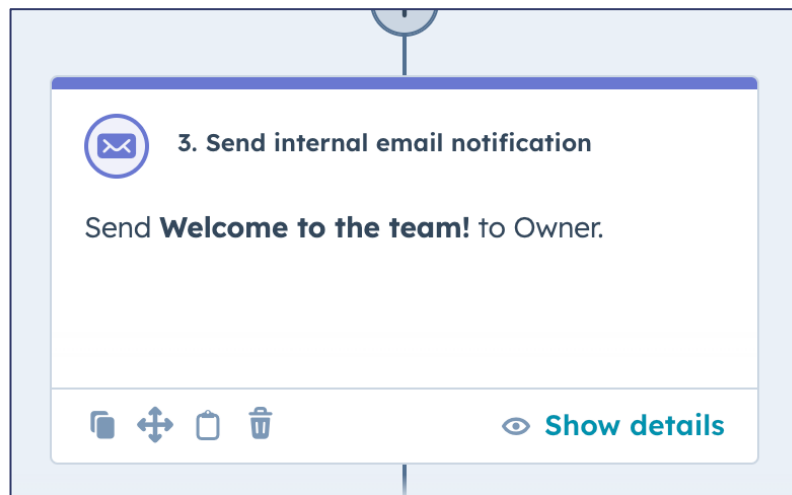
User Object Available in Workflows

- Public Beta
- Marketing, Operations, Sales & Service Hubs
- Professional & Enterprise



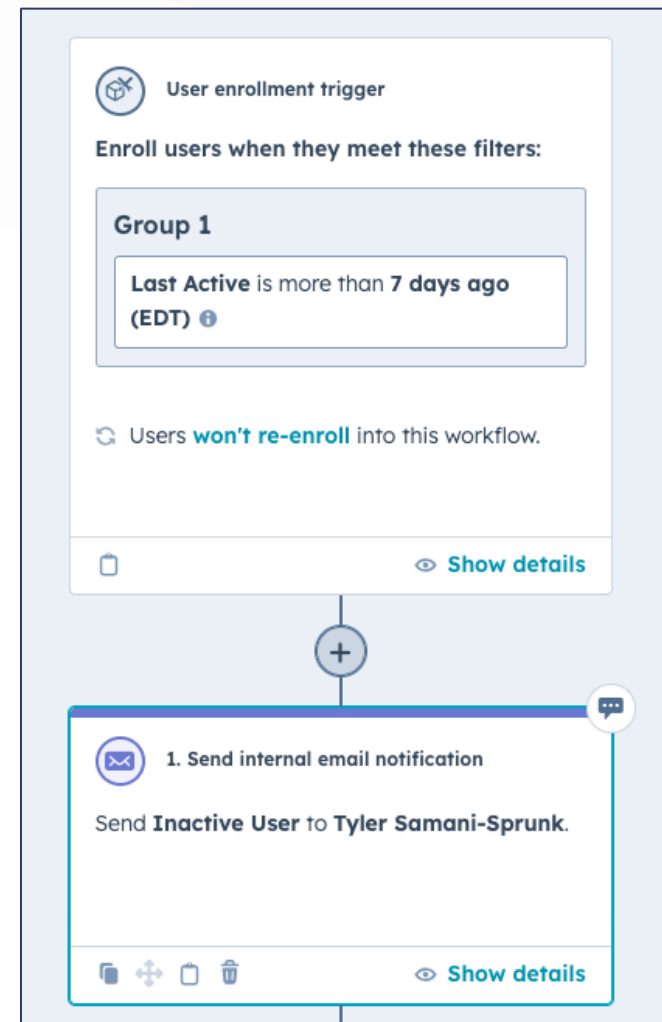
Use User Workflows Now: Streamline User Onboarding

- Trigger: When object is created
- Send welcome email or welcome nurture
- Create onboarding tasks (eg. taking HubSpot Academy certifications)



Use User Workflows Now: User Management Alerts

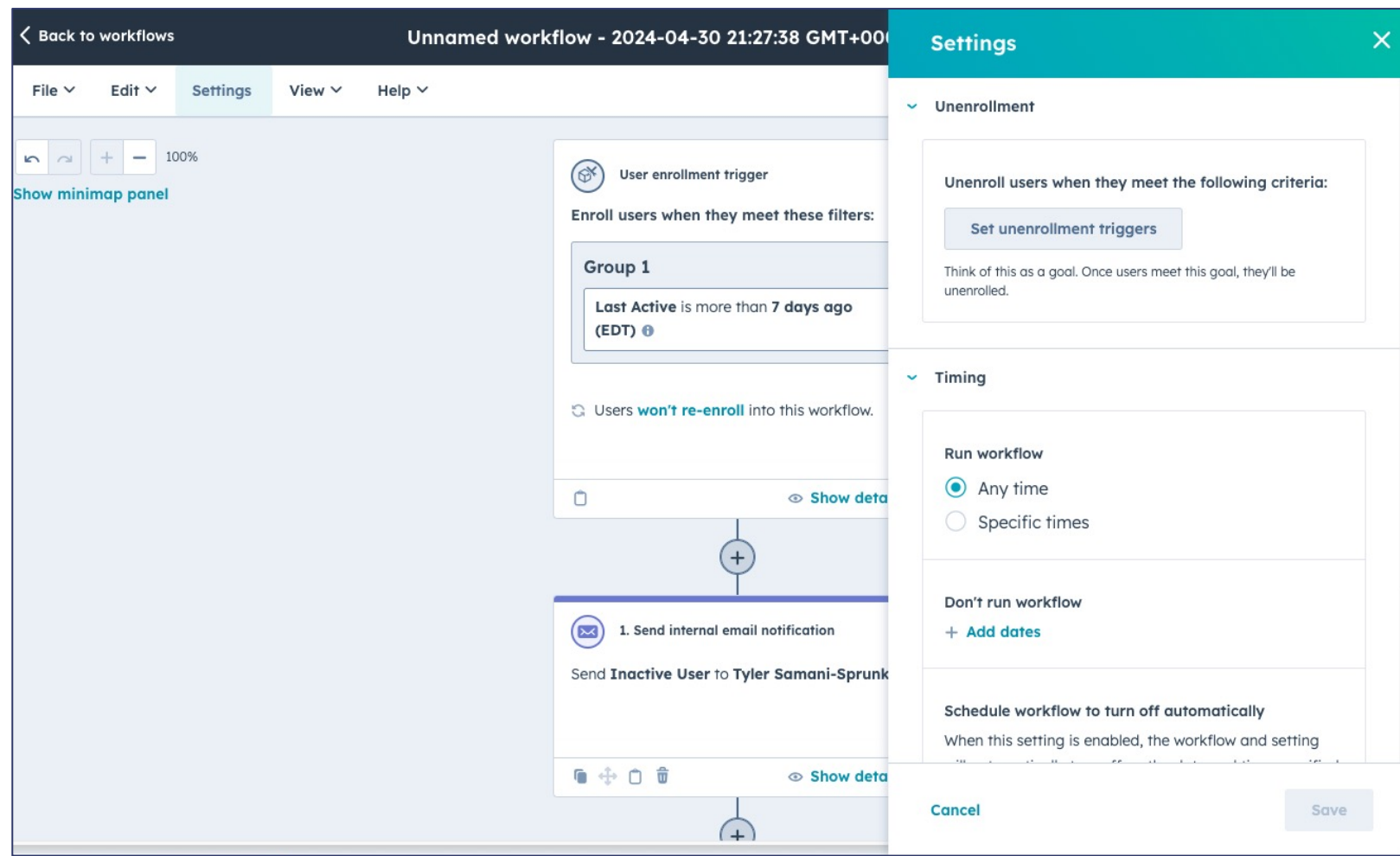
- User accepted invite
- Calendar isn't synced
- Email isn't synced
- Hasn't been active in certain amount of time
- User deactivated
- User team changes
- User seat assigned or unassigned
- User on sales team but doesn't have sales seat



What's New:

Reorganized Navigation and Keyboard Shortcuts in Workflows

- Public Beta
- Marketing, Operations, Sales & Service Hubs
- Professional & Enterprise

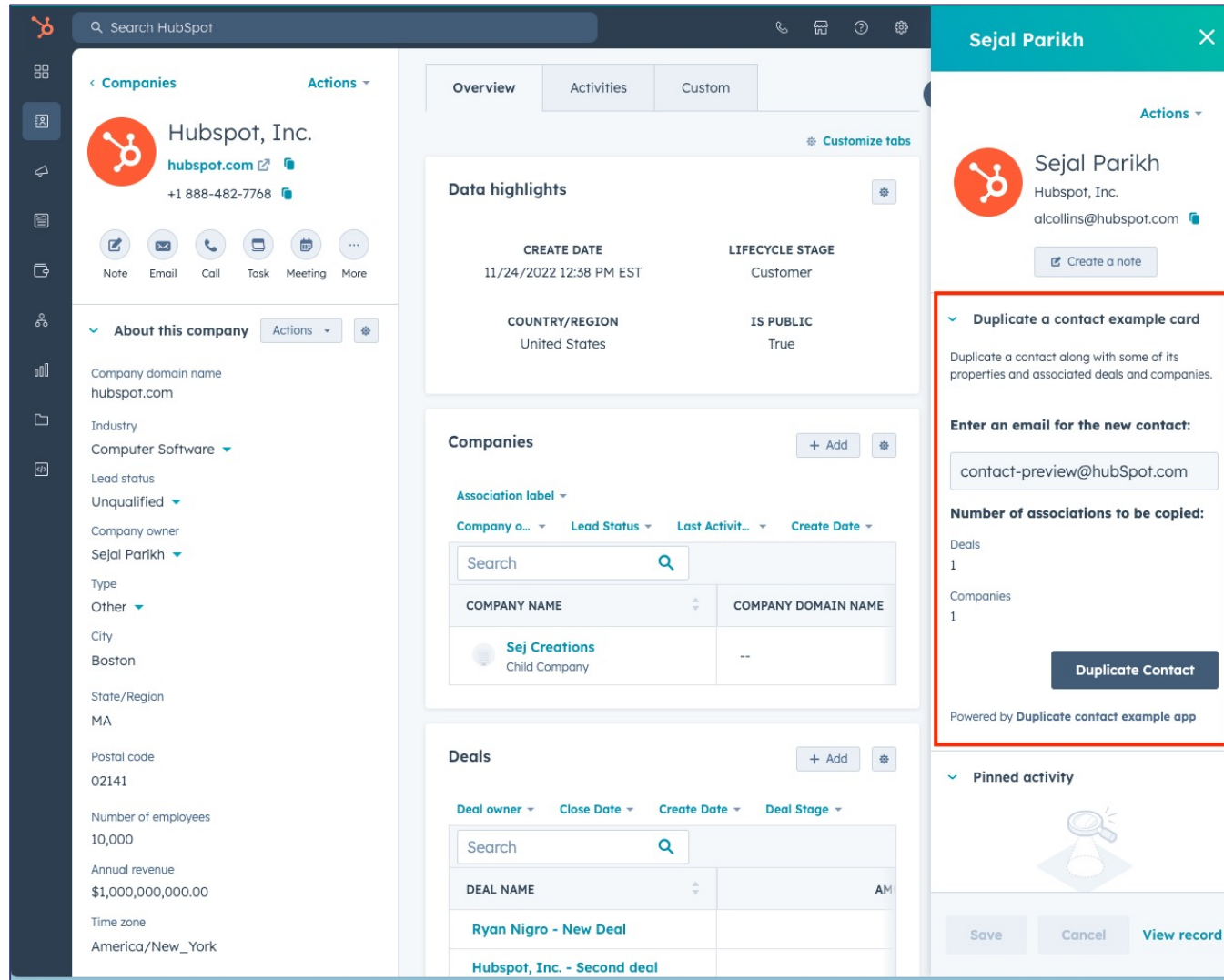


The screenshot displays the HubSpot Workflow settings interface. The main window shows a workflow named "Unnamed workflow - 2024-04-30 21:27:38 GMT+00:00". The settings panel is open on the right, showing the "Settings" tab. The "Unenrollment" section is expanded, showing options to "Set unenrollment triggers" and a note: "Think of this as a goal. Once users meet this goal, they'll be unenrolled." The "Timing" section is also expanded, showing options for "Run workflow" (Any time, Specific times) and "Don't run workflow" (+ Add dates). The "Schedule workflow to turn off automatically" section is partially visible. The main workflow canvas shows a "User enrollment trigger" with filters for "Group 1" (Last Active is more than 7 days ago (EDT)) and "Users won't re-enroll into this workflow." Below the trigger is a step "1. Send internal email notification" with the subject "Send Inactive User to Tyler Samani-Sprunk".

What's New:

Add Custom Cards (UI Extensions) to the Preview Sidebars

- Public Beta
- Sales & Service Hubs
- Enterprise



The screenshot displays the HubSpot CRM interface. On the left, the 'Companies' sidebar shows details for Hubspot, Inc., including contact information and company attributes. The main area shows the 'Overview' tab for the company, with data highlights for create date, lifecycle stage, country/region, and public status. Below this is a table of associated companies, with 'Sej Creations' listed. The right sidebar shows the contact profile for Sejal Parikh. A red box highlights a custom card titled 'Duplicate a contact example card' in the sidebar. This card contains a description, a form to enter an email for the new contact (with 'contact-preview@hubSpot.com' entered), a section for the number of associations to be copied (1 for Deals and 1 for Companies), and a 'Duplicate Contact' button. At the bottom of the sidebar, there is a 'Pinned activity' section with a magnifying glass icon and buttons for 'Save', 'Cancel', and 'View record'.

What's New:

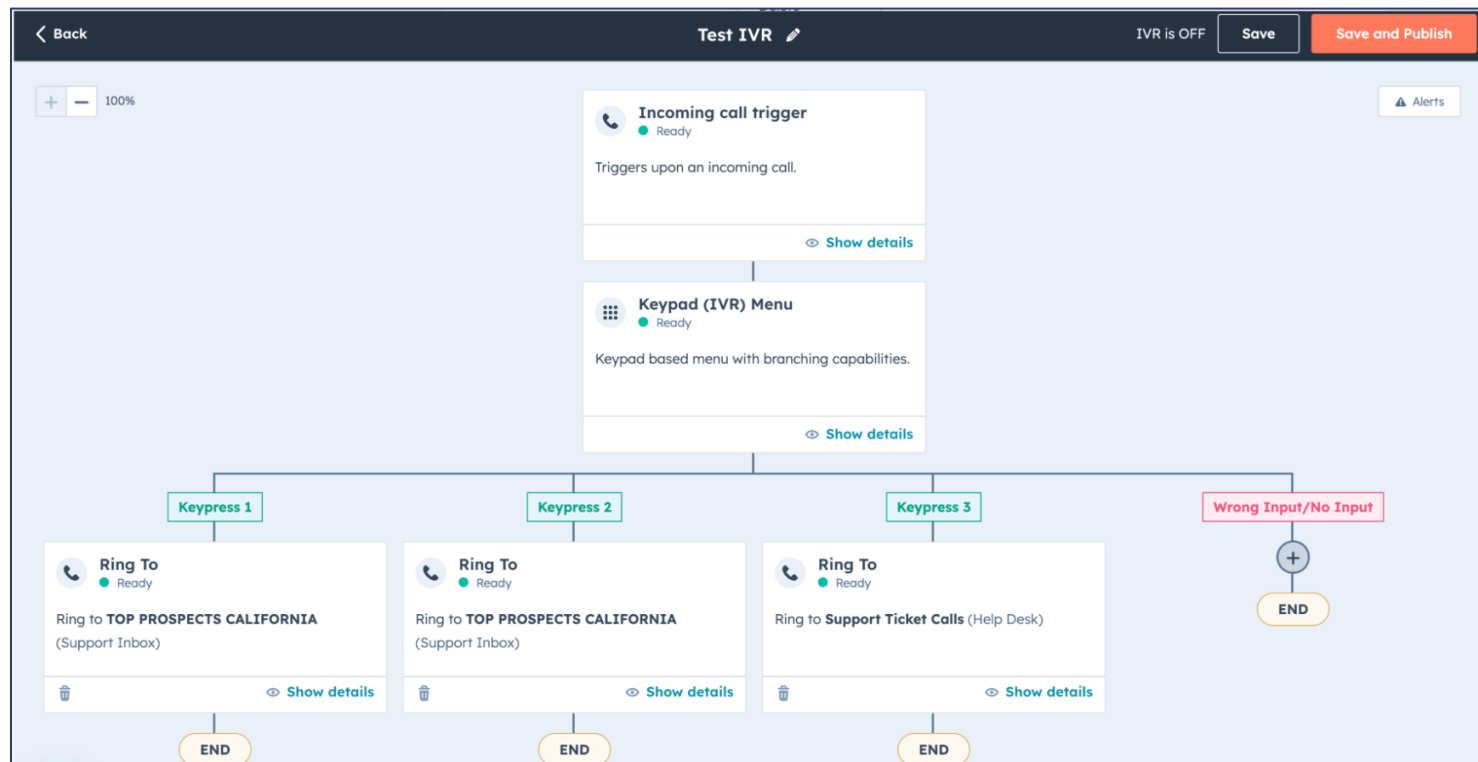
IVR (Interactive Voice Response)

- Public Beta
- Sales & Service Hubs
- Enterprise

Interactive Voice Response

Create an interactive voice response (IVR) system that allows automated interactions with callers through pre-recorded voice prompts and keypad inputs.

Add IVR Menu
Edit audio messages i



Commerce Hub

What's New:

Edit Open Invoices

- Live
- Commerce Hub
- All Tiers

Invoices

Setup

Manage the information you collect and store about your invoices. [Learn more about setting up invoices](#)

Setup

Manage invoice properties
Manage the information you collect about your invoices

Next invoice number ⓘ

ACC-51020

Edit prefix
Change or remove the prefix that each invoice number begins with.

Update starting point for invoice numbers

Allow editing of open invoices **NEW**
Invoices in the "open" status can be edited if they're unpaid. Users must have the invoice edit permission to make edits.

Actions ▾

- Edit
- View invoice [↗](#)
- Copy link

Marketing Hub

What's New:

Improvements to 'Marketing event' Associations in Campaigns

- Live
- Marketing Hub
- Professional & Enterprise

Add assets to Q2 Lead generation campaign Business Unit A

- Marketing
- Website
 - Blog posts
 - Landing pages
 - Website pages
- Lead capture
 - CTAs
 - CTAs (Legacy)
 - Forms
- Ad campaigns
- Emails
- Social posts
- External website pages NEW
- Marketing events
- Static lists
- Workflows
- Content Remix NEW

Marketing events

🔍
Create marketing event ↗

	NAME	EVENT SOURCE	STATUS	UPDATED AT
<input type="checkbox"/>	Q2 webinar <small>Currently part of Q2 nurture campaign</small>	Zoom	○ Completed	April 5, 2024
<input type="checkbox"/>	How to generate leads	GoToWebinar	○ Completed	April 5, 2024
<input type="checkbox"/>	A guide to customer retention	Eventbrite	● Ongoing	April 5, 2024
<input type="checkbox"/>	Q2 UK trade show	Manually created	○ Completed	April 2, 2024

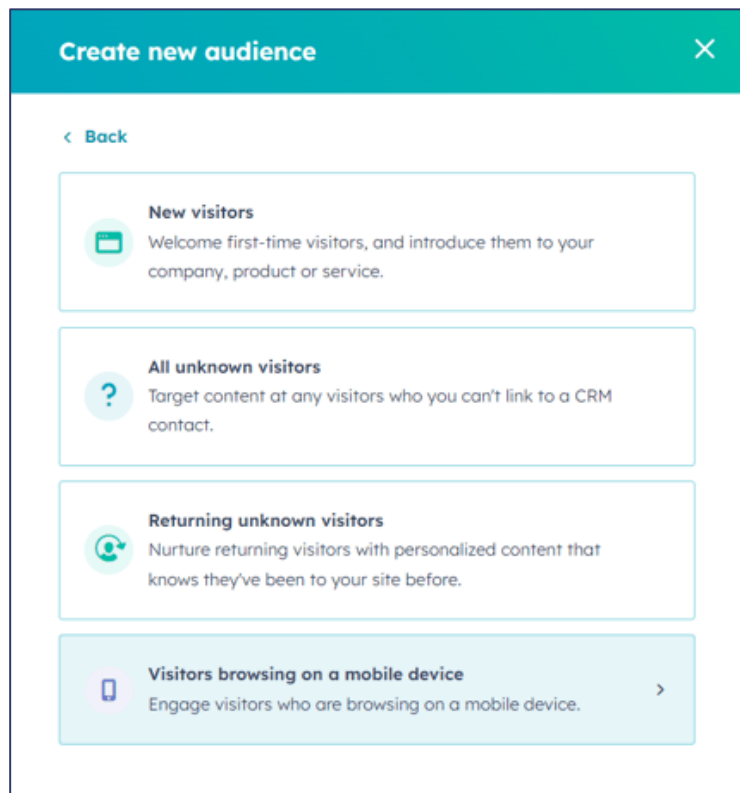
<< First < Prev 1 2 Next > Last >>

Save
Cancel



What's New: Audiences

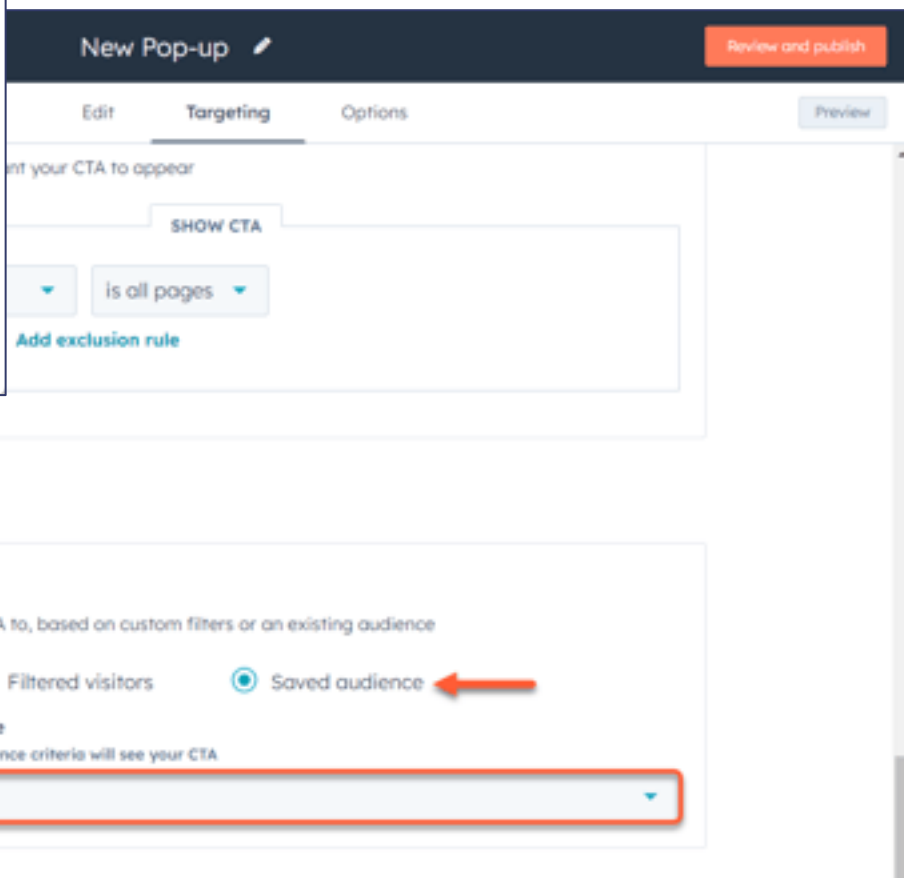
- Private Beta
- Marketing Hub
- Enterprise



Create new audience

< Back

- New visitors**
Welcome first-time visitors, and introduce them to your company, product or service.
- All unknown visitors**
Target content at any visitors who you can't link to a CRM contact.
- Returning unknown visitors**
Nurture returning visitors with personalized content that knows they've been to your site before.
- Visitors browsing on a mobile device**
Engage visitors who are browsing on a mobile device.



New Pop-up Review and publish

Edit Targeting Options Preview

When your CTA to appear

SHOW CTA

is all pages

Add exclusion rule

Who will it be shown to?

Show to these visitors
Choose who to show your CTA to, based on custom filters or an existing audience

All visitors Filtered visitors Saved audience

Choose an existing audience
Only visitors that meet the audience criteria will see your CTA

New visitors

Use Audiences Now: More Relevant Pop-up CTAs

- Show gated content CTA to anonymous visitors and ungated content CTA to known visitors
- Show top-of-funnel CTA to new anonymous visitors and bottom-of-funnel CTA to anonymous visitors with high engagement
 - Example: informative webinar CTA for a new visitor and a demo request CTA for someone that's been to multiple pages or returned multiple times
- Show visitors of a specific page a CTA that's highly-relevant to that page
 - Example: visited page for Service X, show them exit intent pop-up for a Service X case study even if they're no longer on that page

Sales Hub

What's New:

Predictive Deal Score

- Public Beta
- Sales Hub
- Professional & Enterprise

Deal Score

Current score

99

▲ 3
 Since 2 days ago

Key factors

- + Deal probability in pipeline
- + Number of times deal amount has increased
- + Days in current stage
- + Number of times deal probability increased in pipeline
- + Number of associated contacts

[Learn more about deal scoring](#)

Score trend [View score history](#)



Date	Deal Score
3/25/2024	42
3/27/2024	65
3/28/2024	85
3/29/2024	90
4/1/2024	95
4/2/2024	99

Deal Score History ✕

VALUE ▾	KEY FACTORS ▾	DATE ▾
42	<ul style="list-style-type: none"> <li style="margin-bottom: 5px;">- Deal probability in pipeline <li style="margin-bottom: 5px;">- Number of sales activities (sales email or call) <li style="margin-bottom: 5px;">+ Days until close date <li style="margin-bottom: 5px;">+ Days in current stage <li style="margin-bottom: 5px;">+ Number of times close date has changed 	Wednesday, March 27, 2024 6:10 AM

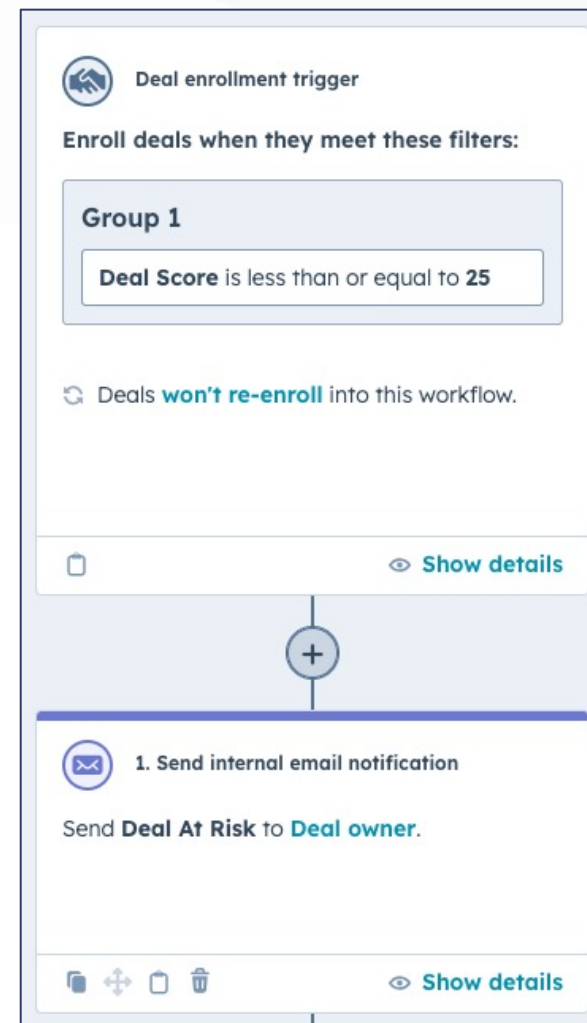
Use Predictive Deal Scores Now: Help Reps Prioritize

- Create a saved view for a rep's deals sorted by deal score
- Create a colored deal tag for deals with a score above a certain score threshold

DEAL NAME	DEAL SCORE
Celebration cake	90
Custom wedding cake	81
Dragonfly Inn Anniversary...	63
Pawnee Parks Dept. - New ...	30

Use Predictive Deal Scores Now: Flag Deals for Action

- Send notification and/or task for deals that fall below a specific score (eg. 25)



The screenshot shows a HubSpot workflow configuration interface. At the top, it says "Deal enrollment trigger" with a hand icon. Below that, it says "Enroll deals when they meet these filters:". There is a "Group 1" section containing a filter: "Deal Score is less than or equal to 25". Below the filter, it says "Deals won't re-enroll into this workflow." with a refresh icon. At the bottom of the filter section, there is a "Show details" link. Below the filter section, there is a plus sign in a circle. Below that, there is a step: "1. Send internal email notification" with an envelope icon. The step description is "Send Deal At Risk to Deal owner." At the bottom of the step section, there are icons for copy, add, delete, and a "Show details" link.

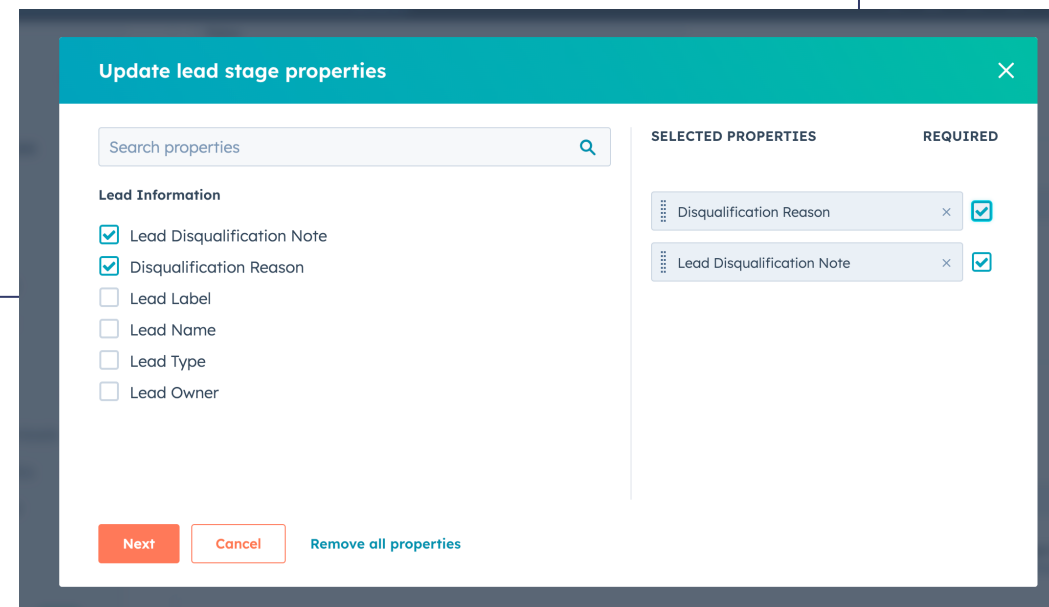
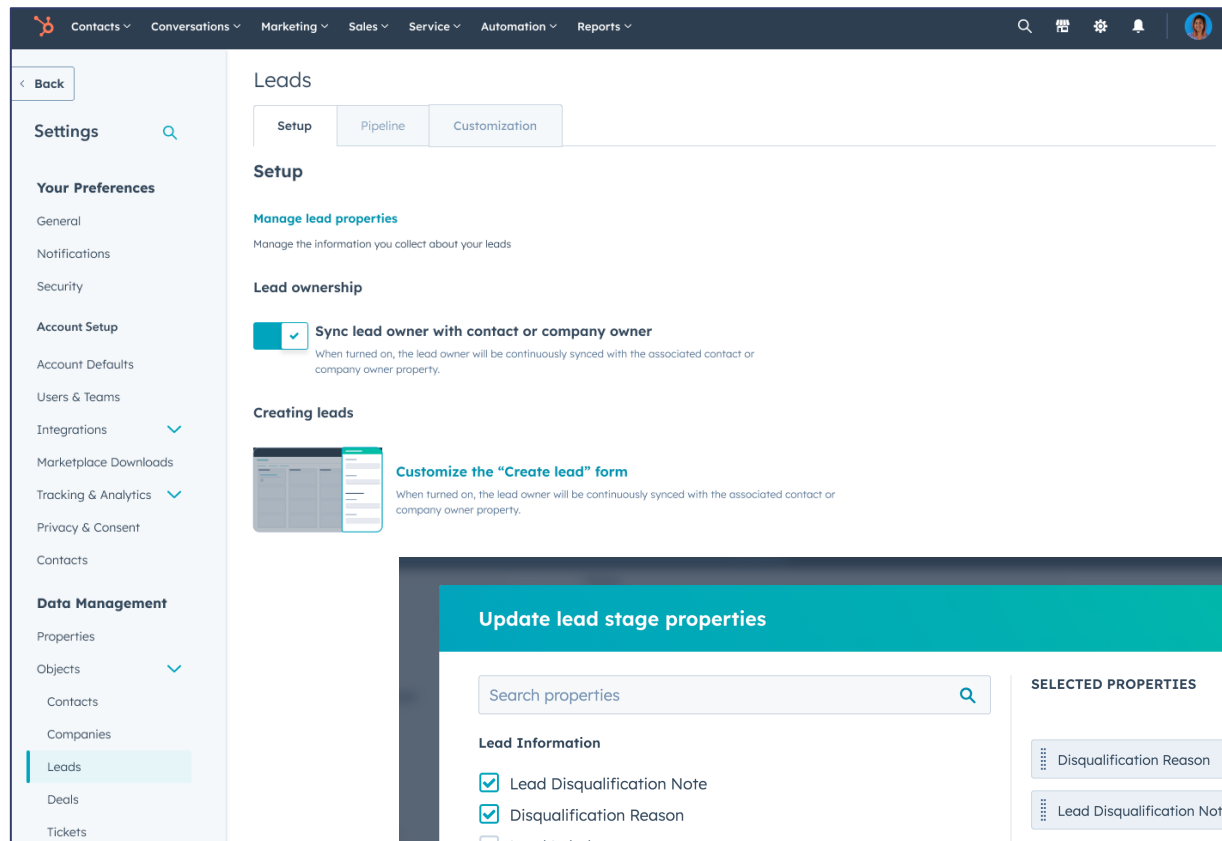
Use Predictive Deal Scores Now: Improve Forecasting

- Create a saved view that shows deal score and forecast category to identify mismatches
 - Example: Deal in committed category but has low score
- Do the same for deal score and close date
 - Deals with an impending close date and a low probability may need a close date adjustment and vice versa

DEAL NAME	DEAL STAGE	FORECAST CATEGORY	DEAL SCORE
CultureRoad Sample Deal	Contract Sent (Demo Sales P...	Commit	92
Leonard-Hawkins - April O...	Contract Sent (Demo Sales P...	Commit	88
Burns-Sims - 60-day Troub...	Contract Sent (Demo Sales P...	Commit	88
Gilmore Girls - New Deal	Consultation Scheduled (De...	Pipeline	61
Compton-Rodriguez - re-c...	Presentation Held (Demo Sal...	Best case	61
Cruz-Collins - Q3 Order	Contract Sent (Demo Sales P...	Commit	56
MA Test Deal	Presentation Scheduled (De...	Best case	51
Fuentes-Kelley - 90-day Tr...	Presentation Held (Demo Sal...	Commit	43

What's New: Custom Lead Properties, Required Lead Properties, and Lead Form Customization

- Live
- Sales Hub
- Professional & Enterprise



Use Custom Lead Properties Now:

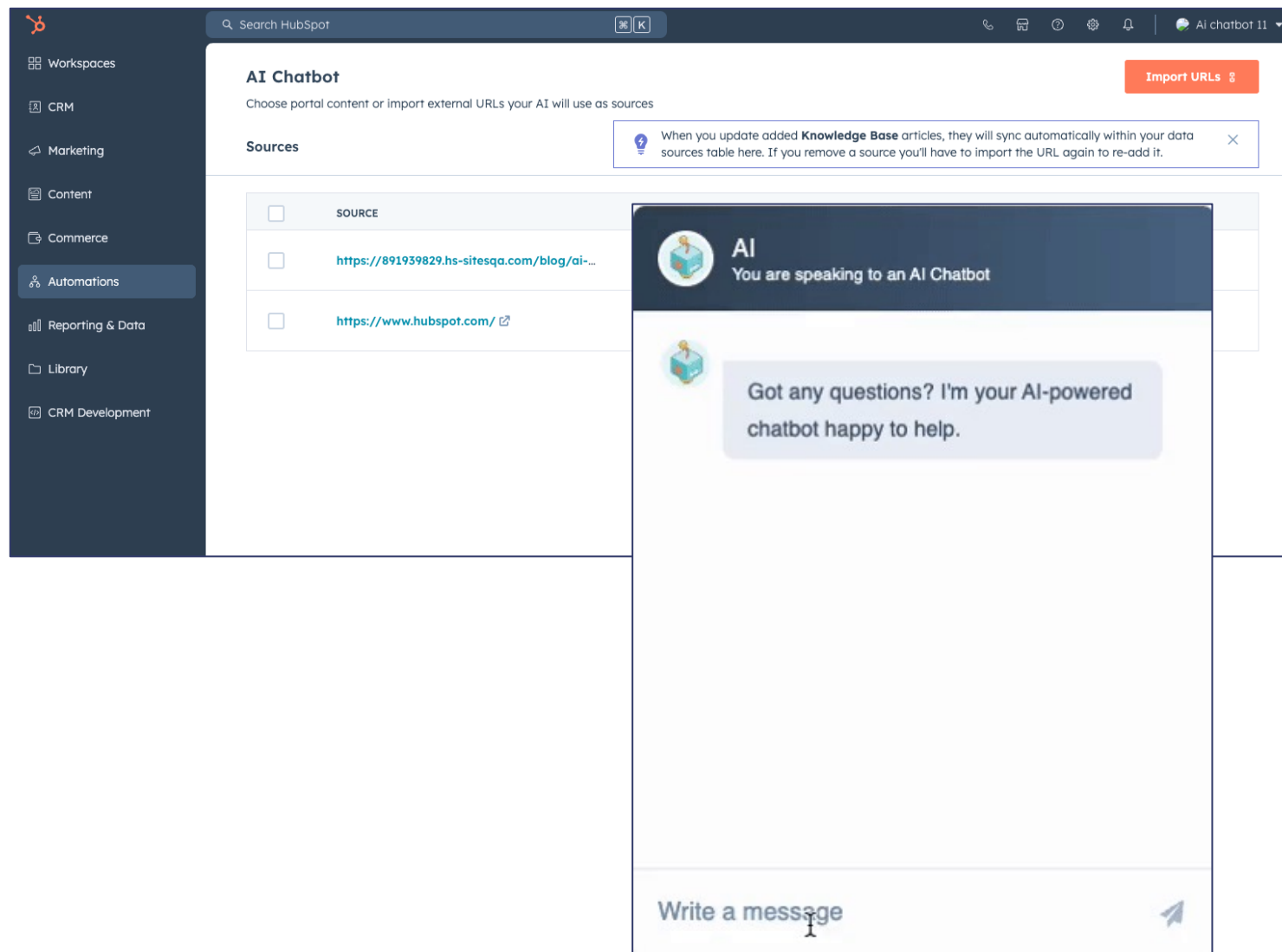
- Differentiate between new and returning/upsell leads
- Identify lead persona or interest
- Copy info from associated contact or company for easier visibility, sorting, and filtering
 - Examples: most recent conversion, industry, lead score
- Multiple owner fields

Service Hub

What's New:

AI Chatbot

- Public Beta
- Service Hub
- Starter, Professional & Enterprise



AI Chatbot Import URLs

Choose portal content or import external URLs your AI will use as sources

Sources

<input type="checkbox"/>	SOURCE
<input type="checkbox"/>	https://891939829.hs-sitesqa.com/blog/ai-...
<input type="checkbox"/>	https://www.hubspot.com/

When you update added **Knowledge Base** articles, they will sync automatically within your data sources table here. If you remove a source you'll have to import the URL again to re-add it.

AI
You are speaking to an AI Chatbot

Got any questions? I'm your AI-powered chatbot happy to help.

Write a message

Use AI Chatbot Now:

- Streamline customer service by adding your knowledge base
- Facilitate early sales conversations by adding service pages, pricing page, online case studies, and online FAQs
- Turn your blog into an interactive educational tool by adding your blog pages
- Add a narrowly-focused chatbot to a robust long-form piece or series of content (such as custom research) and make it interactive by encouraging visitors to ask questions about what's in the content

What's New:

Reply Recommendations in Help Desk

- Private Beta
- Service Hub
- Professional & Enterprise

Reply Recommendations

Reply Recommendations allows AI to suggest responses based on conversations, HubSpot knowledge base content, and added sources.

You can configure added content sources on the AI Chatbot page.

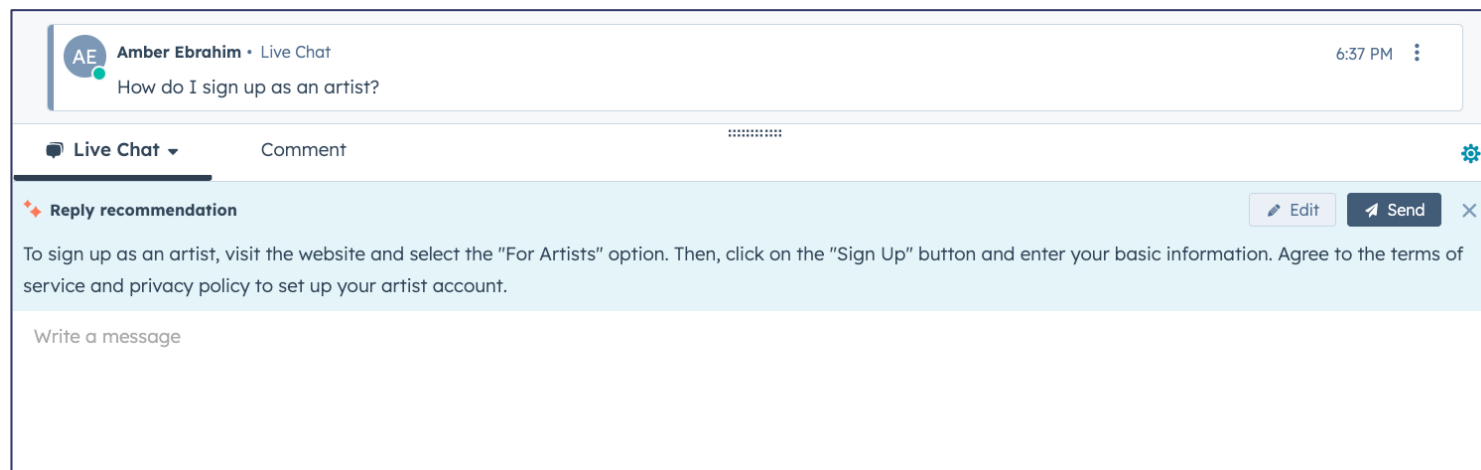
[AI Content Sources](#)



Reply Recommendations

Turned on for all users.

If you have no Knowledge Bases or other added sources, Reply Recommendations won't be enabled.



Amber Ebrahim · Live Chat 6:37 PM

How do I sign up as an artist?

Live Chat Comment

Reply recommendation Edit Send X

To sign up as an artist, visit the website and select the "For Artists" option. Then, click on the "Sign Up" button and enter your basic information. Agree to the terms of service and privacy policy to set up your artist account.

Write a message

What's New:

Connect HubSpot Tickets to Slack and Sync Replies

- Public Beta
- Service Hub
- Professional & Enterprise



Thread [Close] [Share]

HubSpot Help Desk APP 5 minutes ago
A ticket was created through chat

Ticket #974160273
I can't login to my account!
Contact: Not found **Company:** Not found **Priority:** High
Owner: Zakhar Marushchak **Pipeline:** Support Pipeline
Status: New

Replies in thread from users mapped between HubSpot and Slack will sync to the ticket as internal comments.

[View ticket](#) [Update Ticket](#)

4 replies

Vlad Vezikov APP 4 minutes ago
[@Zakhar Marushchak](#) user is having difficulty logging into account. could this be related to the bug we found earlier this morning?

Zakhar Marushchak 3 minutes ago
yeah, probably, I'll check this asap
✓ 1 🙌

Danielle Nuss < 1 minute ago
[@Zakhar Marushchak](#) Thanks for getting eyes on this so quickly!
👏
✓ 1 🙌

Vlad Vezikov APP < 1 minute ago
Thanks [@Zakhar Marushchak](#)! I'll let the customer know

B I S | 🔗 | ☰ ☲ | ☱ | ⌨️ 📎

Reply...

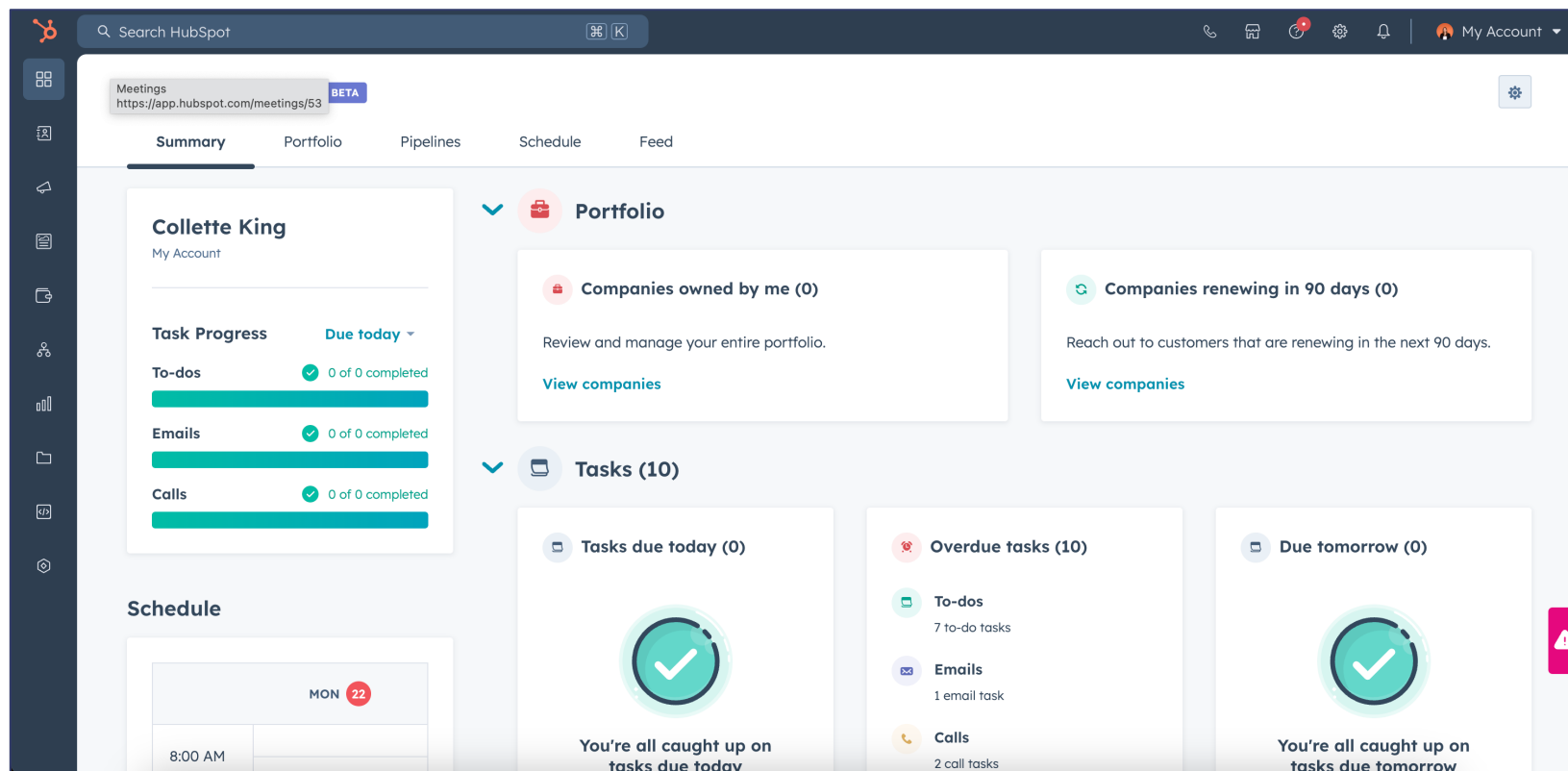
Also send to # general

+ Aa 😊 @ 📎 🗣️ 📄

What's New:

All-New Customer Success Workspace

- Public Beta
- Service Hub
- Professional & Enterprise



Questions & Answers

Book a call at SimpleStrat.com/Consult for personalized help.