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

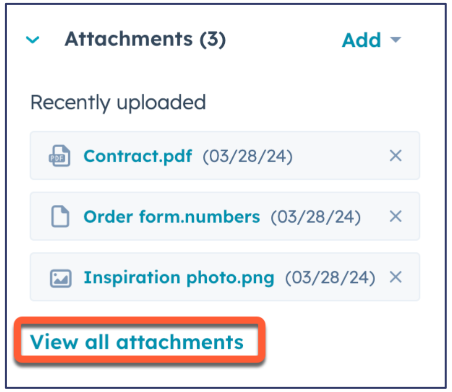
Cohost of HubSpot Hacks

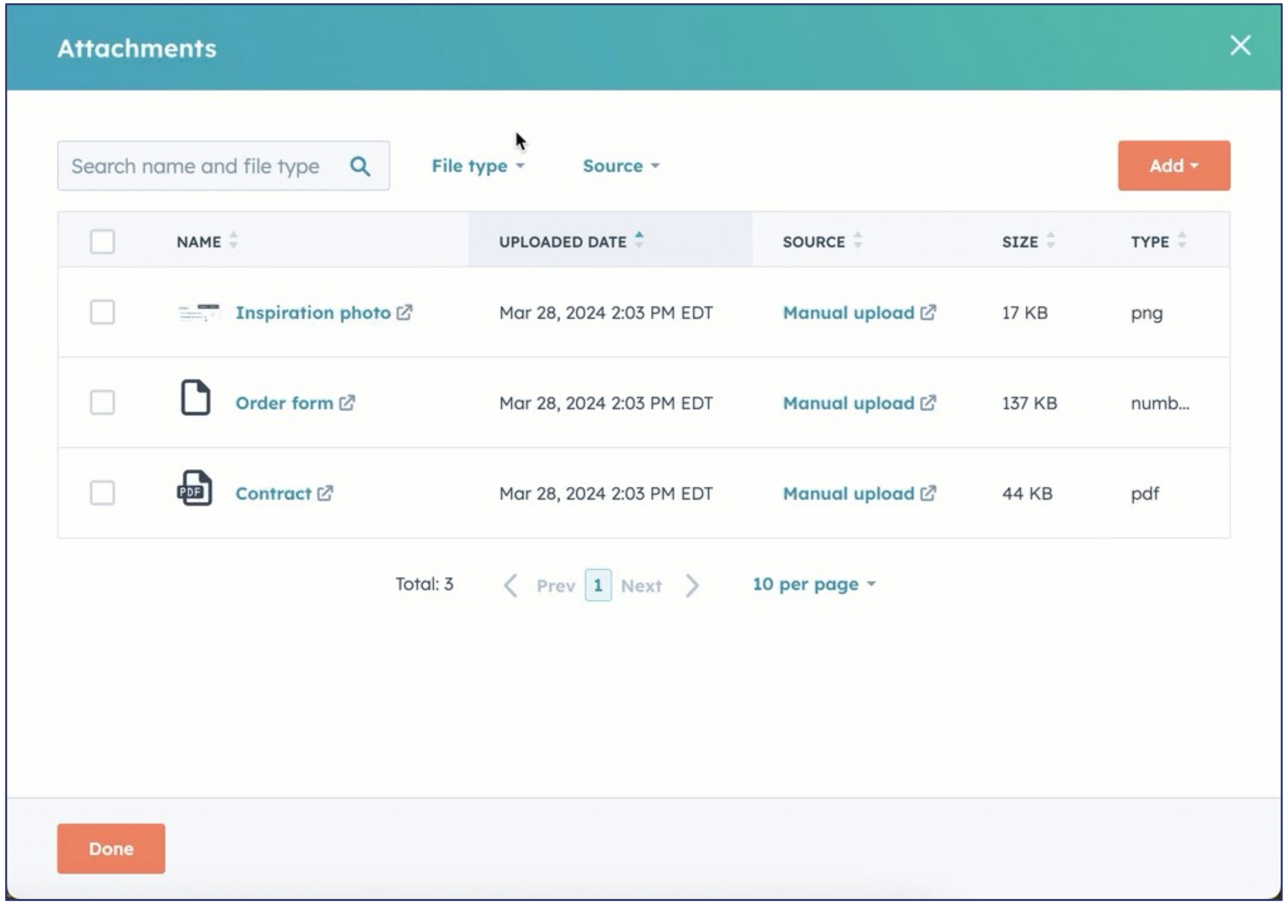
All Hubs

What’s New:

Improved Record Attachments Experience

- Live
- All Hubs
- All Tiers

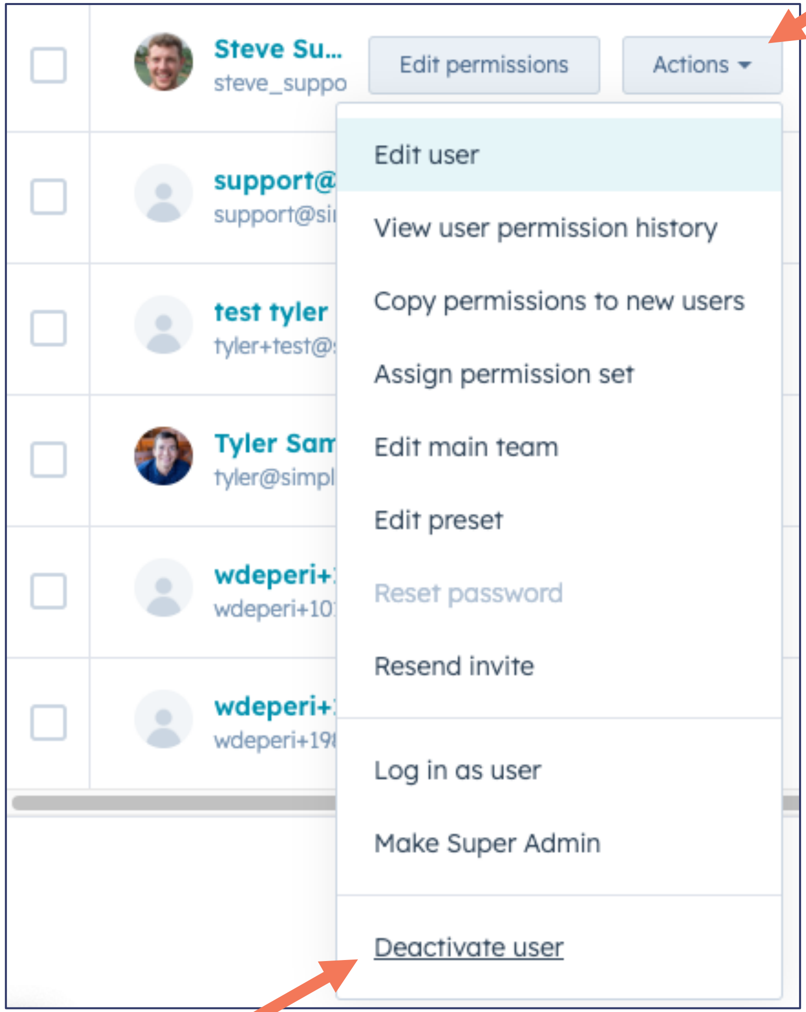


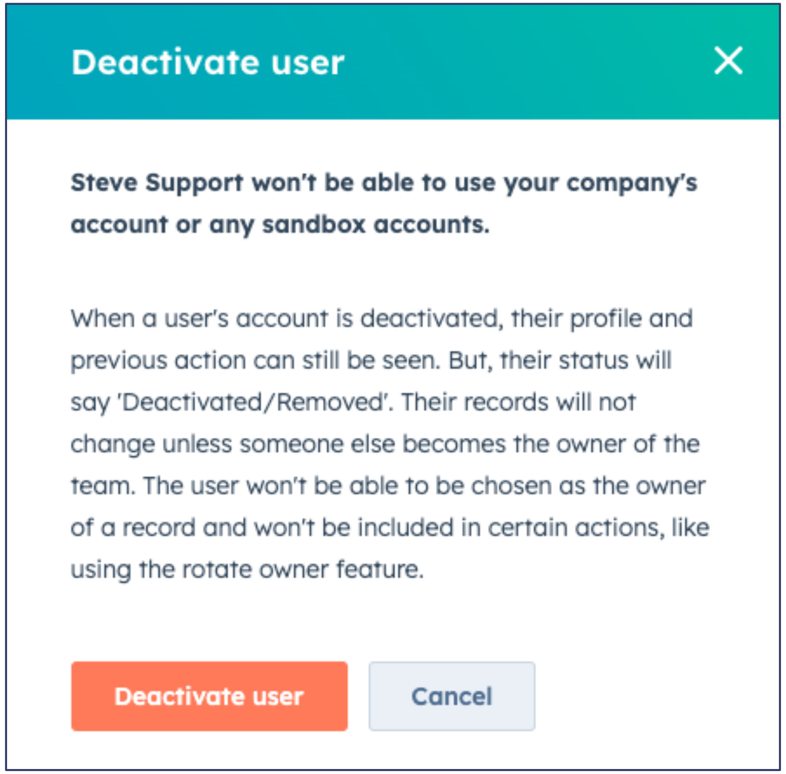


What's New:

User Deactivation Overhaul

- Live
- All Hubs
- All Tiers

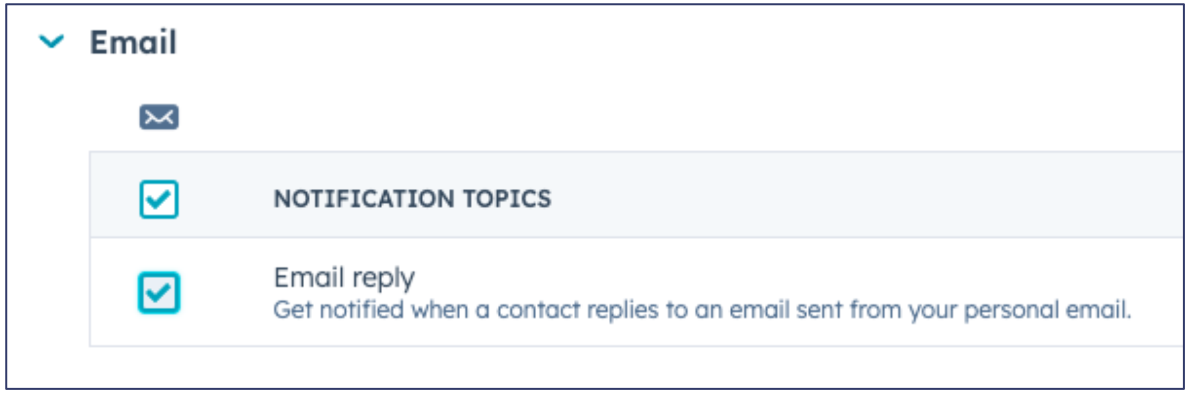


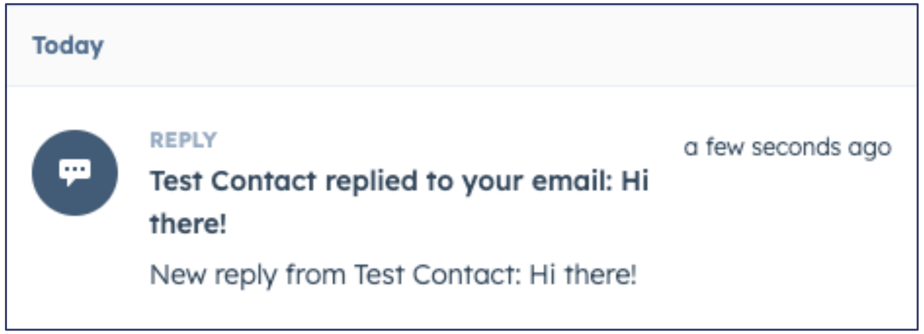


What's New:

Email Reply Notifications

- Live
- All Hubs
- All Tiers



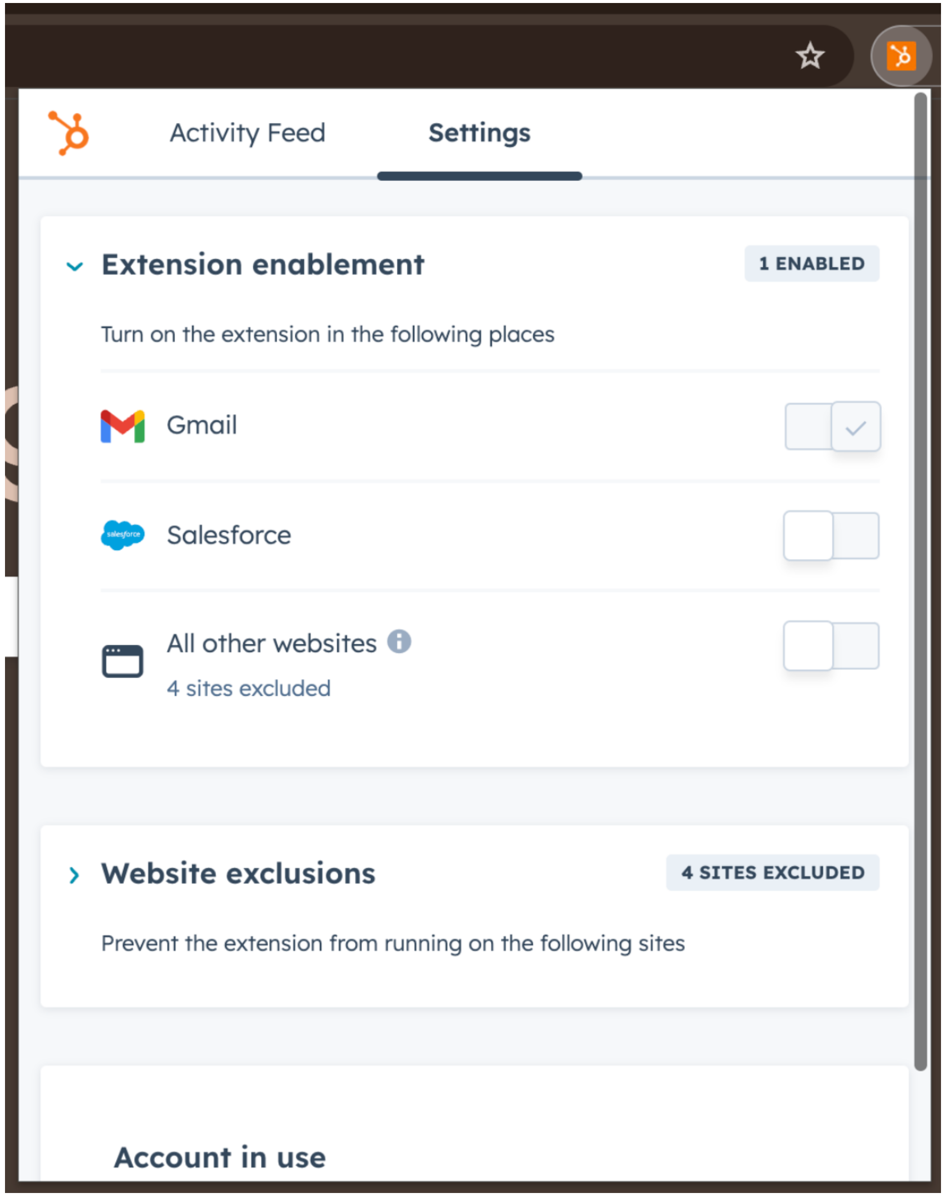


Diamond HubSpot SOLUTIONS PARTNER PROGRAM

What’s New:

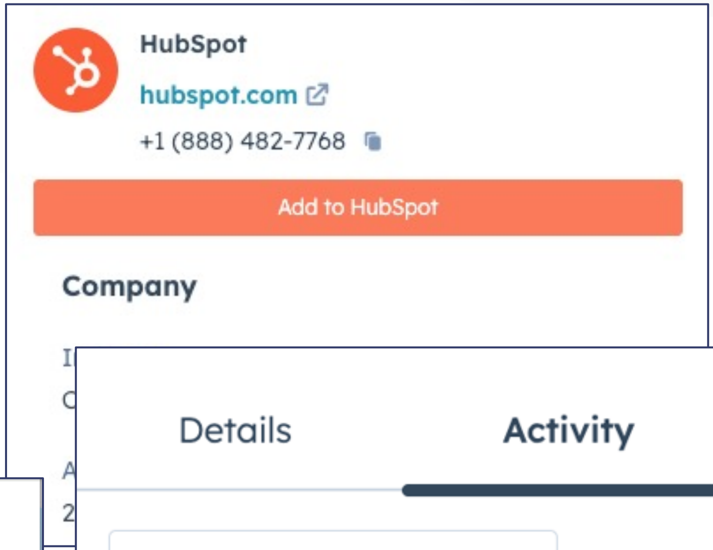
Use HubSpot Sales Chrome Extension Across the Web

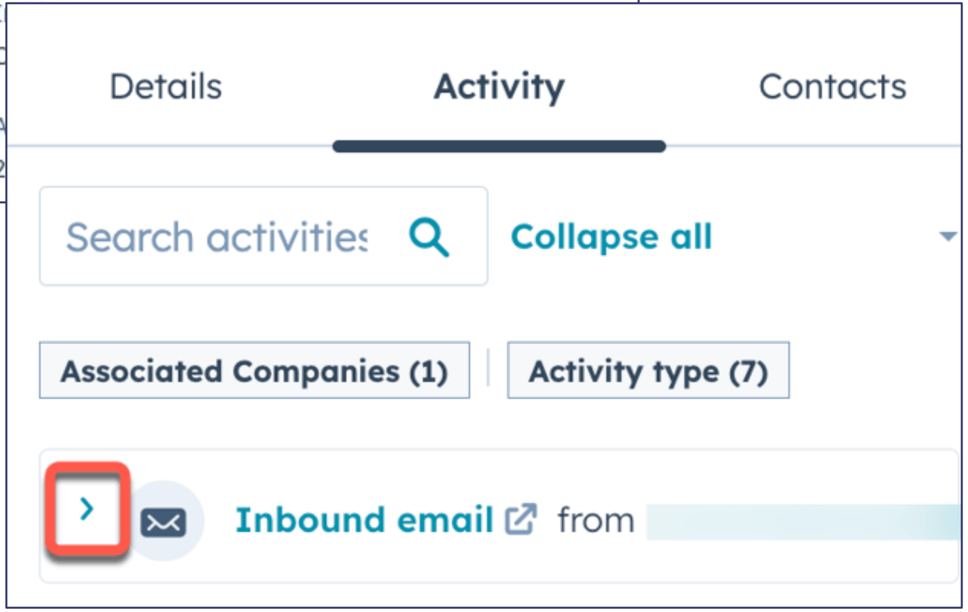
- Private Beta
- All Hubs
- All Tiers

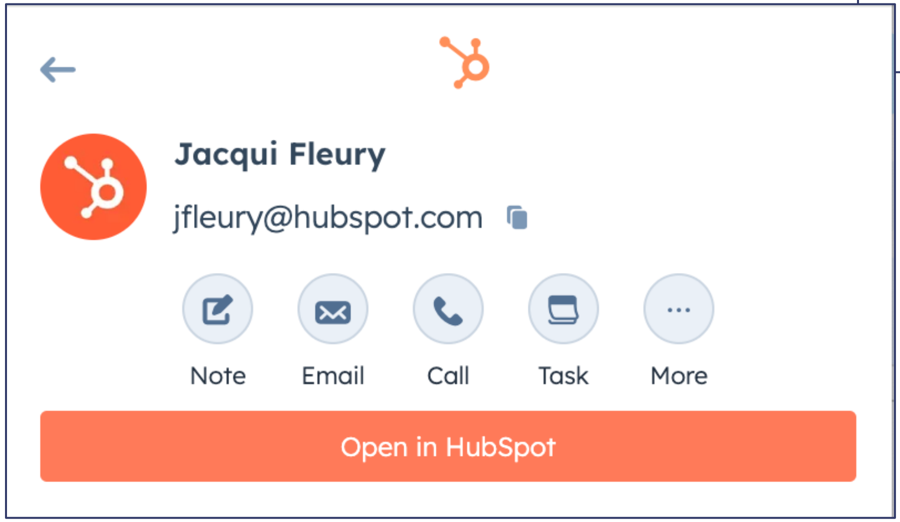


Use HubSpot Sales Extension Now: Research/Prospecting

- 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.)



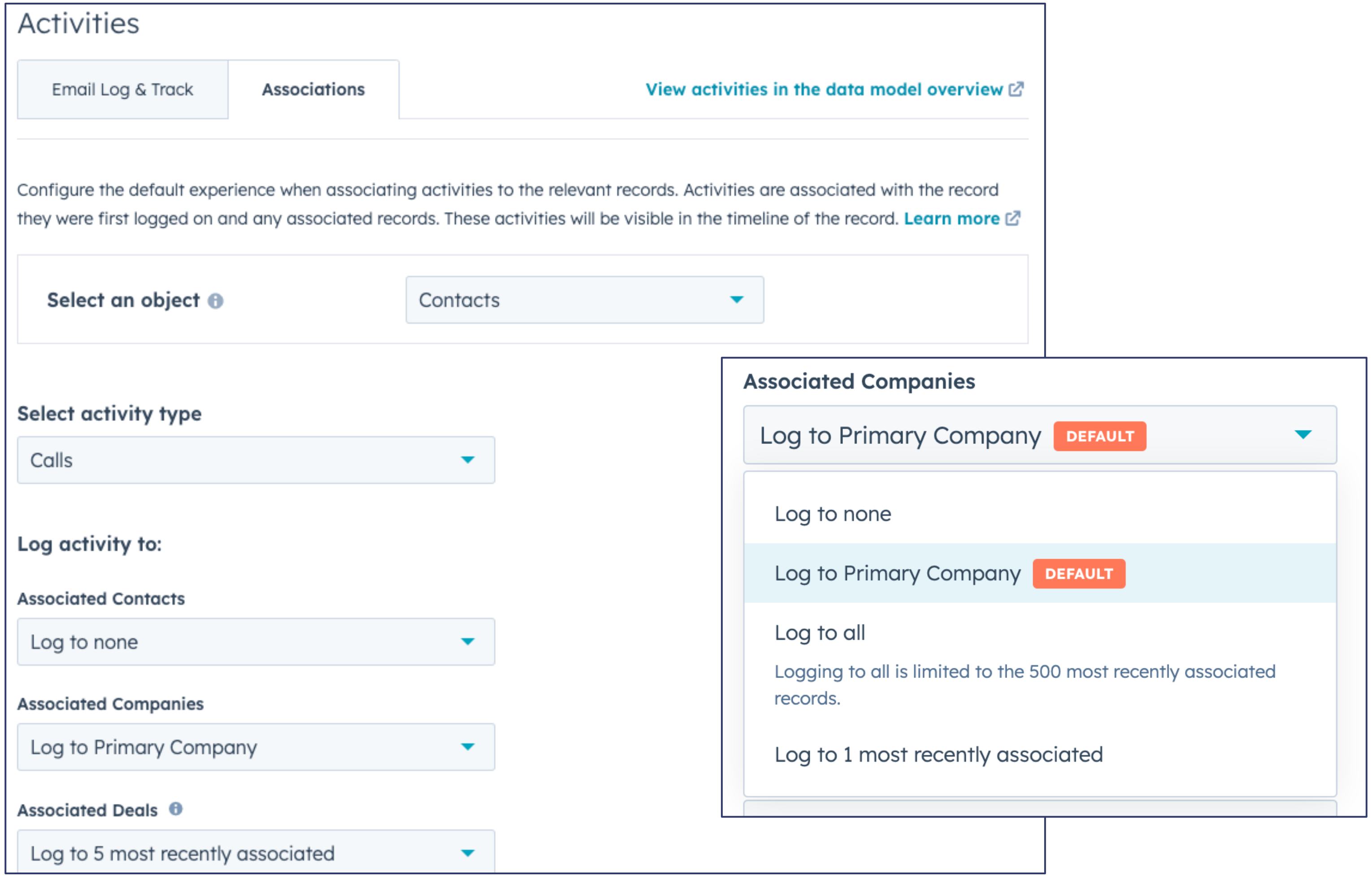




What’s New:

Configure Activity Association Defaults

- Private Beta
- All Hubs
- All Tiers



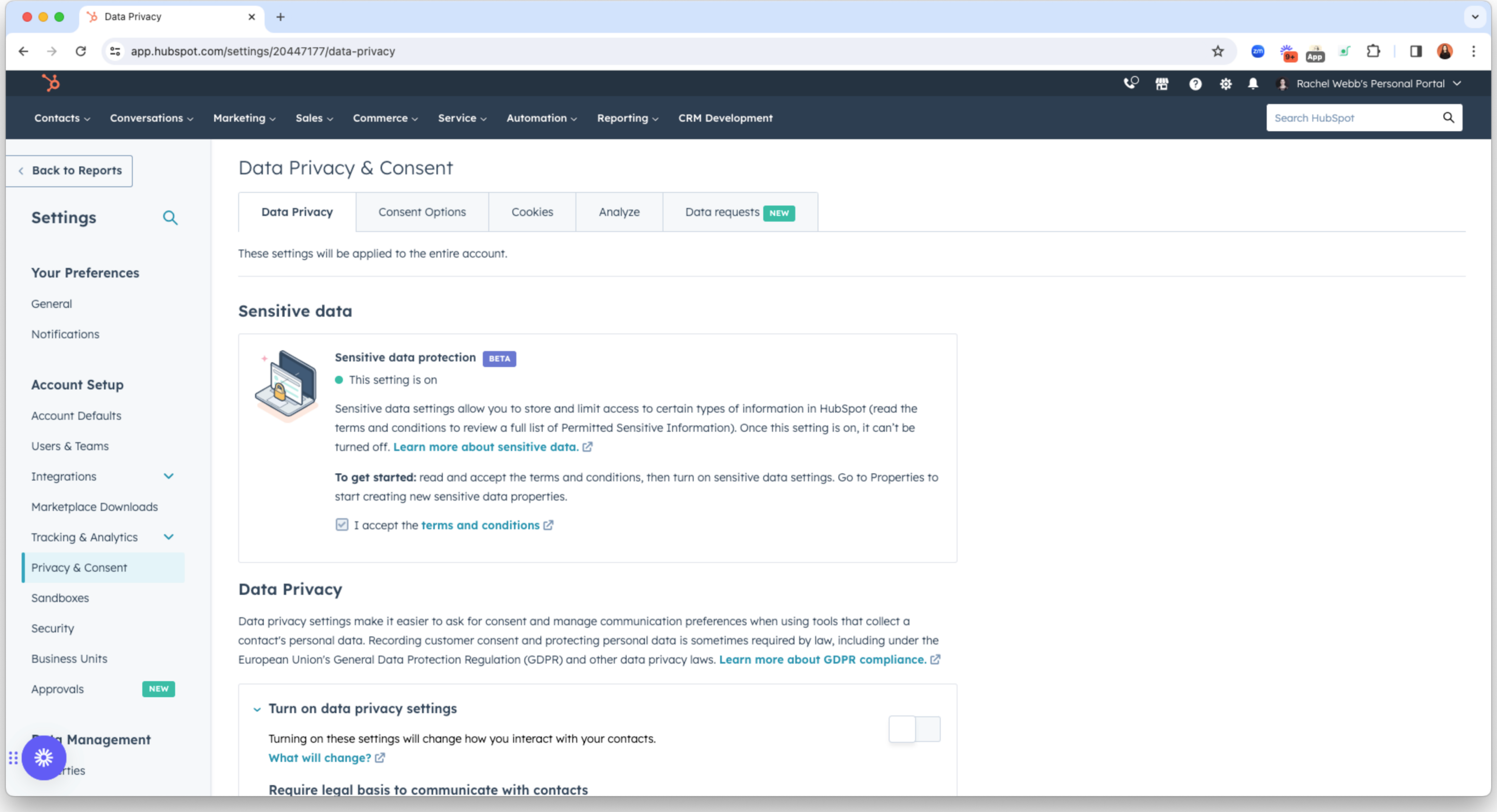
Use Association Defaults Now:

- 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

HubSpot Diamond SOLUTIONS PARTNER PROGRAM

Use Sensitive Data Storage Now:

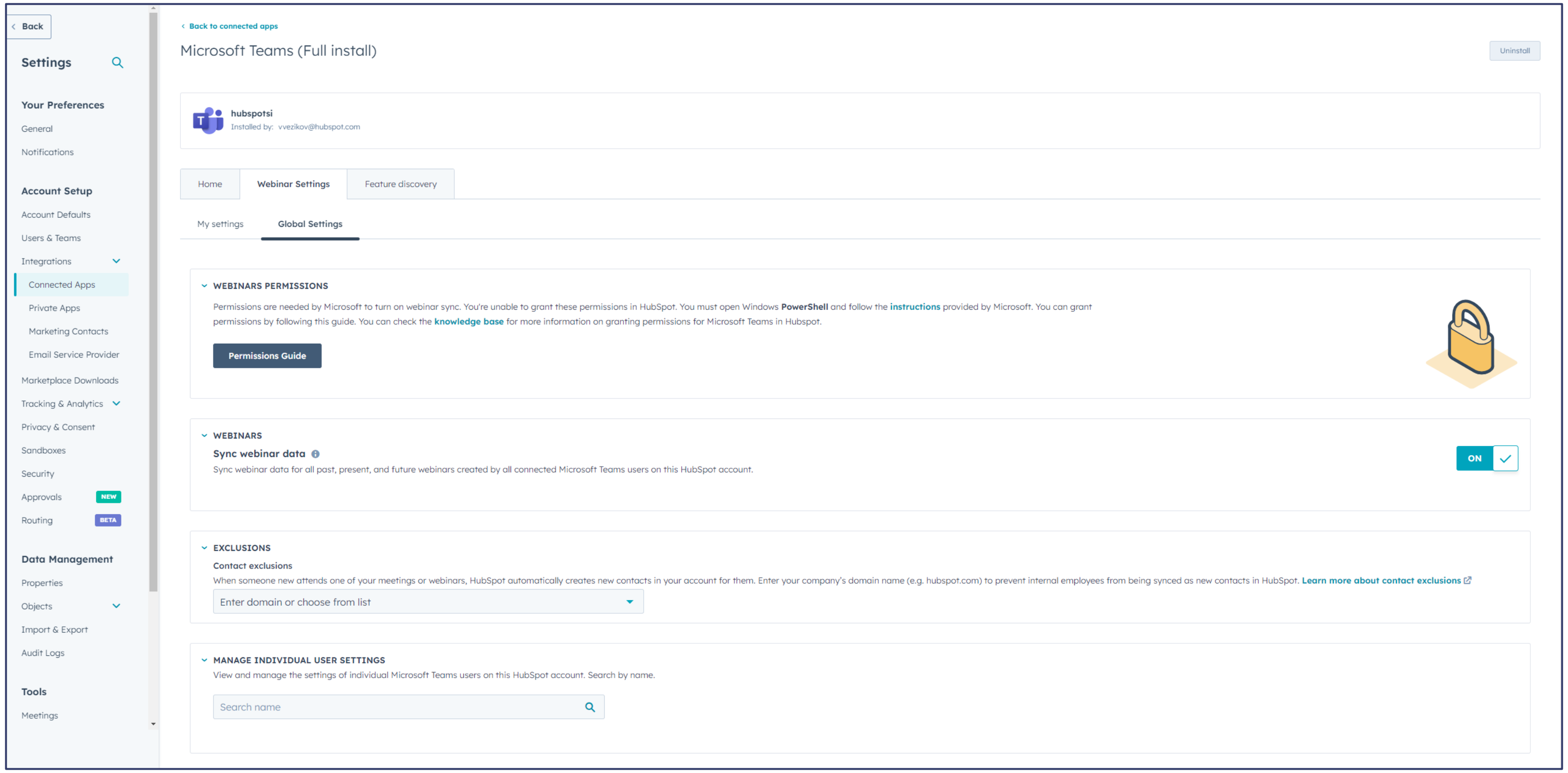
- Store last four digits of account or credit card info to assist with identity verification for phone support
- Store driver license numbers for fleet or delivery drivers
- Store immigration status on contacts for an immigration services firm (eg. law firm)

What’s New:

Sync Microsoft Teams Webinars to HubSpot Marketing Events

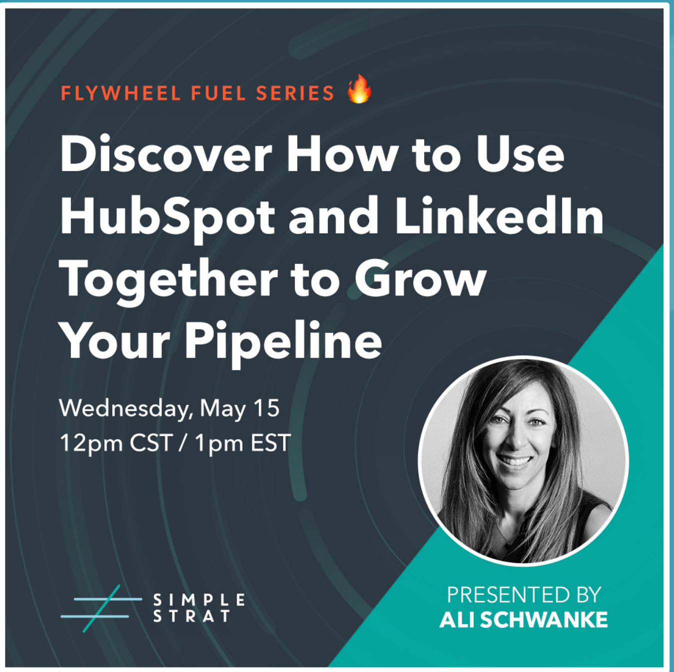
- Public Beta
- All Hubs
- All Tiers

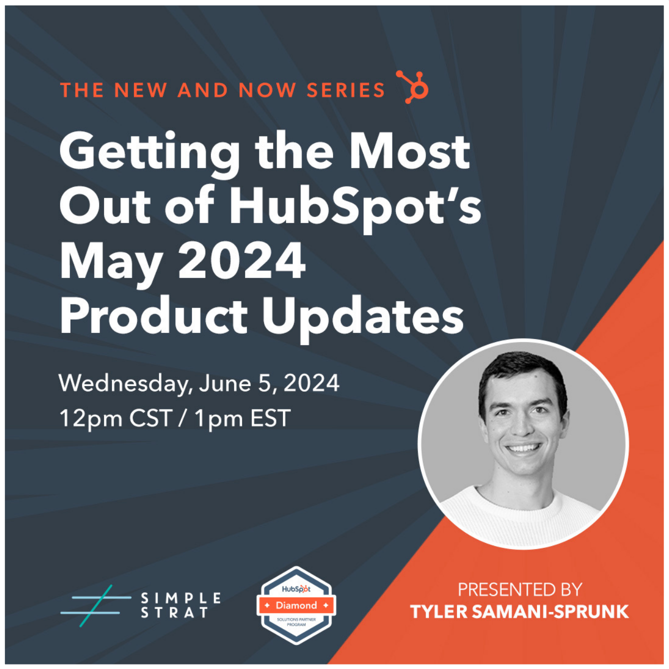
*This feature is only available to Microsoft Teams integration users



HubSpot Diamond SOLUTIONS PARTNER PROGRAM

Join Us Again Soon!





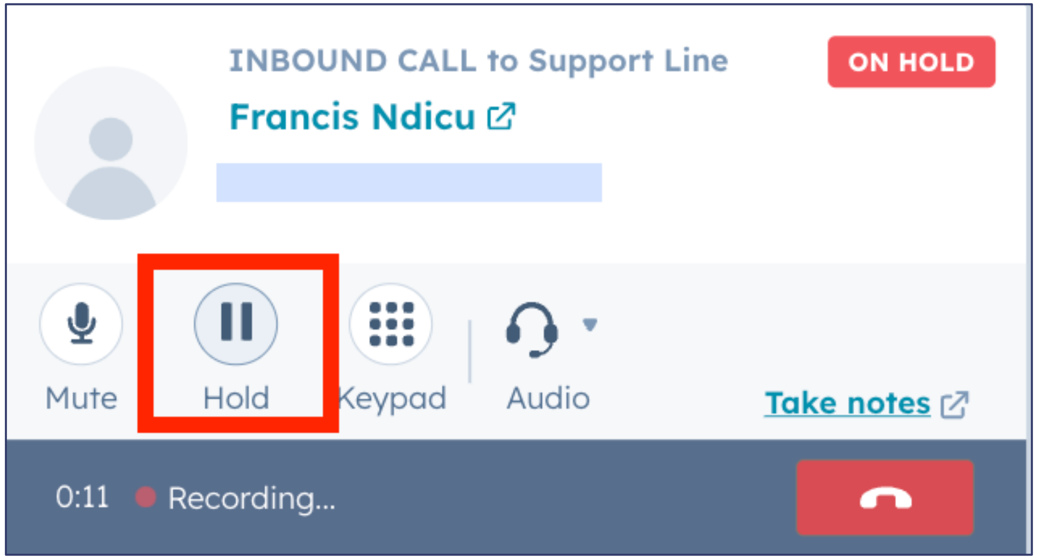
SimpleStrat.com/Webinars

Multi-Hub

What's New:

Place Inbound Calls on Hold

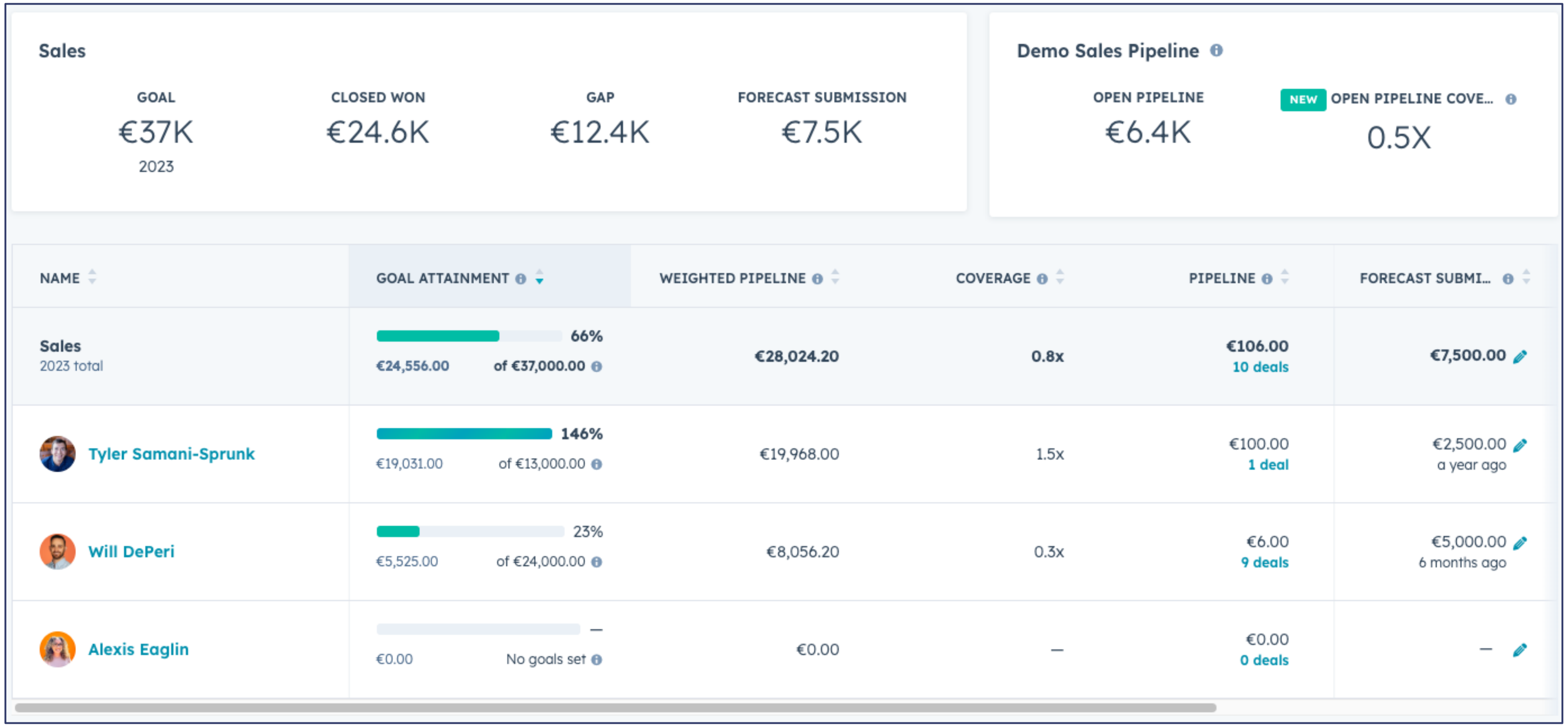
- Public Beta
- Sales & Service Hubs
- Starter, Professional & Enterprise



What’s New:

Forecasting with Multicurrency

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



Sales

GOAL	CLOSED WON	GAP	FORECAST SUBMISSION
€37K 2023	€24.6K	€12.4K	€7.5K

Demo Sales Pipeline

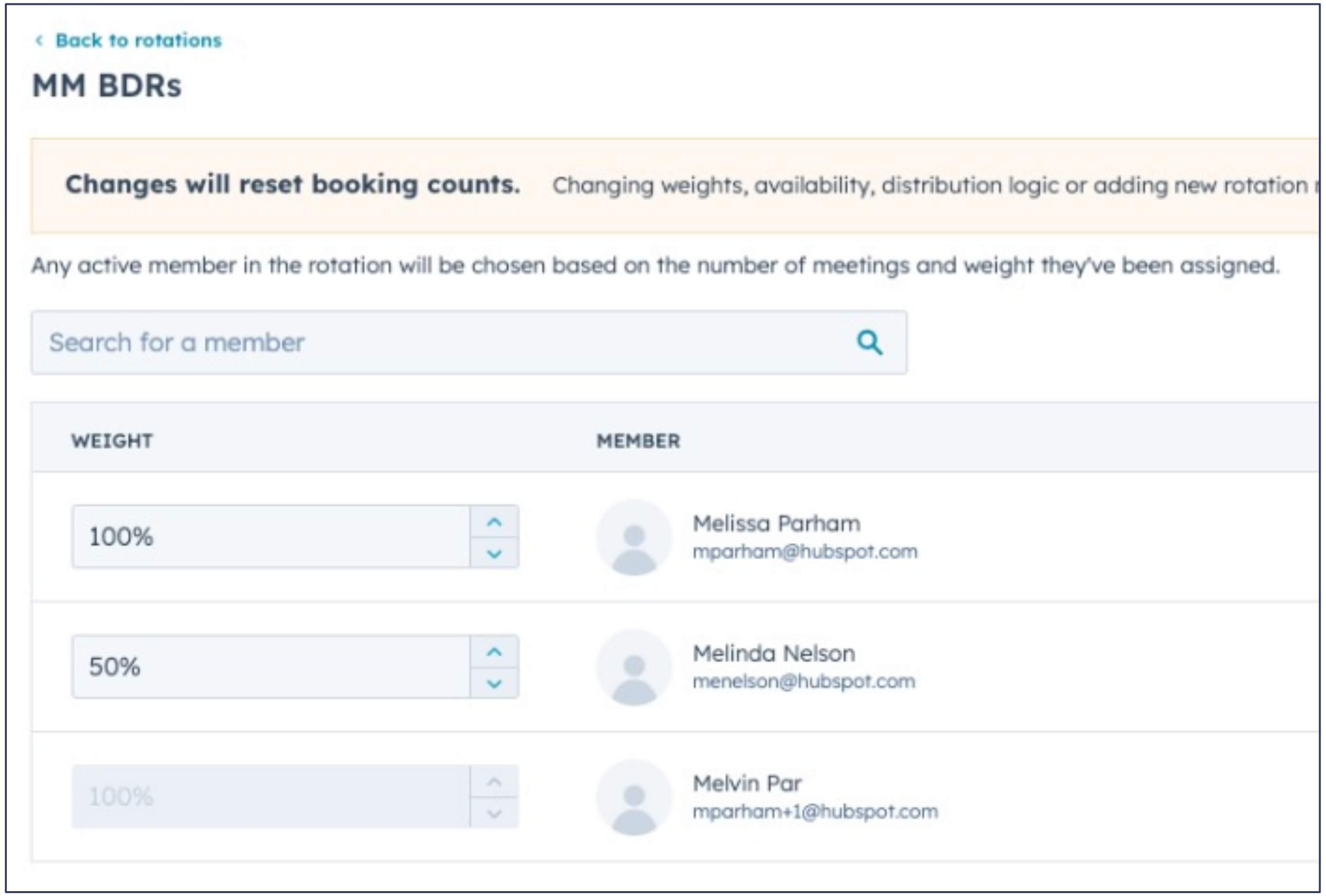
OPEN PIPELINE	NEW OPEN PIPELINE COVE...
€6.4K	0.5X

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



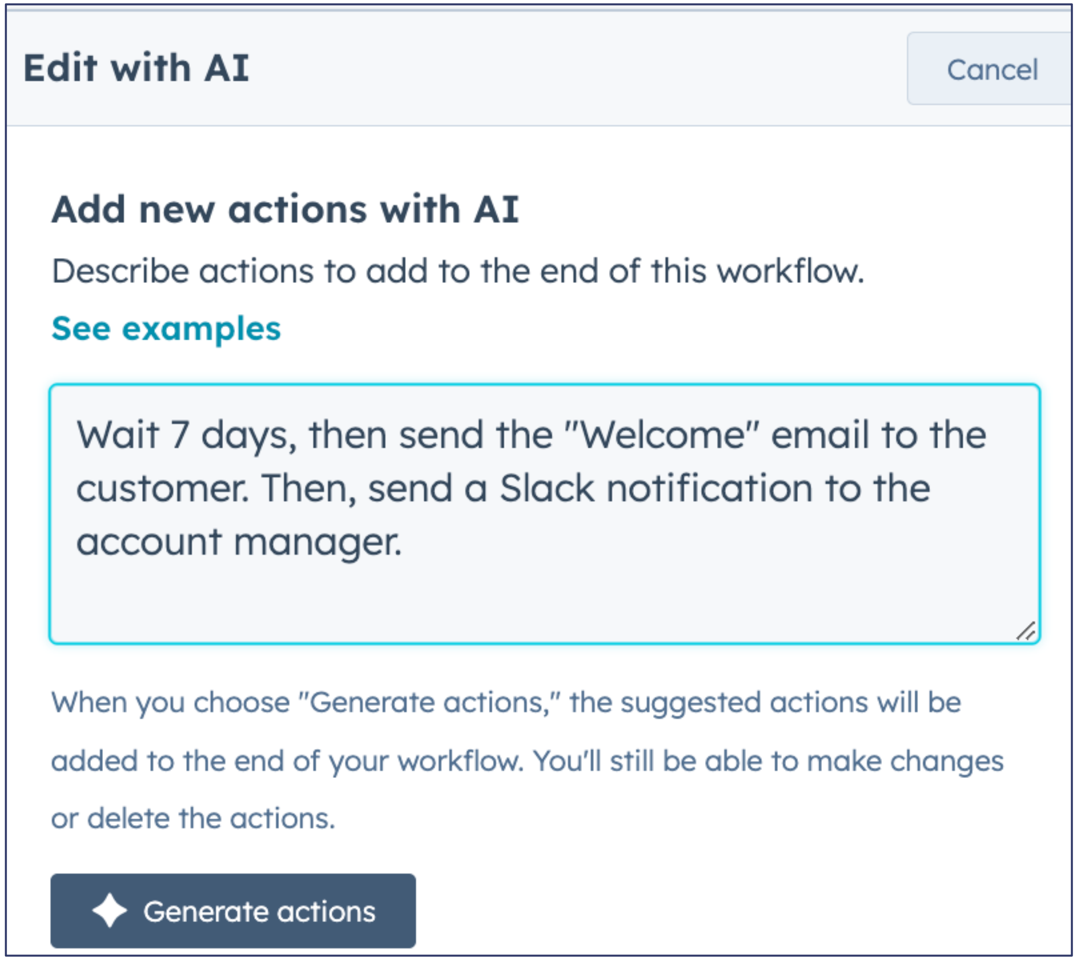
Use Weighted Meeting Rotations Now:

- 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

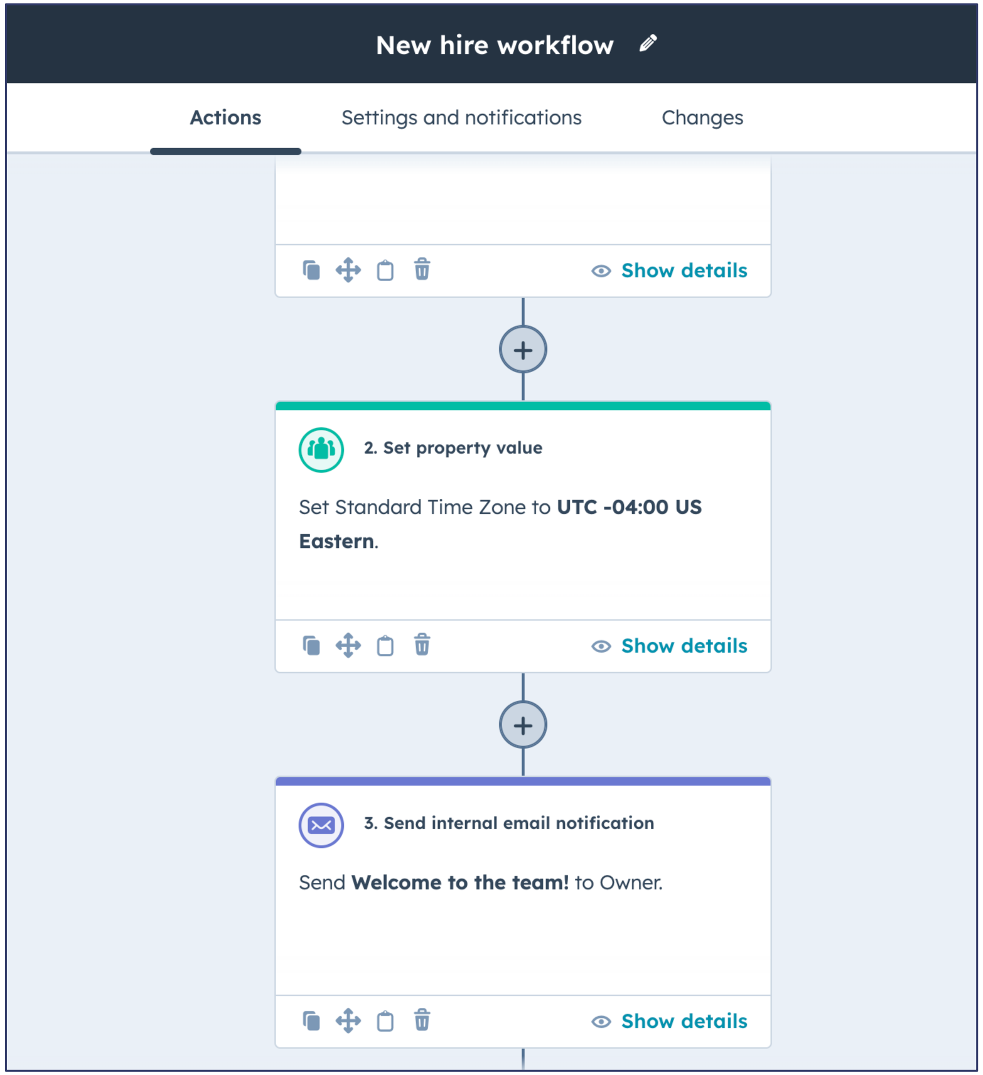
- Public Beta
- Marketing, Operations, Sales & Service Hubs
- Professional & Enterprise



What's New:

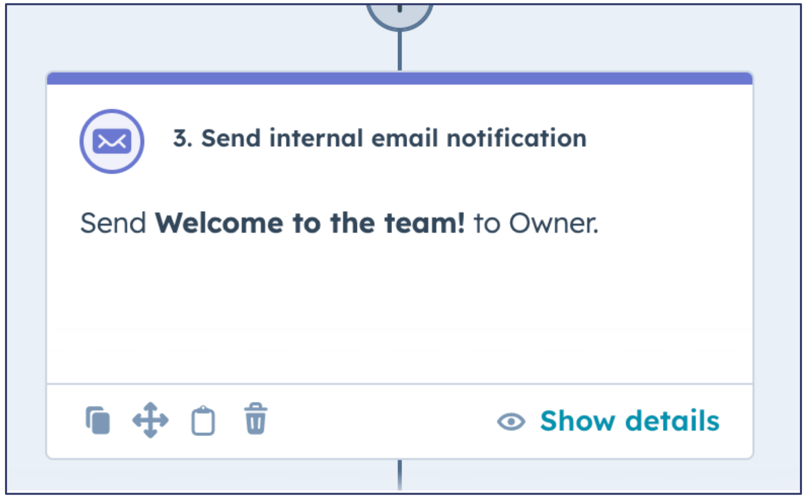
User Object Available in Workflows

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



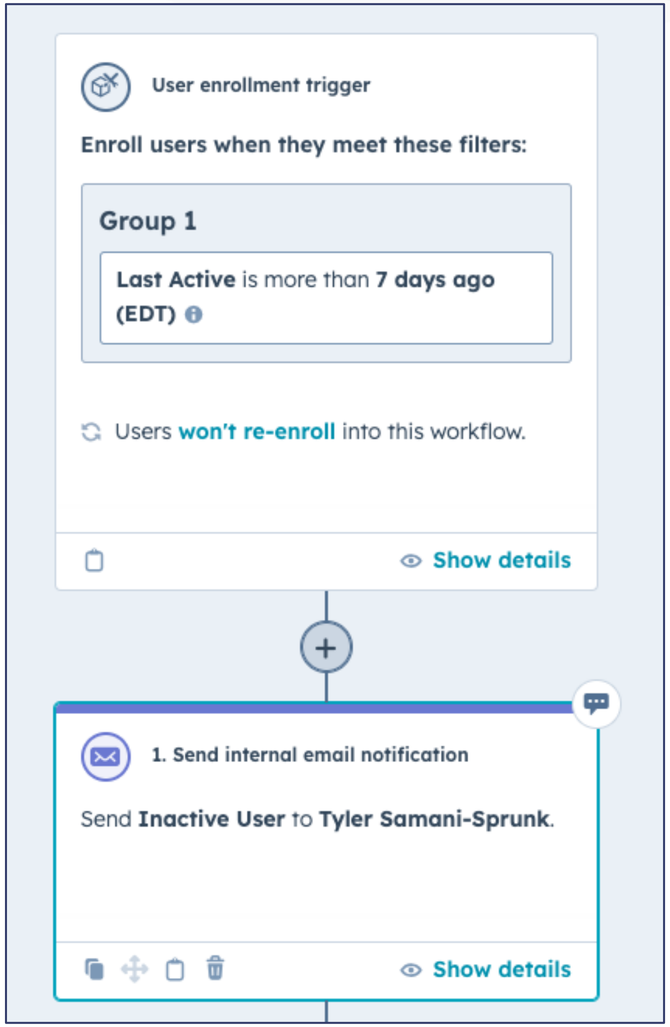
Use User Workflows Now: Streamline User Onboarding

- 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

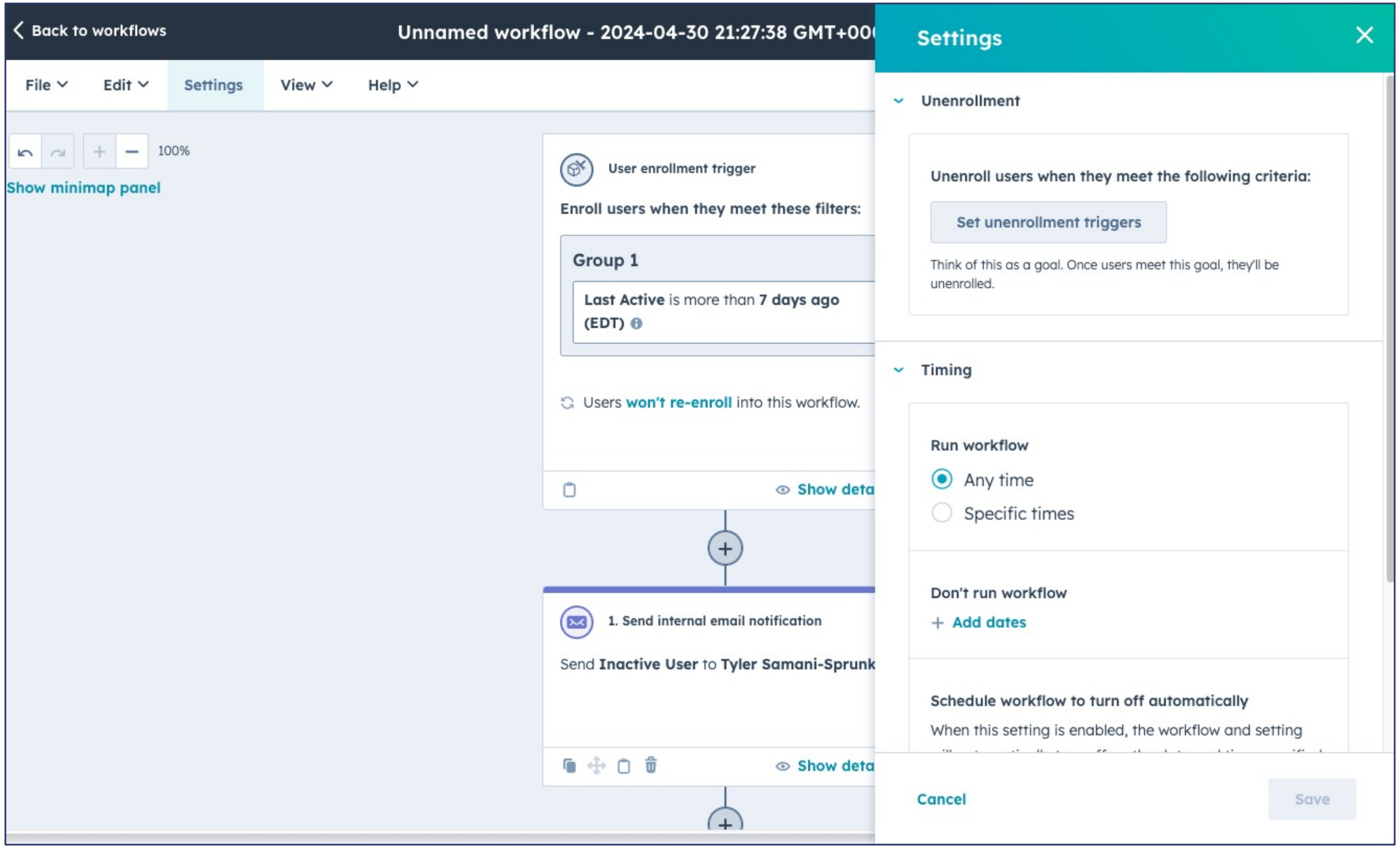
- User accepted invite
- Calendar isn't synced
- Email isn't synced
- Hasn't been active in certain amount of time
- User deactivated
- User team changes
- User seat assigned or unassigned
- User on sales team but doesn't have sales seat



What's New:

Reorganized Navigation and Keyboard Shortcuts in Workflows

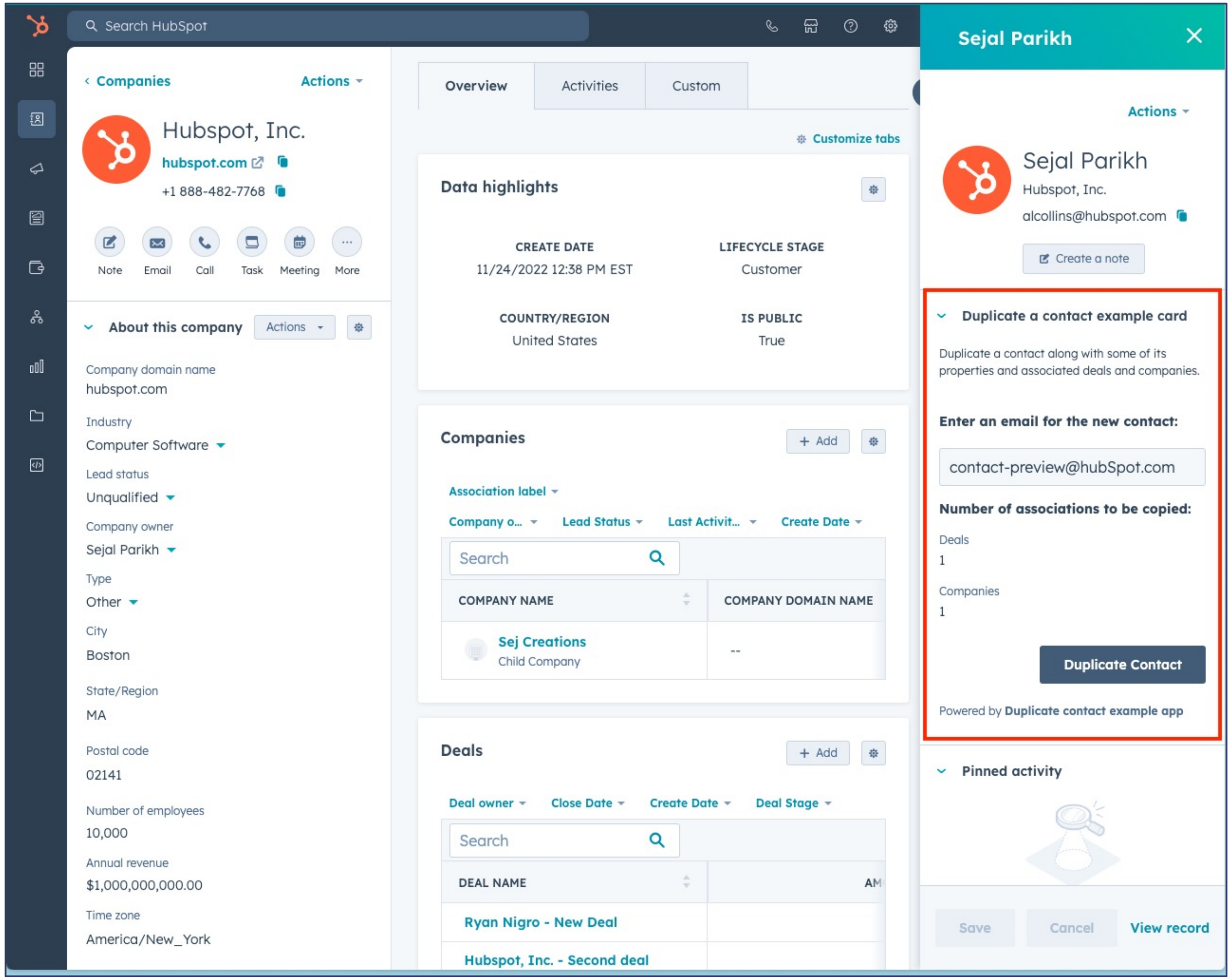
- Public Beta
- Marketing, Operations, Sales & Service Hubs
- Professional & Enterprise



What's New:

Add Custom Cards (UI Extensions) to the Preview Sidebars

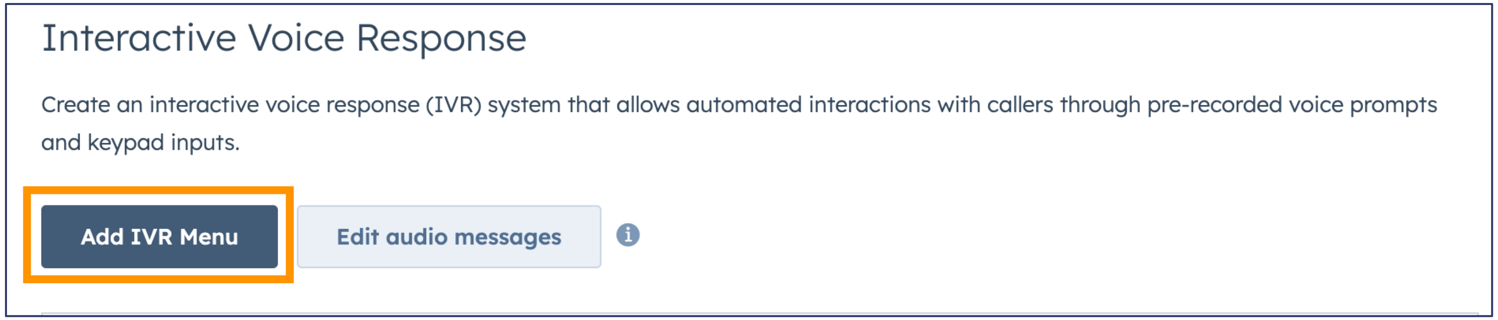
- Public Beta
- Sales & Service Hubs
- Enterprise

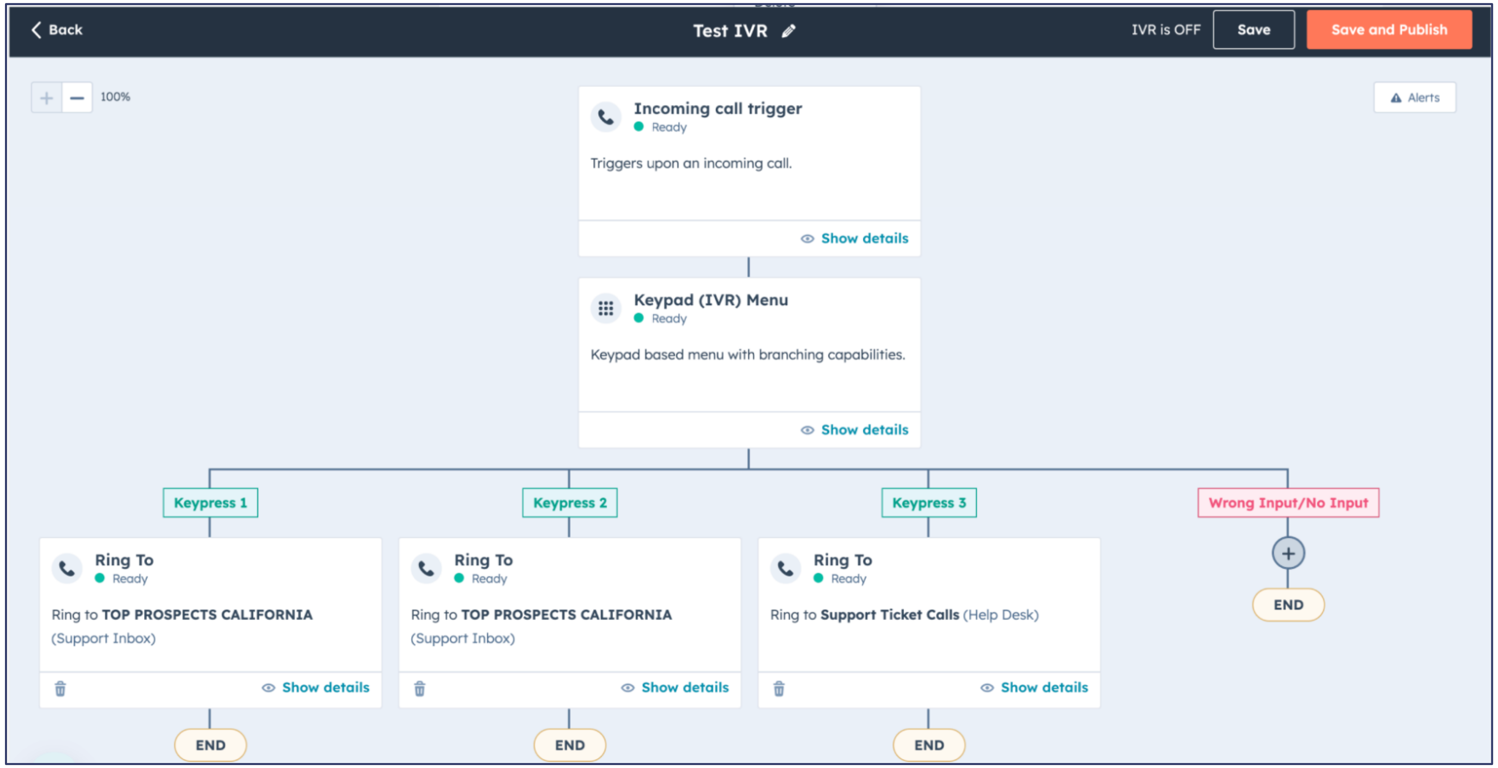


What's New:

IVR (Interactive Voice Response)

- Public Beta
- Sales & Service Hubs
- Enterprise



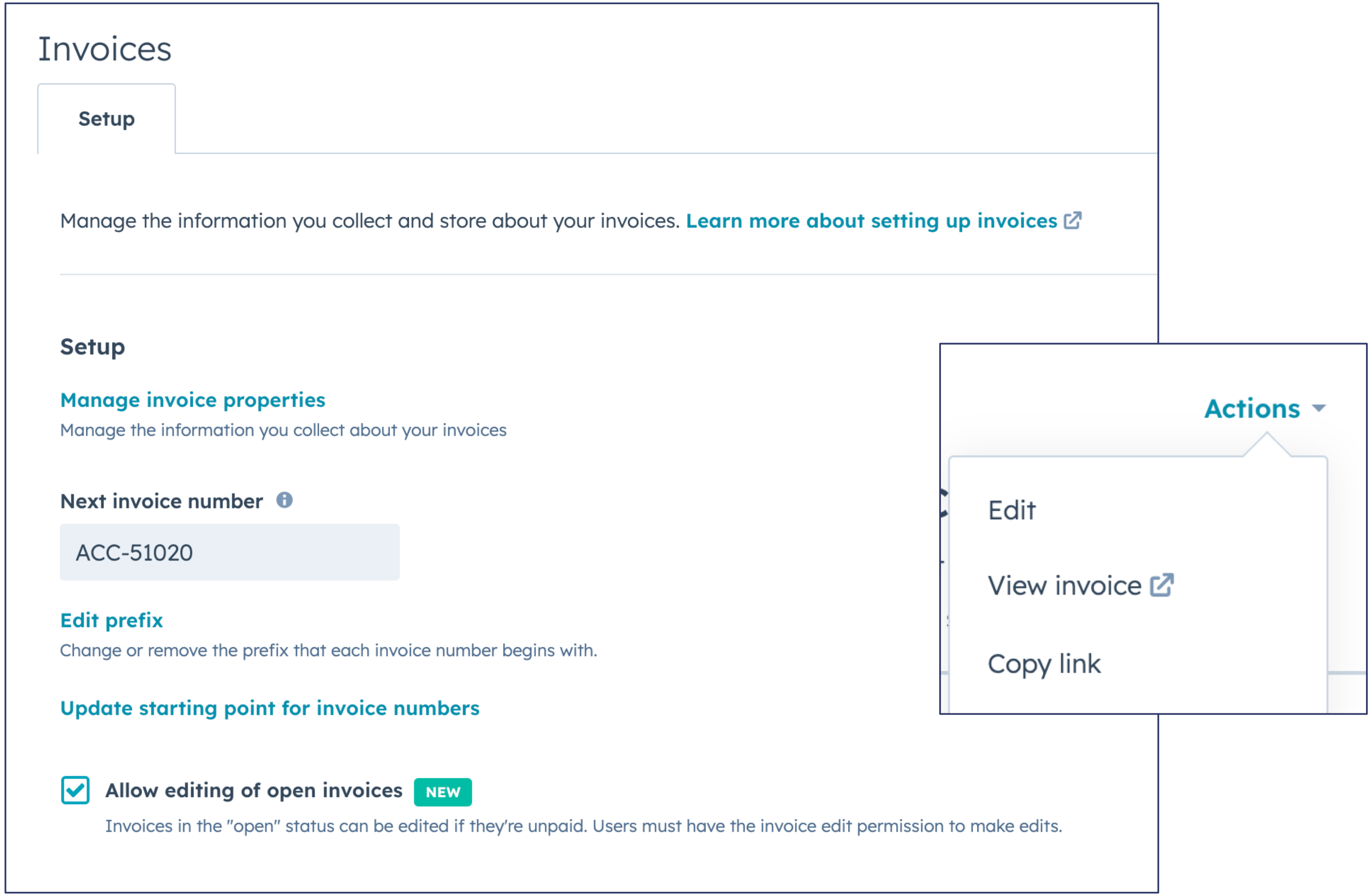


Commerce Hub

What's New:

Edit Open Invoices

- Live
- Commerce Hub
- All Tiers

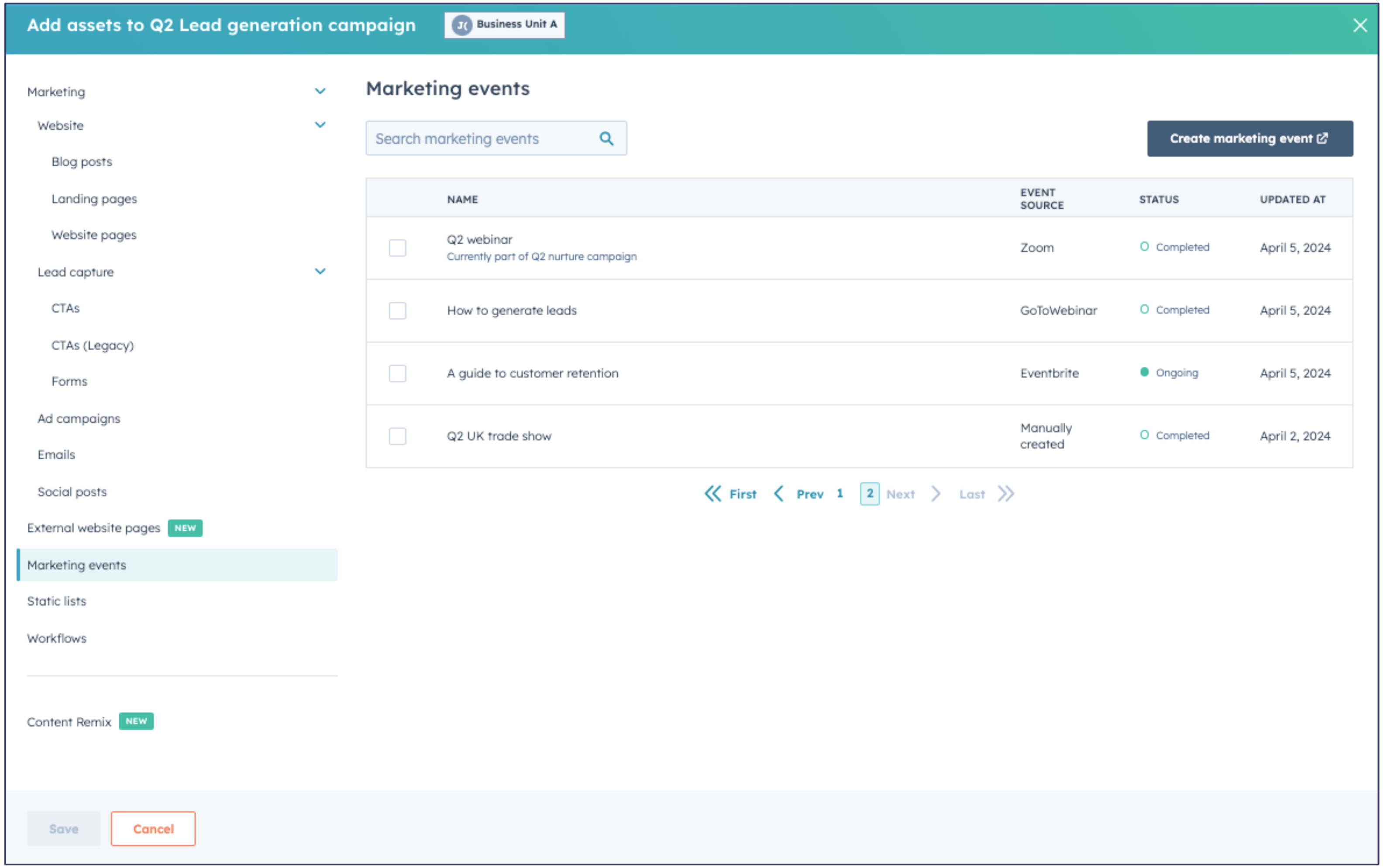


Marketing Hub

What’s New:

Improvements to 'Marketing event’ Associations in Campaigns

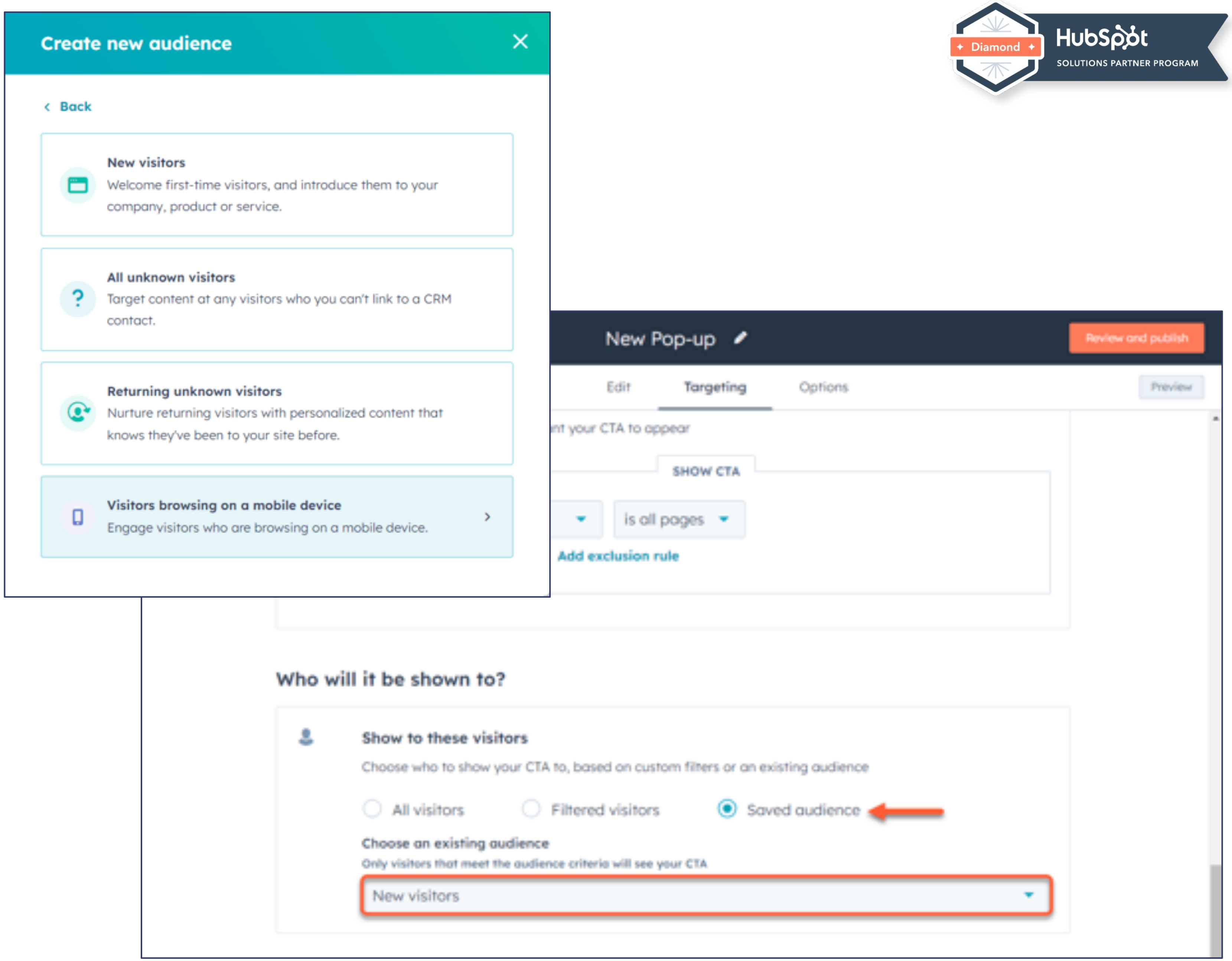
- Live
- Marketing Hub
- Professional & Enterprise



What's New:

Audiences

- Private Beta
- Marketing Hub
- Enterprise



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

Diamond
HubSpot
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What's New:

Predictive Deal Score

- Public Beta
- Sales Hub
- Professional & Enterprise

Deal Score

Current score

99

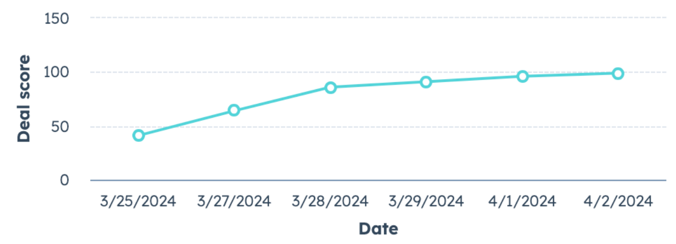
▲ 3
Since
2 days ago

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



Deal Score History

VALUE	KEY FACTORS	DATE
42	− Deal probability in pipeline − Number of sales activities (sales email or call) + Days until close date + Days in current stage + Number of times close date has changed	Wednesday, March 27, 2024 6:10 AM

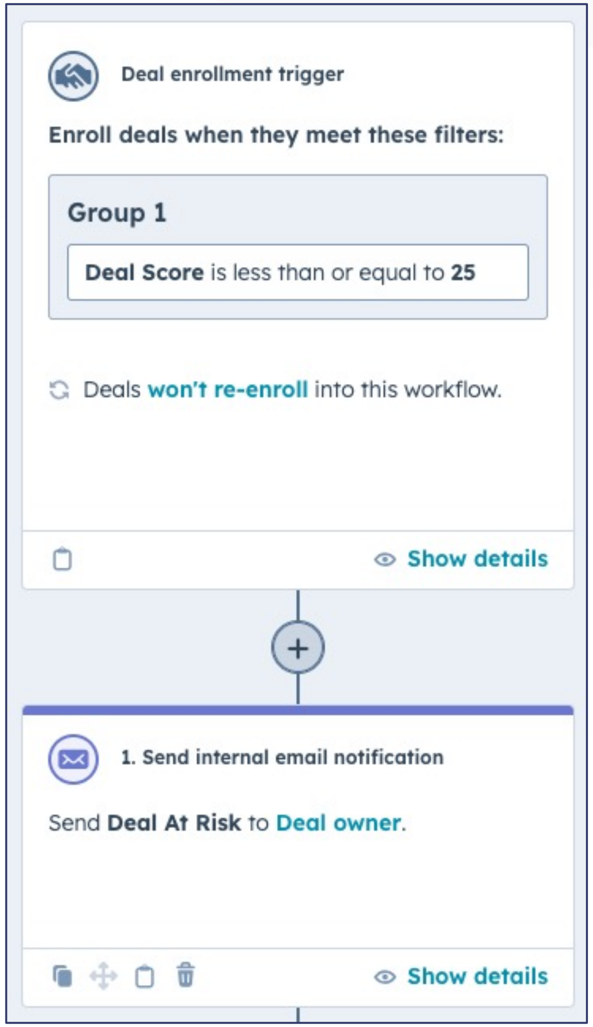
Use Predictive Deal Scores Now: Help Reps Prioritize

- 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)



Use Predictive Deal Scores Now: Improve Forecasting

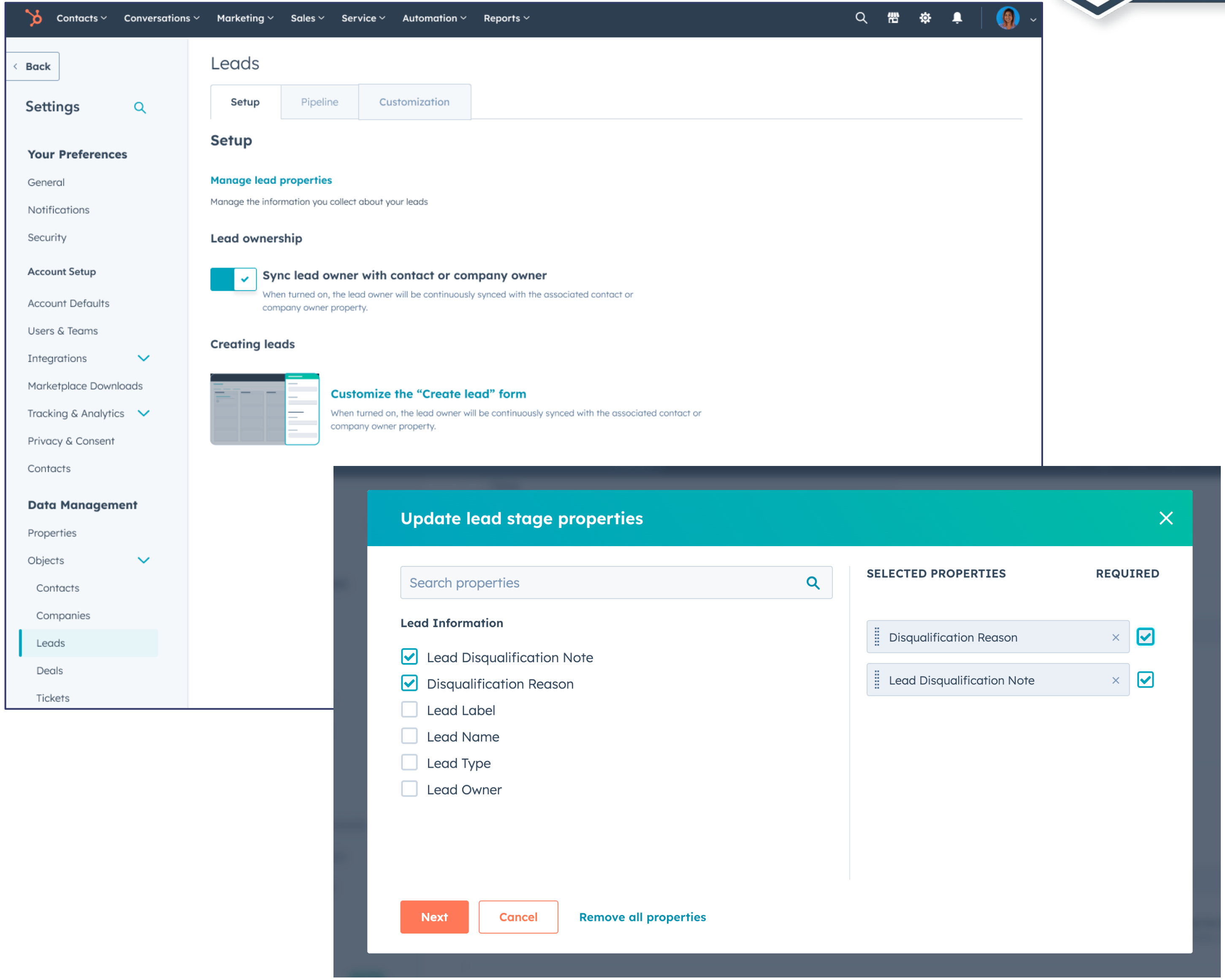
- Create a saved view that shows deal score and forecast category to identify mismatches
  - Example: Deal in committed category but has low score
- Do the same for deal score and close date
  - Deals with an impending close date and a low probability may need a close date adjustment and vice versa

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:

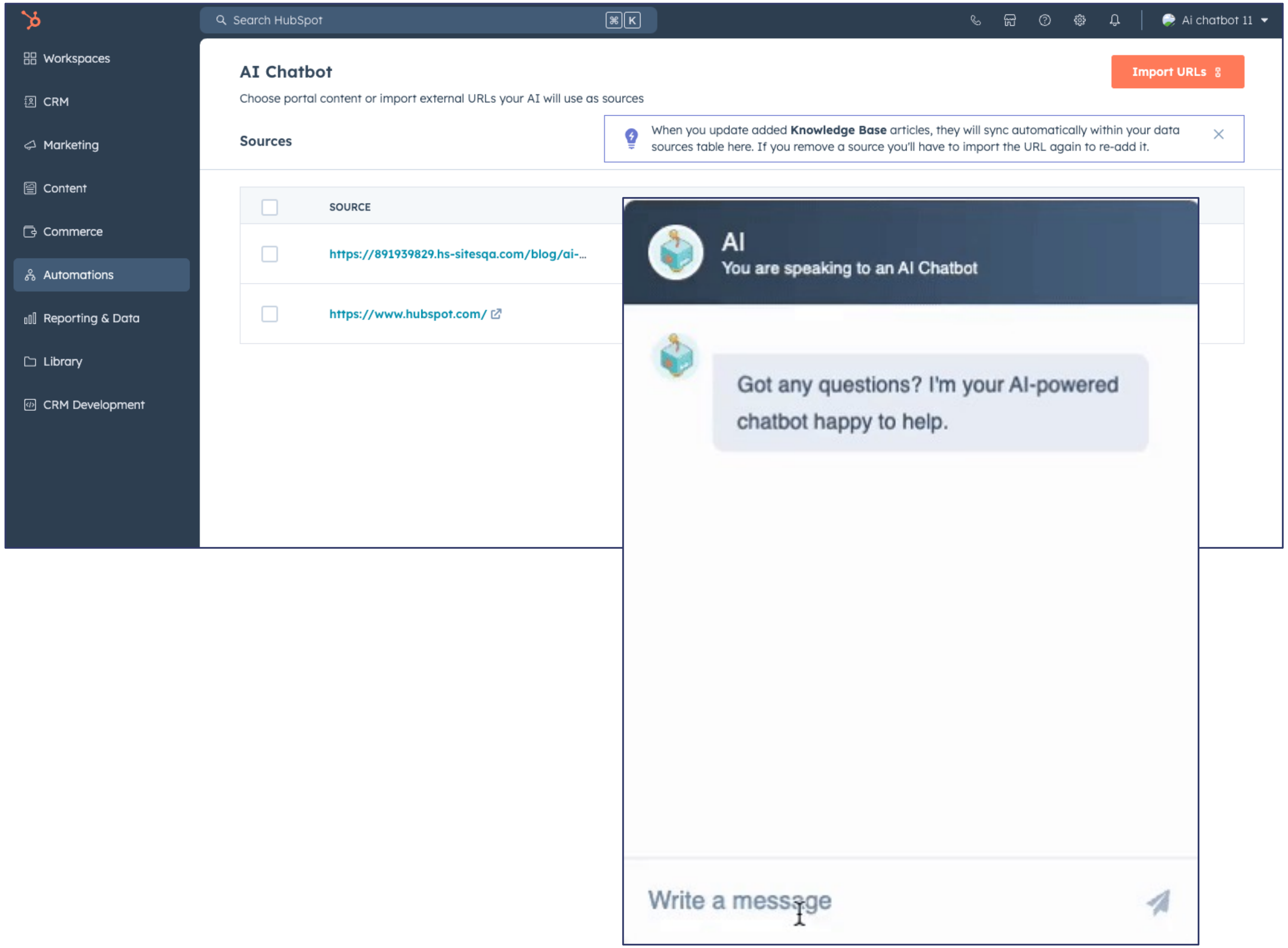
- Differentiate between new and returning/upsell leads
- Identify lead persona or interest
- Copy info from associated contact or company for easier visibility, sorting, and filtering
  - Examples: most recent conversion, industry, lead score
- Multiple owner fields

Service Hub

What's New:

AI Chatbot

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



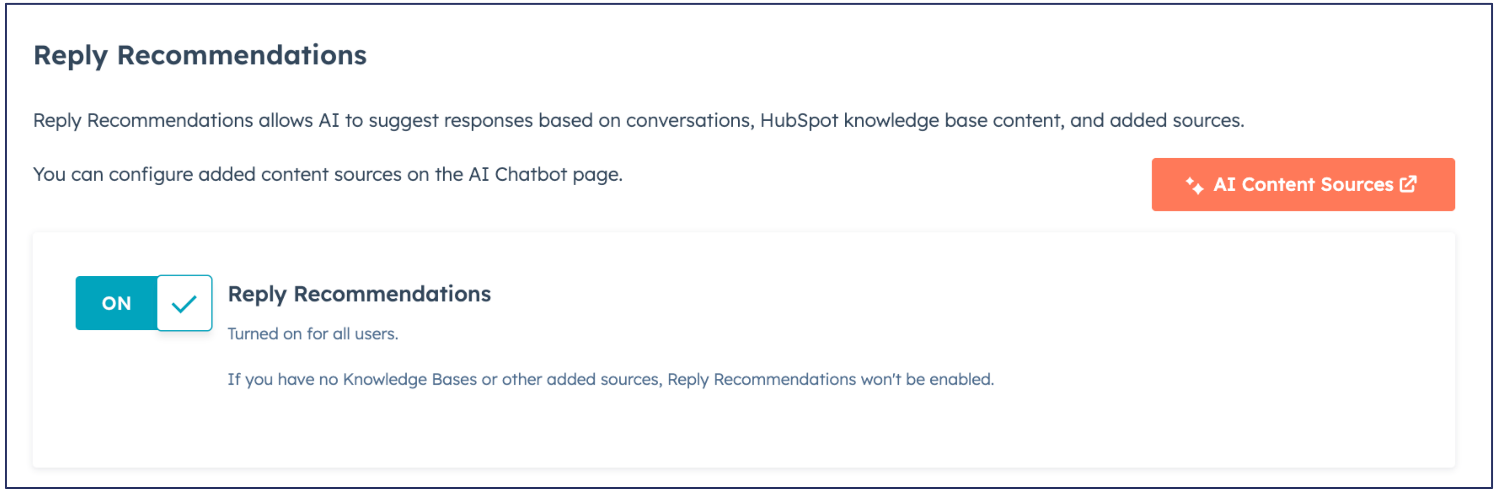
Use AI Chatbot Now:

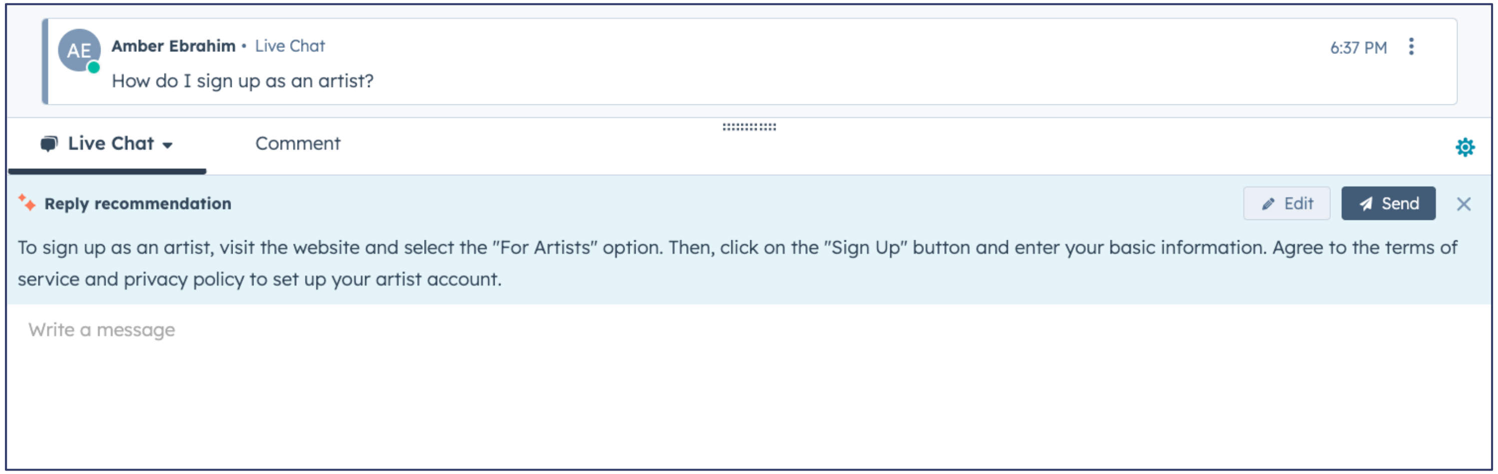
- Streamline customer service by adding your knowledge base
- Facilitate early sales conversations by adding service pages, pricing page, online case studies, and online FAQs
- Turn your blog into an interactive educational tool by adding your blog pages
- Add a narrowly-focused chatbot to a robust long-form 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

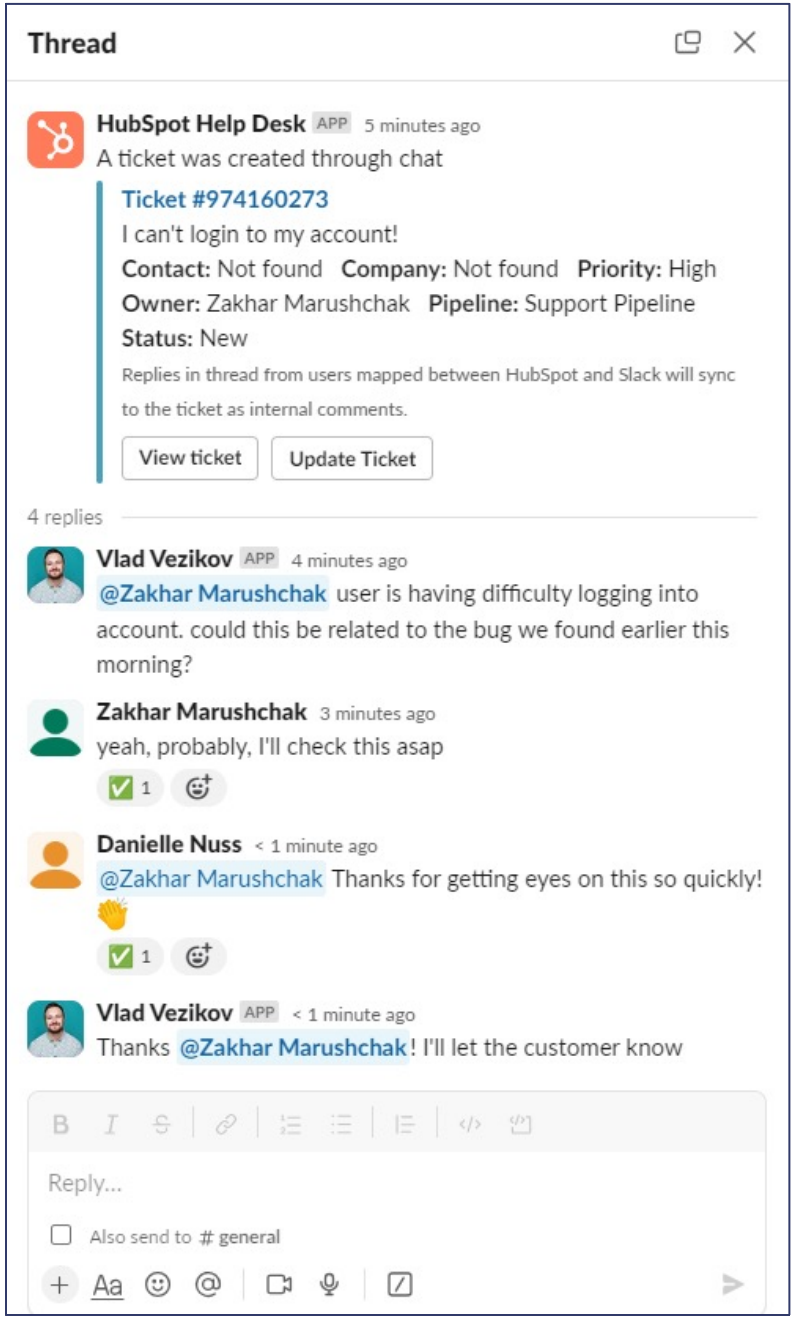




What's New:

Connect HubSpot Tickets to Slack and Sync Replies

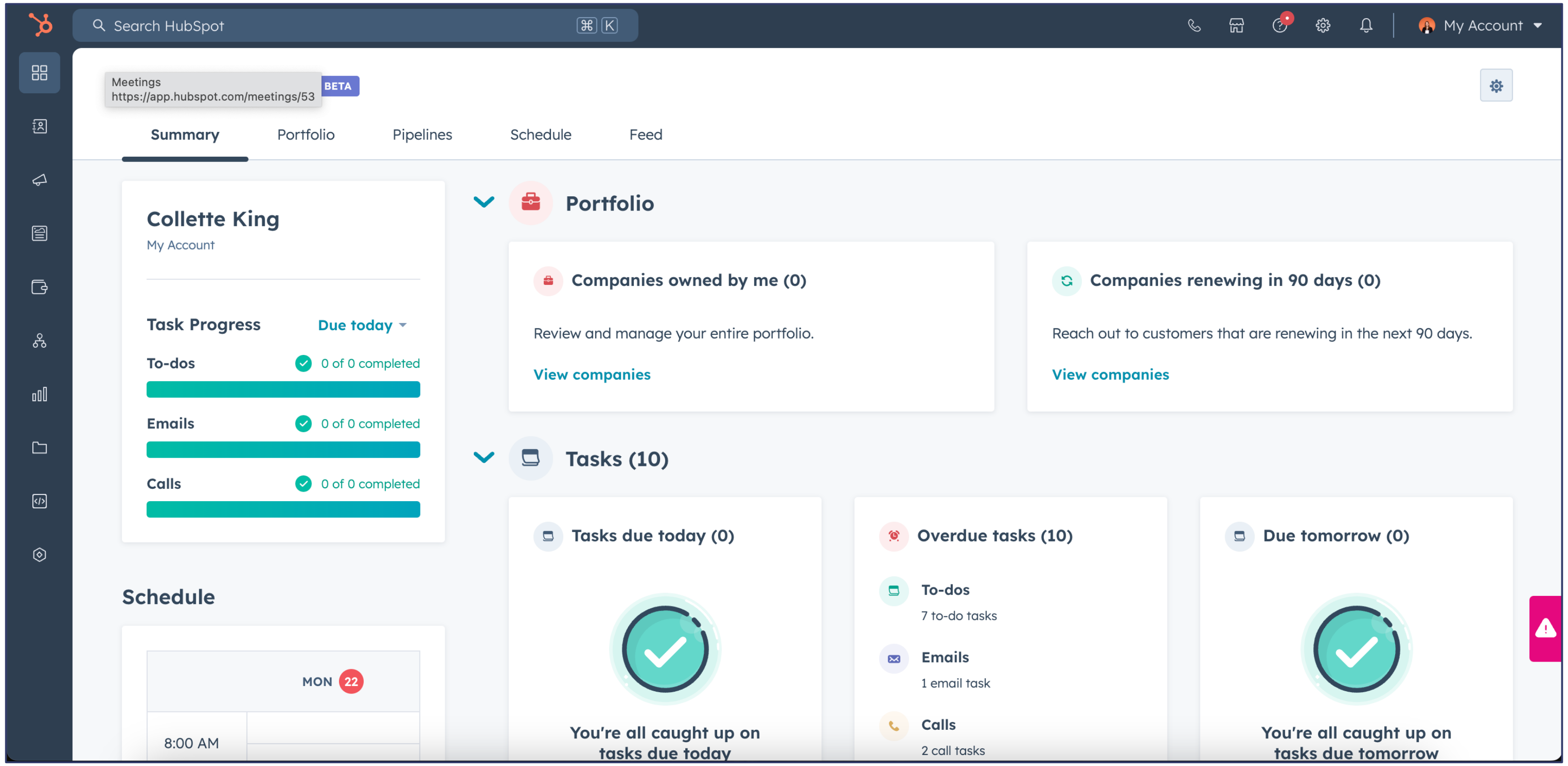
- Public Beta
- Service Hub
- Professional & Enterprise



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.