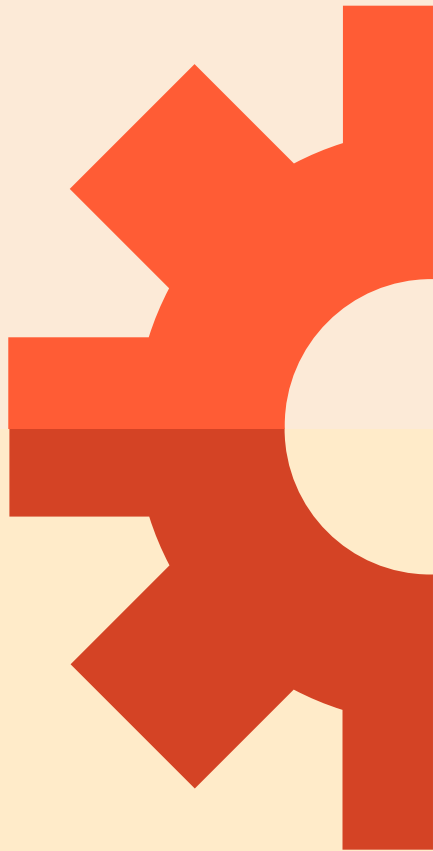
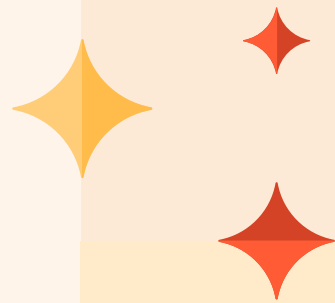




**AI Inside of
HubSpot:**
**Transforming the
way we connect
and grow**





Jan Simon
Team Lead & Principal
Account Executive DACH
[LinkedIn](#)
jsimon@hubspot.com

Trusted by the Best

HubSpot offers ultimate security, reliability, performance, usability, and value.

It is trusted by growing mid-market B2B companies, enterprise brands, high-growth unicorns, B2C brands, and many others. [See for yourself.](#)

Calm

TOYOTA

VIZIO

CISCO

loom

CASIO

GREENPEACE

Trello

randstad

AIRSTREAM

AccuWeather

CONTENTSSQUARE

WISTIA

CRUNCH

SOLO

vmware

eventbrite

reddit

legalzoom

T

headspace

monday.com

Gympass

the method.

VIESSMANN

Rentokil Initial

The Motley Fool

TikTok

PIVIT Global

KUNTZE

talkspace

Coca-Cola
BEVERAGES
NORTHEAST

United
Van Lines

WWF

unicef

Zildjian

zapier

YAMAHA

vacasa

webikeo

HubSpot

Why HubSpot?

HUBSPOT COMPANY NEWS | 2 MIN READ

HubSpot Ranks #1 in Sales and Marketing in G2's 2024 Best Software Awards

Written by [HubSpot Communications](#)





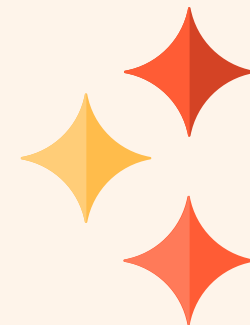

[#1 Tool for Marketing + Sales in 2024](#)

The HubSpot Journey

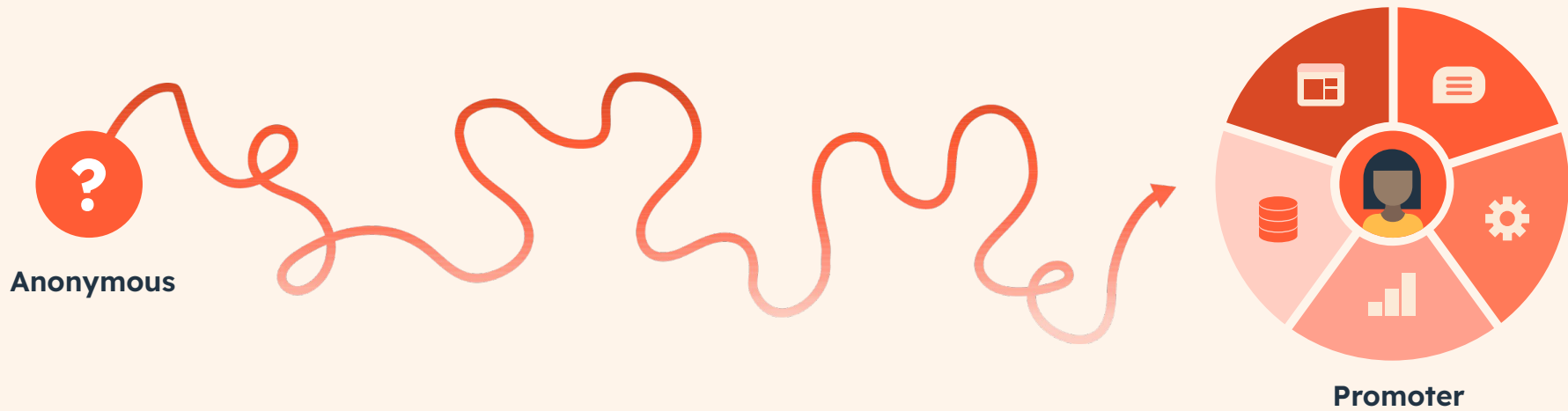


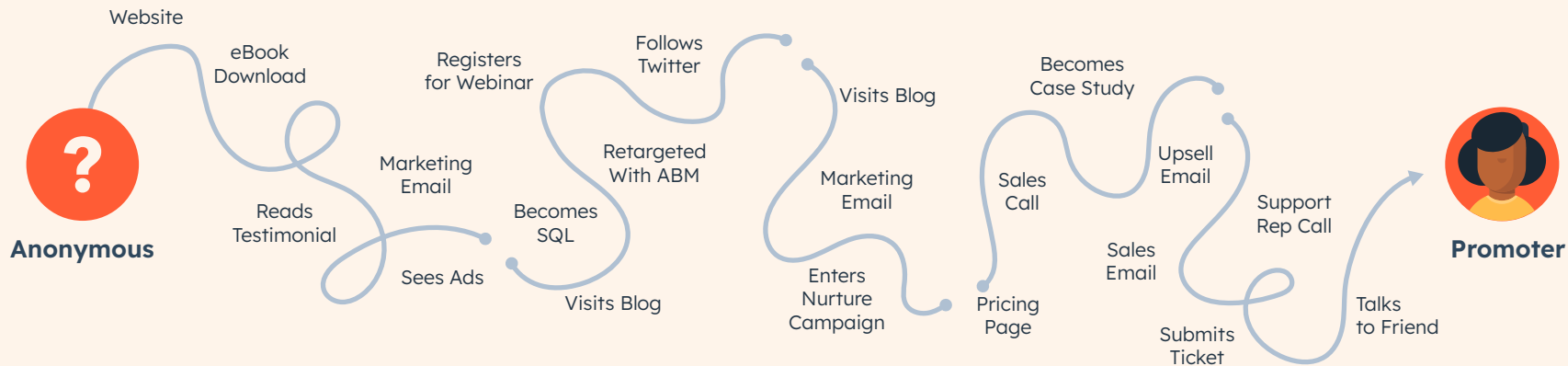
¹ Sales Hub originally launched and branded as "Sidekick".

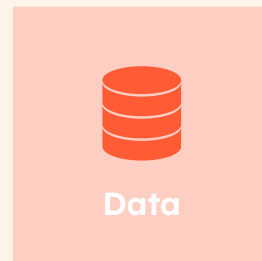
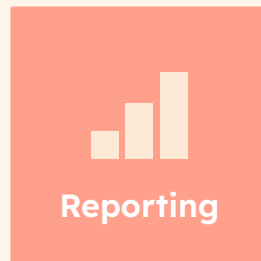
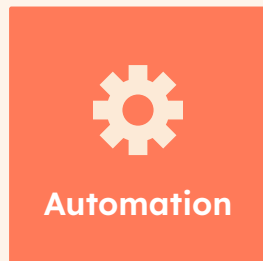
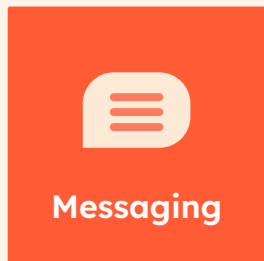
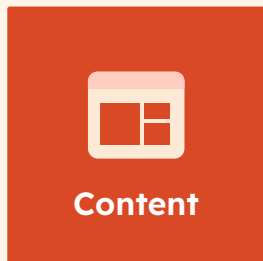
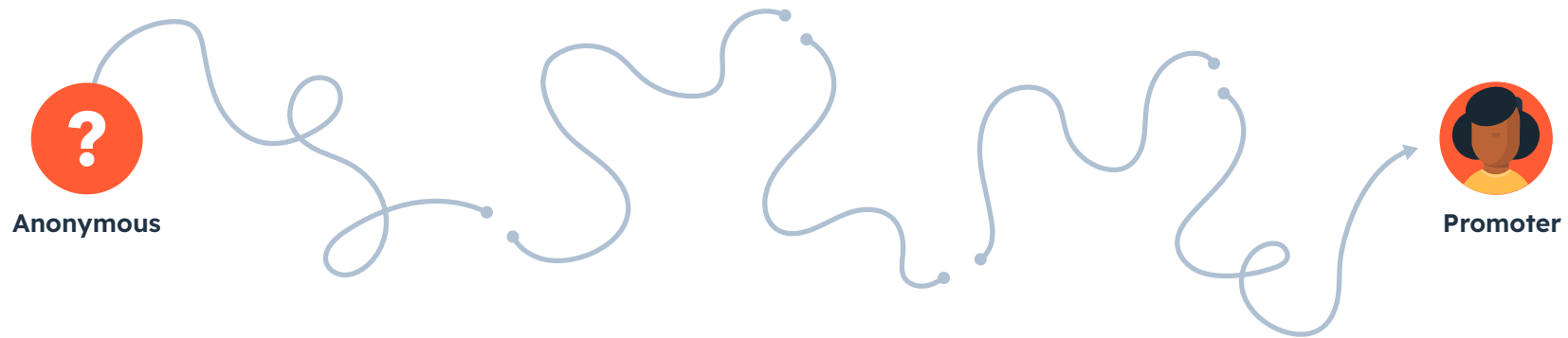
² ARR: Annual Recurring Revenue.



Today's most disruptive
companies are winning
on customer experience.









HubSpot

Crafted for Growth

1. A Single Source of Truth

Makes it easy to align

2. One Intuitive UX

Makes it easy to adopt

3. A Unified Codebase

Makes it easy to adapt



Features Breakdown

Breeze Intelligence

Data Enrichment —> All paid Hubs with credit packs

Form Shortening —> Marketing Pro+

Intent Data —> Free all hubs

Breeze Copilot

Breeze Copilot —> Free (all Hubs)

Breeze Agents

Social Media Agent —> Marketing Pro+

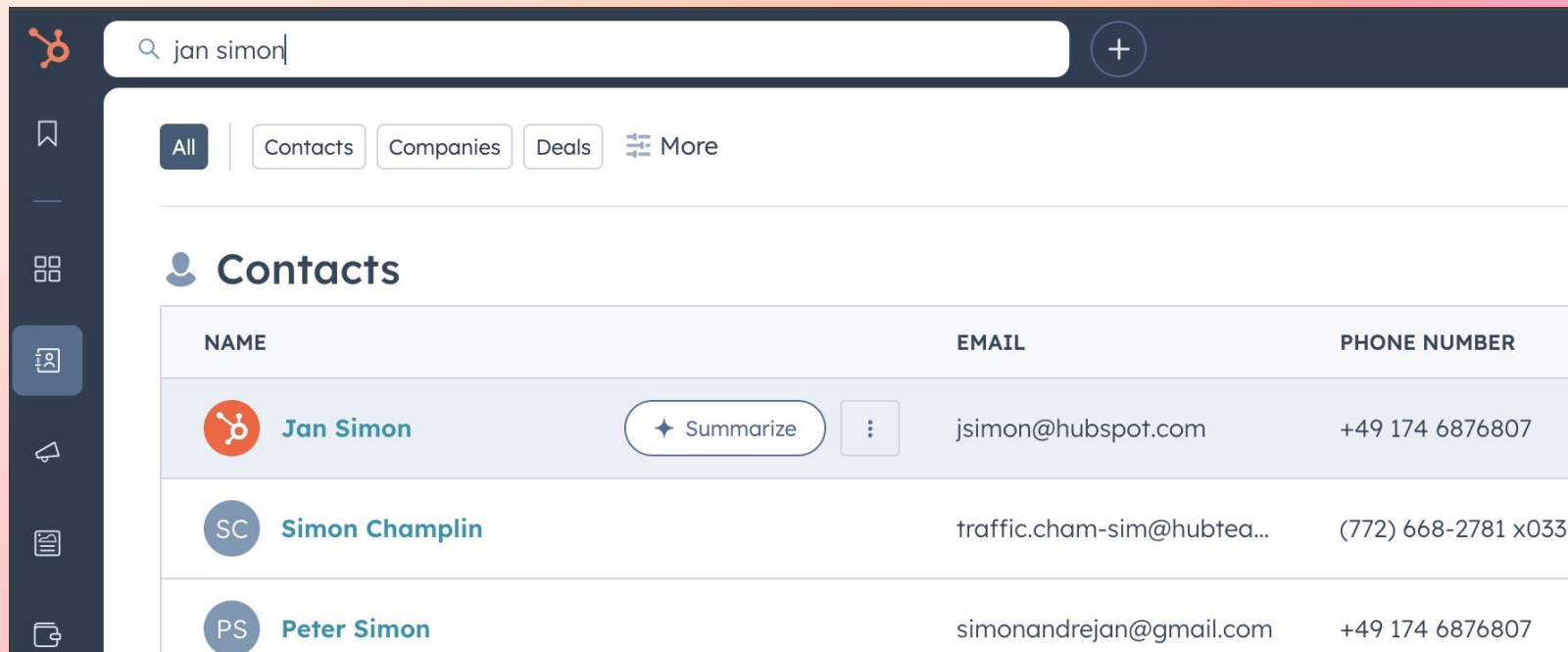
Content Agent —> Content Hub Pro+

Prospecting Agent —> Sales Hub Pro/Ent




Customer Agent —> Service Hub Pro+



Breeze Co-Pilot - Example



The screenshot displays the Breeze Co-Pilot interface. At the top, a search bar contains the text "jan simon". Below the search bar, there are tabs for "All", "Contacts", "Companies", "Deals", and a "More" option. The "Contacts" tab is selected. The main content area shows a list of contacts under the heading "Contacts". The list has three columns: "NAME", "EMAIL", and "PHONE NUMBER".

NAME	EMAIL	PHONE NUMBER
 Jan Simon ✦ Summarize ⋮	jsimon@hubspot.com	+49 174 6876807
 Simon Champlin	traffic.cham-sim@hubtea...	(772) 668-2781 x033
 Peter Simon	simonandrejan@gmail.com	+49 174 6876807

Breeze Co-Pilot - Example

🔍 jan simon

+

📞 📄 ⌚ ⚙️ 🔔 1 ✨ Copilot 👤 My Demo Account ▾

🔖

🗃️

📅

📧

📁

🔗

📊

📄

📁


🔍

📄

< Back to all search results

Summary of jsimon@hubspot.com

✕



jsimon@hubspot.com [View Record](#)

Account Executive jsimon@hubspot.com +49 174 6876807

Email Call Create Task Add Note

Summary



Generated Oct 23, 2024 ↻

Jan Simon is an **Account Executive** and is currently in the **Opportunity** lifecycle stage. They've been in your CRM since **August 16, 2021**, and have one open ticket. Jan's last engagement was on **October 16, 2024**, via email, where they discussed a video invitation for a virtual coffee about the **Sales Hub**. Their phone number is **+491746876807**, and their email is **jsimon@hubspot.com**. If you need to take action, you can add a task or draft an email to follow up.

👍 🗨️ 📄


🔥 Ask a question

🏠 Deals

DEAL NAME	DEAL → CONTACT	DEAL → COMPANY
Jan André Simon - New Deal	 Jan Simon	--
Jan Simon - Demo Test	 Jan Simon	--

New Chat

Chats ▾ ✕



Jan Simon
Jan
Account Executive
+491746876807

> See 10 engagements
> See 2 deals
> See 1 ticket

Add a task Draft email

🔗 See all context

👍 🗨️ 📄

Copilot
Would you like to know anything else about this?

📄 Type a message 🔥

Count objects All prompts →

AI-generated content may be inaccurate. [See terms](#) ⓘ

Breeze Co-Pilot - Example

Create reports from scratch



Single object

Report on a single object such as your contacts.



Custom Report Builder

Report on all of your HubSpot data within a streamlined build flow.



Customer Journey Reports

Analyze all the touchpoints in your customer experience in one report.



Attribution

See what interactions or activities drove conversions and revenue.



Funnels

Show progress through contact or deal stages that you define.



AI Report Generator

Generate a single object report fast with Breeze AI

BETA

Breeze - Best-In-Class Reporting

Revenue by Channel - Clone®

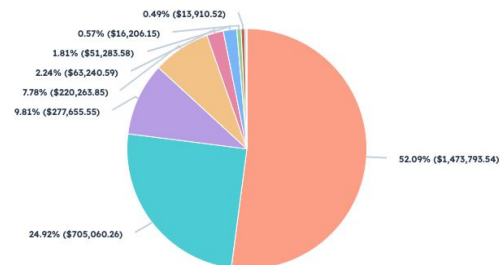
THIS YEAR SO FAR

FILTERS (1)

- Marketing event
- Email Marketing
- Referrals
- Paid Search
- Sales
- Organic Search

▲ 1/2 ▼

Total Sum Linear: \$2,829,457.11

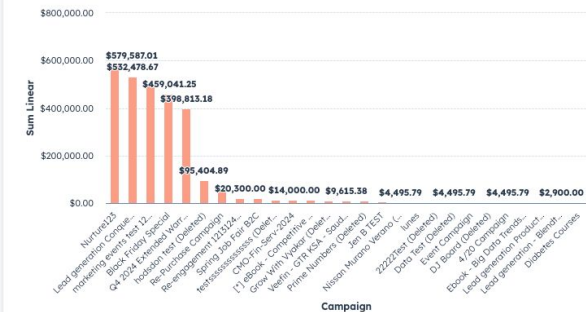


Revenue Attribution by Campaign®

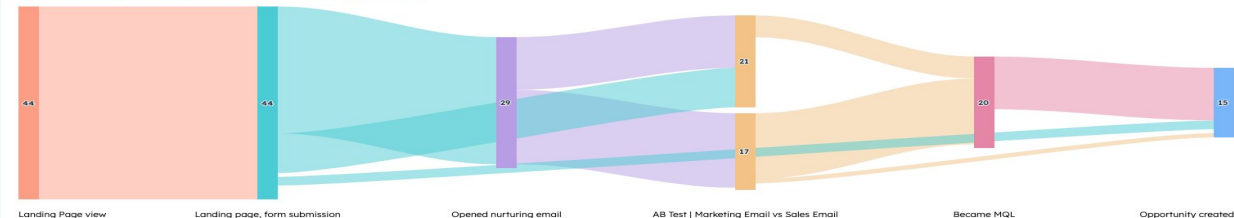
IN THE LAST 365 DAYS

FILTERS (5)

- Sum Linear



Customer Journey Analysis | Form Conversion to Opportunity®



Breeze Co-Pilot - Lead Scoring (Before)

Field type

Score

Build a score

Use filters to add score criteria that can help you identify qualified leads. Each set of criteria can contain multiple filters. Points are added or removed when a record meets all of the criteria in a set. [Learn more](#)

Score criteria

Test score criteria

Filters applied: 0 of 100

Positive

Add points when a record meets this criteria

No positive score criteria

To start adding positive score criteria click "Add criteria"



+ Add criteria

Negative

Remove points when a record meets this criteria

No negative score criteria

To start adding negative score criteria click "Add criteria"



+ Add criteria

Contact enrollment trigger

HubSpot score is greater than 50

+

1. Create task

Actions

Create task "Please Call SQL asap" and assign it to no one

+


Breeze Co-Pilot - Lead Scoring (Now)

[< Back](#)

Choose score type


Create

Contact-based



Contact engagement score


Measure your contact's level of engagement based on their behavior and interactions.



Contact fit score


Evaluate how closely a contact aligns with your ideal customer based on demographics and other criteria.

Company-based



Company engagement score

Measure companies' level of interest in your product based on their employees behavior and interactions.



Company fit score


Evaluate how closely a company aligns with your ideal customer or strategic objectives.

How it works

- ### 1. Build your score


Assign points to behaviors that show a contact's engagement with your product offering and readiness for sales. For example, visiting web pages, downloading resources or marketing email opens.

You can choose the contacts you would like to score.



- ### 2. Nurture leads or route to sales

Keep a score for each contact to evaluate their level of interest and engagement. You can use the score to build a more targeted marketing strategy with higher conversion rates.

Send qualified leads to sales through workflows or lists, to make sure that they focus on the most promising prospects.


- ### 3. Iterate and improve

Track and analyze the results of your lead scoring system to improve its effectiveness and get better quality leads.



Breeze Co-Pilot - Lead Scoring (Now)

✓ Health Score

NEUTRAL

Health Score

65

Last 30 days 15 ▲

Recent score change

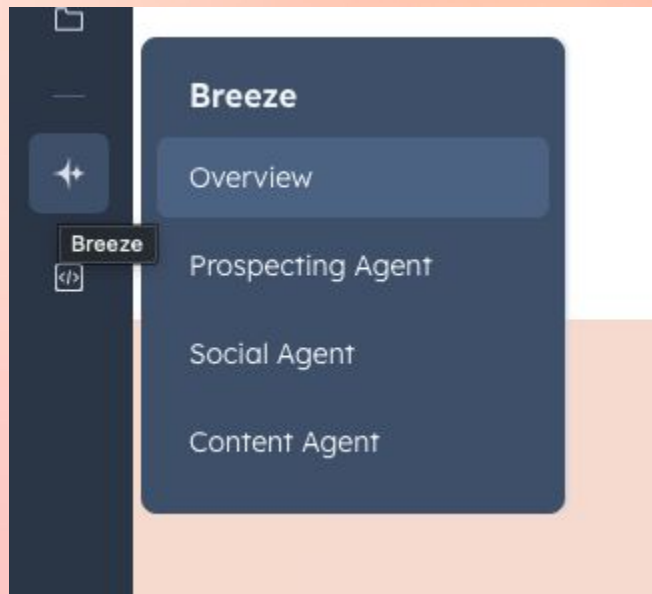
+ 15 Company: , Property updated: CSM ...

[See score history](#)

[See score calculations](#) ↗

[Learn more about health scores](#) ↗

Breeze - Agents Example



Breeze - Agents Example

Prospecting Agent

Put your prospecting on auto-pilot

- ➔ Identifies companies and contacts in your CRM that match your Ideal Customer Profile and target persona.
- ➔ Researches each company and contact, and writes personalized emails based on your data.
- ➔ Select the best outreach strategy and auto-sends emails. The prospecting agent can also manually assign or auto-enroll companies and contacts.

Use Breeze to define your selling needs and let your agent do the rest. In minutes, your agent will be ready to start nurturing leads on your behalf.

Set up agent

Prospecting Agent

Agent set up

Enrol

Overview Performance



Automated enrollment

FORMS IN USE

4

WEB PAGES IN USE

5

FILTER SETS IN USE

1

View all automations



Emails sending today

TOTAL

121

ALREADY SENT

21

NEEDS REVIEW

12

View all emails sending today

Enrollments

View all enrollments →

Contacts currently enrolled

10

Finished

8

AR Albert Blanton
CEO at Buffalo Trace

Researching Albert Blanton

...

LA Lance Lozano
The Most Handsome Man at Dos Equis

1 emails ready for review

Review emails for Lance

...

BJ Daisy Jones
Front Woman at The Six

1 emails ready for review

Review emails for Daisy

...

MM Marcus Mumford
Said Bui at Mumford and Sons

Email 1 of 3 sending today
Estimated send time: 10:12AM EST

Review conversation with Marcus

...

CP Chappell Roan
Midwest Princess at Pink Pony Club

Email 1 of 3 sent today
Sent: July 22, 2024 at 9:34AM EST

Review conversation with Chappell

...

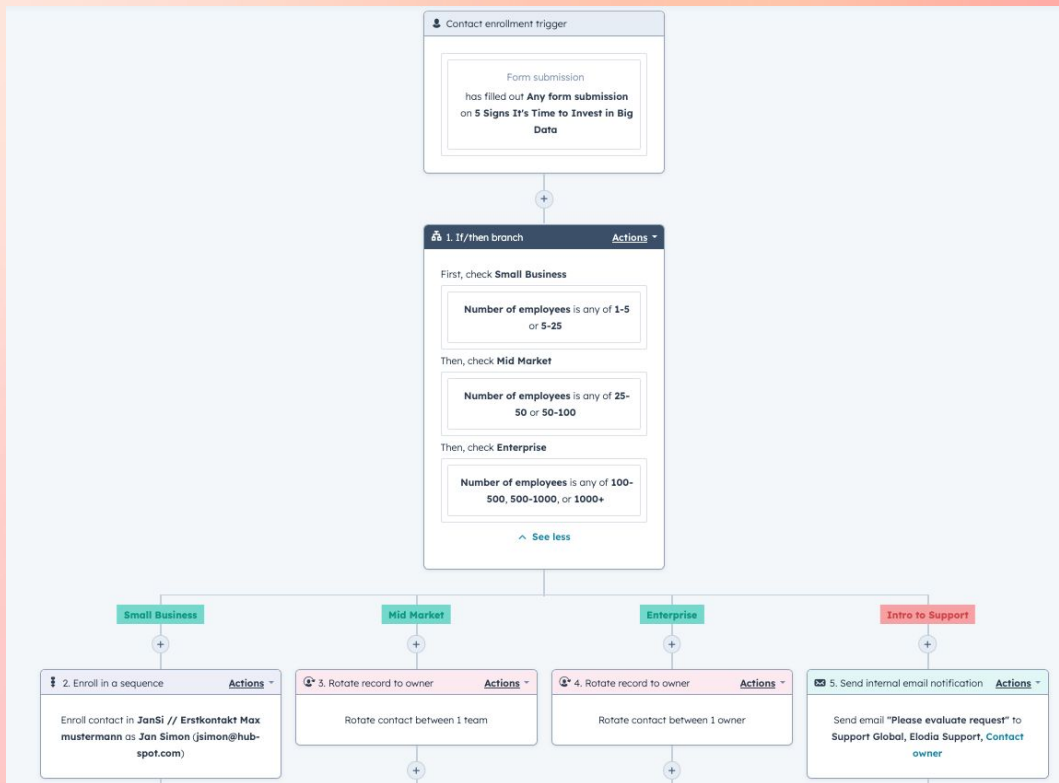
CP Chappell Roan
Midwest Princess at Pink Pony Club

Email 2 of 3 sending tomorrow
Send time calculated on day of send

Review conversation with Chappell

...

Breeze Co-Pilot - Leadmanagement (Before)



Breeze Co-Pilot - Smart Automation


Enrollment triggers

CancelSave

Enrollment

Unenrollment

Re-enrollment



Generate a trigger with AI

BETA


Describe what should start this workflow and AI will build a trigger for you

Use AI to generate

Contacts can be manually enrolled


Automatically trigger enrollment

(optional)



When an event occurs

Example: Contact has completed a **form** submission



When filter criteria is met

Example: City is equal to any of Brea, AND

Breeze Co-Pilot - Example

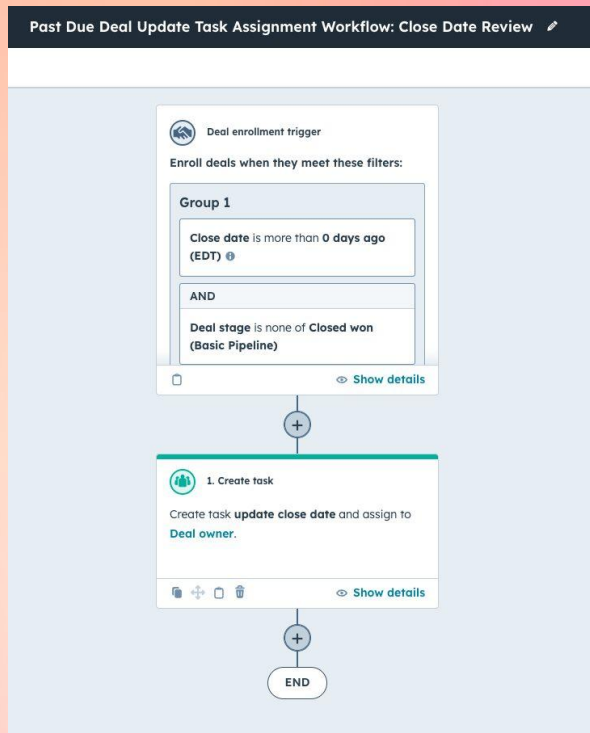
Create a workflow. When a deal's close date is in the past and its deal stage is not "closed won" assign a task called "update close date" to the deal owner

Copilot

Sure! I've created a workflow called "**Past Due Deal Update Task Assignment Workflow: Close Date Review** [↗](#)" to automate the process you described.

To learn more about building workflows with AI, read this [Knowledge Base article](#) [↗](#).

[View workflow](#) [↗](#)

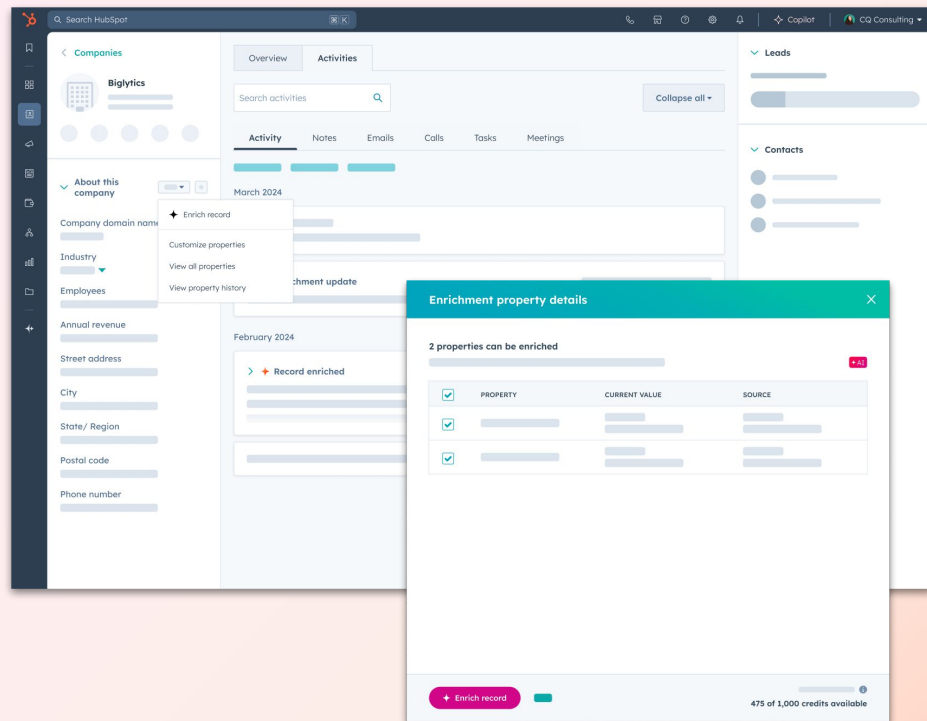


Data Enrichment

Contact and company enrichment data directly within HubSpot.

Enrich contact and company records with key attributes like role, employer, location, social media links -- or, annual revenue, industry, employee count, address, and many more.

Use automatic enrichment, bulk enrichment, and other advanced enrichment settings to align your enrichment strategy with your business.



Data Enrichment - Example

October 2024

▼ About this contact

First name
Benito

Last name
Gutkowski

Email
traffic.gutk_benit@hubteam.co

Recent conversion

Actions ▼

⚙️

Customize Properties

View all properties

View property history

✦ Enrich record

> Page view

Benito Gutkowski viewed **[Demo v2]**
Data Webinar LP

Lifecycle change

The lifecycle stage for this contact was

🔗

Form Shortening

Capture more leads without sacrificing data.

Extra form fields mean fewer qualified leads.

Get the best of both worlds by dynamically shortening your forms with HubSpot's global enrichment database while still collecting the data you need to understand, score, and route your leads with speed and precision.

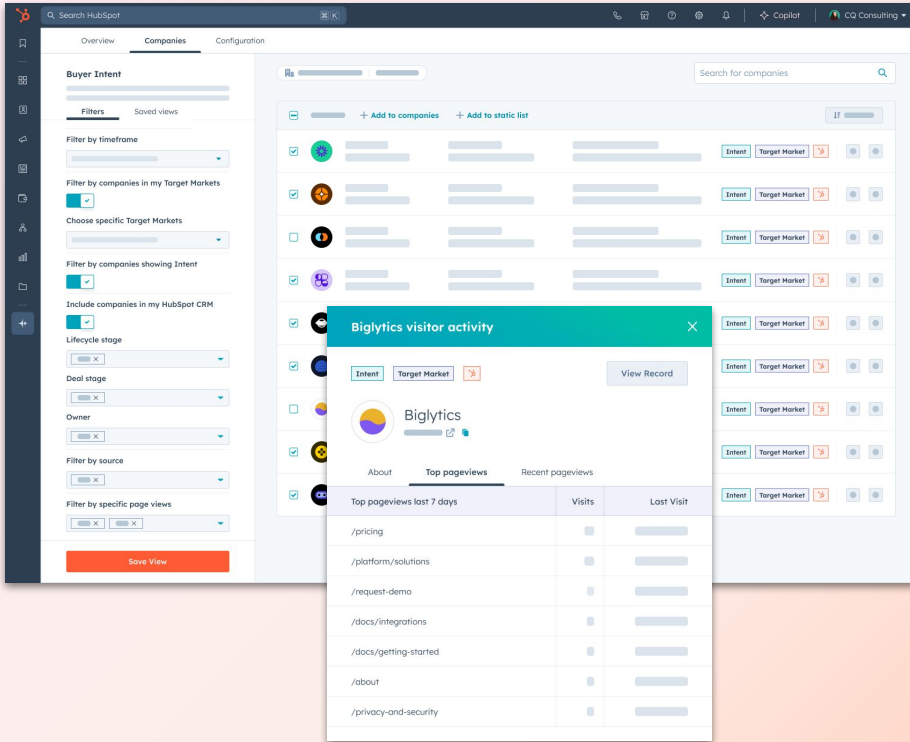
The image shows a screenshot of the HubSpot CRM interface. On the left is a dark sidebar with navigation links: Bookmarks, Workspaces, CRM, Marketing, Content, Commerce, Automations, Reporting & Data, and Library. Below these is a "Breeze AI" button. The main content area is titled "Contact Form" and has tabs for "Performance", "Analyze", and "Submissions". The "Submissions" tab is active, showing a table of submissions. The table has columns for "CONTACT", "COMPANY", "CONVERSION PAGE", and "SUBMITTED". Below the table is a "Last 30 days" filter. On the right, a "Submission details" panel is open for a submission by "Brian Halligan". It shows fields for "Email", "First name", "Last name", and "Job title". Below these are "Contact Properties (2 fields)" and "Other values (1)". A tooltip indicates that the "Company name" value has been populated by enrichment. At the bottom of the panel is a "View object records" button.

Buyer Intent

Intent data directly within HubSpot.

Know what high-fit accounts are visiting and showing intent on your website.

Powered by reverse-IP and enrichment data sources and your own HubSpot Smart CRM data, buyer intent tells you which companies in your target market(s) are ready to buy—regardless if they're already in your CRM or not.



The screenshot displays the HubSpot Buyer Intent interface. On the left, a sidebar contains filters for Buyer Intent, including options to filter by timeframe, target markets, and lifecycle stage. The main panel shows a list of companies with columns for Intent, Target Market, and a 'View Record' button. A modal window titled 'Biglytics visitor activity' is overlaid on the right, showing a table of top pageviews for the last 7 days.

Top pageviews last 7 days	Visits	Last Visit
/pricing		
/platform/solutions		
/request-demo		
/docs/integrations		
/docs/getting-started		
/about		
/privacy-and-security		

Businesses that consider their **CRMs the heart** of their business create **better outcomes** for both their customers and their businesses:



Better customer
satisfaction



Better customer
retention rates



Faster company
growth



Greater intent to
continue scaling

Source: These insights come from a HubSpot-sponsored survey of 1,841 CRM users at companies with 51-5000 employees in the US, Canada, Germany, UK, Australia, France, and Japan.

What's next?



Dharmesh Shah • Following

Founder and CTO at HubSpot. Helping millions grow better.

[View my newsletter](#)

16h •

BREAKING NEWS: Anthropic announces the ability for Claude to *use a computer*.

Yes, you read that right. A.I. will now have the ability to *use* computer software, just like humans can.

This dramatically increases the potential use cases for AI Agents because no longer is it necessary for an API to exist for the specific functionality you need to access.

Instead, agents will be able to get to the same features/functions that a human can get to.


This is a development that we knew was coming, we just didn't know when and from who.

Can't wait to build an agent on [Agent.ai](#) that automates a personal workflow for me (just to see how this works). It's going to be another long/fun night.

What would you automate, if you had an AI agent that could use software on your computer?

2,065

273 comments · 88 reposts



Thank you for your attention!
:)