

**INBOUND  
EDITION**

# 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
  - 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



Implement  
HubSpot



Learn  
HubSpot

- HubSpot Management -
- Marketing Support -



# Tyler Samani-Sprunk

Cofounder & CMO @ Simple Strat  
Cohost of HubSpot Hacks

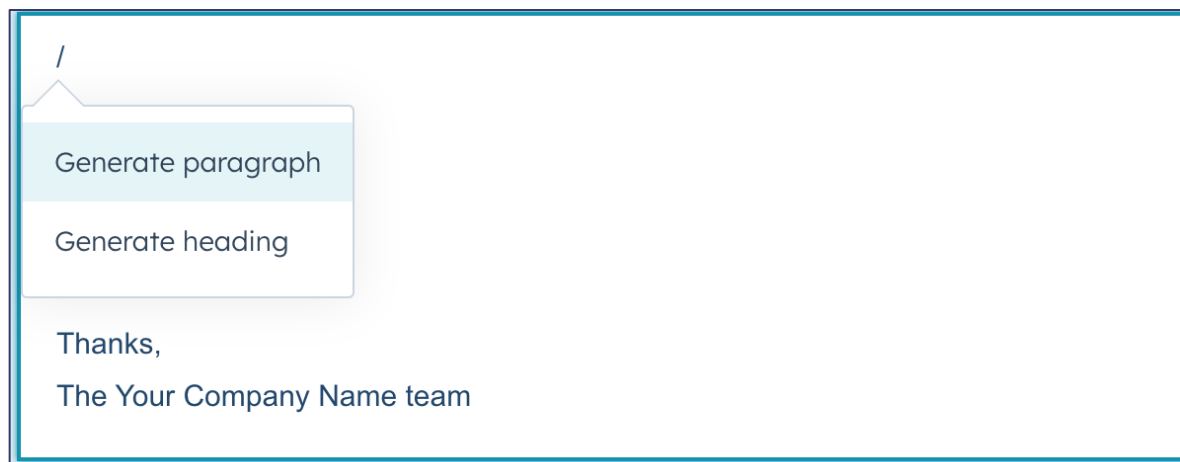
# Previously Covered Features

[YouTube.com/@HubSpotHacks](https://www.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](https://www.hubspot.com/Campaign-Assistant)





FLYWHEEL FUEL SERIES 

# Putting AI to Work: 33 Ideas for Sales and Marketing

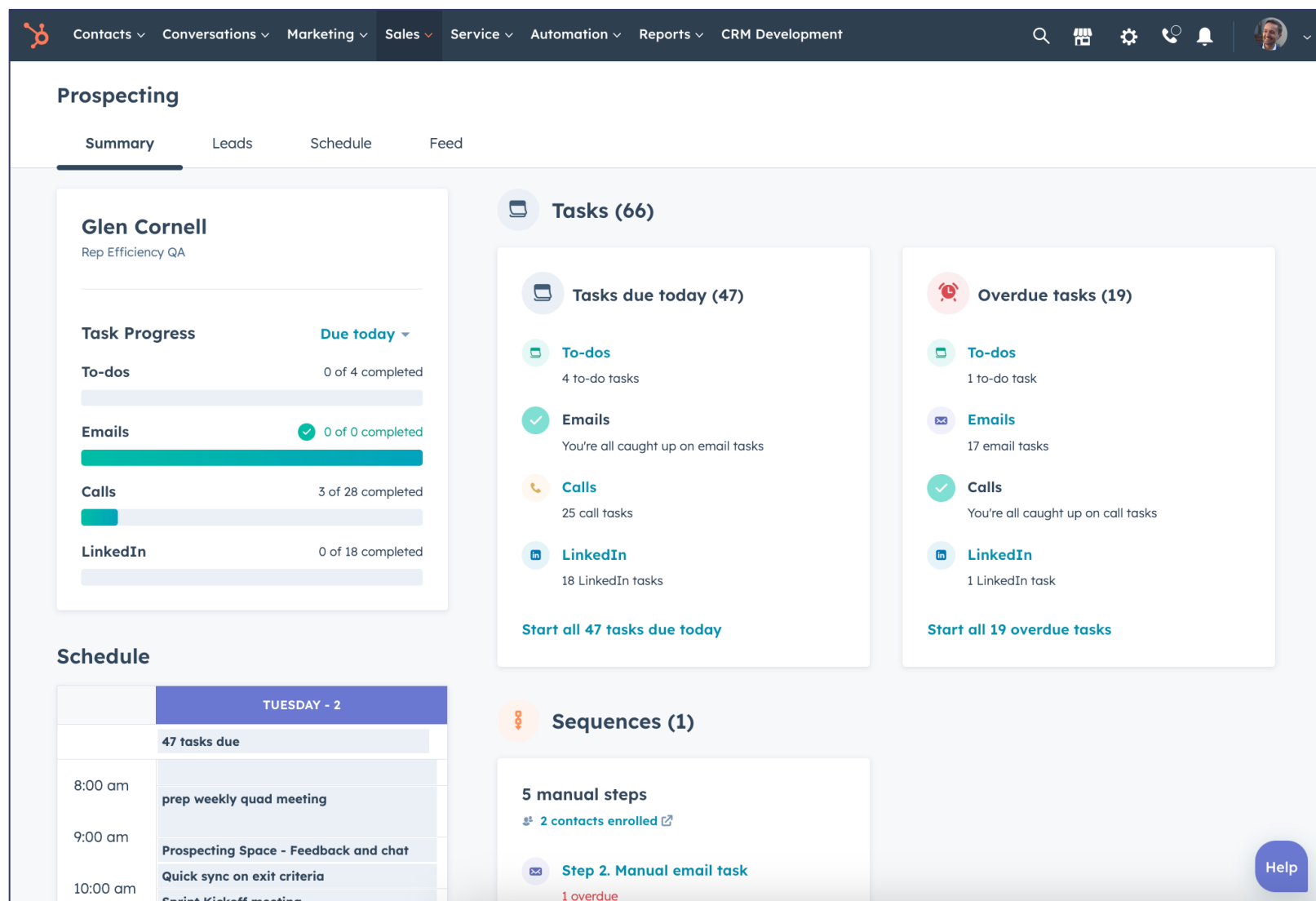
Wednesday, September 20  
12pm CST / 1pm EST



[SimpleStrat.com/Webinars](https://SimpleStrat.com/Webinars)

# Prospecting Workspace

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



The screenshot shows the HubSpot Prospecting Workspace for user Glen Cornell (Rep Efficiency QA). The interface includes a navigation bar with categories like Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, and CRM Development. The main content area is divided into several sections:

- Summary:** Displays task progress for To-dos (0 of 4 completed), Emails (0 of 0 completed), Calls (3 of 28 completed), and LinkedIn (0 of 18 completed).
- Tasks (66):** A summary of tasks due today (47) and overdue tasks (19). It breaks down tasks by type: To-dos (4), Emails (17), Calls (25), and LinkedIn (18).
- Schedule:** A calendar view for Tuesday showing tasks such as 'prep weekly quad meeting' at 8:00 am, 'Prospecting Space - Feedback and chat' at 9:00 am, and 'Quick sync on exit criteria' at 10:00 am.
- Sequences (1):** Shows a sequence with 5 manual steps and 2 contacts enrolled. The current step is 'Step 2. Manual email task' with 1 overdue item.

Help

# Sequence Reporting Improvements

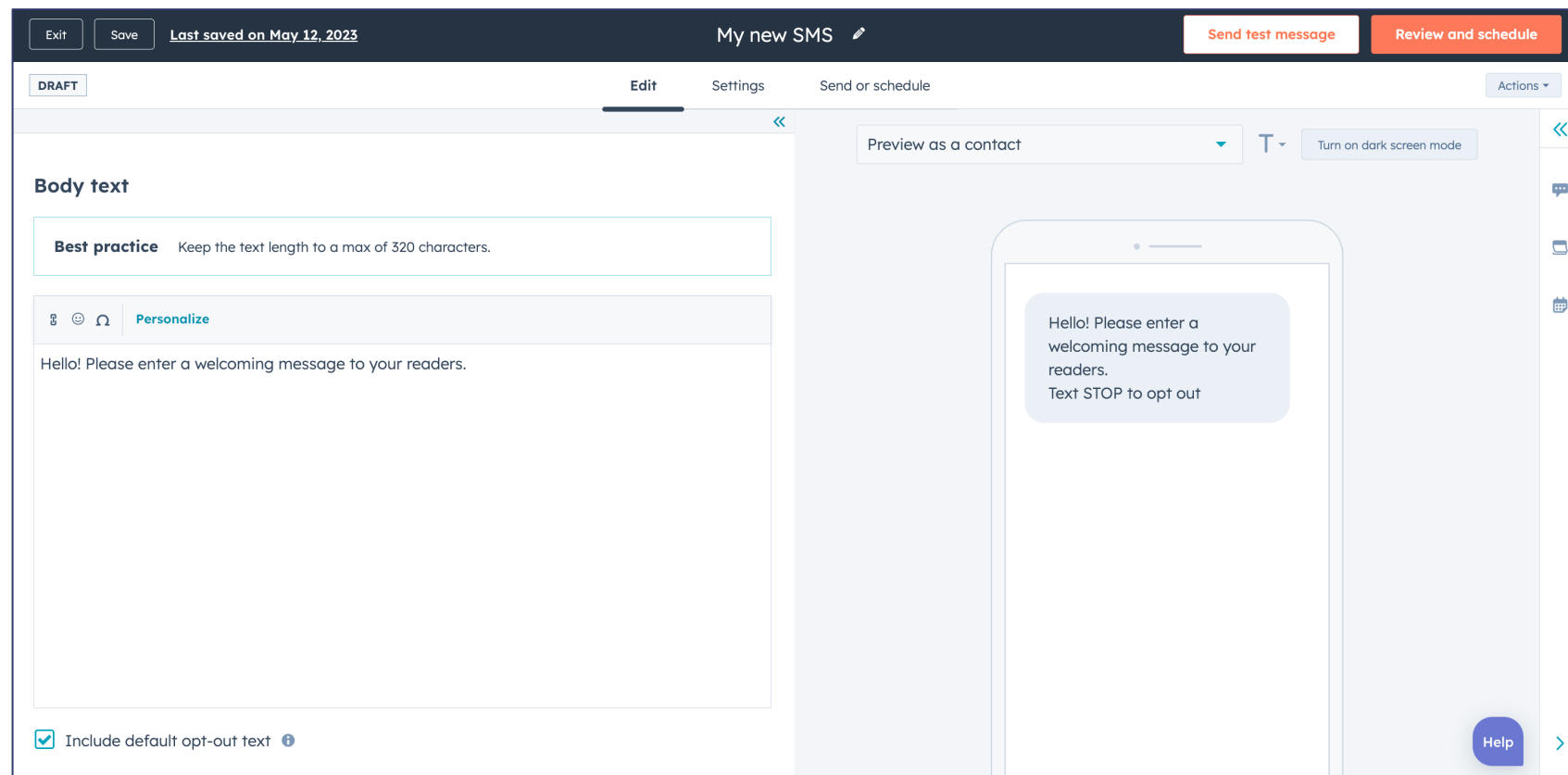
- Live
- Sales & Service Hubs
- Pro & Enterprise

**Step performance**  Hide steps no longer in use Rates Counts

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

# SMS Marketing Tool

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



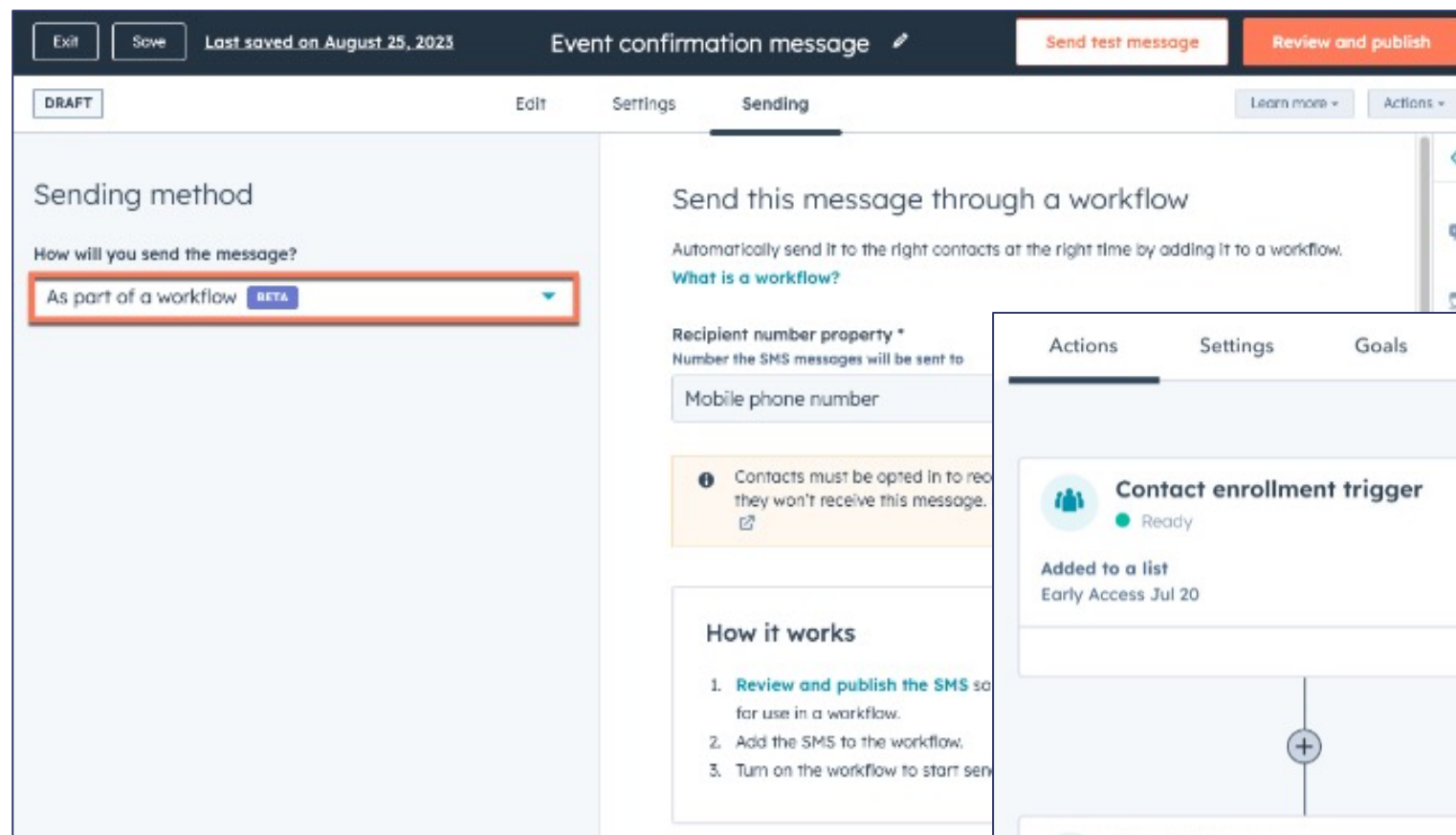
The screenshot displays the HubSpot SMS Marketing Tool interface. At the top, there are buttons for 'Exit', 'Save', and 'Last saved on May 12, 2023'. The main title is 'My new SMS'. On the right, there are buttons for 'Send test message' and 'Review and schedule'. Below the title bar, there are tabs for 'DRAFT', 'Edit', 'Settings', and 'Send or schedule'. The 'Edit' tab is active. The main content area is divided into two sections: 'Body text' and a preview. The 'Body text' section has a 'Best practice' note: 'Keep the text length to a max of 320 characters.' Below this is a 'Personalize' section with a 'Personalize' link. The main text area contains the message: 'Hello! Please enter a welcoming message to your readers.' At the bottom left, there is a checkbox labeled 'Include default opt-out text' which is checked. The preview section shows a mobile phone screen with the message: 'Hello! Please enter a welcoming message to your readers. Text STOP to opt out'. There are also navigation icons on the right side of the preview area.

# Exciting New Features & Use Cases

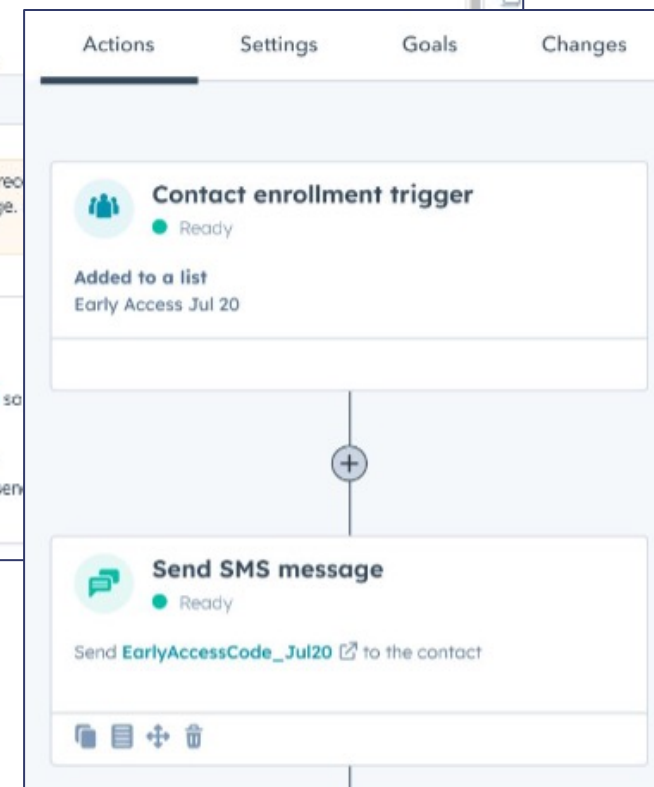
# What's New:

## SMS Automation

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



The screenshot shows the HubSpot interface for configuring an SMS message. At the top, there are buttons for 'Exit', 'Save', and 'Last saved on August 25, 2023'. The message title is 'Event confirmation message'. On the right, there are buttons for 'Send test message' and 'Review and publish'. Below this, there are tabs for 'DRAFT', 'Edit', 'Settings', and 'Sending'. The 'Sending' tab is active, showing a 'Sending method' dropdown menu with 'As part of a workflow' selected and a 'BETA' badge. To the right, there is a section titled 'Send this message through a workflow' with a description and a link 'What is a workflow?'. Below that, there is a 'Recipient number property' section with 'Mobile phone number' selected. A warning message states: 'Contacts must be opted in to receive this message.' At the bottom, there is a 'How it works' section with three steps: 1. Review and publish the SMS so far use in a workflow. 2. Add the SMS to the workflow. 3. Turn on the workflow to start sending.



The screenshot shows a HubSpot workflow builder interface. At the top, there are tabs for 'Actions', 'Settings', 'Goals', and 'Changes'. The 'Actions' tab is active, showing a workflow diagram. The first step is 'Contact enrollment trigger' with a 'Ready' status and a note 'Added to a list Early Access Jul 20'. Below this is a plus sign icon indicating a connection point. The second step is 'Send SMS message' with a 'Ready' status and a note 'Send EarlyAccessCode\_Jul20 to the contact'. At the bottom, there are icons for deleting, duplicating, and moving steps.

# 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



Connected (1)

Stay on top of the leads you're currently working on


[Follow up with leads](#)

All open stages ▾

NAME	LABEL	COMPANY
Alex Campbell	Hot	Cruz-Collins
Heather Lee		Pierce, F
Roku		Roku Add conta
Kenneth Lee		Leonard

◀ Prev 1 Next ▶ 25 per page ▾

[View lead](#) ✕



**Alex Campbell**  
Cruz-Collins  
alex.campbell-w42387@demospot.org

ⓘ ✍ ✉ ☎ 📄 📅 📱 ⋮

LAST CONTACTED	LAST ENGAGEMENT DATE
You logged a call on Aug 23, 2023 1:46 PM CDT	--

Leads (1)

**Connected** ▾ for 20 days

Created on 08/23/2023 1:43 PM CDT

LAST ACTIVITY

☎ Made a call [🔗](#)

20 days ago

NEXT ACTIVITY

🕒 [Schedule next activity](#) ▾

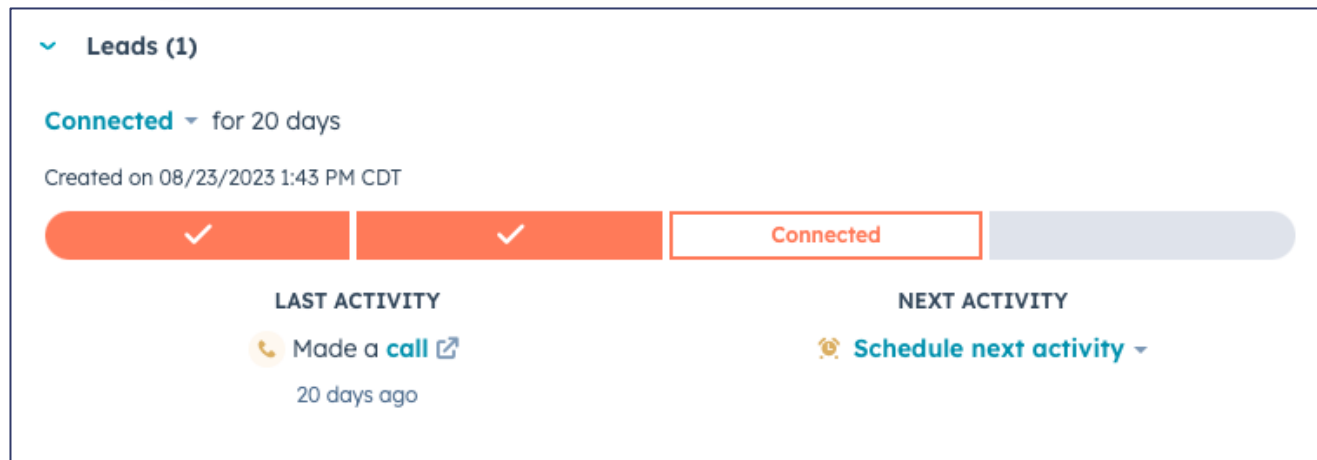
Recent communications ⓘ

▶ ☎ Tyler Samani-Sprunk logged a call [🔗](#) to Alex Campbell Aug 23, 2023



# 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



Leads (1)

Connected ▾ for 20 days

Created on 08/23/2023 1:43 PM CDT

✓ ✓ Connected

LAST ACTIVITY

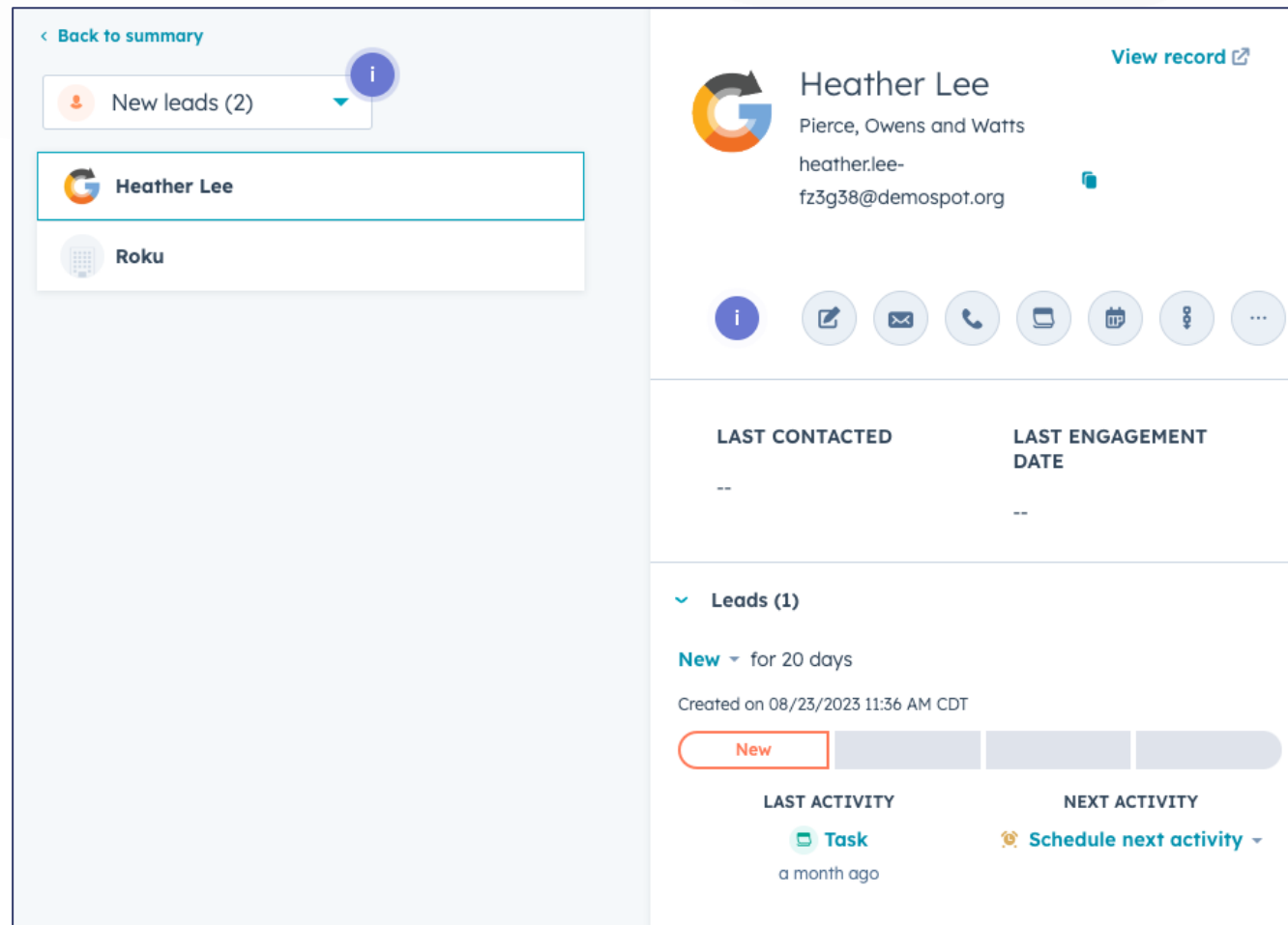
Made a call 20 days ago

NEXT ACTIVITY

Schedule next activity ▾

# 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?



The screenshot displays the HubSpot CRM interface for a lead. On the left, a sidebar shows a list of leads with 'New leads (2)' at the top, followed by 'Heather Lee' and 'Roku'. The main content area shows the profile for Heather Lee, including her name, company (Pierce, Owens and Watts), and email address (heather.lee-fz3g38@demospot.org). Below the profile, there are icons for various actions like info, edit, email, call, etc. A table shows 'LAST CONTACTED' and 'LAST ENGAGEMENT DATE' as '--'. A section titled 'Leads (1)' shows a lead with status 'New' and a task 'Task' scheduled 'a month ago'.

## 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](https://SimpleStrat.com/Consult)

# What's New:

## A/B Testing Sequence Steps

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



↗

1. Automated Email - Day 1

✓
Version A

...

	11	0%	0%	0%	0%
	Sends	Opens	Clicks	Replies	Meetings

Hey Contact: First name, I saw you downloaded Placeholder: X CONTENT from our website and was curious what you

▼ See more

✓
Version B

...

	17	0%	0%	0%	0%
	Sends	Opens	Clicks	Replies	Meetings

Hey Contact: First name, Just gave you a ring. I was looking over your website just now and thought you might enjoy some

▼ See more

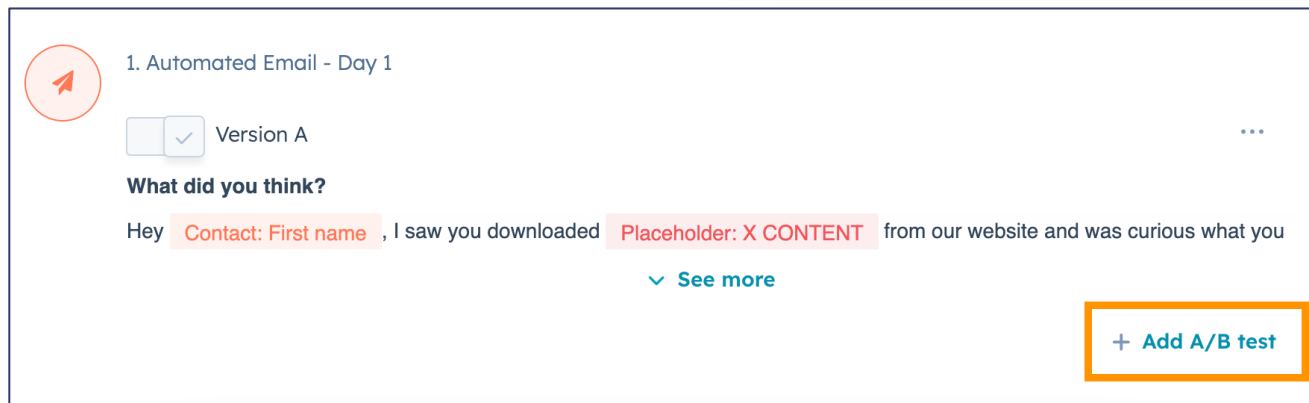
+ Add A/B test

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9/14/23 | 20

# 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



1. Automated Email - Day 1

Version A ...

**What did you think?**

Hey **Contact: First name**, I saw you downloaded **Placeholder: X CONTENT** from our website and was curious what you

[See more](#)

[+ Add A/B test](#)

# What's New:

## Lead Form Routing

- Public Beta
- Sales & Service Hubs
- Enterprise

### What should happen after someone submits this form?

Choose between displaying a thank you message or redirecting people to a website or scheduling page.

- Display a thank you message    Redirect to another page    Redirect to a Meetings scheduling page

Conditionally redirect people to different scheduling pages

### Set up conditions for redirecting visitors to a scheduling page ⓘ

IF

1 State/Region

2 is equal to any of

3 Asia x

REDIRECT TO

4 Round Robin

+ Add condition

+ Add field

### Choose what to display to visitors who don't meet any conditions

- Thank you message    Scheduling page

60 min, 30 min, and 15 min meeting

# 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

What should happen after someone submits this form?

Choose between displaying a thank you message or redirecting people to a website or scheduling page.

Display a thank you message
  Redirect to another page
  Redirect to a Meetings scheduling page NEW

Conditionally redirect people to different scheduling pages

Set up conditions for redirecting visitors to a scheduling page ⓘ

IF	REDIRECT TO
Country/Region	is equal to any of <span>United States</span> ×
	Test round robin

+ Add condition

+ Add field



Choose what to display to visitors who don't meet any conditions

Thank you message
  Scheduling page

Thank you for reaching out! Someone from our team will follow-up as soon as possible.

# 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


IF		REDIRECT TO
Country/Region ▼	is equal to any of ▼	United States x ▼
	is equal to any of ▼	Canada x ▼
	+ Add condition	
		60 min and 30 ... ▼ 
		Test round robin ▼ 



# What's New:

## Advanced Playbook Recommendations

- Live
- Sales & Service Hubs
- Pro & Enterprise

Discovery Playbook 

Write **Settings**

### Playbook logging

Log playbook submissions

Engagement types ⓘ Default call/meeting type

Call x ▼ Discovery Meeting or Call ▼

### Recommendation Settings

Use the filters to create custom recommendation rules. When a CRM record matches the rule, the right playbook will display at the right time.

**Filters** Actions ▼


**Group 1**

Lifecycle stage is any of Sales Qualified Lead

AND

Lead status is any of New

Playbooks Manage

Search 

**Discovery Playbook** RECOMMENDED

0 views

# 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

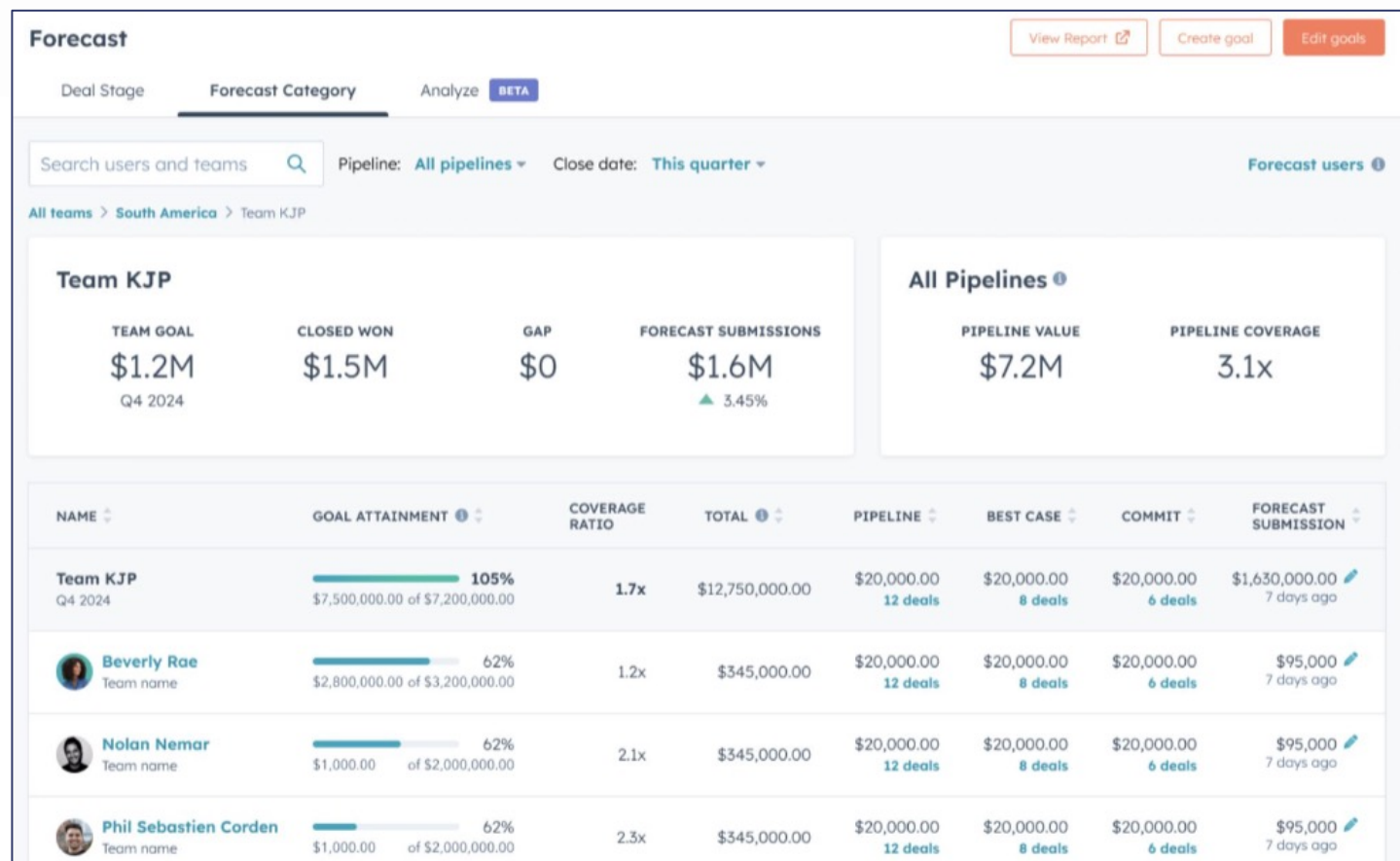
What are your 2023 targets?

 To bulk apply targets and pipelines, choose multiple contributors. < 2023 >

<input type="checkbox"/>	REP	PIPELINE	UNIT OF MEAS...	ACTIONS
<input type="checkbox"/>	 Tyler Samani-...	<div style="border: 1px solid #ccc; padding: 5px;"><p>Select pipelines ▼</p><ul style="list-style-type: none"><li><input type="checkbox"/> All pipelines</li><li><input type="checkbox"/> HubSpot Consulting</li><li><input type="checkbox"/> HubSpot Shared Selli...</li><li><input type="checkbox"/> HubSpot Auto-Renew...</li><li><input type="checkbox"/> Marketing Sales</li></ul></div>	USD \$	<a href="#">Apply tar</a>

# 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



**Forecast** | View Report | Create goal | Edit goals

Deal Stage | Forecast Category | Analyze BETA

Search users and teams | Pipeline: All pipelines | Close date: This quarter | Forecast users

All teams > South America > Team KJP

**Team KJP**

TEAM GOAL	CLOSED WON	GAP	FORECAST SUBMISSIONS
\$1.2M	\$1.5M	\$0	\$1.6M
Q4 2024			▲ 3.45%

**All Pipelines**

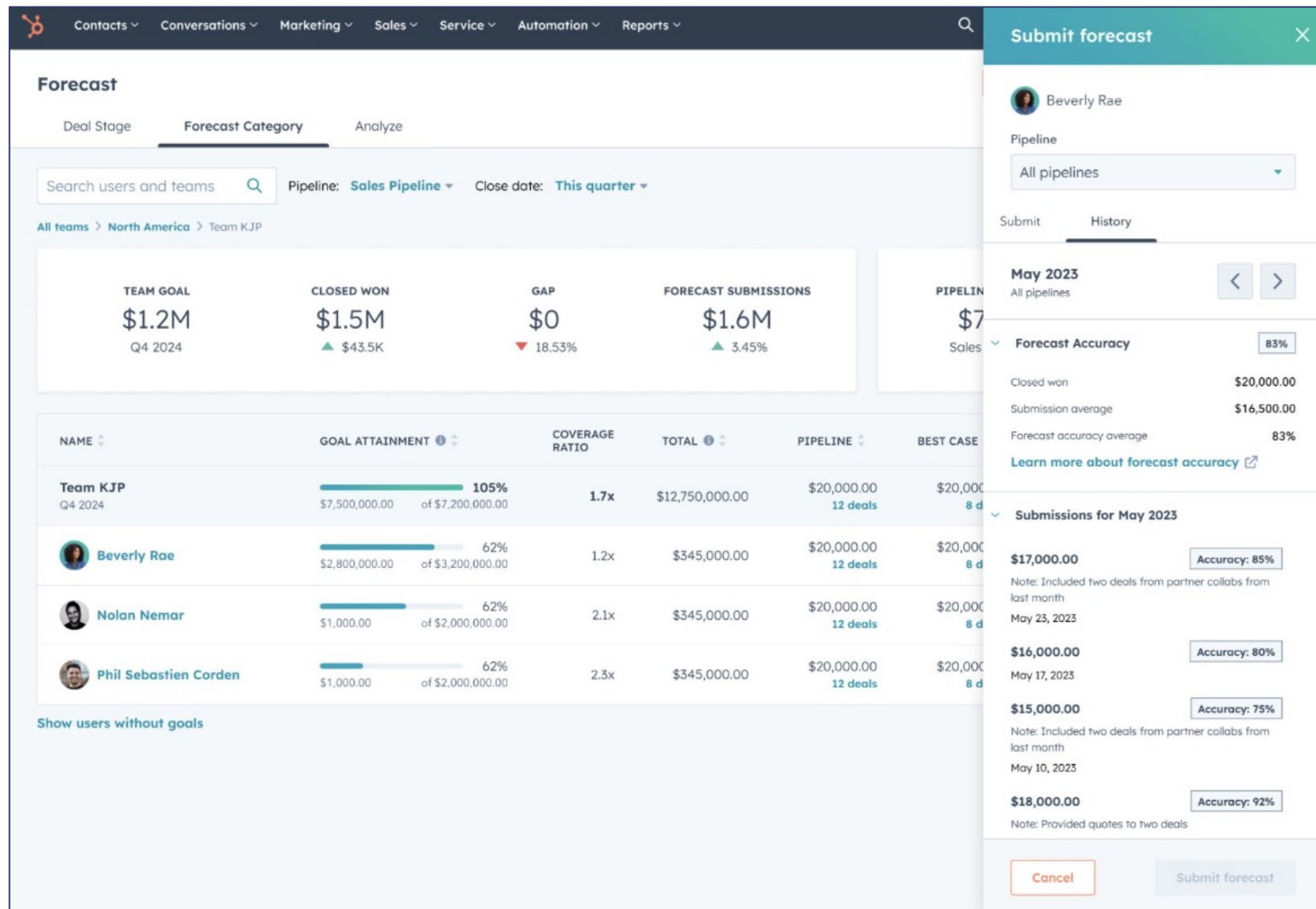
PIPELINE VALUE	PIPELINE COVERAGE
\$7.2M	3.1x

NAME	GOAL ATTAINMENT	COVERAGE RATIO	TOTAL	PIPELINE	BEST CASE	COMMIT	FORECAST SUBMISSION
<b>Team KJP</b> Q4 2024	<div style="width: 105%;"><div style="width: 100%;">105%</div></div> \$7,500,000.00 of \$7,200,000.00	1.7x	\$12,750,000.00	\$20,000.00 12 deals	\$20,000.00 8 deals	\$20,000.00 6 deals	\$1,630,000.00 7 days ago
<b>Beverly Rae</b> Team name	<div style="width: 62%;"><div style="width: 100%;">62%</div></div> \$2,800,000.00 of \$3,200,000.00	1.2x	\$345,000.00	\$20,000.00 12 deals	\$20,000.00 8 deals	\$20,000.00 6 deals	\$95,000 7 days ago
<b>Nolan Nemar</b> Team name	<div style="width: 62%;"><div style="width: 100%;">62%</div></div> \$1,000.00 of \$2,000,000.00	2.1x	\$345,000.00	\$20,000.00 12 deals	\$20,000.00 8 deals	\$20,000.00 6 deals	\$95,000 7 days ago
<b>Phil Sebastien Corden</b> Team name	<div style="width: 62%;"><div style="width: 100%;">62%</div></div> \$1,000.00 of \$2,000,000.00	2.3x	\$345,000.00	\$20,000.00 12 deals	\$20,000.00 8 deals	\$20,000.00 6 deals	\$95,000 7 days ago

# What's New:

## Forecast Accuracy Tracking

- Live
- Sales Hub
- Pro & Enterprise



The screenshot shows the HubSpot Forecast Accuracy Tracking interface. The main view displays a summary of team goals and a table of user performance. A 'Submit forecast' modal is open on the right, showing a detailed breakdown of forecast accuracy for May 2023.

**Forecast Summary:**

- TEAM GOAL: \$1.2M (Q4 2024)
- CLOSED WON: \$1.5M (+\$43.5K)
- GAP: \$0 (-18.53%)
- FORECAST SUBMISSIONS: \$1.6M (+3.45%)
- PIPELINE: \$7M

**Team Performance Table:**

NAME	GOAL ATTAINMENT	COVERAGE RATIO	TOTAL	PIPELINE	BEST CASE
Team KJP (Q4 2024)	105% (\$7,500,000.00 of \$7,200,000.00)	1.7x	\$12,750,000.00	\$20,000.00 (12 deals)	\$20,000.00 (8 deals)
Beverly Rae	62% (\$2,800,000.00 of \$3,200,000.00)	1.2x	\$345,000.00	\$20,000.00 (12 deals)	\$20,000.00 (8 deals)
Nolan Nemar	62% (\$1,000.00 of \$2,000,000.00)	2.1x	\$345,000.00	\$20,000.00 (12 deals)	\$20,000.00 (8 deals)
Phil Sebastien Corden	62% (\$1,000.00 of \$2,000,000.00)	2.3x	\$345,000.00	\$20,000.00 (12 deals)	\$20,000.00 (8 deals)

[Show users without goals](#)

**Submit forecast Modal (May 2023):**

- Forecast Accuracy: 83%
- Closed won: \$20,000.00
- Submission average: \$16,500.00
- Forecast accuracy average: 83%
- Submissions for May 2023:
  - \$17,000.00 (Accuracy: 85%) - Note: Included two deals from partner collabs from last month. May 23, 2023
  - \$16,000.00 (Accuracy: 80%) - May 17, 2023
  - \$15,000.00 (Accuracy: 75%) - Note: Included two deals from partner collabs from last month. May 10, 2023
  - \$18,000.00 (Accuracy: 92%) - Note: Provided quotes to two deals

# 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

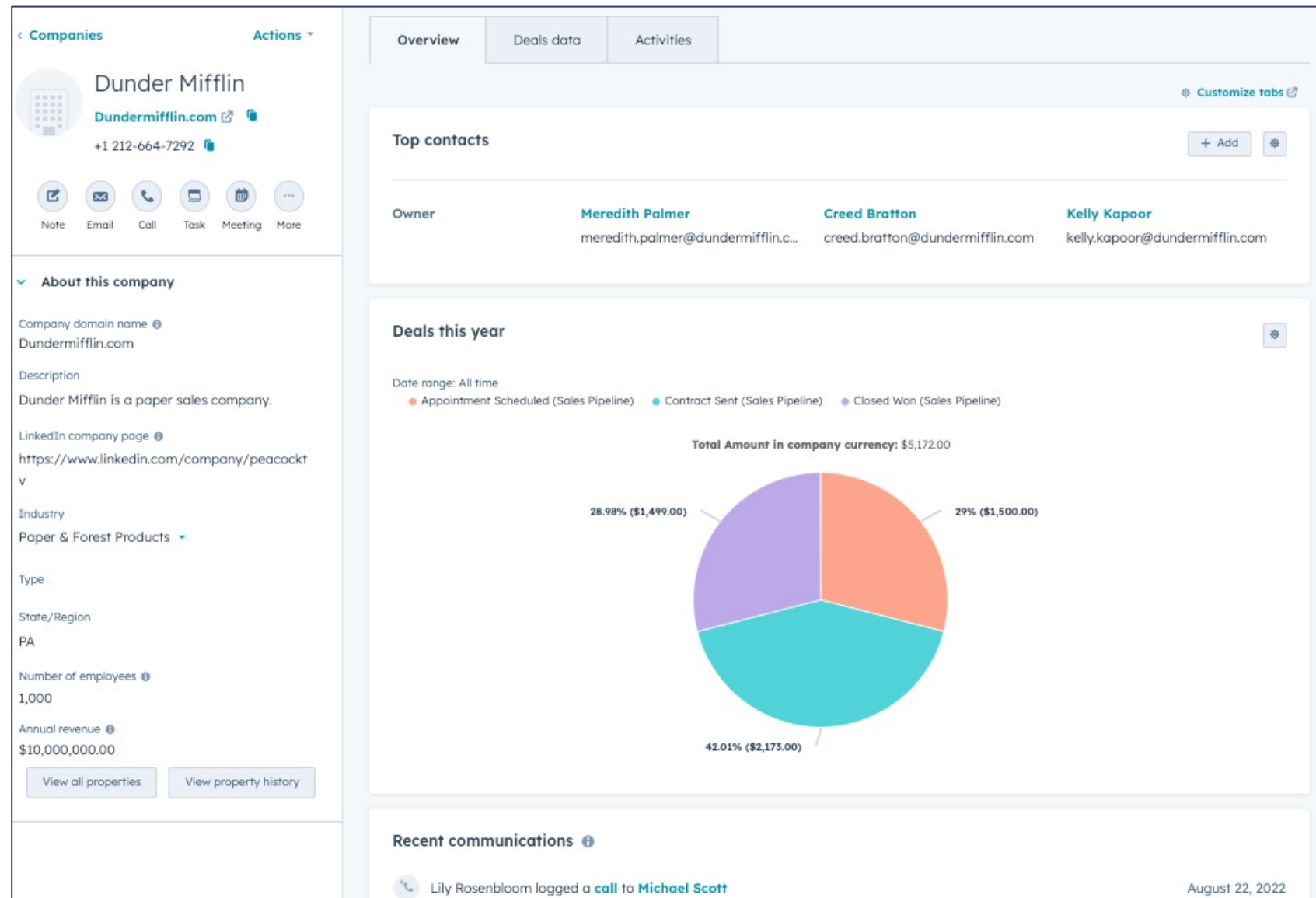
# What's New:

# 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



The screenshot shows the HubSpot CRM Record Page Editor for the company 'Dunder Mifflin'. The interface is divided into two main columns. The left column contains company details, and the right column contains a summary and analytics.

**Left Column: Company Details**

- Header:** Companies | Actions
- Company Profile:** Dunder Mifflin, Dundermifflin.com, +1 212-664-7292
- Actions:** Note, Email, Call, Task, Meeting, More
- About this company:**
  - Company domain name: Dundermifflin.com
  - Description: Dunder Mifflin is a paper sales company.
  - LinkedIn company page: https://www.linkedin.com/company/peacocktv
  - Industry: Paper & Forest Products
  - Type: (empty)
  - State/Region: PA
  - Number of employees: 1,000
  - Annual revenue: \$10,000,000.00
- Buttons:** View all properties, View property history

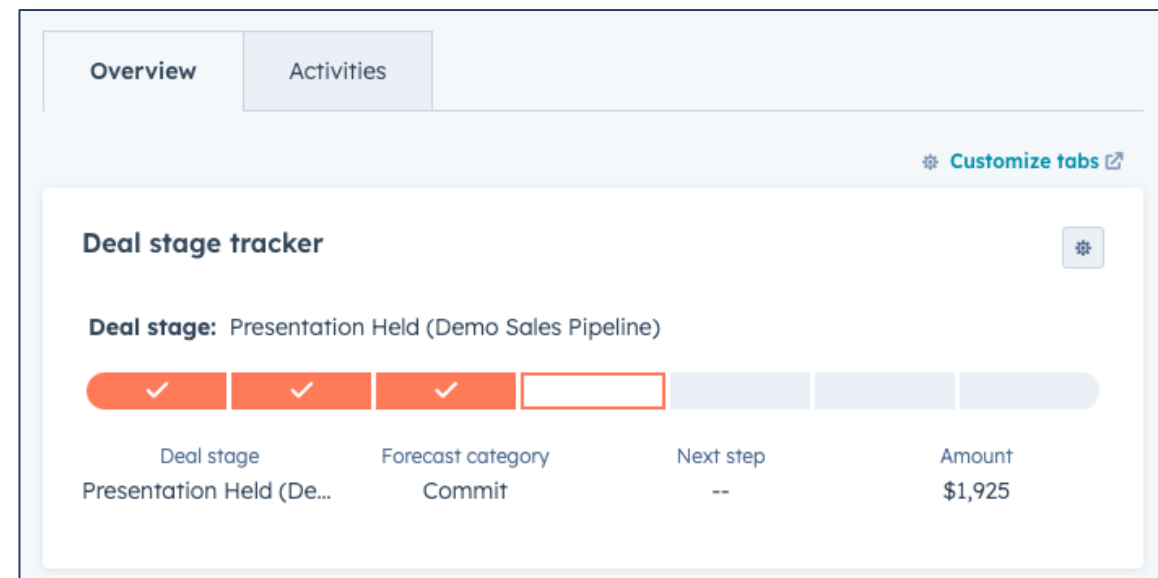
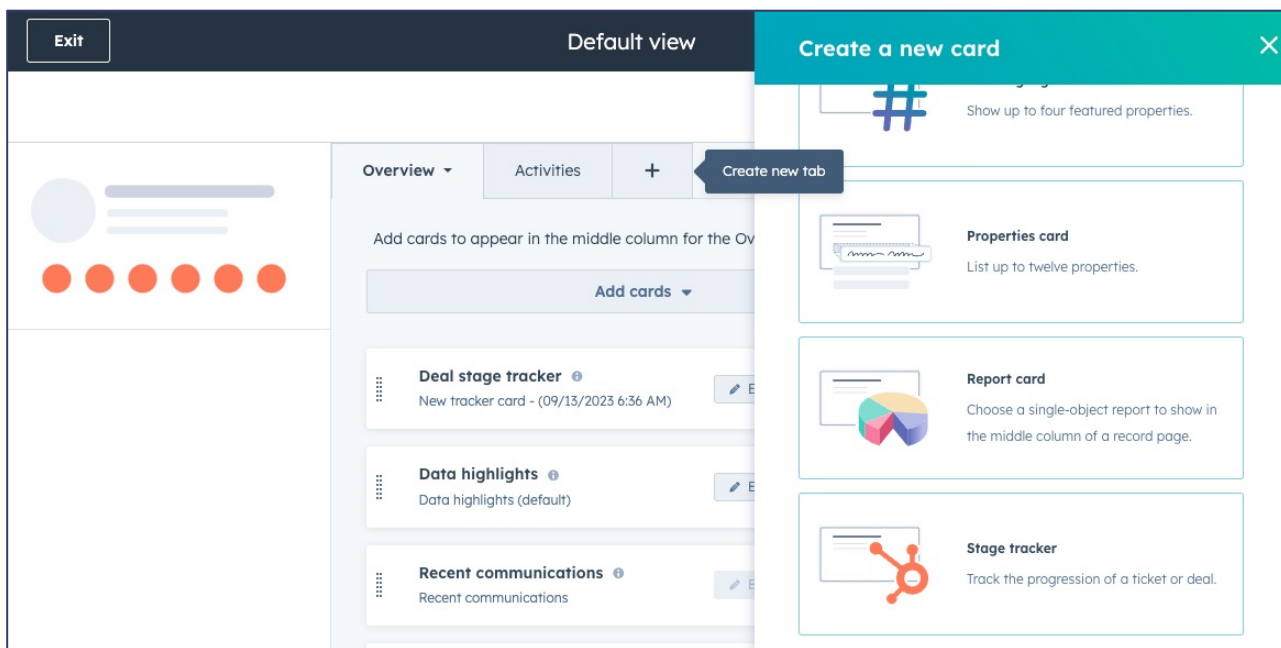
**Right Column: Summary and Analytics**

- Overview:** Overview | Deals data | Activities | Customize tabs
- Top contacts:** Meredith Palmer, Creed Bratton, Kelly Kapoor
- Deals this year:**
  - Date range: All time
  - Total Amount in company currency: \$5,172.00
  - Legend: Appointment Scheduled (Sales Pipeline), Contract Sent (Sales Pipeline), Closed Won (Sales Pipeline)
  - Pie chart data:
 

Category	Percentage	Amount
Appointment Scheduled (Sales Pipeline)	28.98%	(\$1,499.00)
Contract Sent (Sales Pipeline)	29%	(\$1,500.00)
Closed Won (Sales Pipeline)	42.01%	(\$2,173.00)
- Recent communications:** Lily Rosenbloom logged a call to Michael Scott (August 22, 2022)

# Use Editor Now: Visualize Progress for Deals & Tickets

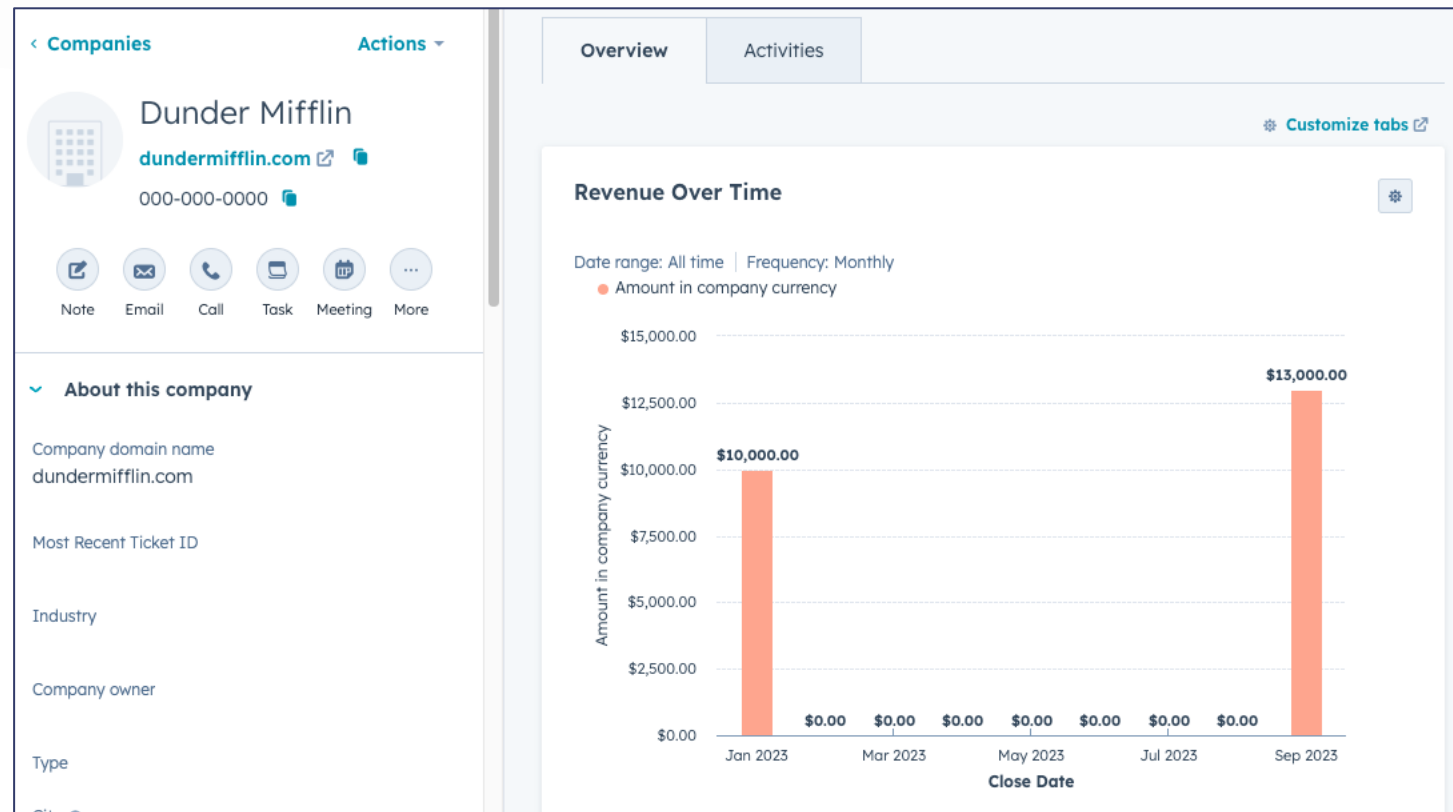
- Add new Stage Tracker card
  - Settings > Object > Record Customization > Customize Middle Column > Add cards > Create New Card





# 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

**Team views**


Search by view or team name   [Create team view](#)

TEAM VIEW	ASSIGNED TO	LAST UPDATED	
<a href="#">Sales Team View</a>	No teams assigned	Sep 13, 2023 7:08 AM CDT Tyler Samani-Sprunk	⋮
<a href="#">Service Team View</a>	No teams assigned	Sep 13, 2023 7:08 AM CDT Tyler Samani-Sprunk	⋮

## Enterprise Only

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

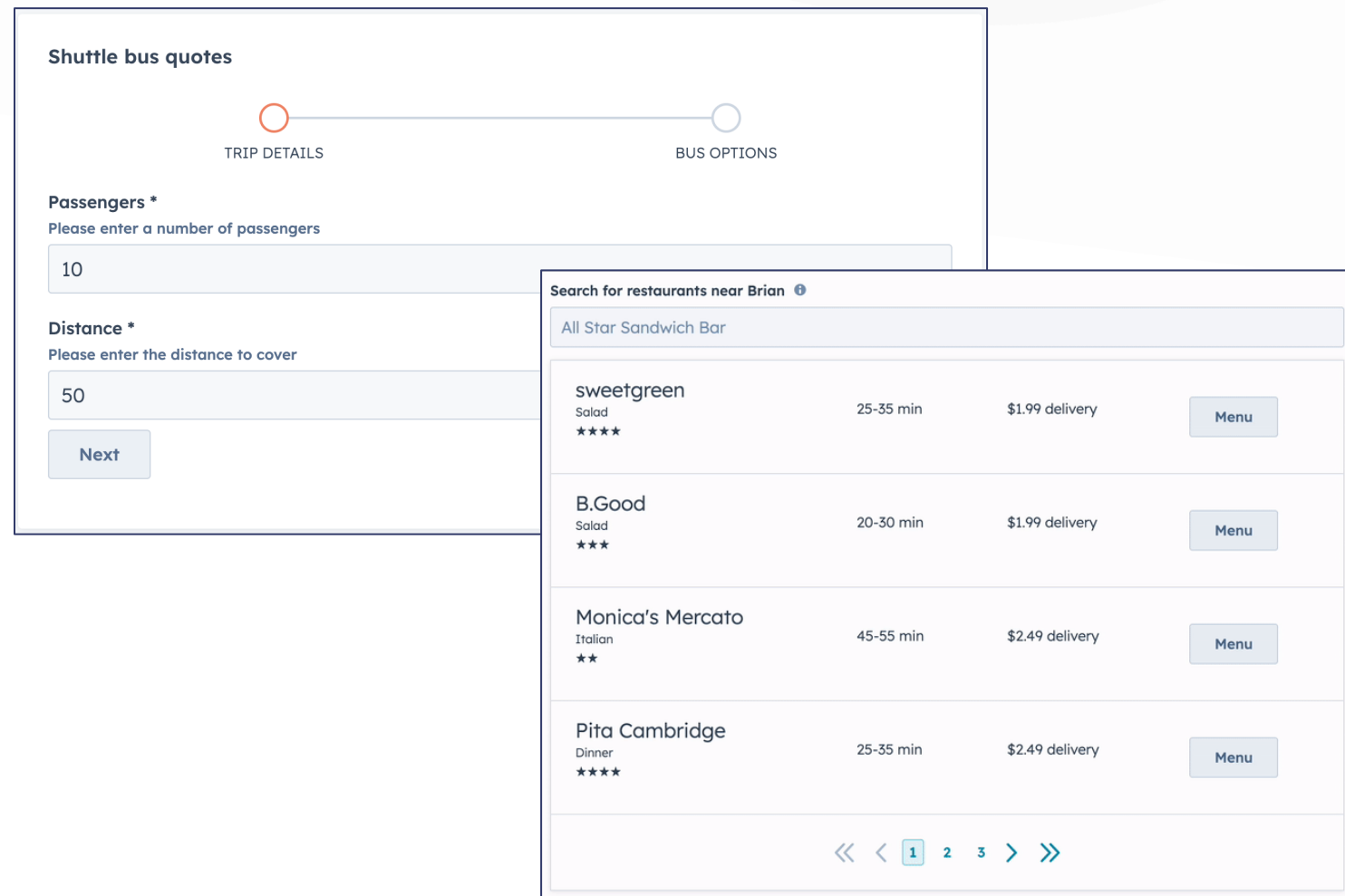
Overview | Activities | **Sales** | [Customize tabs](#)

**Sales property highlights** 

LIFECYCLE STAGE	CONTACT PRIORITY	LAST ENGAGEMENT DATE	LAST CONTACTED
Customer	Closed won	--	11/16/2022 9:00 AM EST

# 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



**Shuttle bus quotes**

TRIP DETAILS — BUS OPTIONS

**Passengers \***  
Please enter a number of passengers

10

**Distance \***  
Please enter the distance to cover

50

Next

---

**Search for restaurants near Brian**

All Star Sandwich Bar

<b>sweetgreen</b> Salad ★★★★	25-35 min	\$1.99 delivery	Menu
<b>B.Good</b> Salad ★★★	20-30 min	\$1.99 delivery	Menu
<b>Monica's Mercato</b> Italian ★★	45-55 min	\$2.49 delivery	Menu
<b>Pita Cambridge</b> Dinner ★★★★	25-35 min	\$2.49 delivery	Menu

« < 1 2 3 > »

# 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.



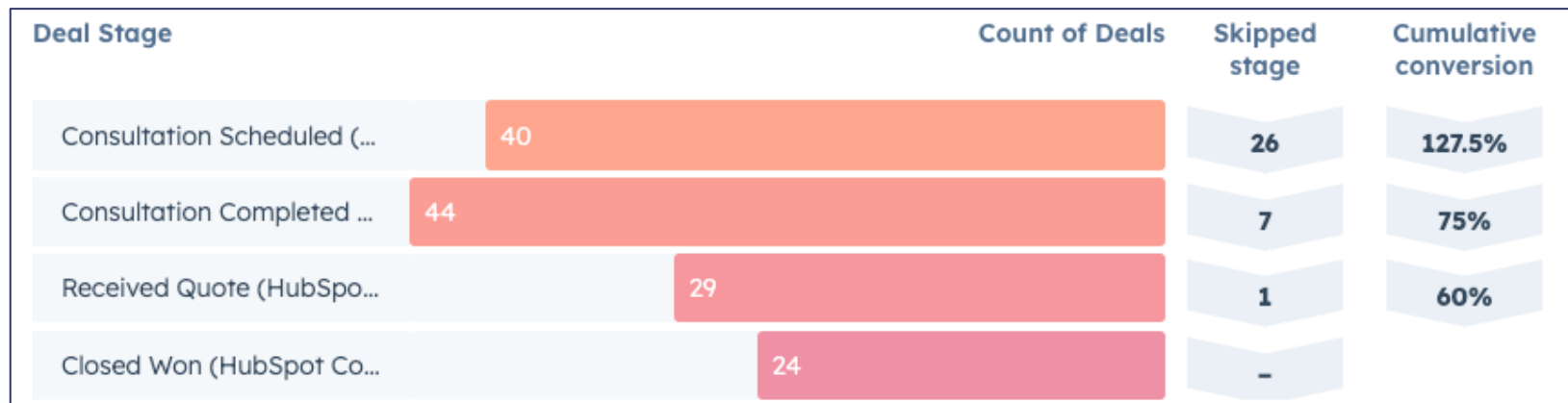
### Quotes

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



# What's New:

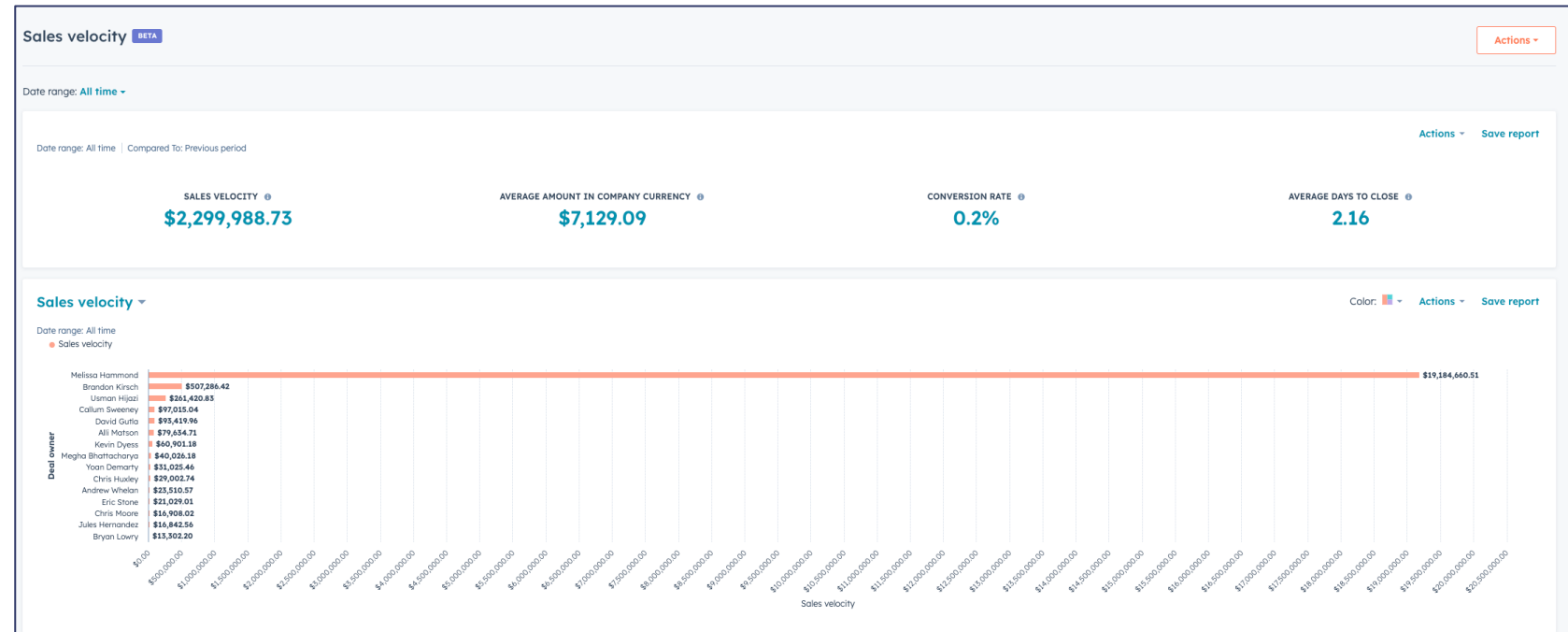
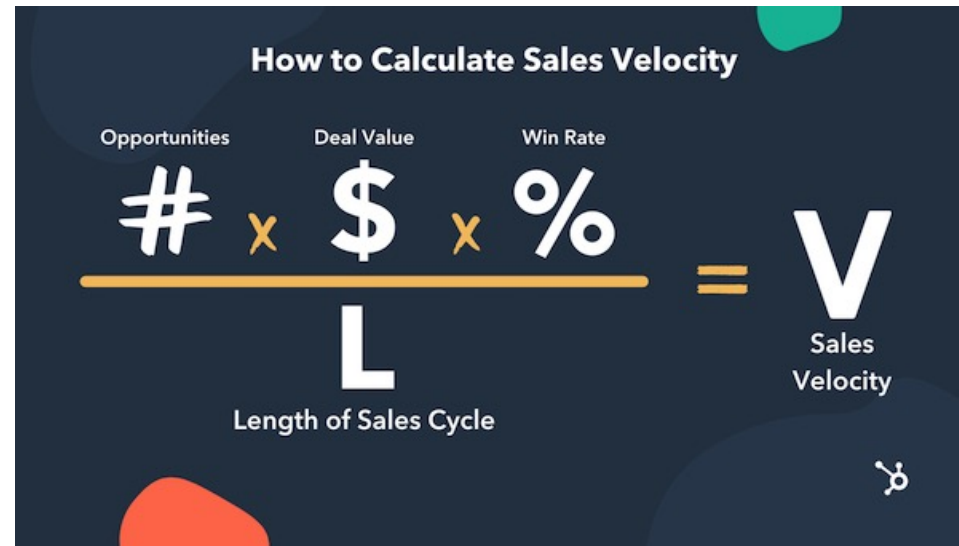
## Lead Funnel Report

- 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

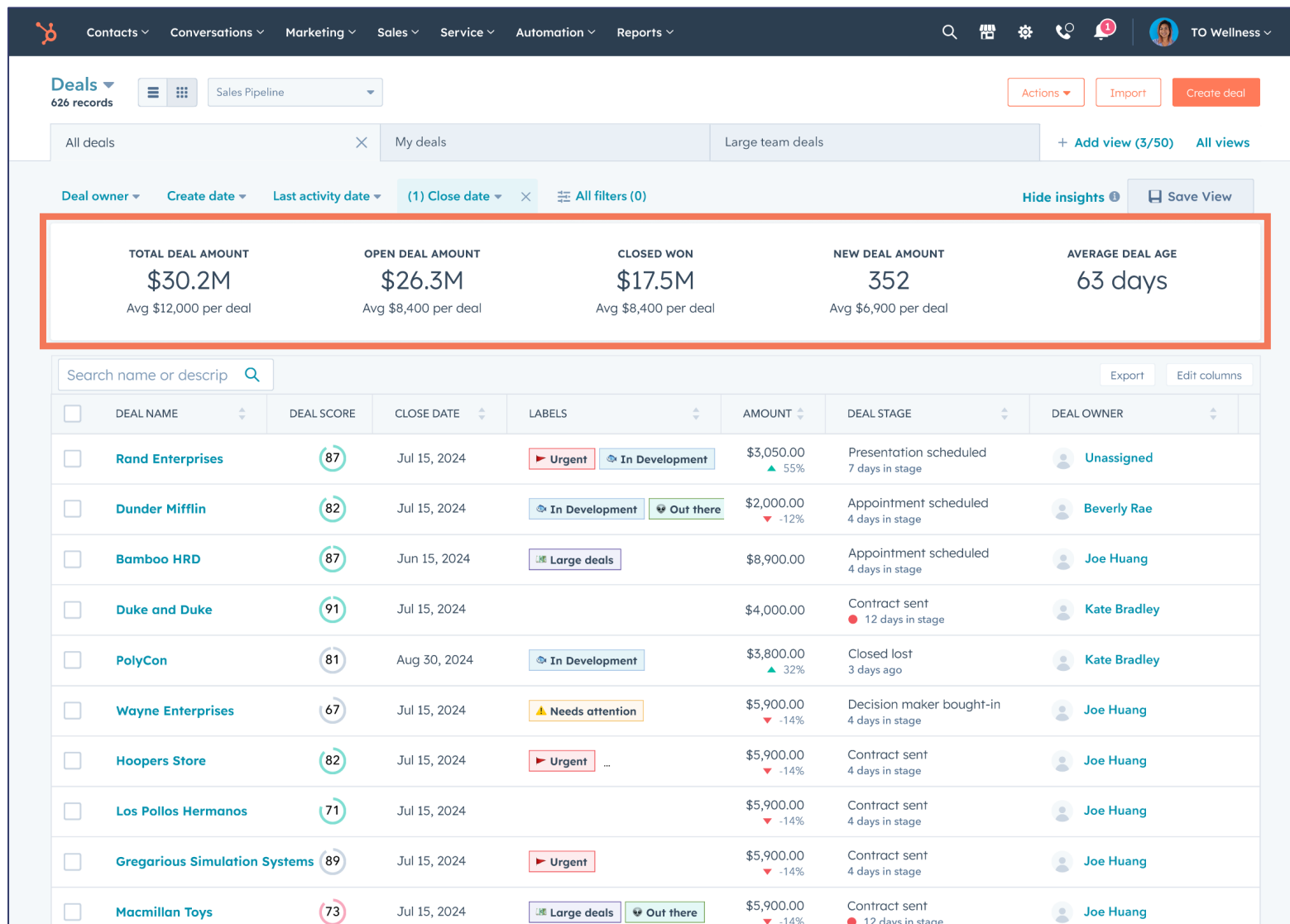




# What's New:

## Deal Insights

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



The screenshot shows the HubSpot Deals interface. At the top, there are navigation tabs for Contacts, Conversations, Marketing, Sales, Service, Automation, and Reports. The main header includes 'Deals' with 626 records, a 'Sales Pipeline' dropdown, and buttons for 'Actions', 'Import', and 'Create deal'. Below this, there are filters for 'All deals', 'My deals', and 'Large team deals', along with an 'Add view (3/50)' button. A secondary filter bar includes 'Deal owner', 'Create date', 'Last activity date', '(1) Close date', and 'All filters (0)'. There are also 'Hide insights' and 'Save View' options.

The 'Deal Insights' summary is highlighted with a red box and contains the following data:

TOTAL DEAL AMOUNT	OPEN DEAL AMOUNT	CLOSED WON	NEW DEAL AMOUNT	AVERAGE DEAL AGE
\$30.2M Avg \$12,000 per deal	\$26.3M Avg \$8,400 per deal	\$17.5M Avg \$8,400 per deal	352 Avg \$6,900 per deal	63 days

Below the summary is a search bar and a table of deals. The table has columns for DEAL NAME, DEAL SCORE, CLOSE DATE, LABELS, AMOUNT, DEAL STAGE, and DEAL OWNER. The deals listed are:

DEAL NAME	DEAL SCORE	CLOSE DATE	LABELS	AMOUNT	DEAL STAGE	DEAL OWNER
Rand Enterprises	87	Jul 15, 2024	Urgent, In Development	\$3,050.00 ▲ 55%	Presentation scheduled 7 days in stage	Unassigned
Dunder Mifflin	82	Jul 15, 2024	In Development, Out there	\$2,000.00 ▼ -12%	Appointment scheduled 4 days in stage	Beverly Rae
Bamboo HRD	87	Jun 15, 2024	Large deals	\$8,900.00	Appointment scheduled 4 days in stage	Joe Huang
Duke and Duke	91	Jul 15, 2024		\$4,000.00	Contract sent ● 12 days in stage	Kate Bradley
PolyCon	81	Aug 30, 2024	In Development	\$3,800.00 ▲ 32%	Closed lost 3 days ago	Kate Bradley
Wayne Enterprises	67	Jul 15, 2024	Needs attention	\$5,900.00 ▼ -14%	Decision maker bought-in 4 days in stage	Joe Huang
Hoopers Store	82	Jul 15, 2024	Urgent	\$5,900.00 ▼ -14%	Contract sent 4 days in stage	Joe Huang
Los Pollos Hermanos	71	Jul 15, 2024		\$5,900.00 ▼ -14%	Contract sent 4 days in stage	Joe Huang
Gregarious Simulation Systems	89	Jul 15, 2024	Urgent	\$5,900.00 ▼ -14%	Contract sent 4 days in stage	Joe Huang
Macmillan Toys	73	Jul 15, 2024	Large deals, Out there	\$5,900.00 ▼ -14%	Contract sent ● 12 days in stage	Joe Huang



# 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]

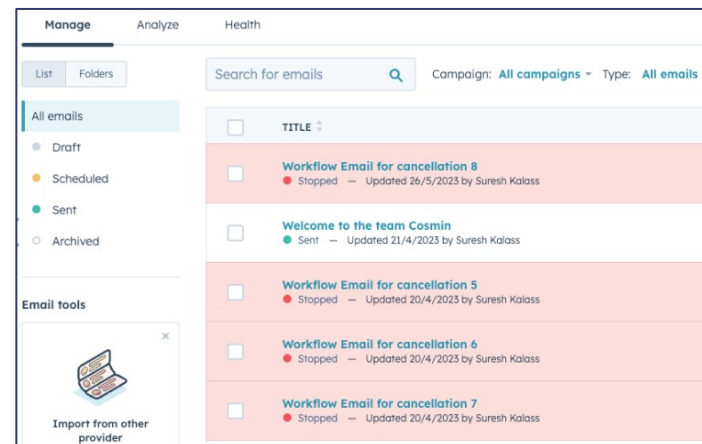


A screenshot of the Salesforce CRM interface. The top navigation bar shows "Sales Console" and "Contacts". The main content area is divided into two columns. The left column displays the contact profile for "Teacher Melissa", including fields for Title, Company, Phone, and Email. The right column shows the "Activity" tab, which is filtered to show "HubSpot Embed" events. The activity list includes events such as "You have a meeting with Melissa Nelson" (Sep 5, 2023), "Melissa Nelson was added to Meeting Logged in CRM is known" (Aug 7, 2023), and "Melissa Nelson was synced with Salesforce" (Mar 23, 2023). A "Load more events" link is visible at the bottom of the activity list. The bottom of the interface shows the lead owner "Winnie Hien" and the contact name "Teacher Melissa".

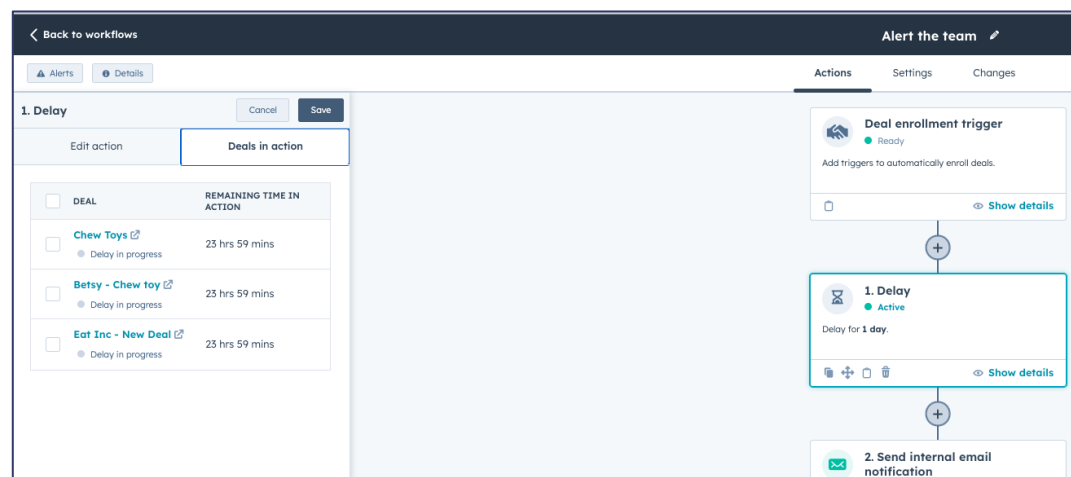
# What's New:

## 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

Add line items you want to sell Edit columns Add line item

NAME	QUANTITY	UNIT PRICE	UNIT DISCOUNT	NET PRICE	BILLING START DATE	BILLING FREQUENCY
2 Hour Consultation	1	\$200.	USD ▼ \$30.	\$170.00	08/31/2023 ▼	Monthly ▼
Monthly Consulting...	1	\$150.0	% ▼ 5	\$142.50	21 days after payment ▼	Quarterly ▼

Summary

Subtotal ⓘ

+ Add discount, fee, or tax ▼ ⓘ

Due now

Future payments

Total ⓘ

Summary

**Due now** **\$0.00**

**Future payments ⓘ**

First payment in 21 days

**Monthly Consulting 2023** **\$142.50 / quarter**

~~\$150.00~~ **5% off**

For 12 payments

---

First payment on 08/31/2023

**2 Hour Consultation** **\$170.00 / month**

2 hours ~~\$200.00~~ **\$30.00 off**

For 12 payments

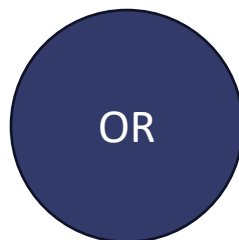


# Next Steps

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

## Get Expert Help

- Book a consultation with our team:  
[SimpleStrat.com/Consult](https://SimpleStrat.com/Consult)



## 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](https://SimpleStrat.com/Webinars)

# Questions & Answers