INBOUND EDITION

Diamond
HubSpot
SOLUTIONS PARTNER PROGRAM

Getting the Most Out of HubSpot's August 2023 Product Updates

SIMPLE STRAT

NEW & NOW SERIES

New & Now Series

What's NEW in HubSpot?

How can you drive results with these updates NOW?

On Deck

1. Previously Covered Features
2. Exciting New Features & Use Cases
   - Lead Management
   - Conditional Form Routing
   - CRM Customization
3. Small but Mighty Updates
   - New Sales Reports
   - Salesforce Updates
   - Commerce Hub
4. Q & A

Simplify Growth

With HubSpot and the expertise to use it to its full potential.

Buy/Upgrade HubSpot

Fix HubSpot

Put HubSpot to Work

- HubSpot Management -

- Marketing Support -

Implement HubSpot

Learn HubSpot

Tyler Samani-Sprunk

Cofounder & CMO @ Simple Strat

Cohost of HubSpot Hacks

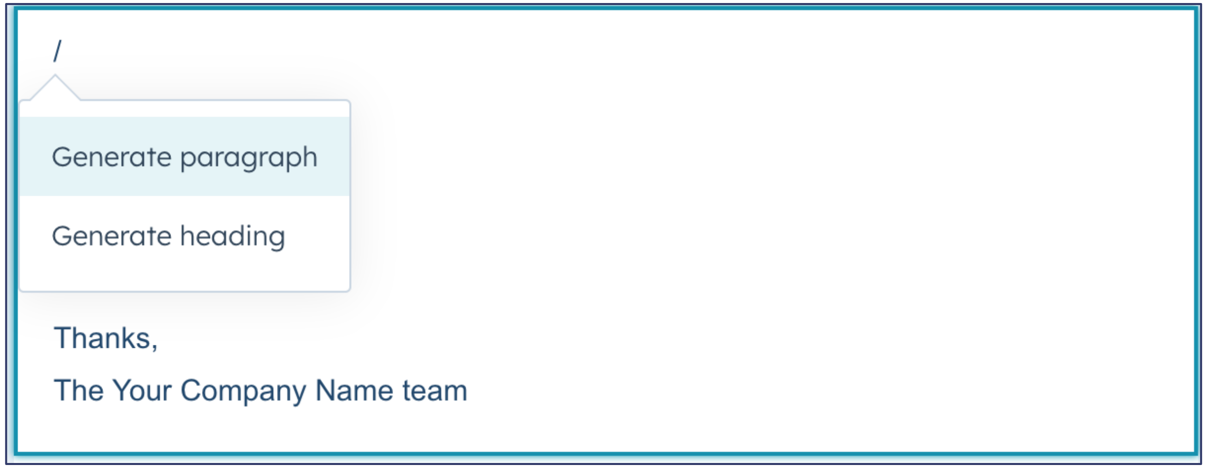
Previously Covered Features

YouTube.com/@HubSpotHacks

Expanded AI Content Assistant Functionality

- Public Beta
- All Hubs
- All Tiers

- Conversations Inbox
- Page Title & Meta Description
- Mobile Sales Emails (iOS)
- Blog
- Sales Chrome Extension for Gmail
- Social
- Slash & Highlight Commands (Marketing Emails, CTAs, web pages, landing pages, knowledge base)



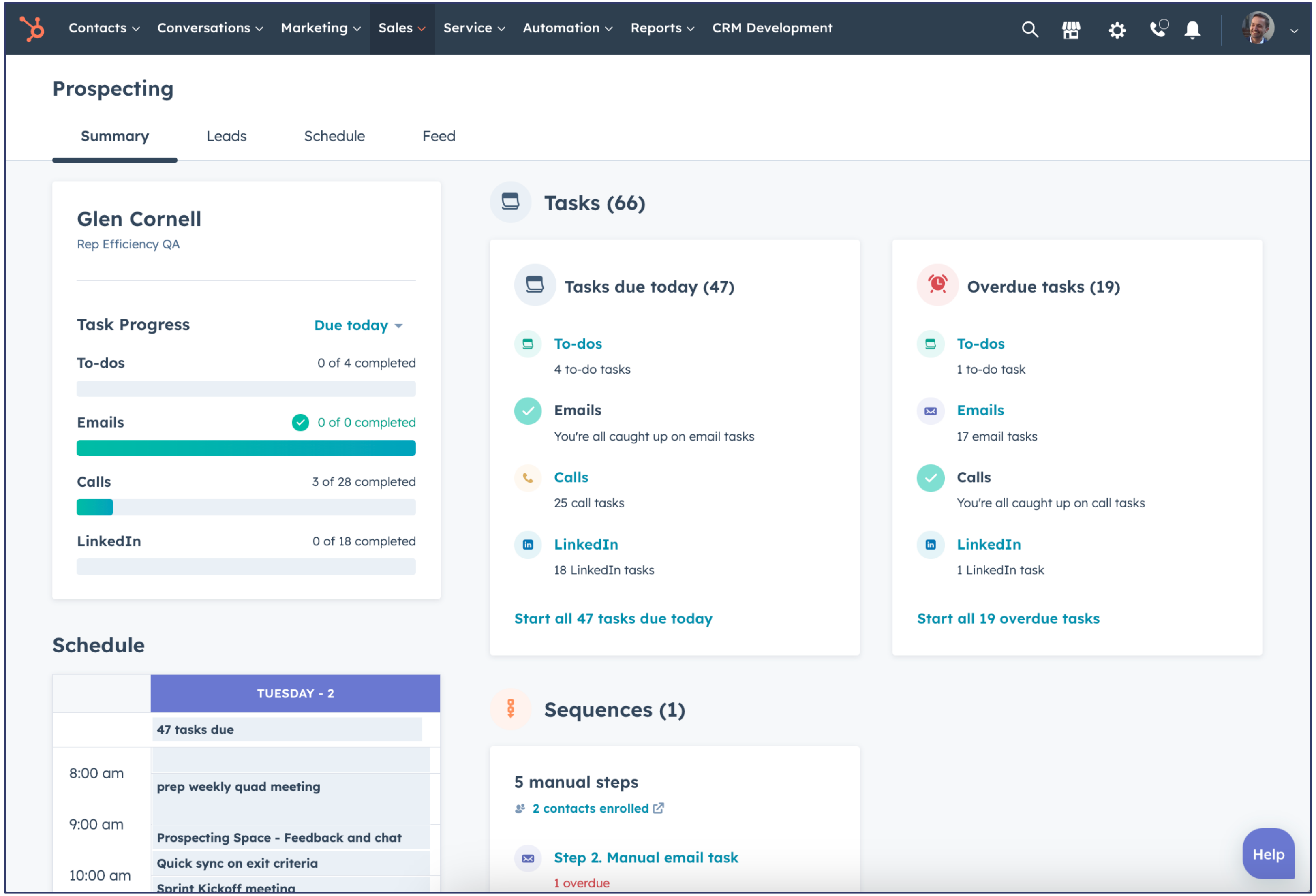
What’s Coming with AI in HubSpot

- AI-assisted live chat
  - Flesh out your website & knowledgebase content now
- AI report generator
- AI website assistant
- AI campaign assistant
  - HubSpot.com/Campaign-Assistant

SimpleStrat.com/Webinars

Prospecting Workspace

- Public Beta
- Sales Hub (not legacy)
- Pro & Enterprise



Sequence Reporting Improvements

- Live
- Sales & Service Hubs
- Pro & Enterprise

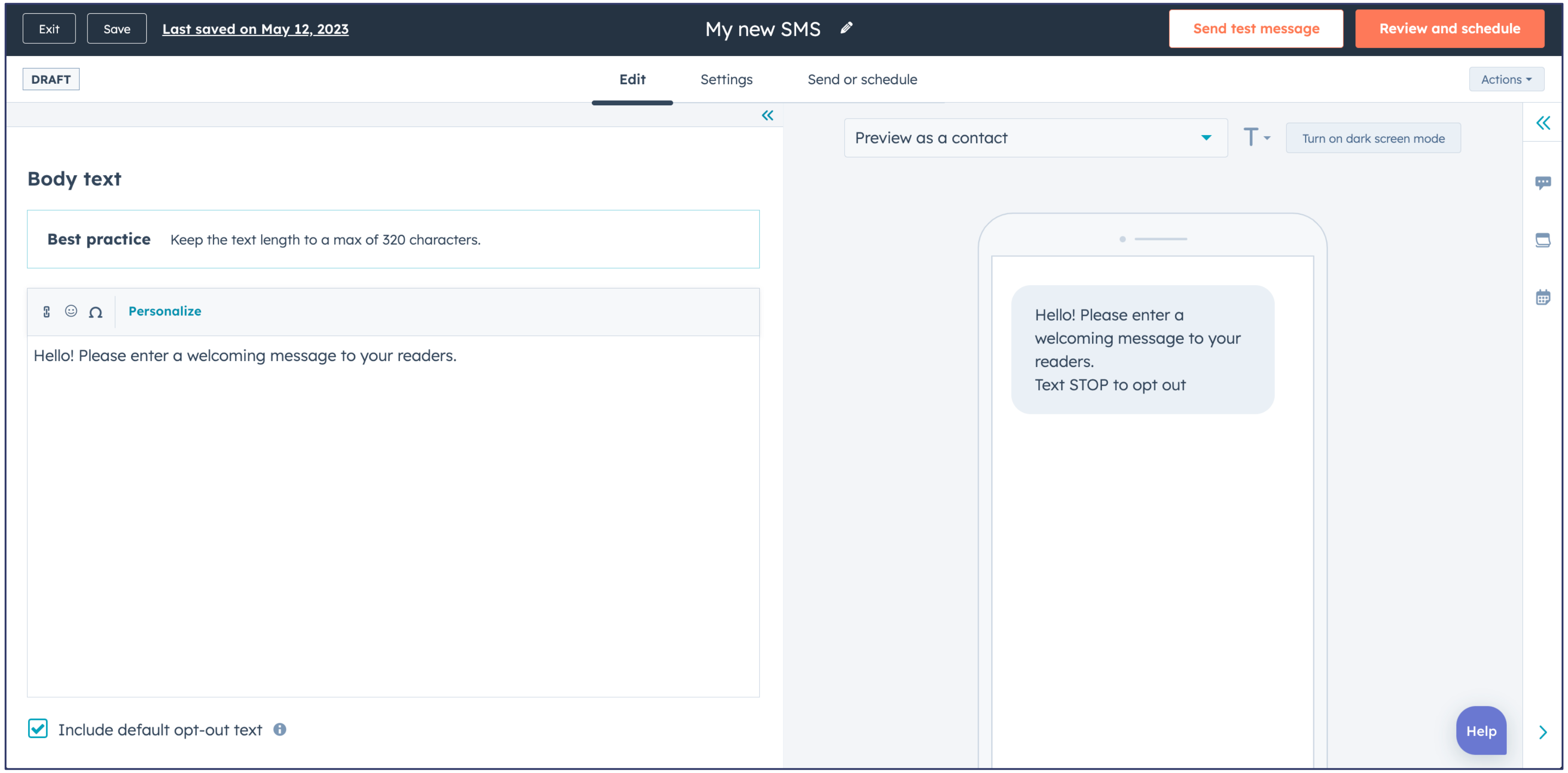
Step performance

☑ Hide steps no longer in use | Rates | Counts

STEP NAME	EXECUTED STEPS	MEETINGS	OPENS	CLICKS	REPLIES	TASKS COMPLETED
Step 1 Automated email Prospecting - Call Heavy Email #1	153	1%	41%	3%	0%	–
Step 2 LinkedIn task Send Connection request	150	0%	–	–	–	87%
Step 3 Call task Call contact and leave voicemail (2nd touch)	132	2%	–	–	–	58%
Step 4 Call task Call contact to follow up (3rd touch)	70	3%	–	–	–	93%
Step 5 Manual email Send follow-up email	63	3%	56%	0%	0%	98%
Step 6 Call task Call contact to follow up (5th touch)	60	0%	–	–	–	98%
Step 7 Automated email Prospecting - Call Heavy Email #3	59	0%	49%	0%	0%	–
Step 8 Call task Call contact to follow up (7th touch)	59	10%	–	–	–	63%
Step 9 Call task Final follow-up call (8th touch)	31	6%	–	–	–	100%

SMS Marketing Tool

- Live
- Marketing Hub
- Pro & Enterprise
- Requires Add-on ($75/mo)

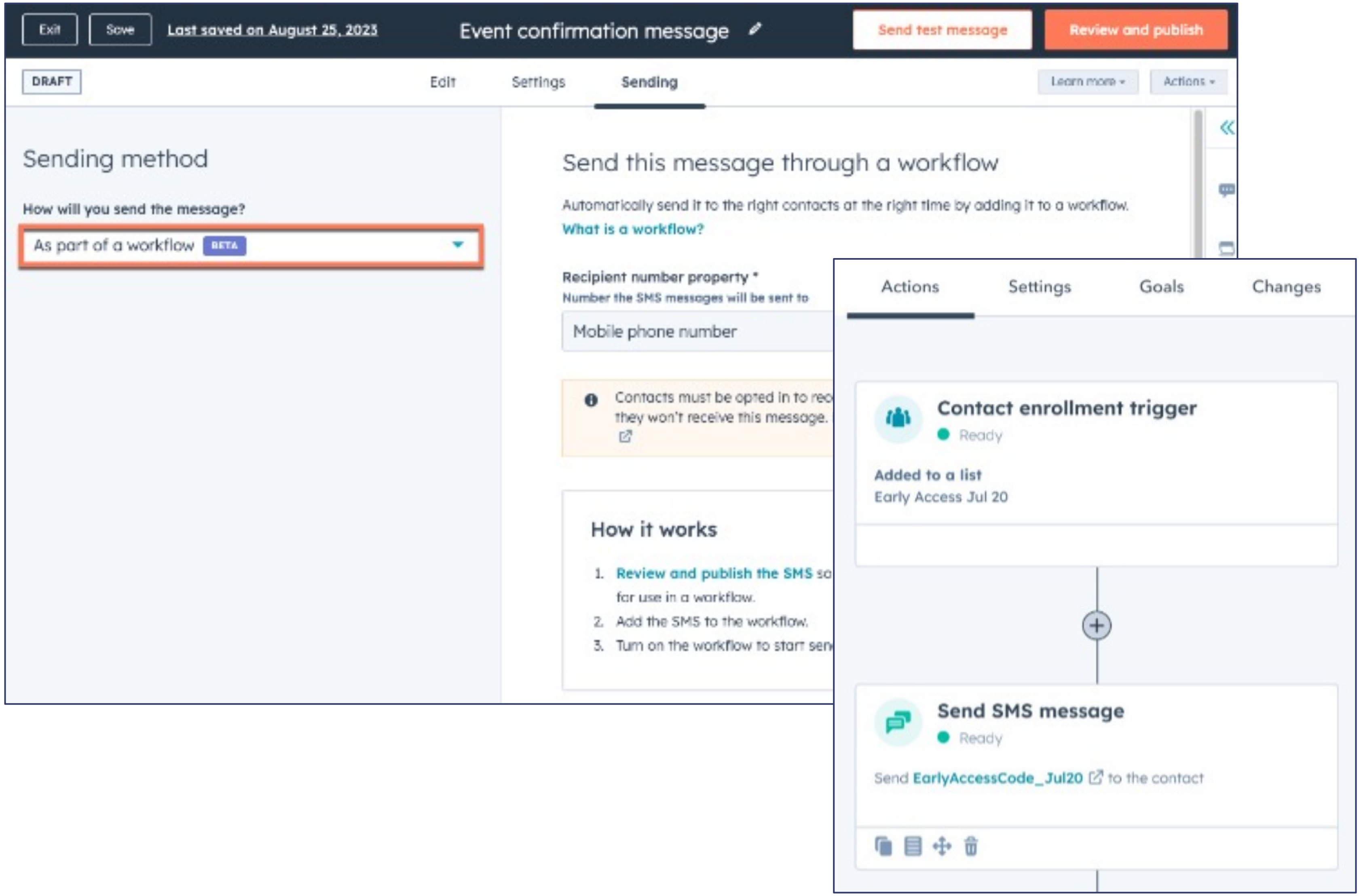


Exciting New Features & Use Cases

What's New:

SMS Automation

- Public Beta
- Marketing Hub
- Pro & Enterprise
- Requires Add-on ($75/mo)



Use Automated SMS Now:

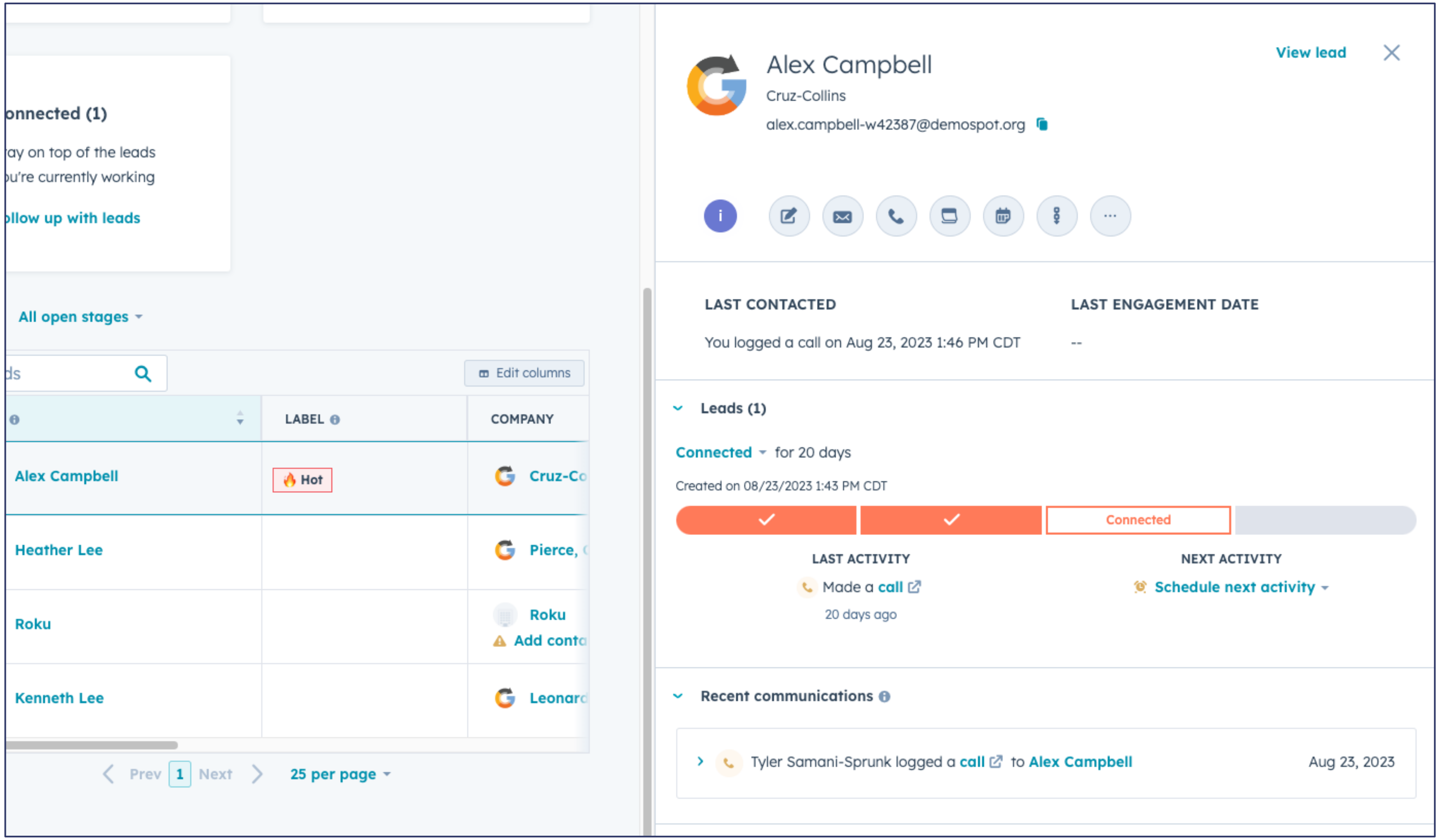
- Confirm an online order
- Send welcome message after sign up
- Abandon cart follow-up
- Prompt to finish a form
- Onboarding message after closed-won deal
- Request feedback after customer service interaction
- Personalized marketing offer based on page(s) visited

What's New:

Leads in Prospecting Workspace

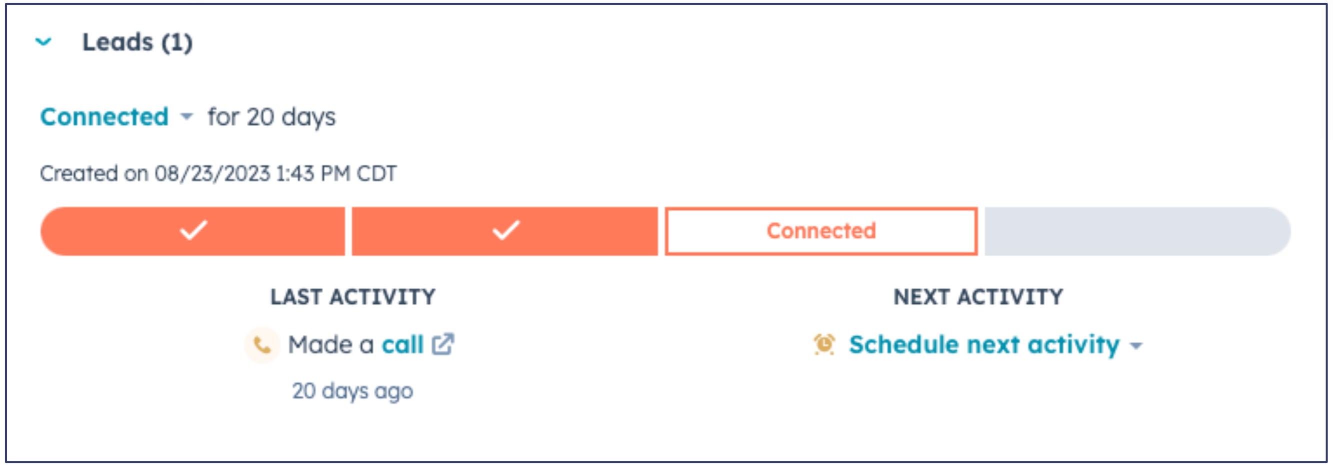
- Public Beta
- Sales Hub
- Pro & Enterprise

HUBSPOT HACKS



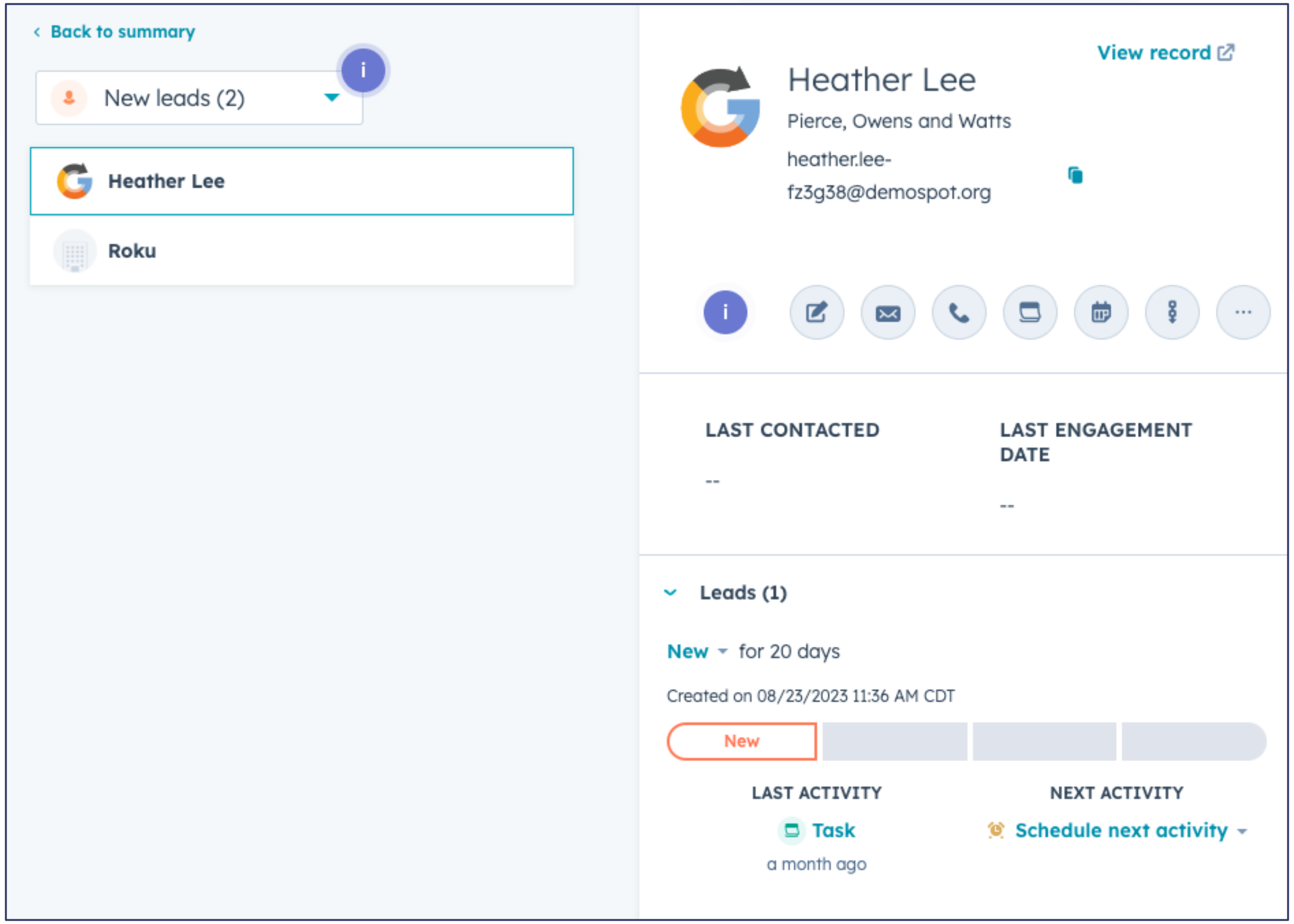
Use Leads Now: Stop Creating Deals Too Early

- Deal stages early in the process cause issues with data quality, efficiency, and adoption
- Remove deal stages like "prospecting" and "qualified" and use deal stages instead
- Out-of-the box automation & clear visualization – made to handle scale



Use Leads Now: Modify Hand-offs & Train Reps

- Modify handoffs to ensure leads get created when needed – USE LIFECYCLE STAGES
- Train SDRs, BDRs, and/or sales reps to work from the new prospecting workspace
- Define SOPs and definitions
    - What does “qualified” mean?



HubSpot Diamond SOLUTIONS PARTNER PROGRAM

Your Processes

Lead Gen
Nurturing
Handoffs
Sales Process
Onboarding
Customer Success

Buyer's Journey Workshop

Your tailored HubSpot portal ready to scale.

HubSpot Best Practices

Lifecycle Stages
Lead Stages
Deal Stages
Ticket Pipelines
Automation
Notifications

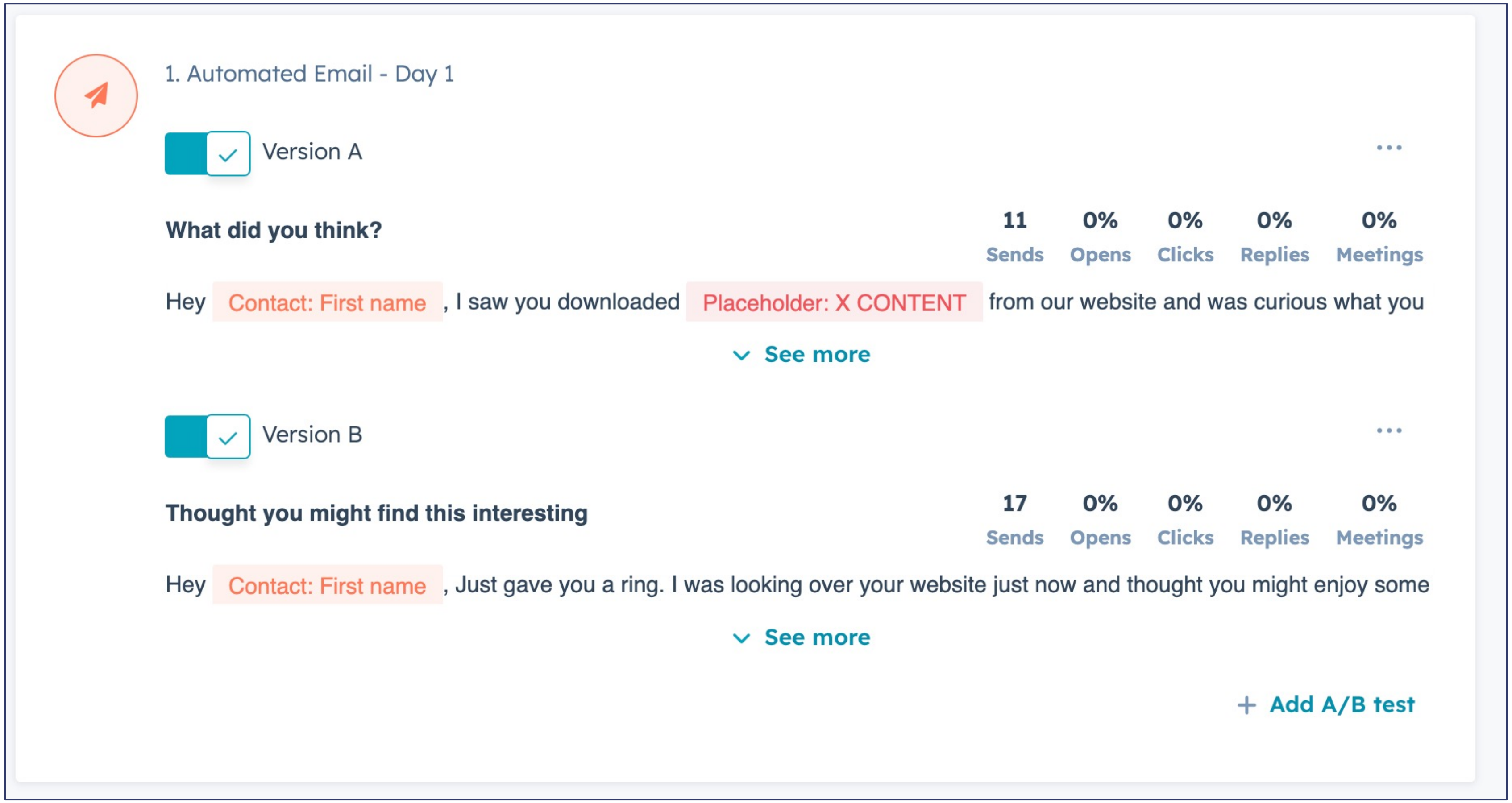
SimpleStrat.com/Consult

What's New:

A/B Testing Sequence Steps

- Public Beta
- Sales & Service Hubs
  -- Legacy Not Included
- Pro & Enterprise

HUBSPOT HACKS



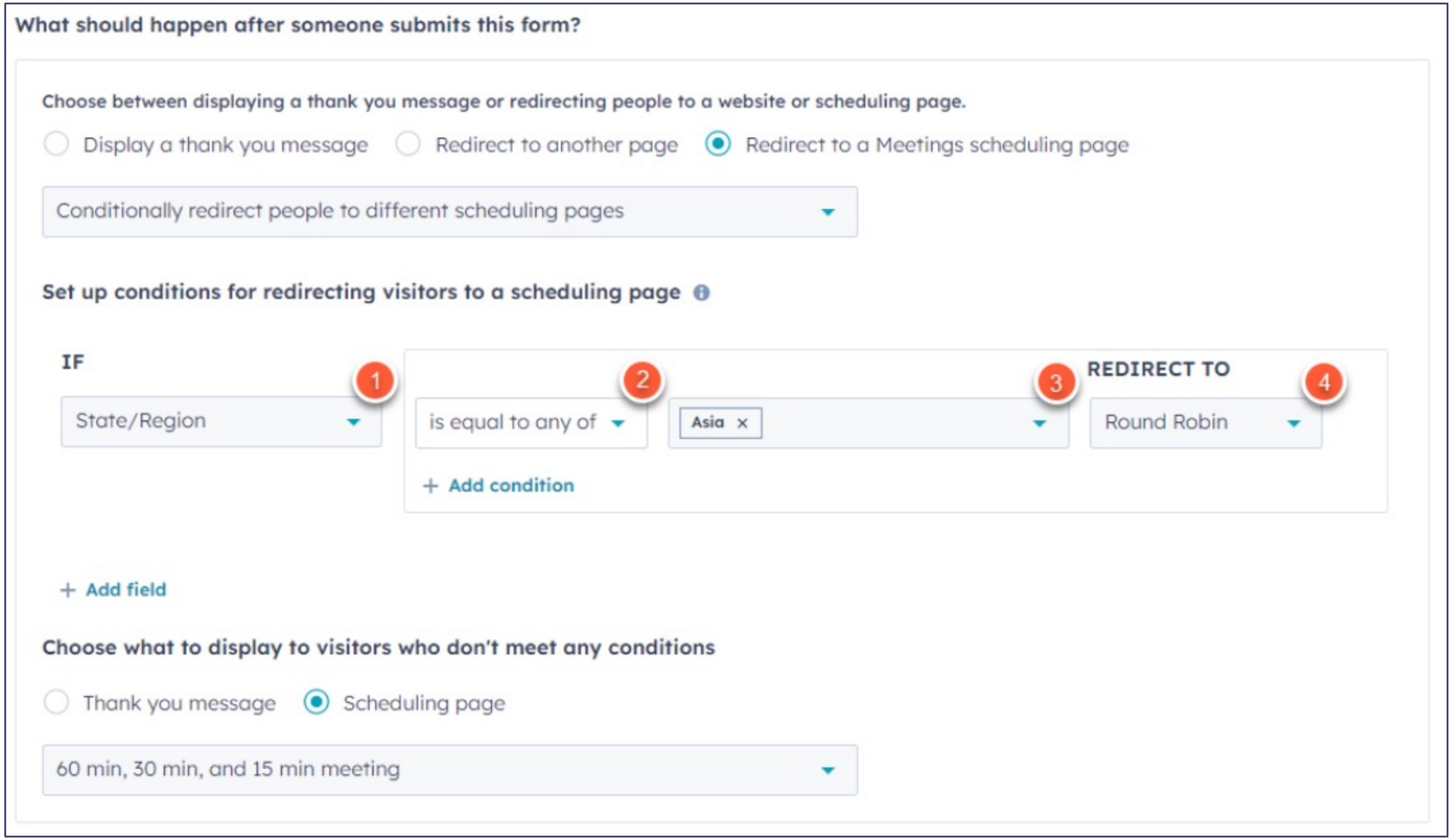
Use A/B Testing Now: Start Optimizing

- Identify underperforming sequence steps on frequently-used sequences
- Create a variation for this step
  - Test one variable at a time (e.g. subject line, CTA)
- Wait until enough volume has been sent, turn off weaker version, test new variation with different change
- Apply what you learn across current and future sequences

What's New:

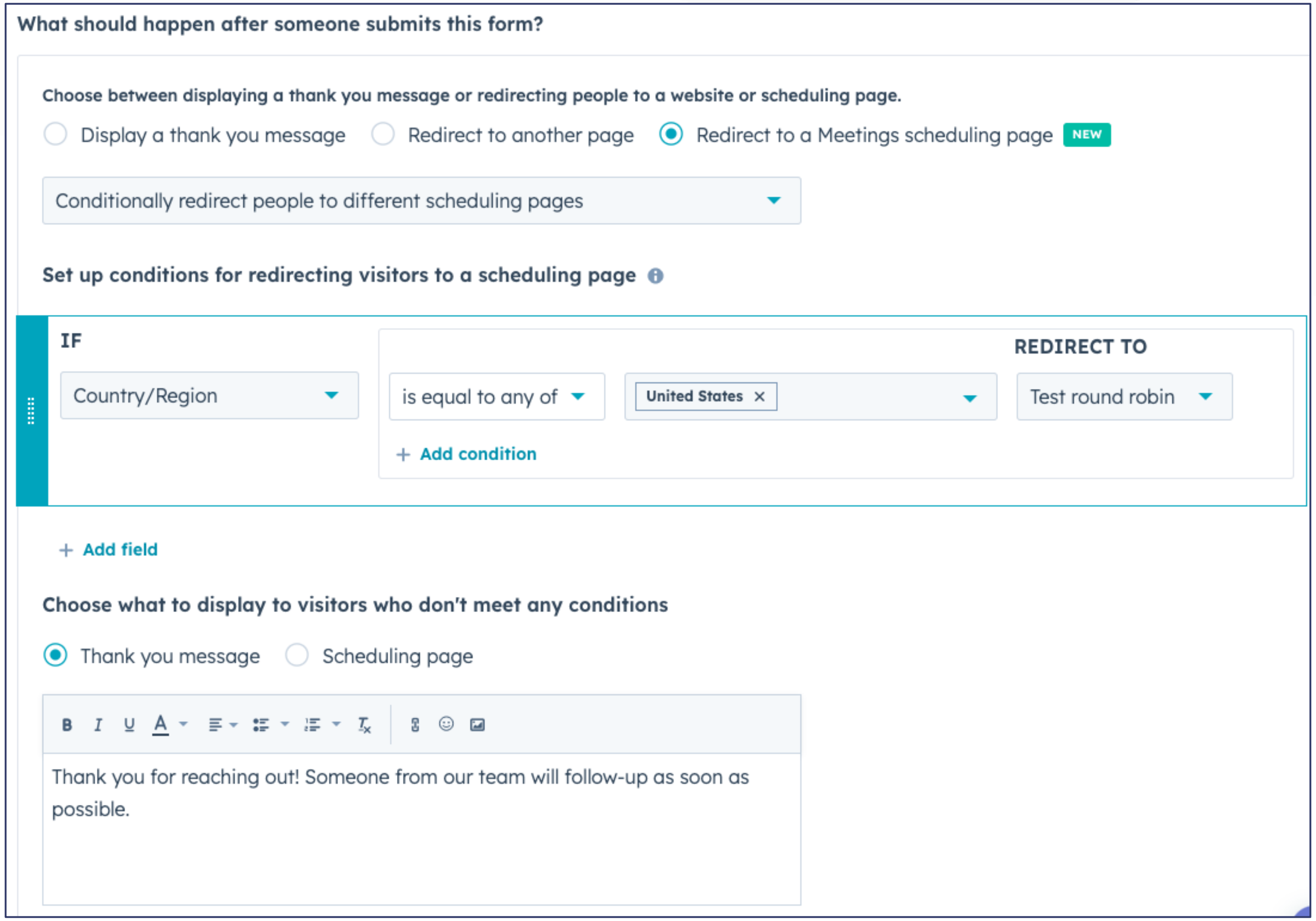
Lead Form Routing

- Public Beta
- Sales & Service Hubs
- Enterprise



Use Form Routing Now: Only Qualified Meetings

- Include qualifying question(s) in a form before allowing them to book meeting
  - Company size
  - Industry
  - Location
- Route qualified prospects to a meeting link
- Display thank you message to unqualified prospects



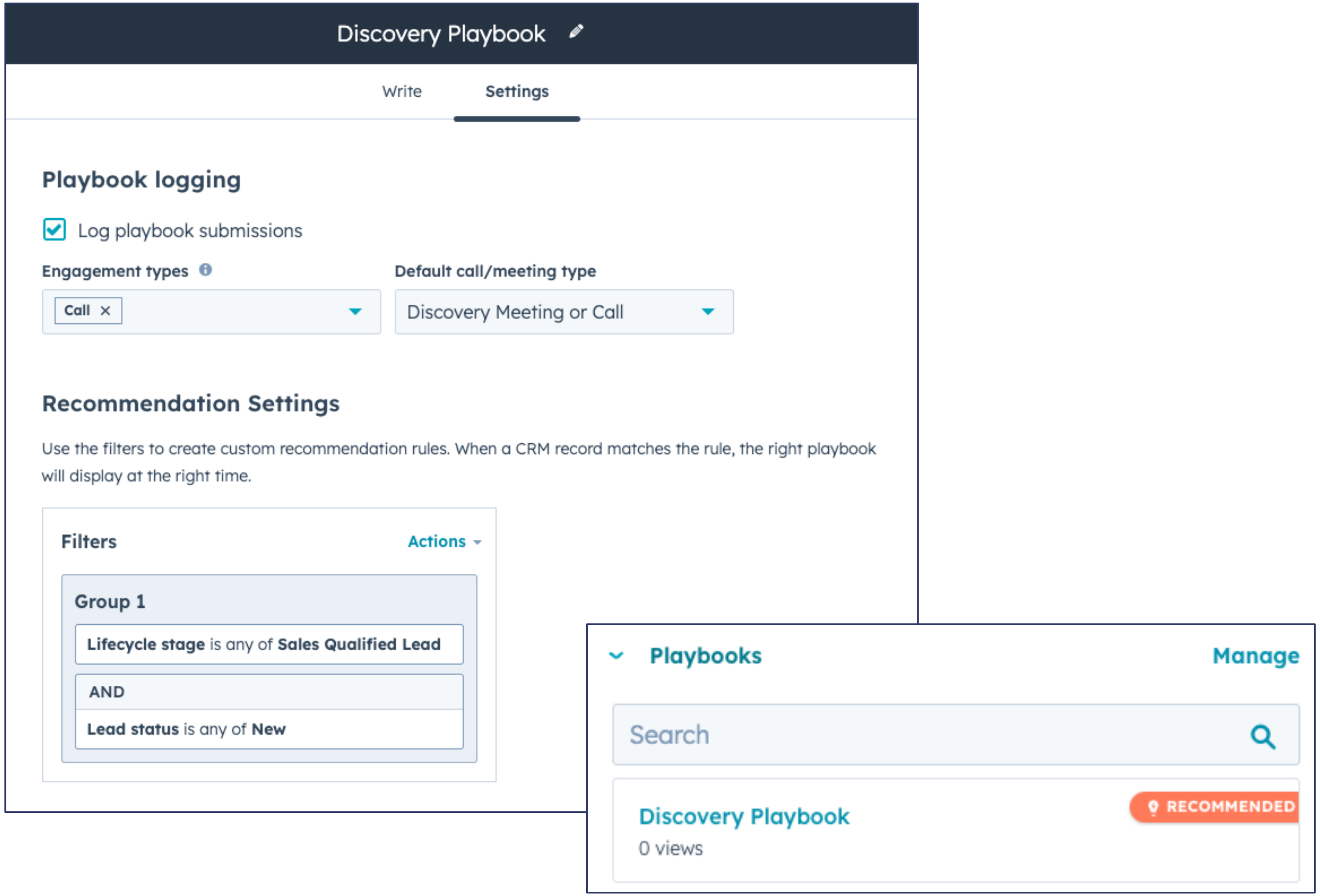
Use Form Routing Now: Book With Correct Team

- Include routing question(s) in a form before allowing them to book meeting
    - Company size
    - Industry
    - Location
- Route prospects to the sales team responsible for that type of prospect

What’s New:

Advanced Playbook Recommendations

- Live
- Sales & Service Hubs
- Pro & Enterprise



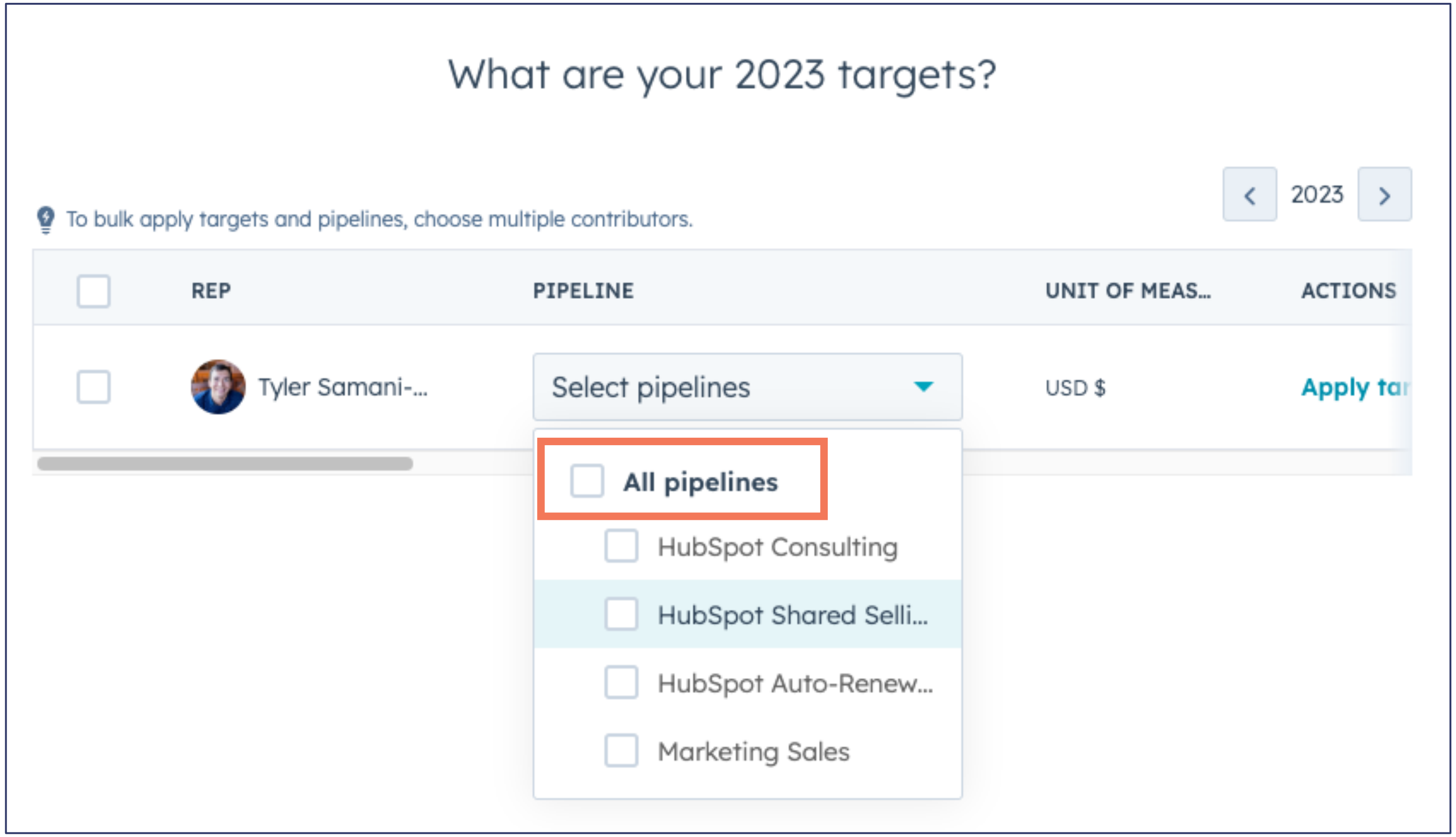
Use Playbook Recommendations Now: Enable Reps

- Discovery Playbook for leads marked new
- Demo playbook for deals in “Demo Scheduled” deal stage
- Onboarding playbook when contact has recent closed-won deal
- Different playbooks for different ICPs
  - Company size
  - Recommended solution
- Different follow-up playbooks based on recent conversion
- Intake playbook for inbound customer service calls from customers with no open tickets

What's New:

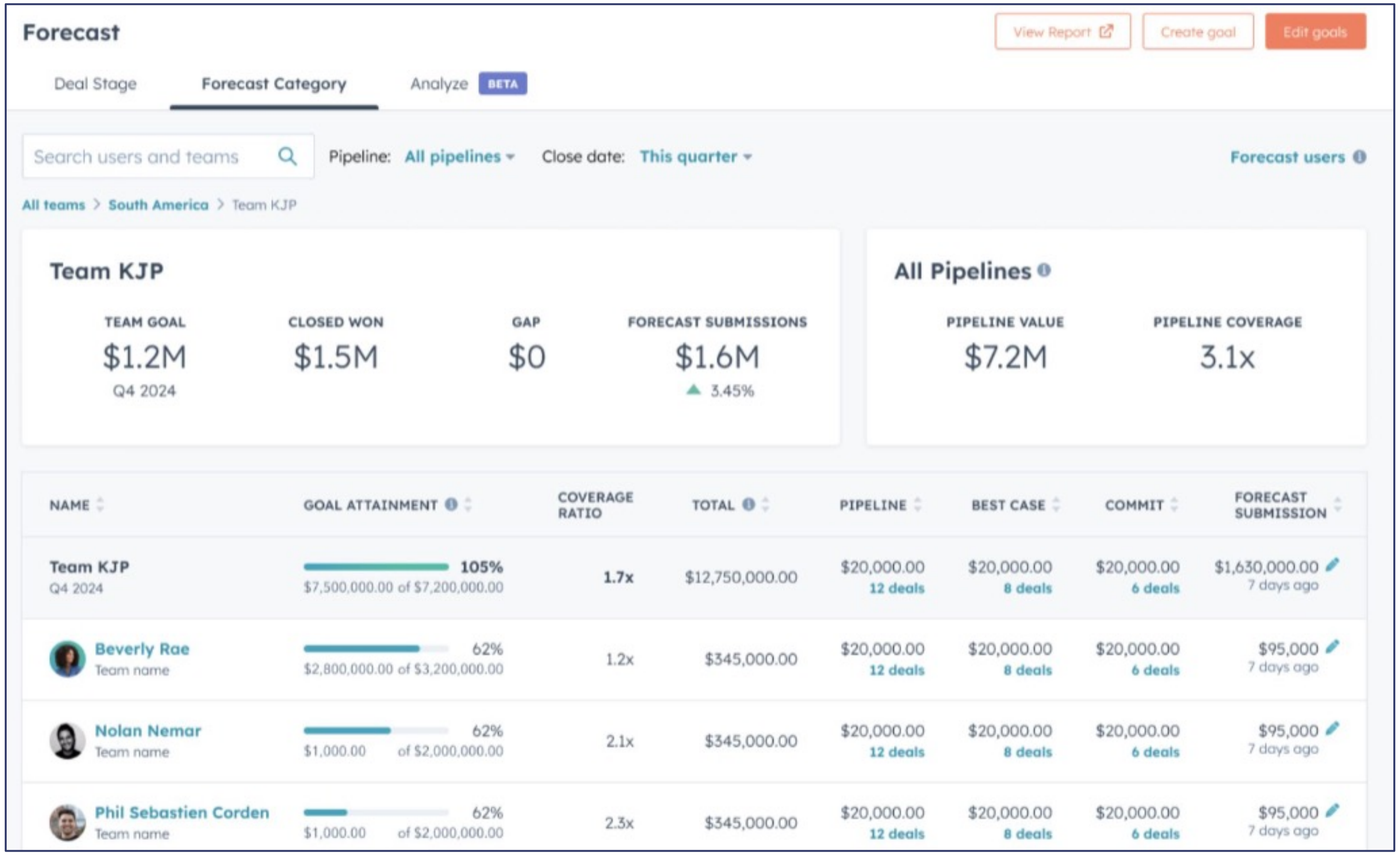
Forecast Across All Pipelines

- Live
- Sales Hub
- Pro & Enterprise



Use Cross-Pipeline Forecasting Now: Update / Add Goals

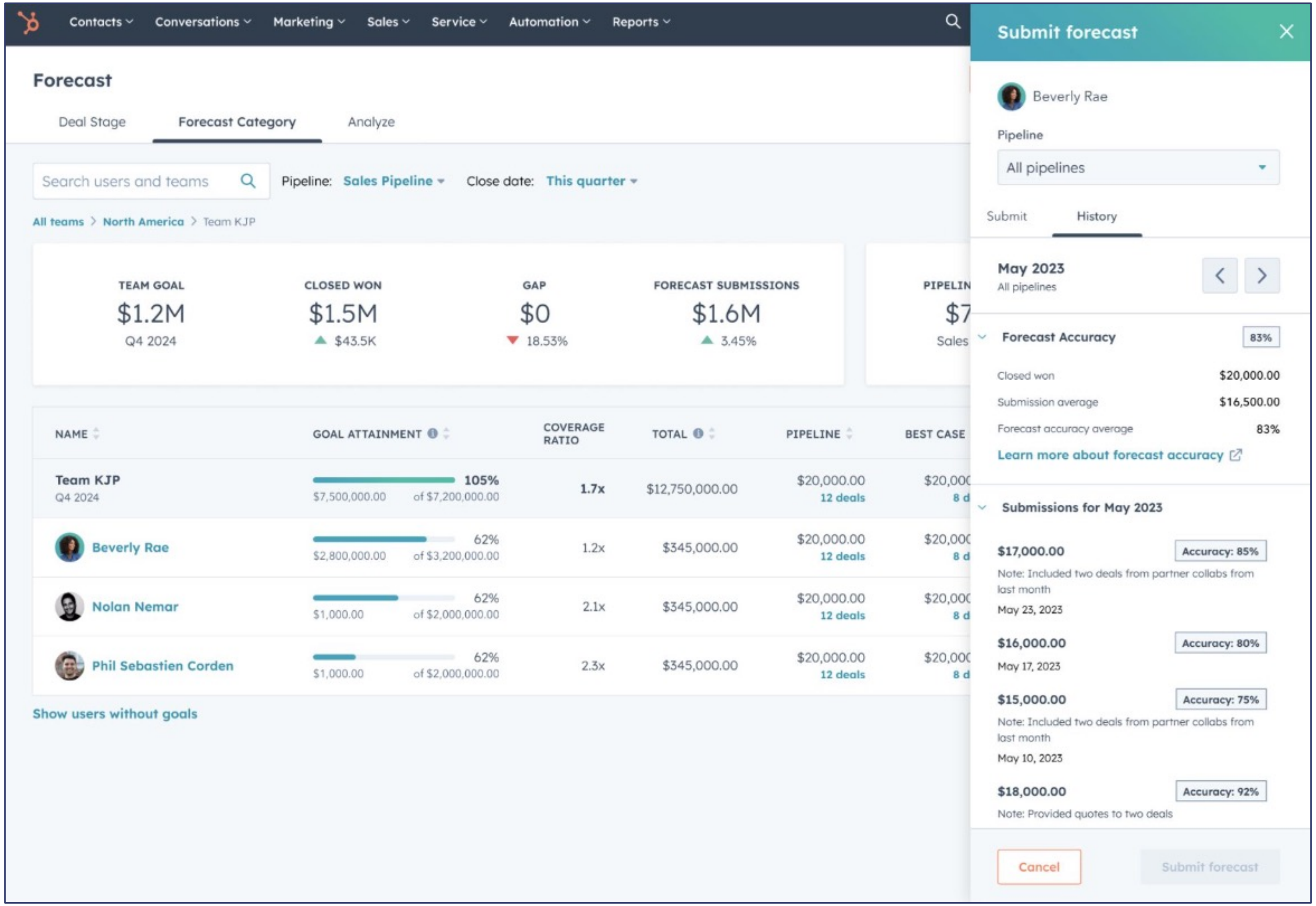
- If pipeline-specific forecasting added unnecessary complexity or prevented you from using forecasts or revenue goals:
  - Set up category forecasting if not yet using it
  - Add or update revenue goals that apply to all pipelines



What's New:

Forecast Accuracy Tracking

- Live
- Sales Hub
- Pro & Enterprise



Use Forecasting Accuracy Now: Review History

- If your team has been using forecast submissions, go back and review historical accuracy
  - Identify reps with consistently poor accuracy
  - Coach/train as necessary
- If not using forecast submissions, consider using it as a way to motivate reps and hold them accountable

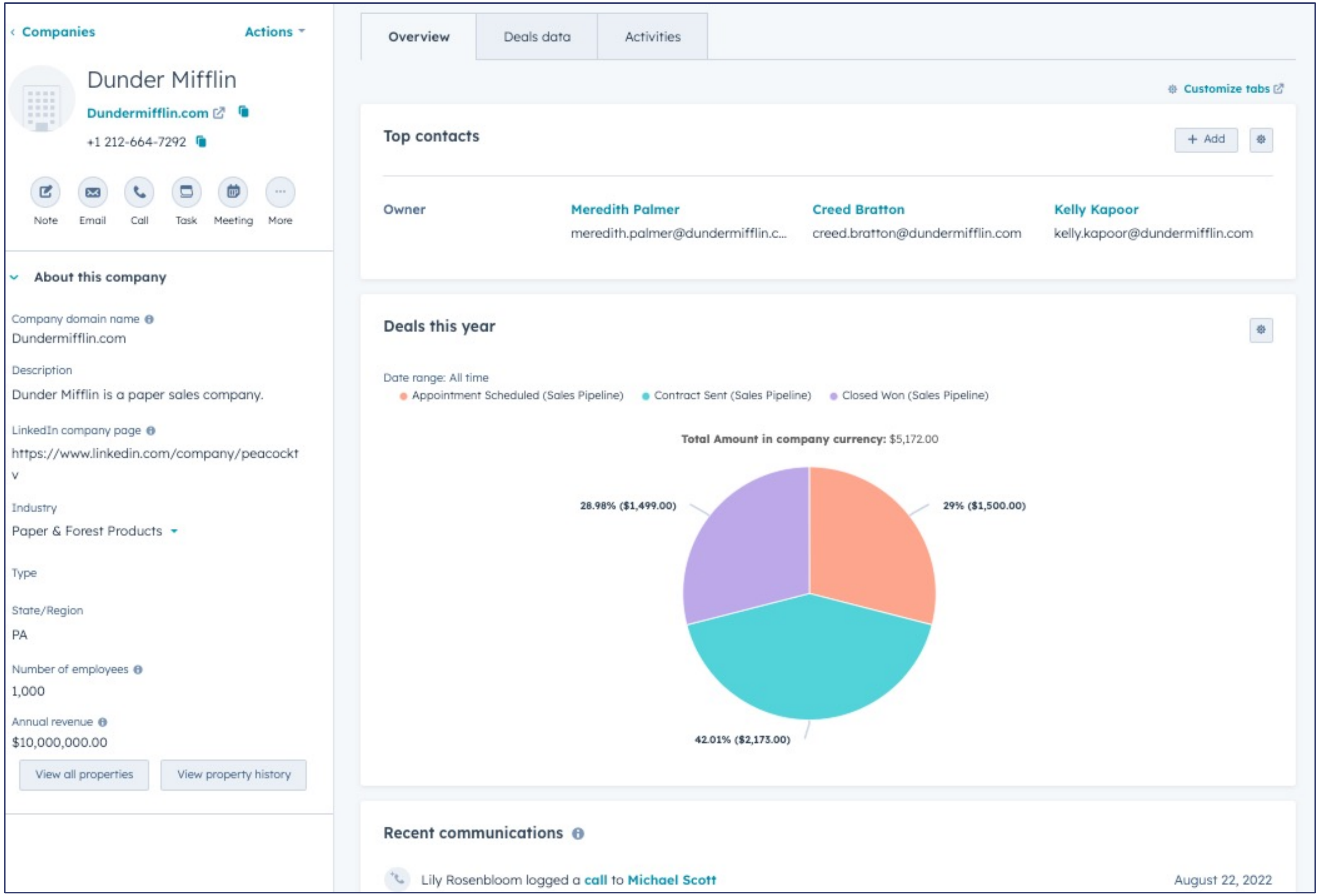
What's New:

CRM Record Page Editor

- Public Beta
- All Hubs*
- All Tiers*

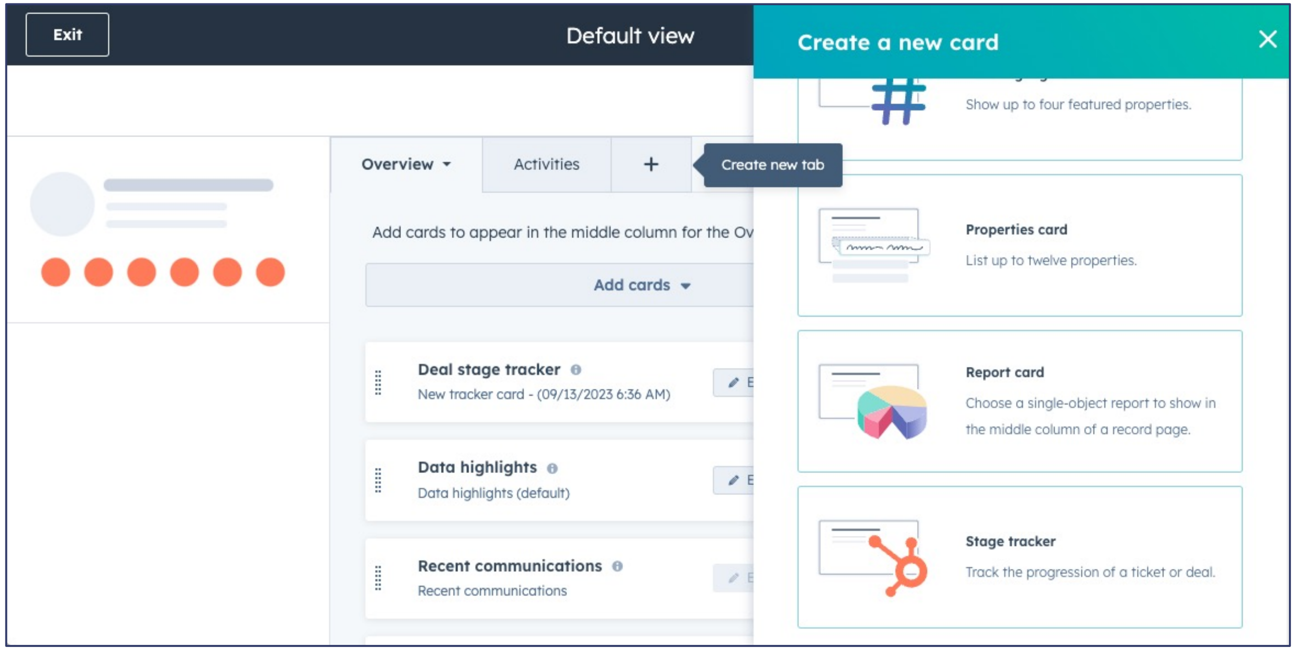
*Pro or Enterprise Required for Team Views

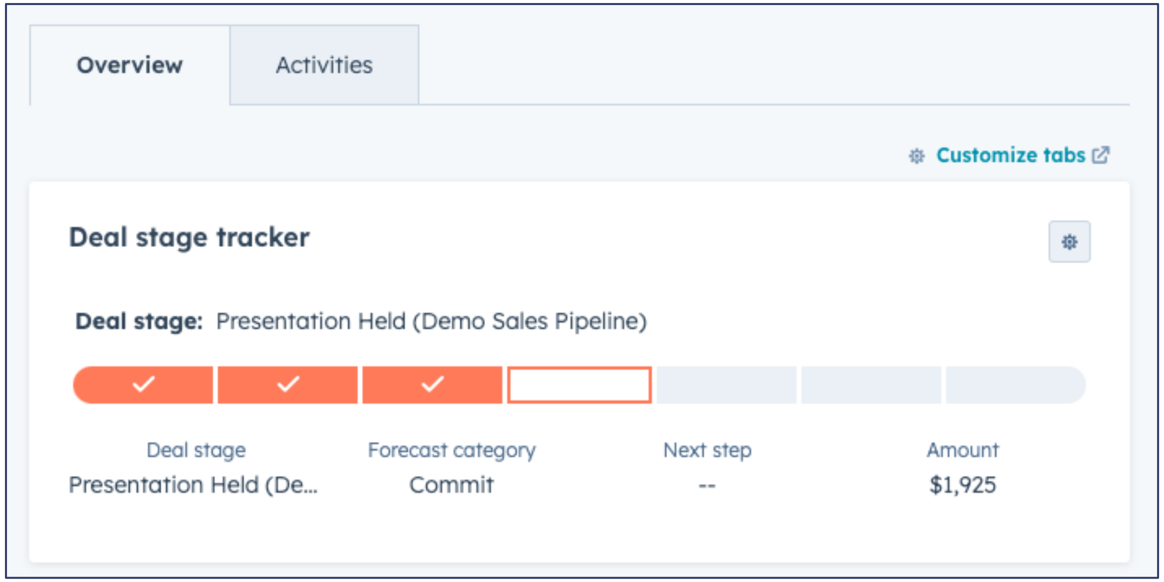
*Sales or Service Enterprise Required to Add Tabs



Use Editor Now: Visualize Progress for Deals & Tickets

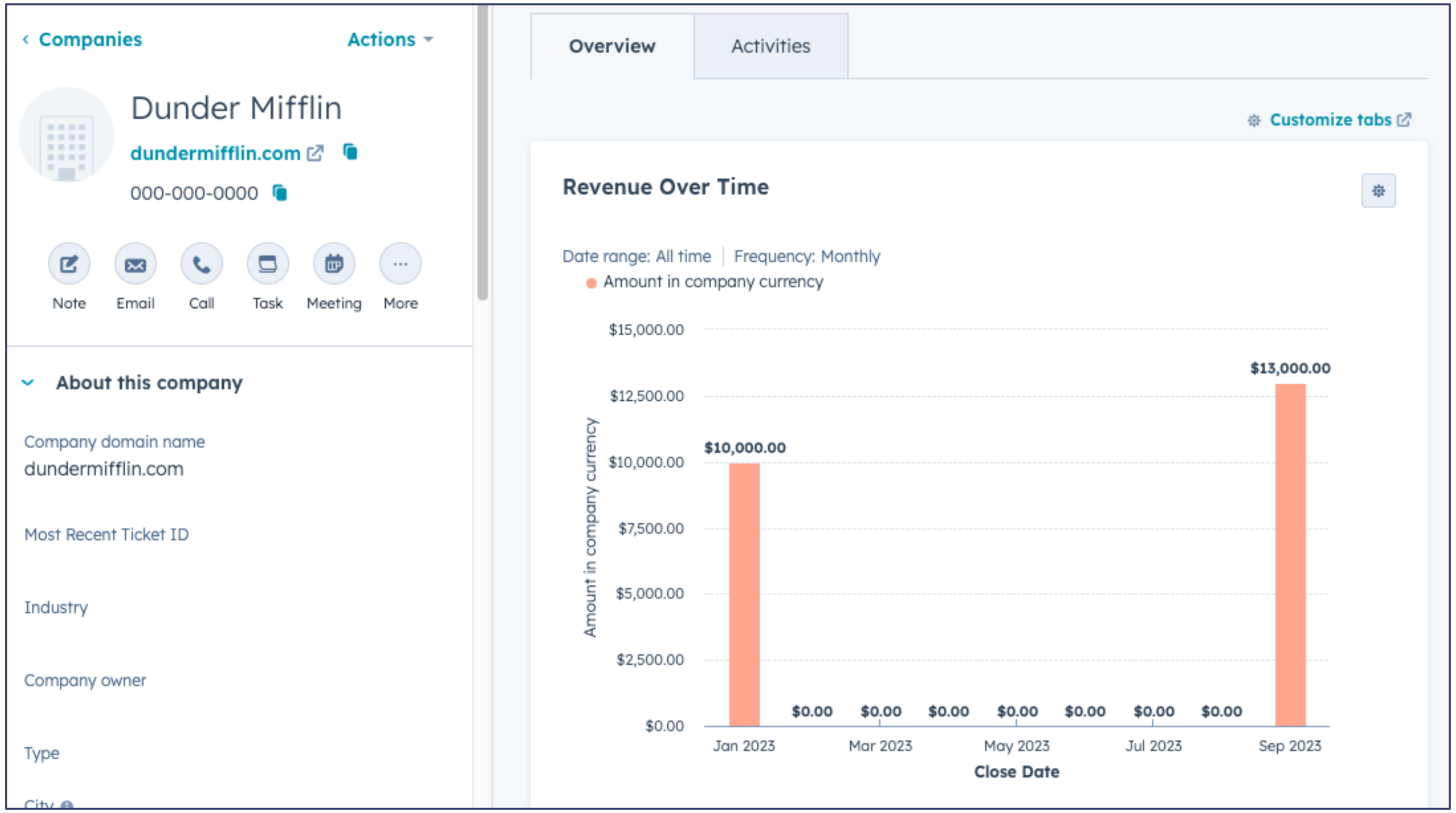
- Add new Stage Tracker card
  - Settings > Object > Record Customization > Customize Middle Column > Add cards > Create New Card





Use Editor Now: Show Company Revenue Over Time

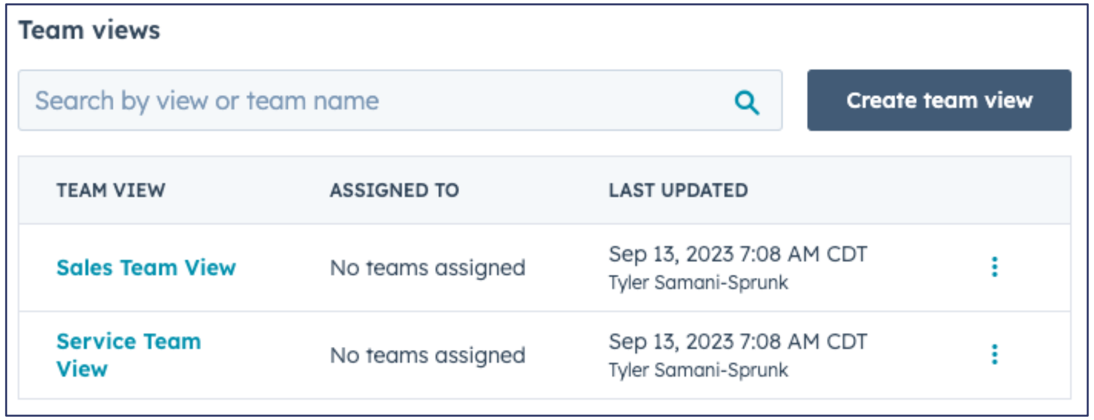
- Create new single object report to show revenue by month for closed-won deals (Deals object)
- Add new Report card to Company object (report will filter to associated deals)



Use Editor Now: Surface Relevant Info by Role

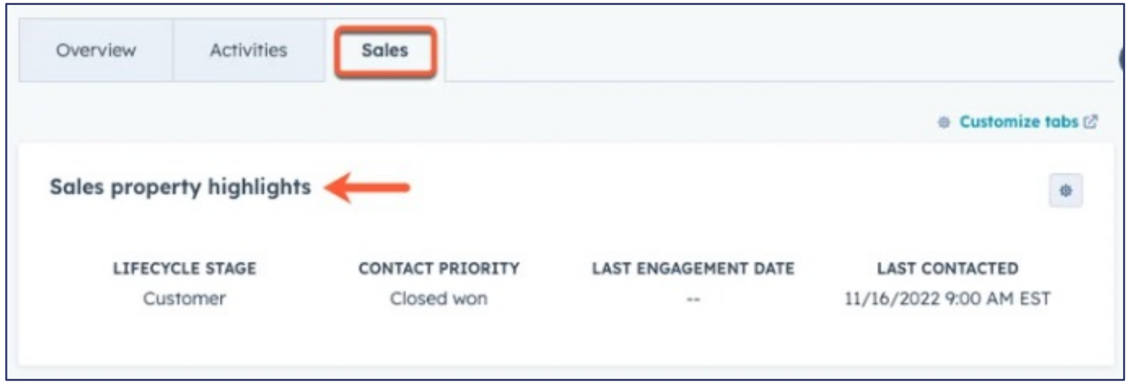
Professional or Enterprise

- Create different overview tabs for different teams
  - Sales team: associated deal info
  - Service team: associated tickets



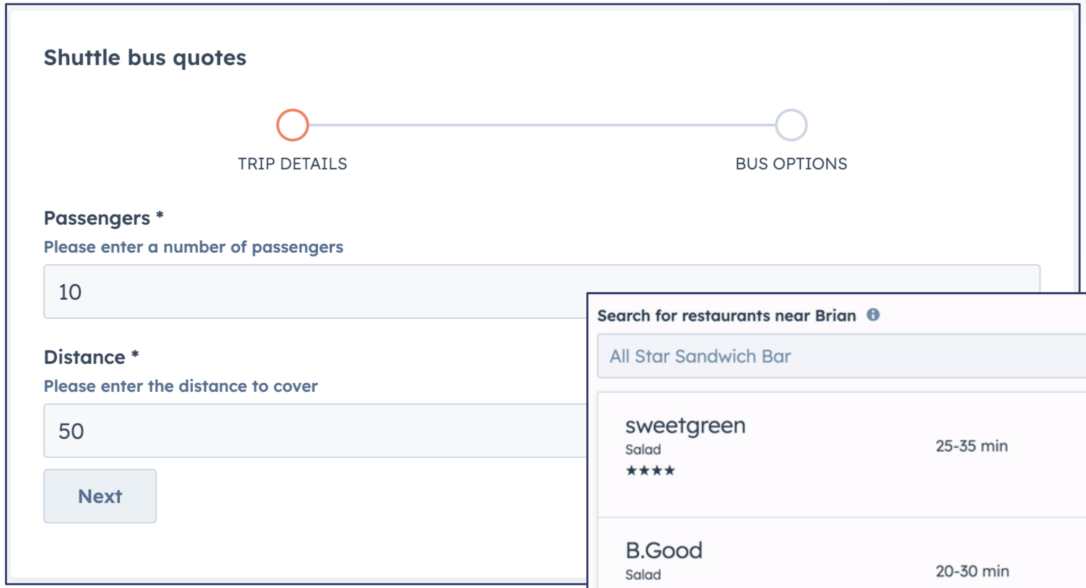
Enterprise Only

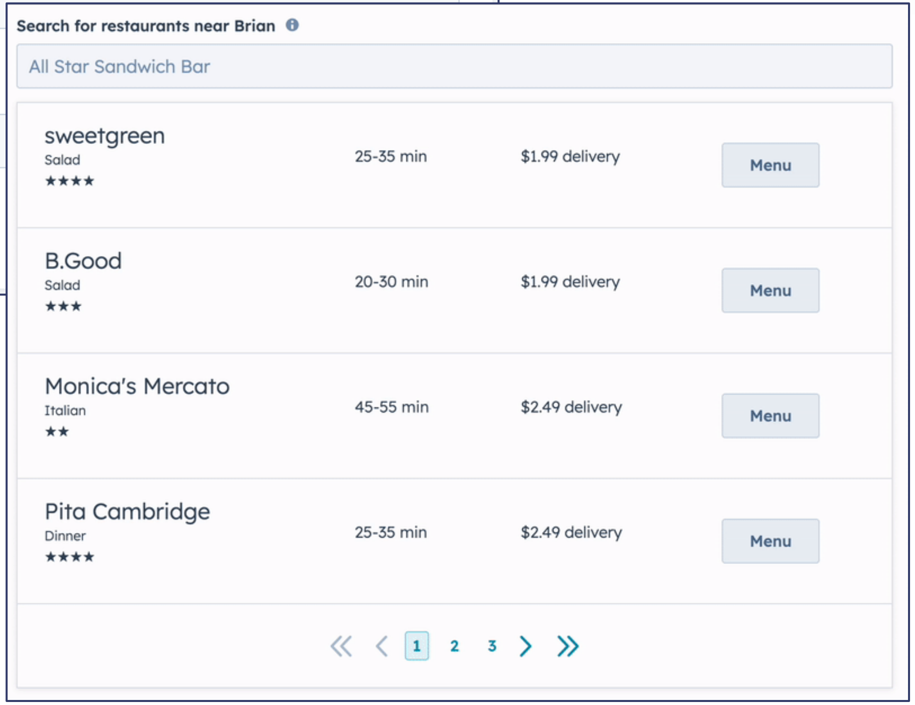
- Create role-specific tabs
  - Sales team tab: deals, sales activities, sales-specific property highlights
  - Service team: tickets, service conversations, service property highlights



Use Editor Now: Make HubSpot Do/Show Whatever

- New capability for developers to create custom cards (uses react)
- Public beta for Enterprise tier
- What you can do:
  - Show data from other systems
  - Add new functionality available from within record pages
  - Enhance integrations with other systems





Small But Mighty Updates

What's New:

Commerce Hub

- Live
- Added On to All Hubs
- Starter, Pro, Enterprise
- Fees based on processed payments

Invoices

Quickly turn quotes into cash with invoices sent directly from your HubSpot CRM.

Payment links

Collect one-time and recurring payments with simple yet powerful payment links you can embed in web pages, forms, emails, and more.

Quotes

Create quotes and capture signatures on beautifully branded templates, powered by data in your CRM.

What’s New:

Deal Funnel Report Updates

- Public Beta
- Sales Hub
- Pro & Enterprise

Deal Stage	Count of Deals	Skipped stage	Cumulative conversion
Consultation Scheduled (...	40	26	127.5%
Consultation Completed ...	44	7	75%
Received Quote (HubSpo...	29	1	60%
Closed Won (HubSpot Co...	24	–	

What's New:

Lead Funnel Report

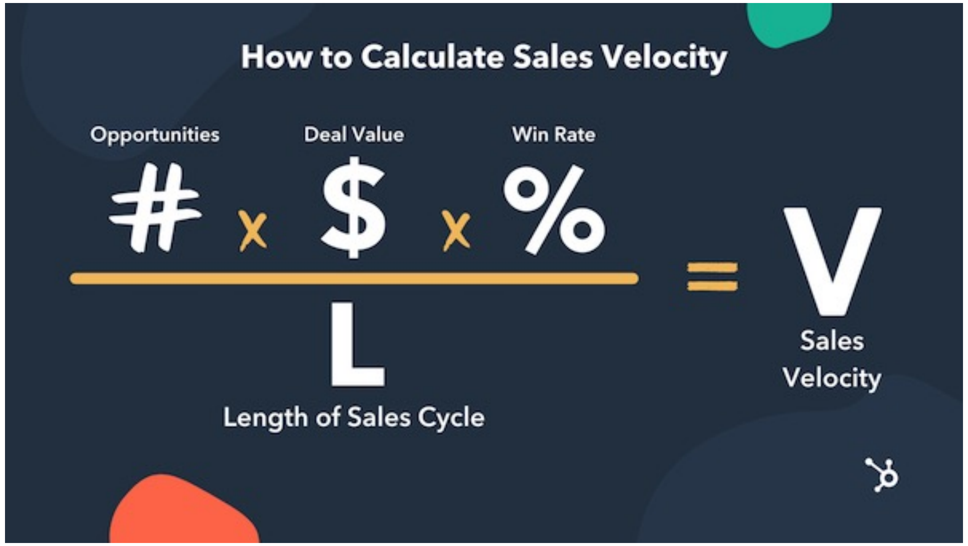
- Public Beta
- Sales Hub
- Pro & Enterprise

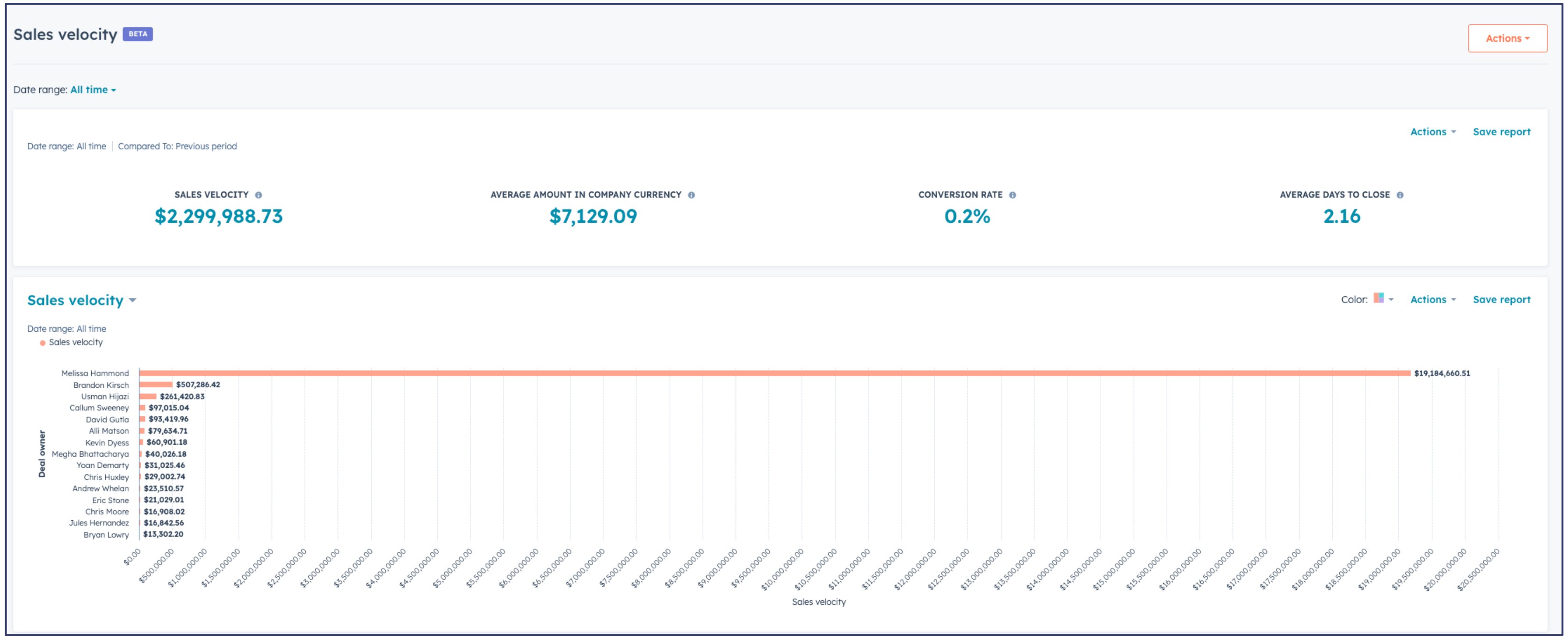
Next step	Total	Next step conversion	Skipped stage
Lead	1,775	100%	0
Marketing Qualified Lead	136	7.66%	443
Sales Qualified Lead	105	55.15%	414
New	6	5.71%	439
Attempting	8	0%	432
Connected	1	0%	431
Opportunity	233	100%	199
Customer	264	27.9%	(No value)

What's New:

Sales Velocity Report

- Public Beta
- Sales Hub
- Pro & Enterprise

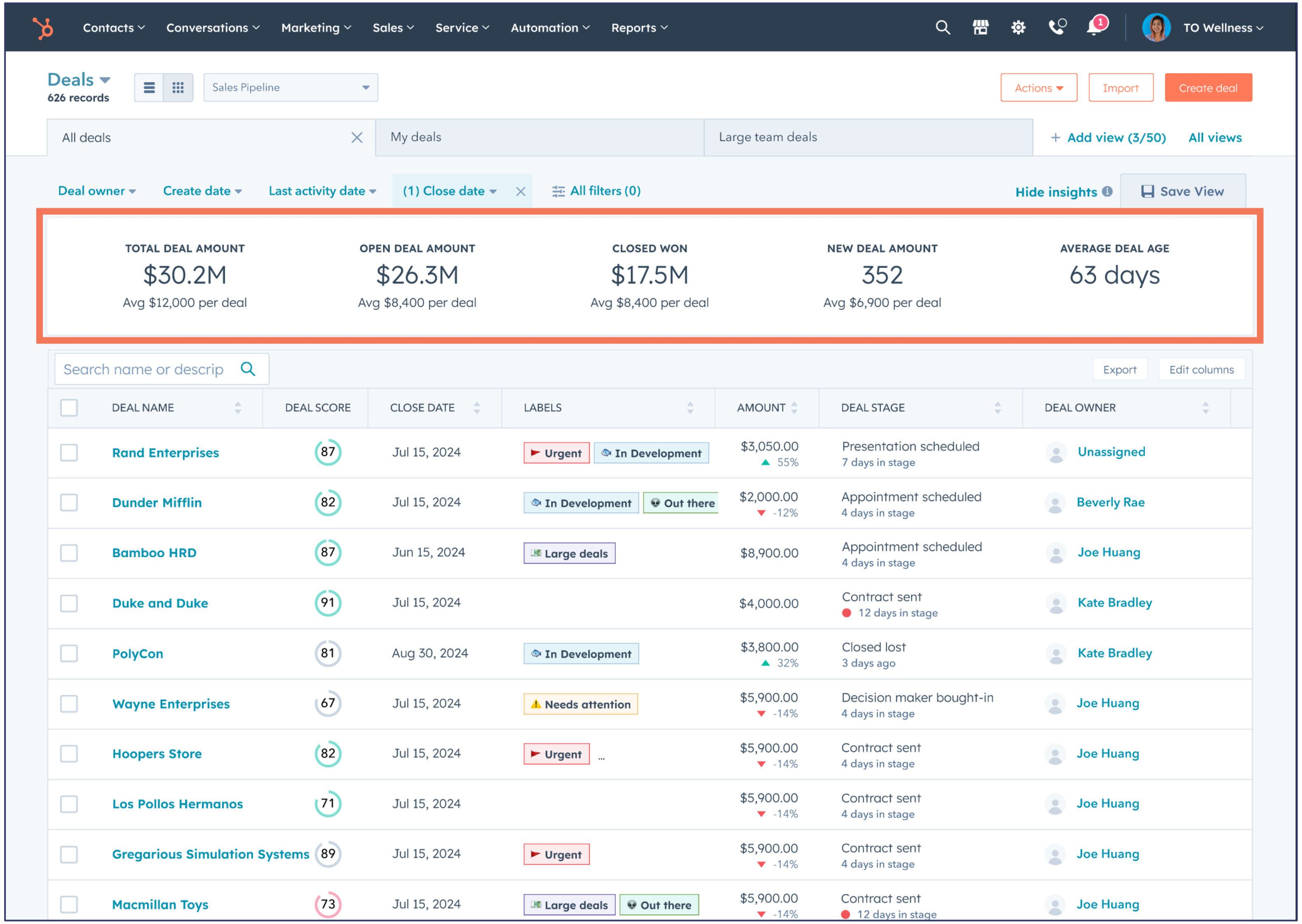




What's New:

Deal Insights

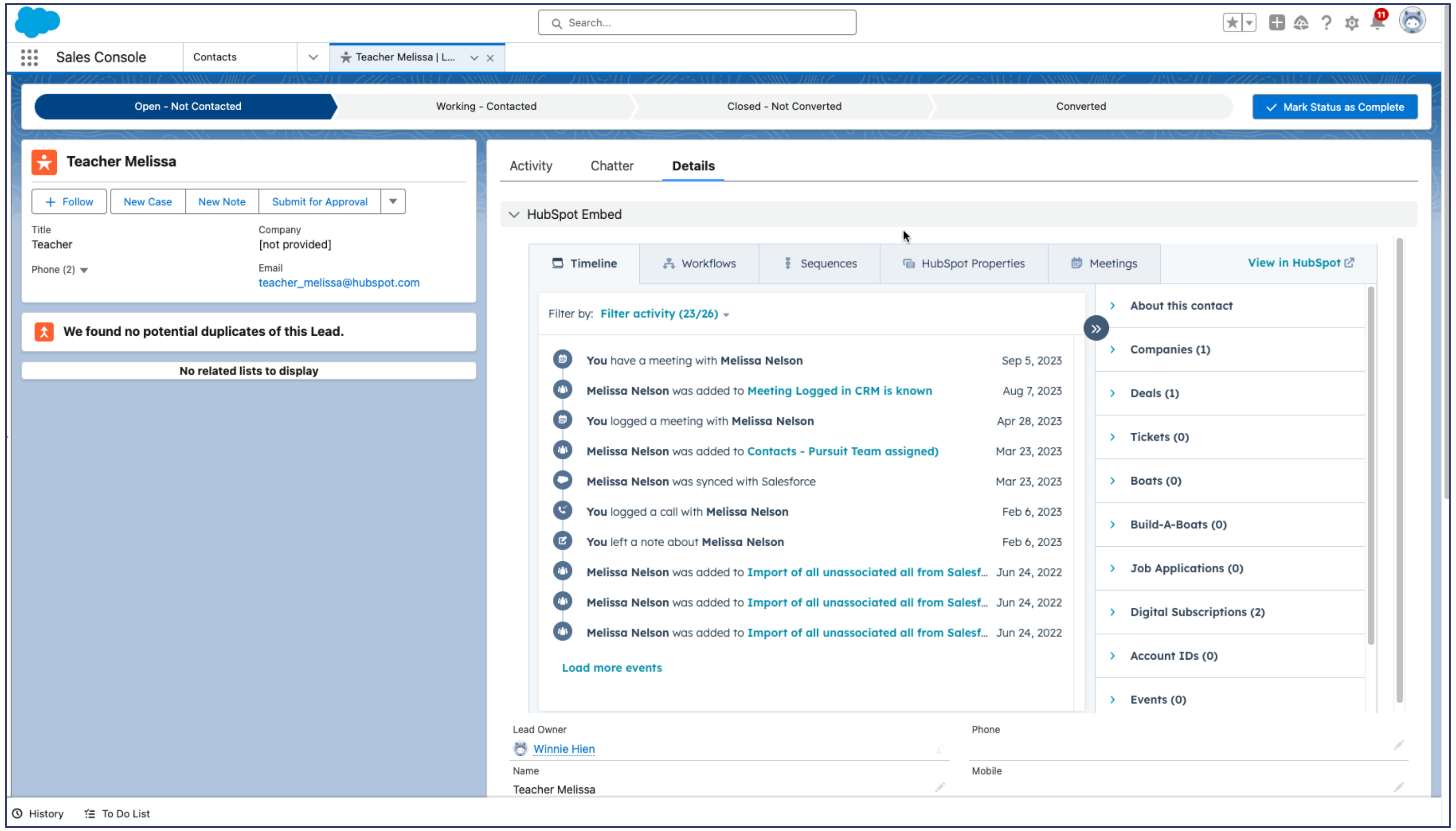
- Live
- Sales Hub
- Starter, Pro, & Enterprise



What's New:

Salesforce HubSpot Embed Updates

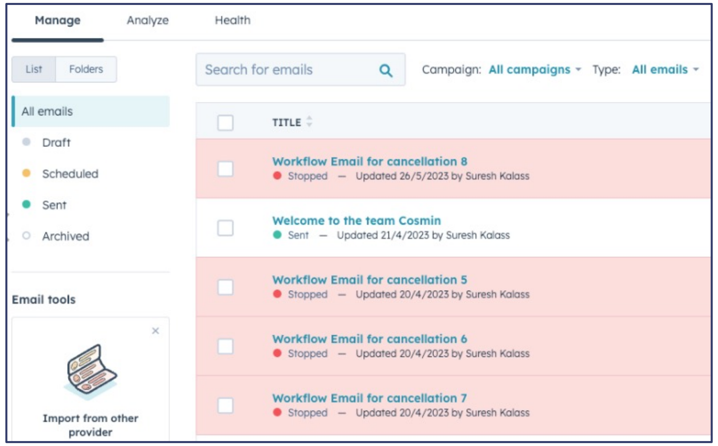
- **Schedule HubSpot meetings inside Salesforce [Public Beta]**
- **Enroll in HubSpot Sequence from Salesforce [Public Beta]**
- **Salesforce activity sync [Coming Soon]**



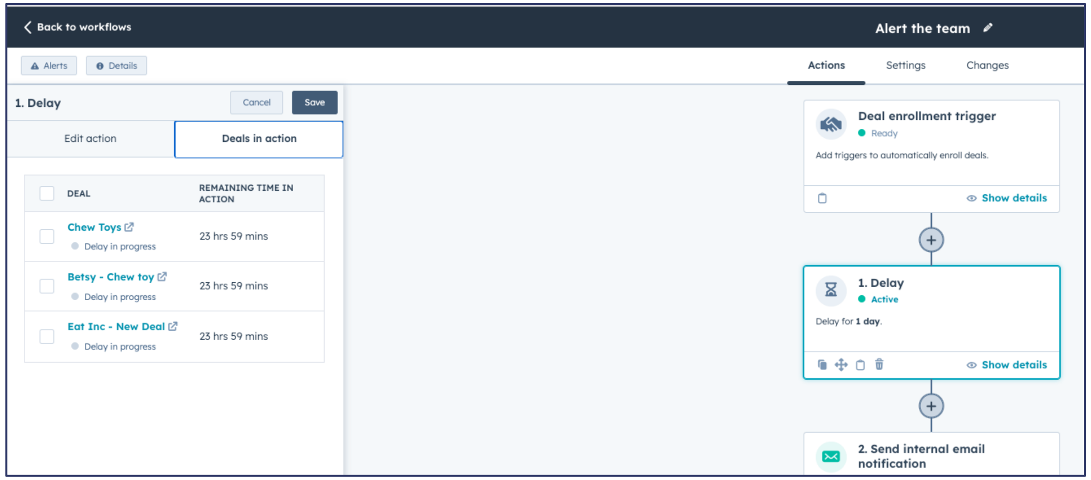
What’s New:

Workflow Changes

- **HubSpot will automatically cancel underperforming workflow emails**



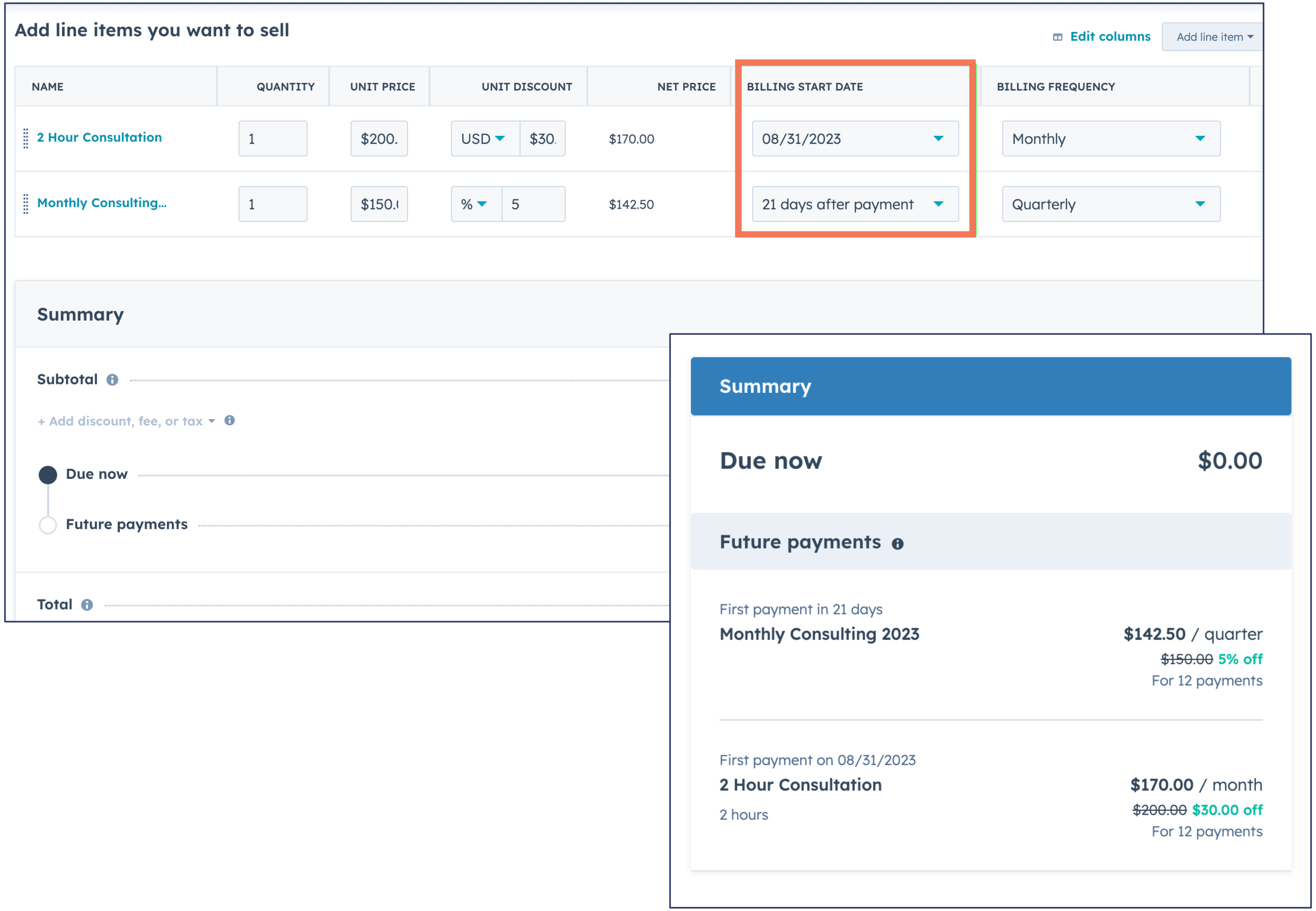
- **Steps will no longer show number of records in workflow actions**



What's New:

Subscriptions with No Upfront Payment

- Live
- All Hubs
- Starter, Pro, & Enterprise



Next Steps

- Identify 1-2 updates your team could benefit from right away

Get Expert Help

- Book a consultation with our team: SimpleStrat.com/Consult

OR

DIY

- Research the updates details on the HubSpot knowledge base and/or product updates section
- Enroll in any necessary betas
- Implement and measure the impact

- Join us next time! SimpleStrat.com/Webinars

Questions & Answers