Getting the Most Out of HubSpot's November 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?

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On Deck

1. Exciting New Features & Use Cases
   - Sales pipeline rules
   - Easier workflow creation
   - New LinkedIn capabilities
2. Small but Mighty Updates
   - New meeting features
   - Better email privacy
   - AI subject lines
3. Q & A

Simplify Growth

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

Buy HubSpot

Fix HubSpot

Put HubSpot to Work

- HubSpot Management -

- Marketing Support -

Implement HubSpot

Learn HubSpot

Tyler Samani-Sprunk

Cofounder & CMO @ Simple Strat

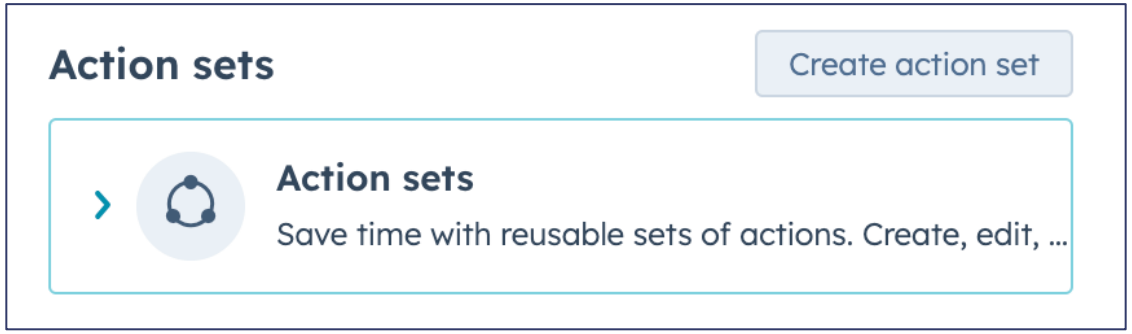
Cohost of HubSpot Hacks

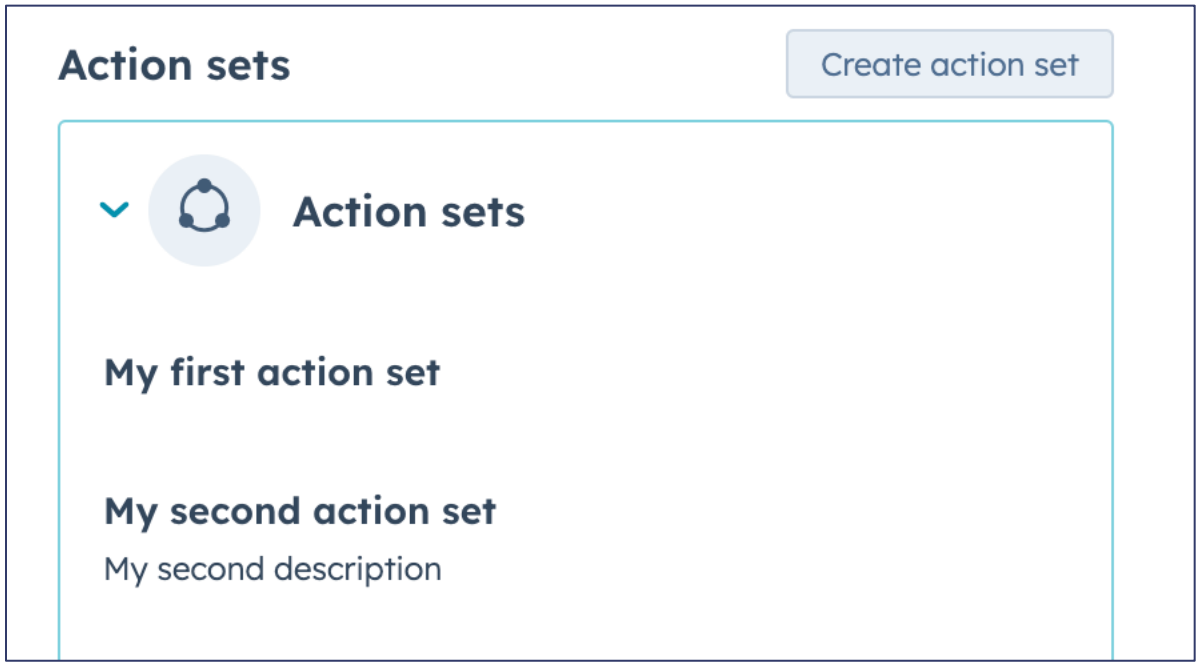
Exciting New Features & Use Cases

What's New:

Save & Reuse Groups of Workflow Actions with Action Sets

- Private Beta
- Marketing, Operations, Sales & Service Hubs
- Enterprise





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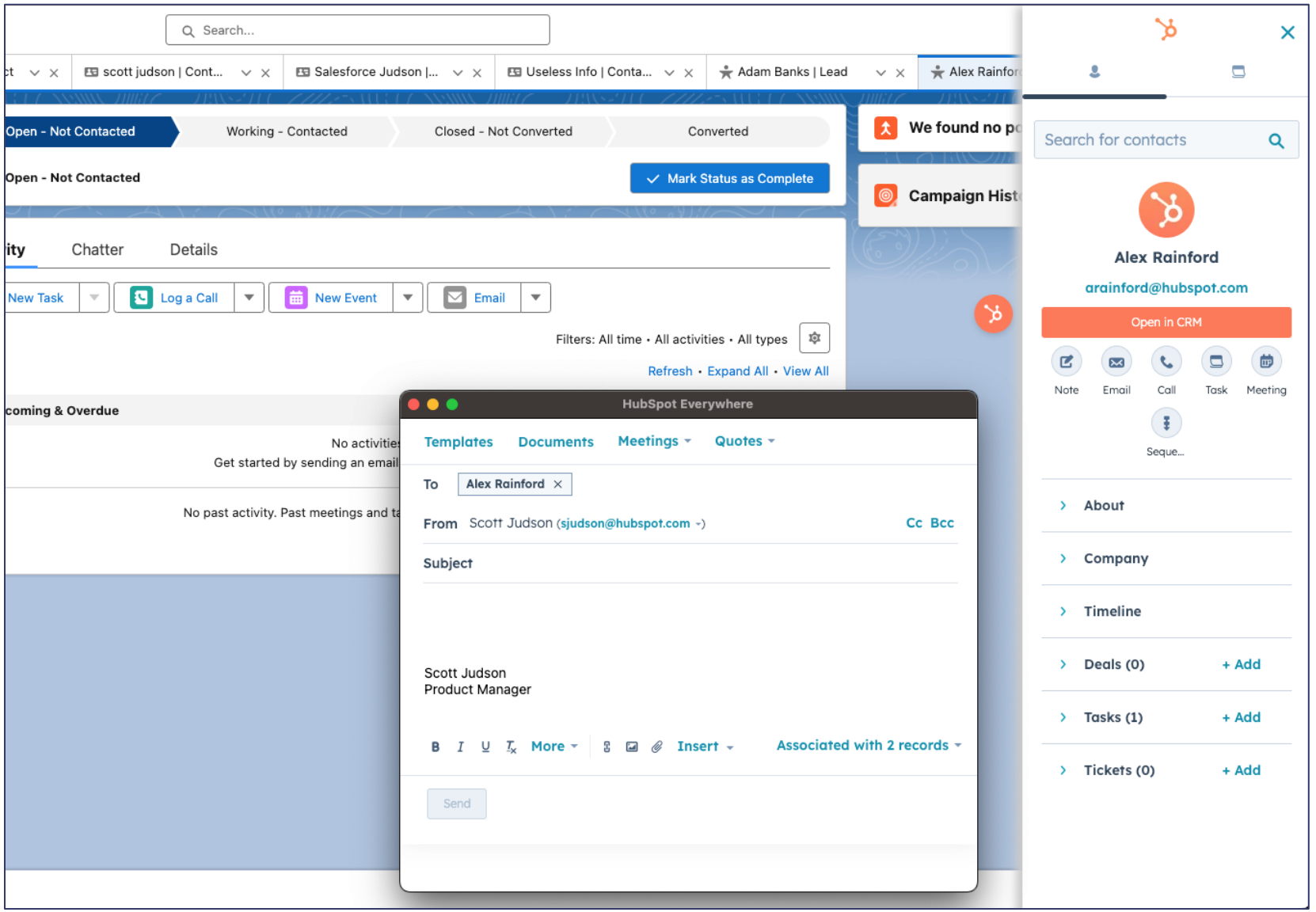
Use Action Sets Now:

- Consistent steps after a form fill
  - Internal notifications
  - Consistent nurture cadence
- Reusable branch logic
  - Example: one branch for customers, another for leads, another for people that shouldn’t continue workflow
- Complex action steps
  - Custom coded actions
  - Data formatting actions
  - Complex integration actions
- Note: goal should still be to minimize number of workflows
  - “Enroll in other workflow” steps could be saved as an action step too

What's New:

Use HubSpot Chrome Extension in Salesforce

- Private Beta
- Sales Hub
- All Tiers (Pro+ for Sequences)



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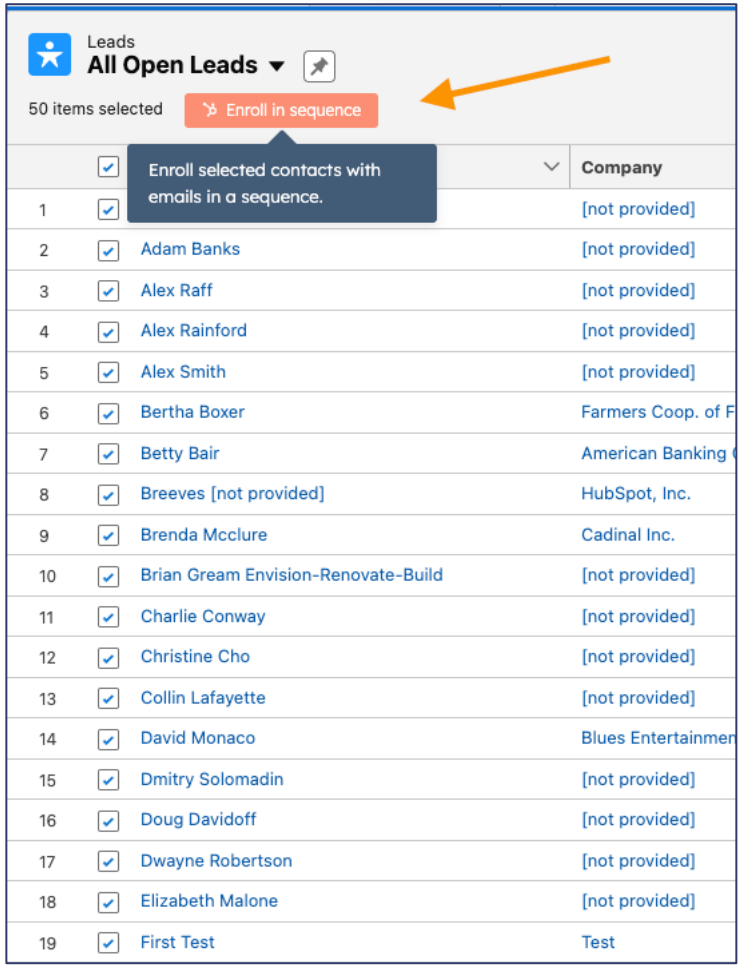
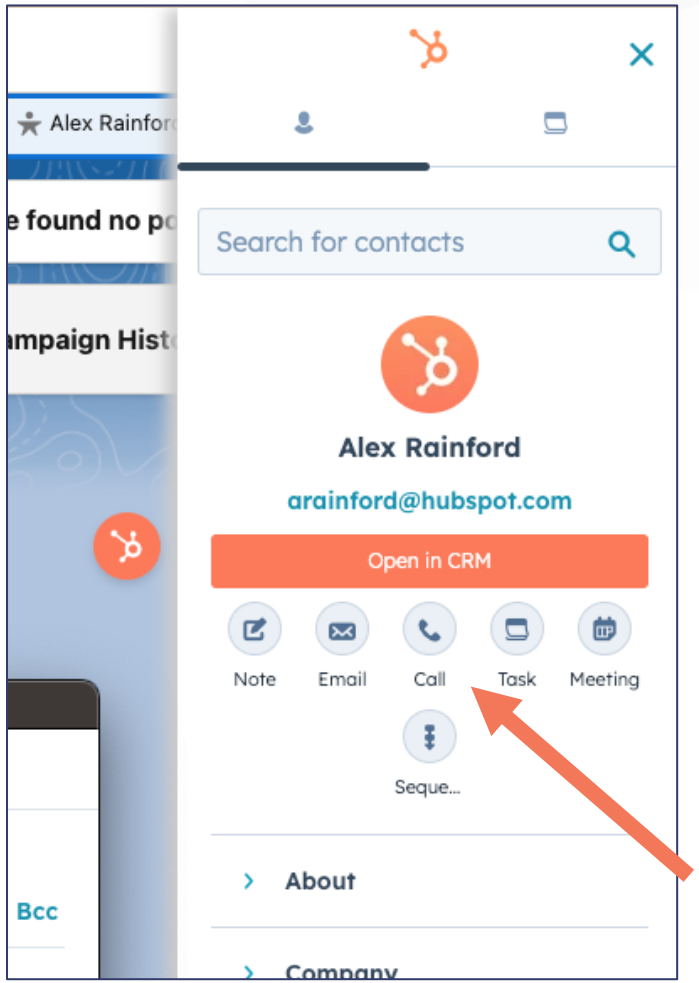
Use HubSpot in Salesforce Now: Send Email Sequences

- HubSpot Sequences: Automated 1-to-1 emails and sales tasks to leads/customers
- Extension allows you to send this automated engagement from within Salesforce
  - Individual contacts
  - Bulk enroll

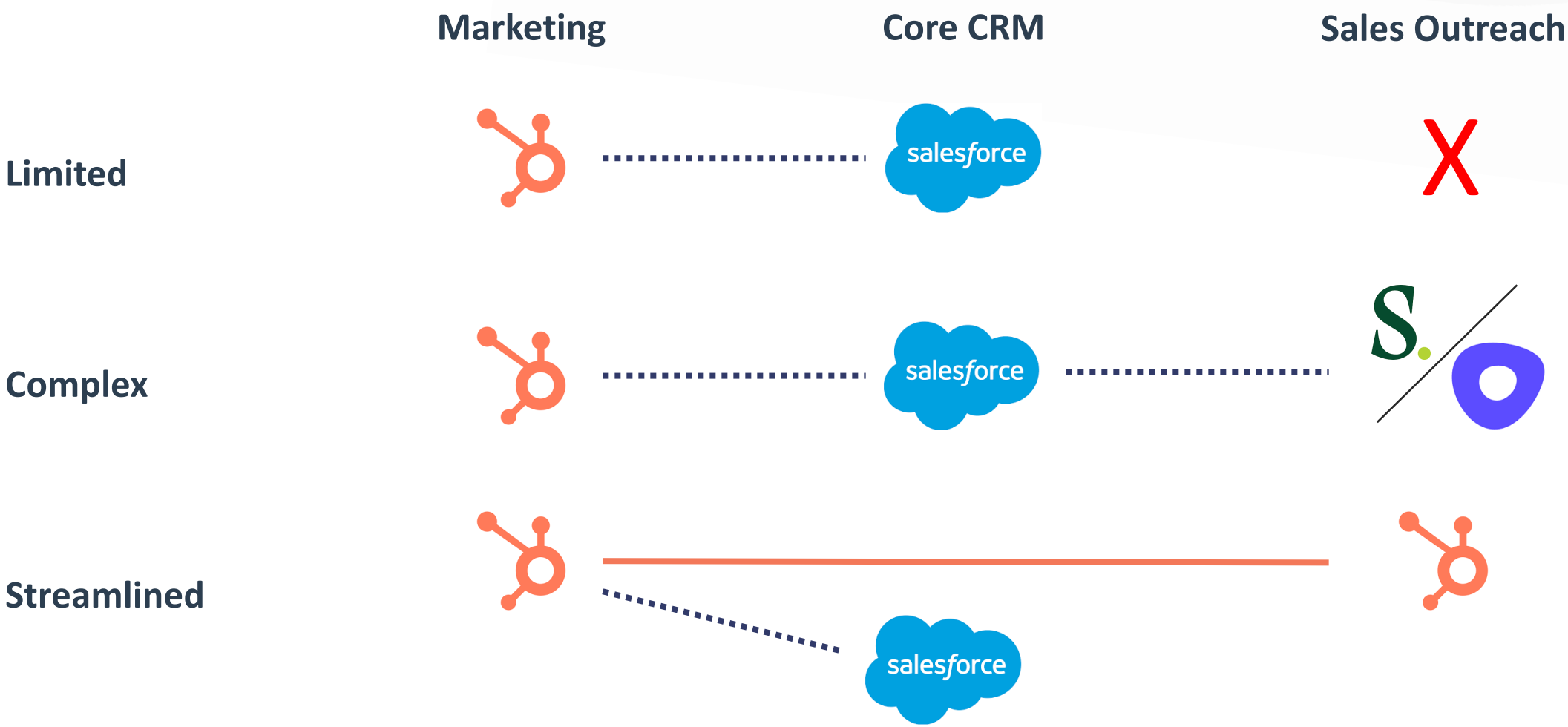


Use HubSpot in Salesforce Now: HubSpot Calling

- Use HubSpot calling to call Salesforce leads/contacts from within Salesforce
- HubSpot Calling Features:
  - Call recording, transcriptions, and commenting
  - Coaching playlists of recordings
  - Conversation intelligence – track terms of interest (Enterprise-level only)



Use HubSpot in Salesforce Now: Consolidate & Align



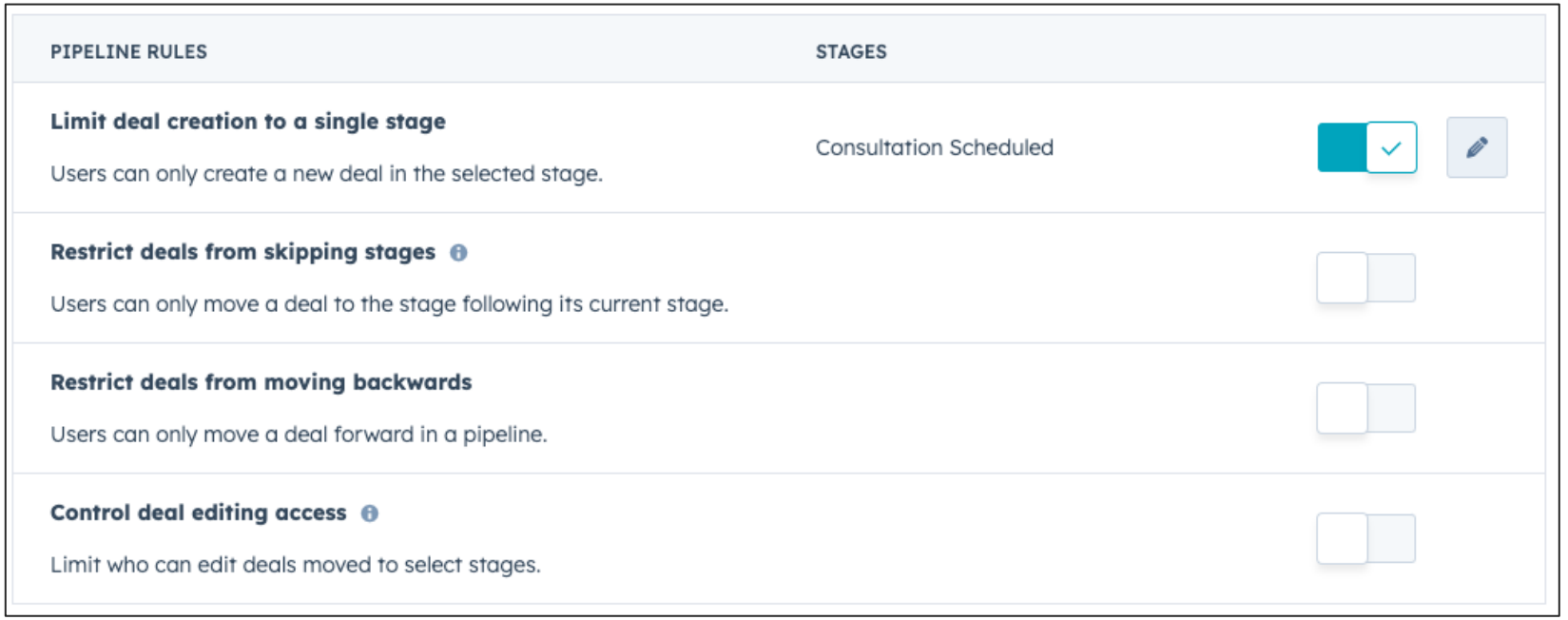
Use HubSpot in Salesforce Now: Consolidate & Align

	Marketing	Core CRM	Sales Outreach
Perfect			

What's New:

Deal Pipeline Rules

- Public Beta
- Sales Hub
- Pro & Enterprise



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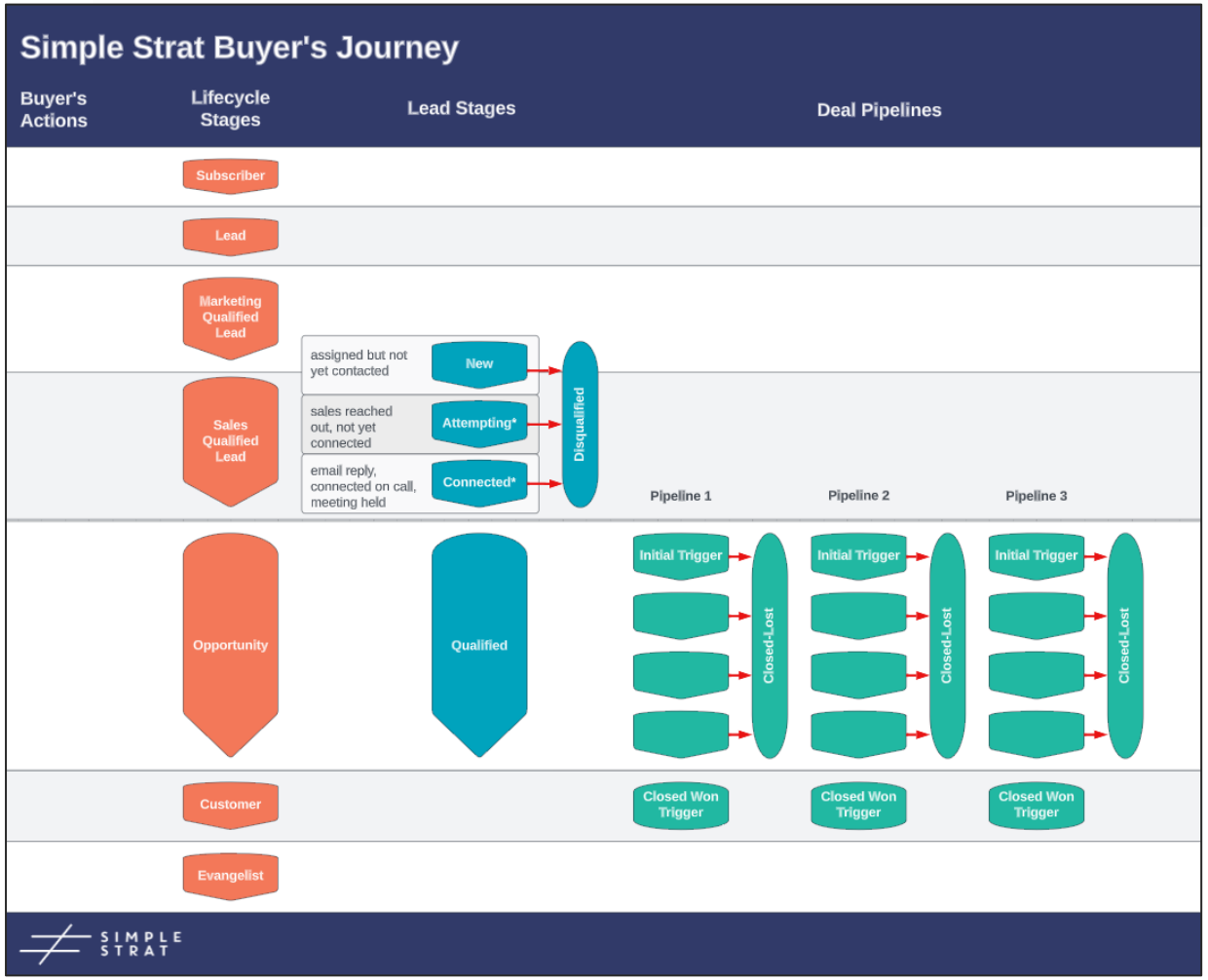
Use Pipeline Rules Now: Pipeline Governance

- Step 1: Bring your pipelines in line with best practices:
  - Concise
  - Linear
  - Objective
  - Supported
  - Engaged at every stage
- Restrict skipping
  - Use with caution, may not be worth it
- Limit creation to single deal stage & control deal editing access
  - Useful for some teams but not all – consider and roll out cautiously
- Restrict backward movement
  - Good idea for nearly all teams

Clean up your pipelines with a Buyer's Journey Workshop



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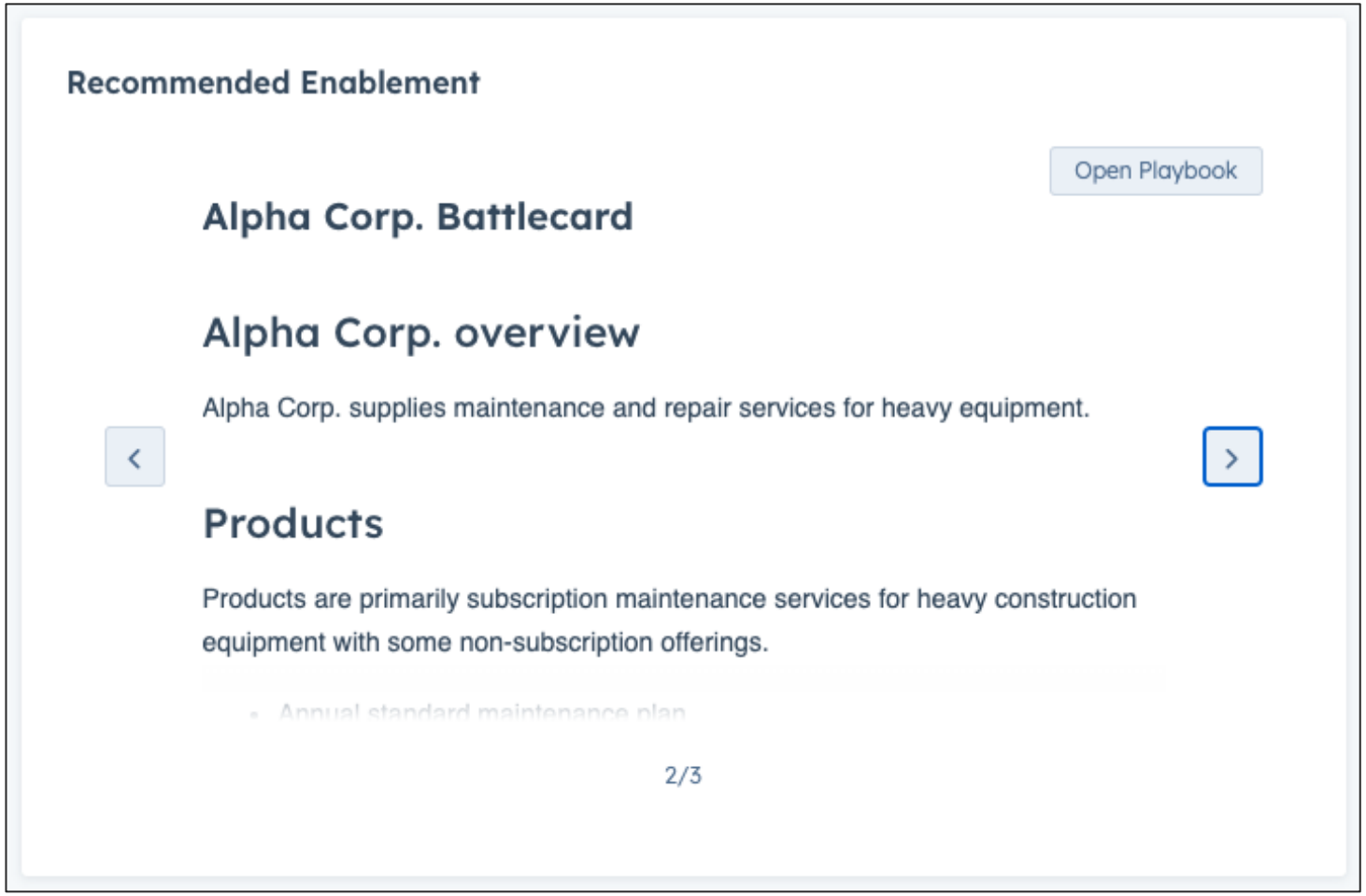
What's New:

Recommended Enablement CRM Card

- Live
- Sales & Service Hubs
- Pro & Enterprise Units



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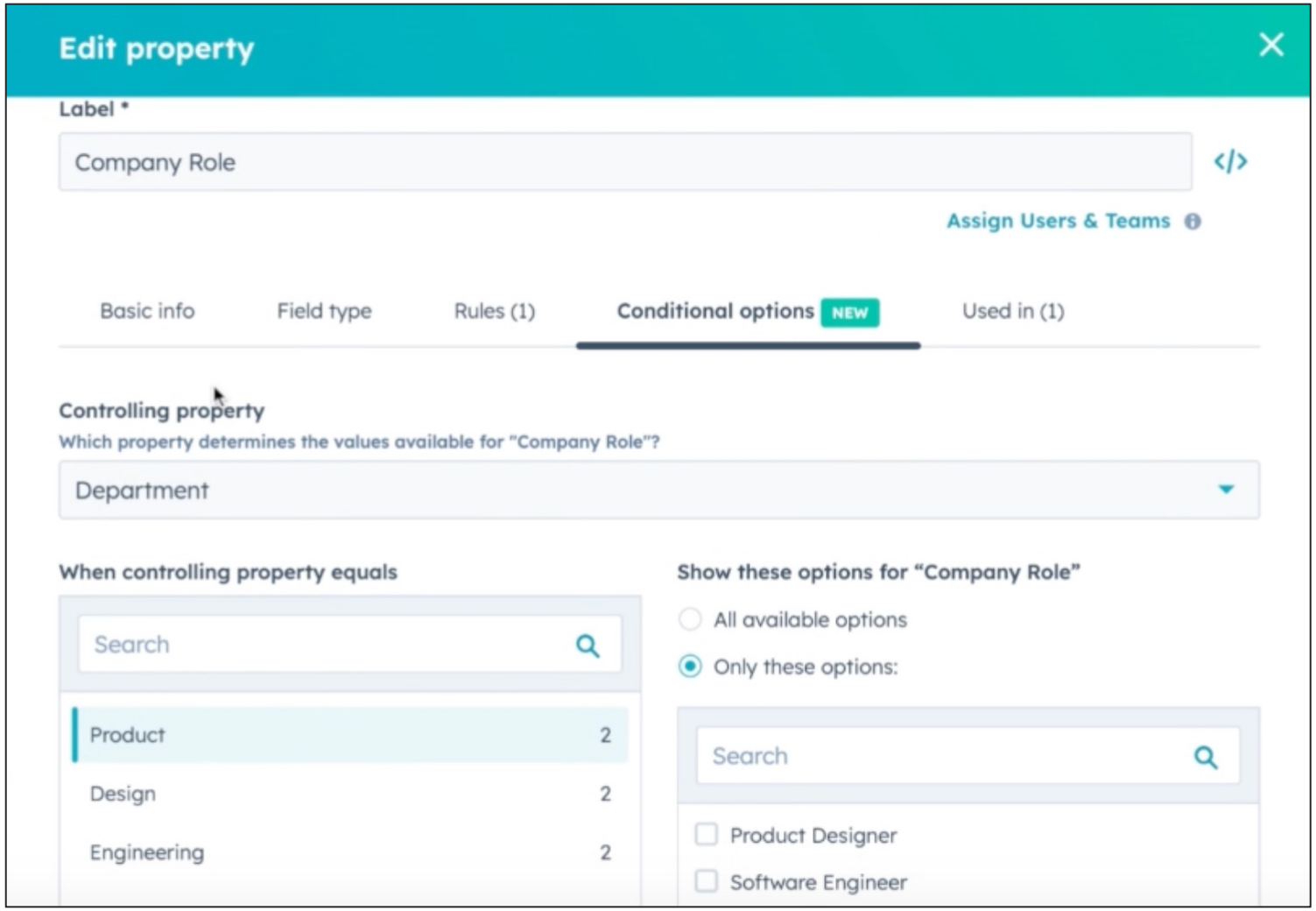
Use Enablement Card Now: Enable Reps

- Battlecards
  - Competitive based on a “known competitors” deal property
  - Product-focused based on a deal’s line items
- Surface relevant enablement docs (case studies, product info sheets)
- 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:

Conditional Property Options

- Public Beta
- All Hubs
- Pro, Enterprise



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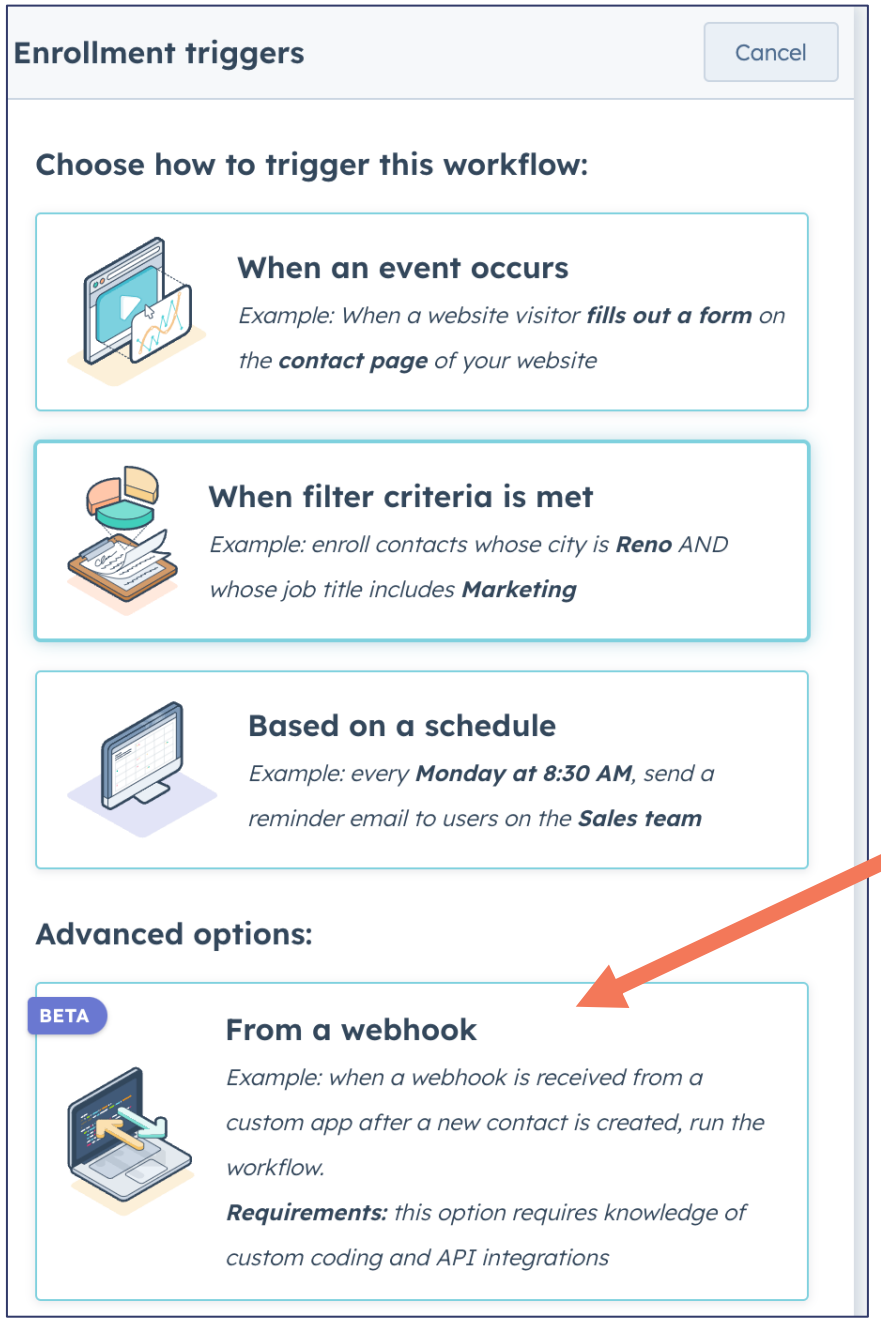
Use Conditional Property Options Now:

- Show specific job titles based on department
- Show sub-stages in deal or ticket pipelines based on the pipeline stage
- Deal type options based on deal pipeline
- States/Provinces/Territories by country
- Show sub-industries based on high-level industry
- Drill-down closed lost reasons
  - Closed lost reason is competitor
  - Closed lost drill-down includes: competitor-cost, competitor-solution fit, etc.
- Ask yourself:
  - Where can we consolidate properties?
  - Where can we drill down for additional information?

What's New:

Webhook Triggers in Workflows

- Live
- Operations Hub
- Pro & Enterprise Units



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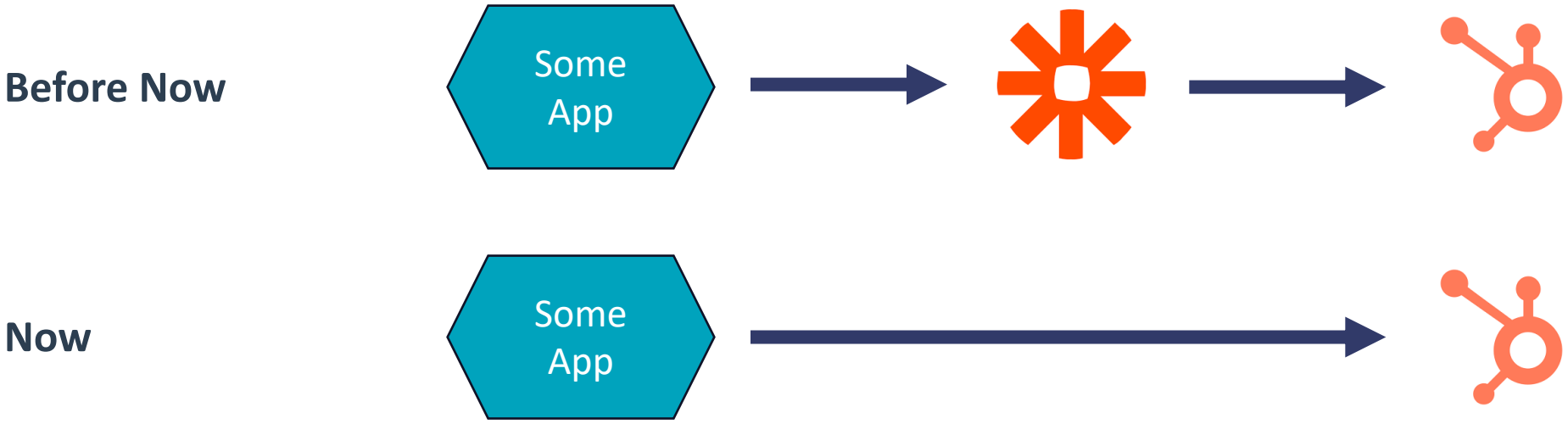
Use Webhook Triggers Now: Reduce Middleware Reliance

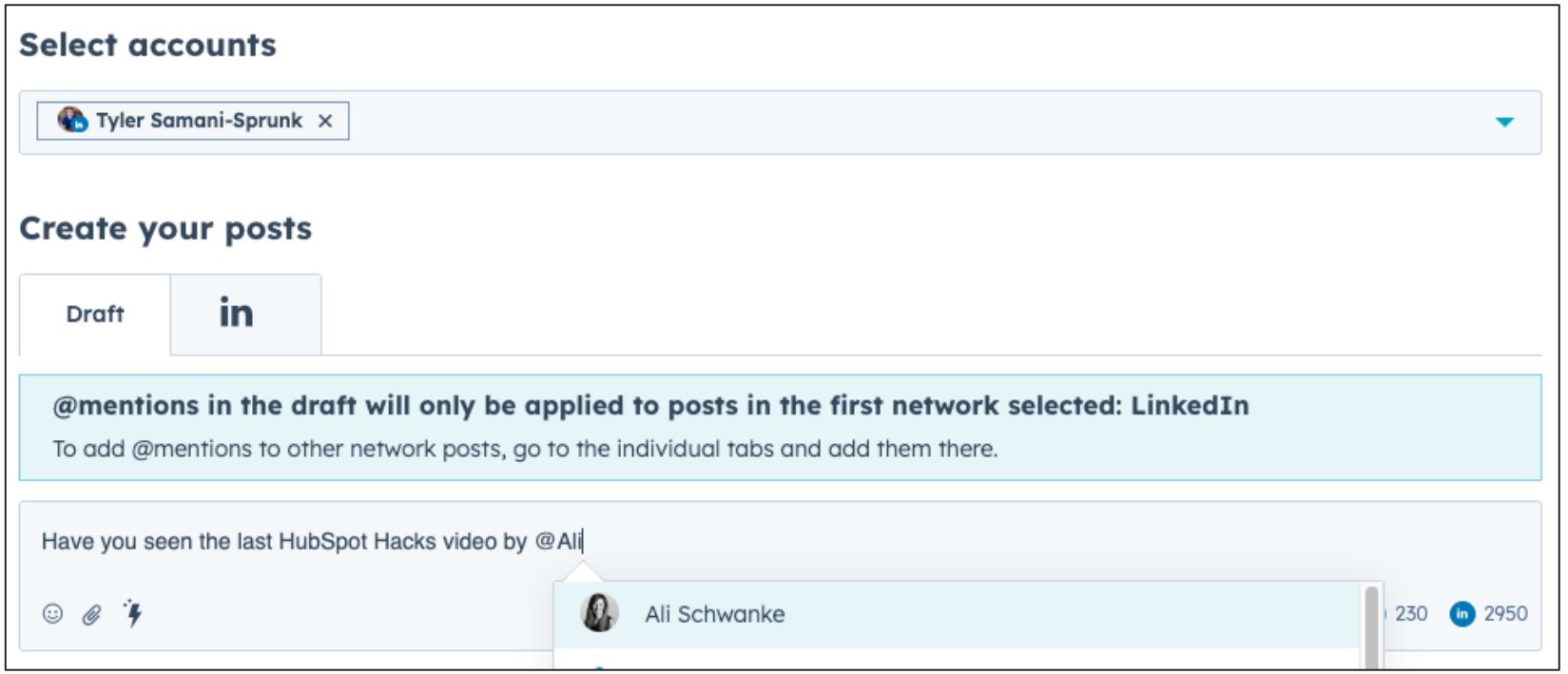
- Make your technical team aware of this update if:
  - You currently have integrations that rely on tools like Zapier
  - You want an integration with HubSpot you don't already have



What's New:

Social Publishing: LinkedIn Personal Profile Mentions

- Live
- Marketing Hub
- Pro & Enterprise



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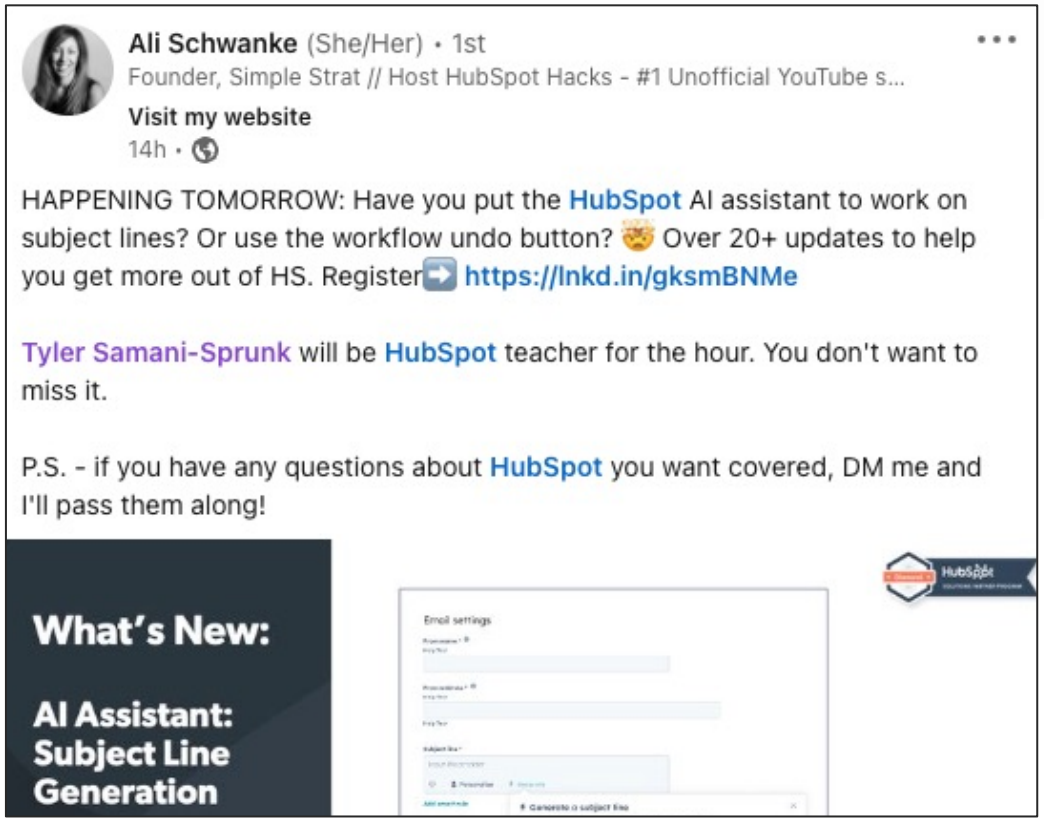
Use LinkedIn Mentions Now: Increase Engagement

- People like people
- Tagged people are likely to engage and share
- Tagging people can get your posts show to their audiences

- Ideas:
  - Ask for input on a question
  - Tag the source of a quote or article you're sharing
  - Tag the person or people hosting a webinar you're promoting
  - Post a photo from an event and tag who's in it

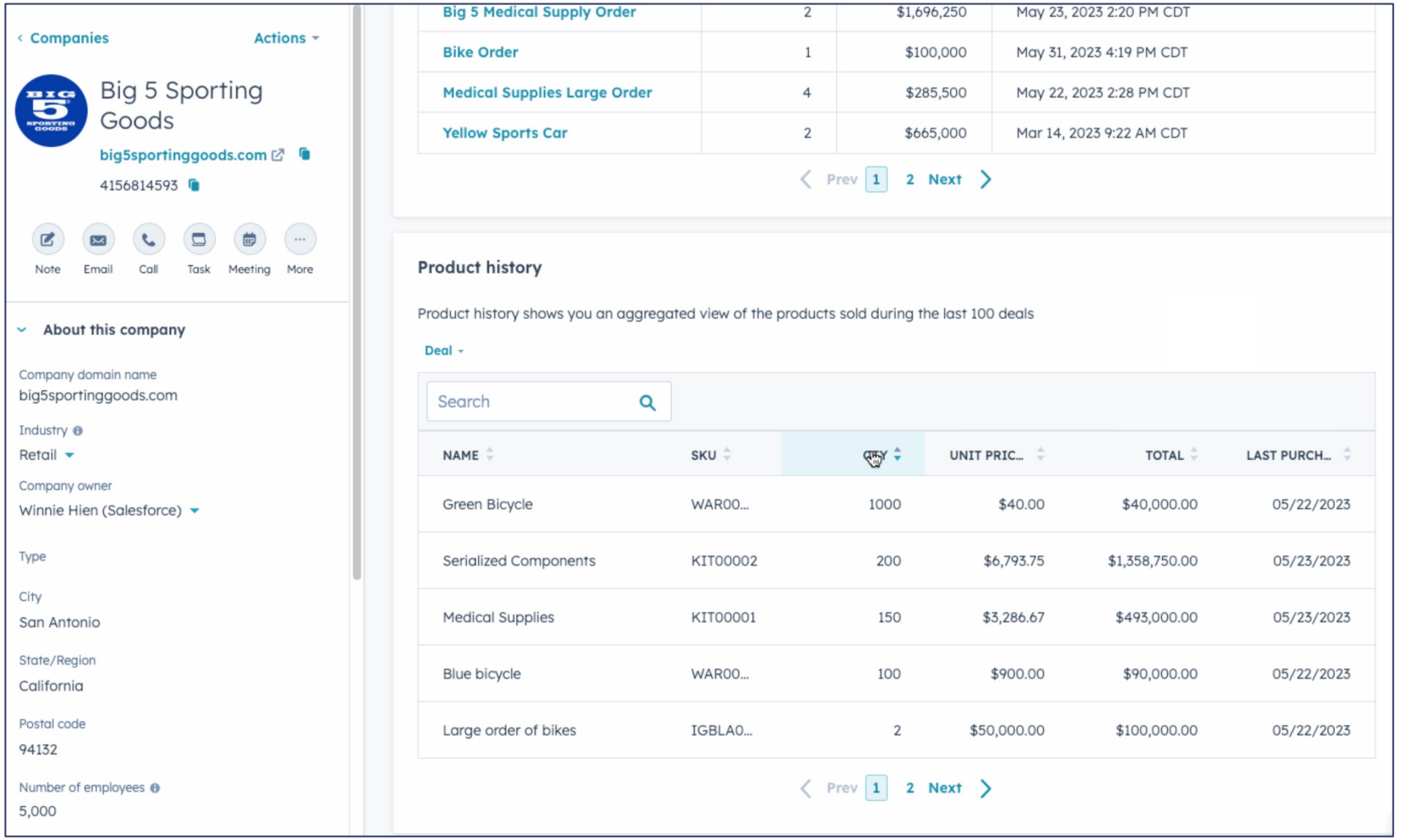


Small But Mighty Updates

What's New:

View Products Purchased from the Contact or Company Record

- Private Beta
- All Hubs
- All Tiers



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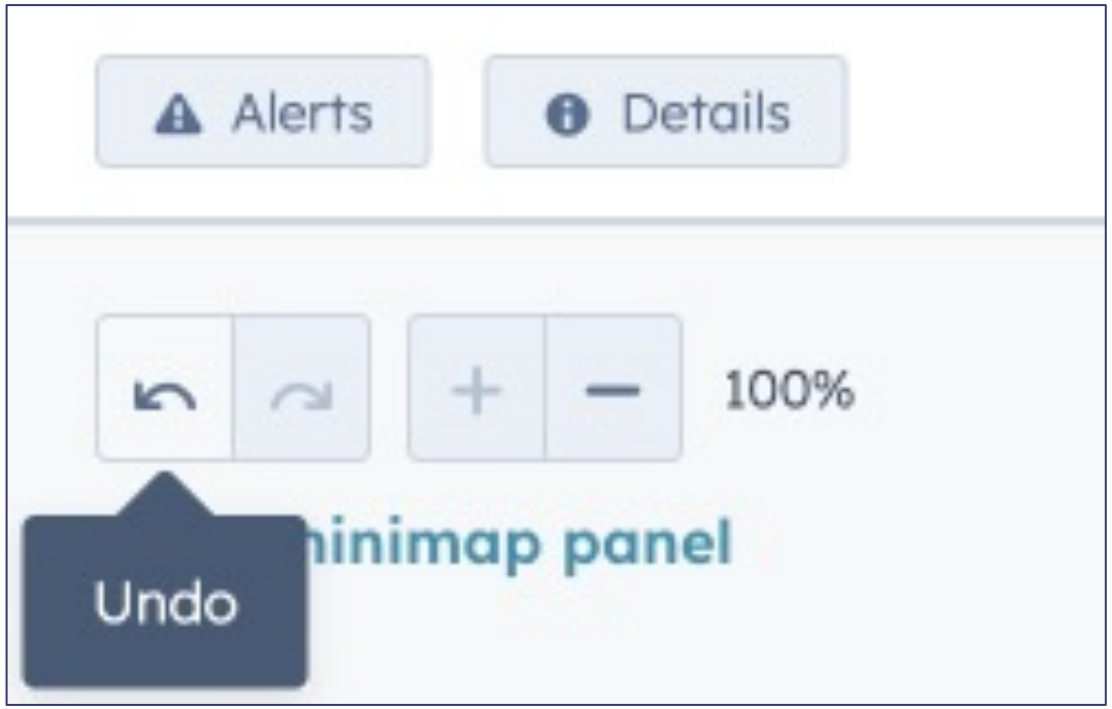
What's New:

Undo or Redo Changes on the Workflows Canvas

- Live
- All Hubs
- Pro & Enterprise



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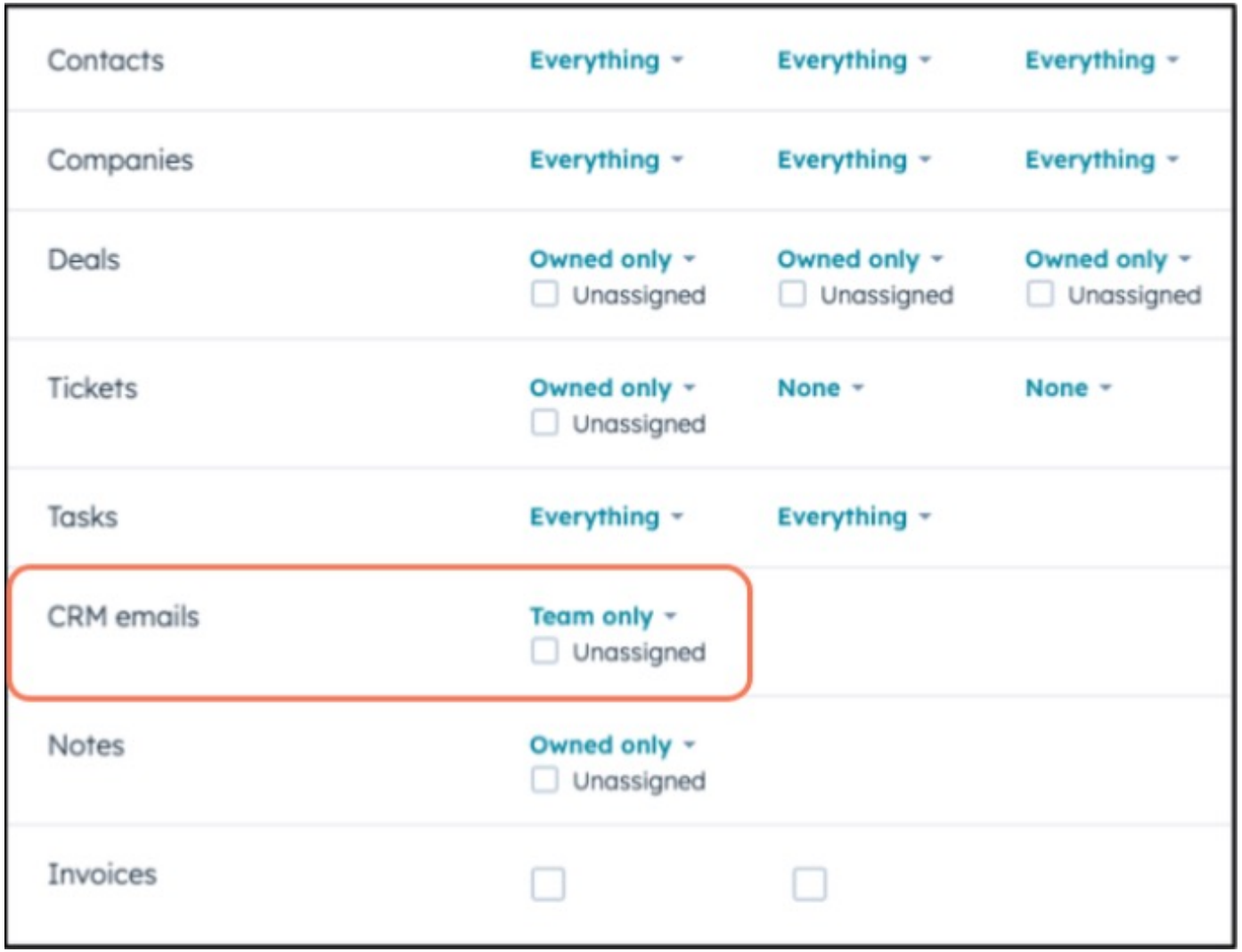
What's New:

CRM Email Permissions

- Public Beta
- All Hubs
- All Tiers



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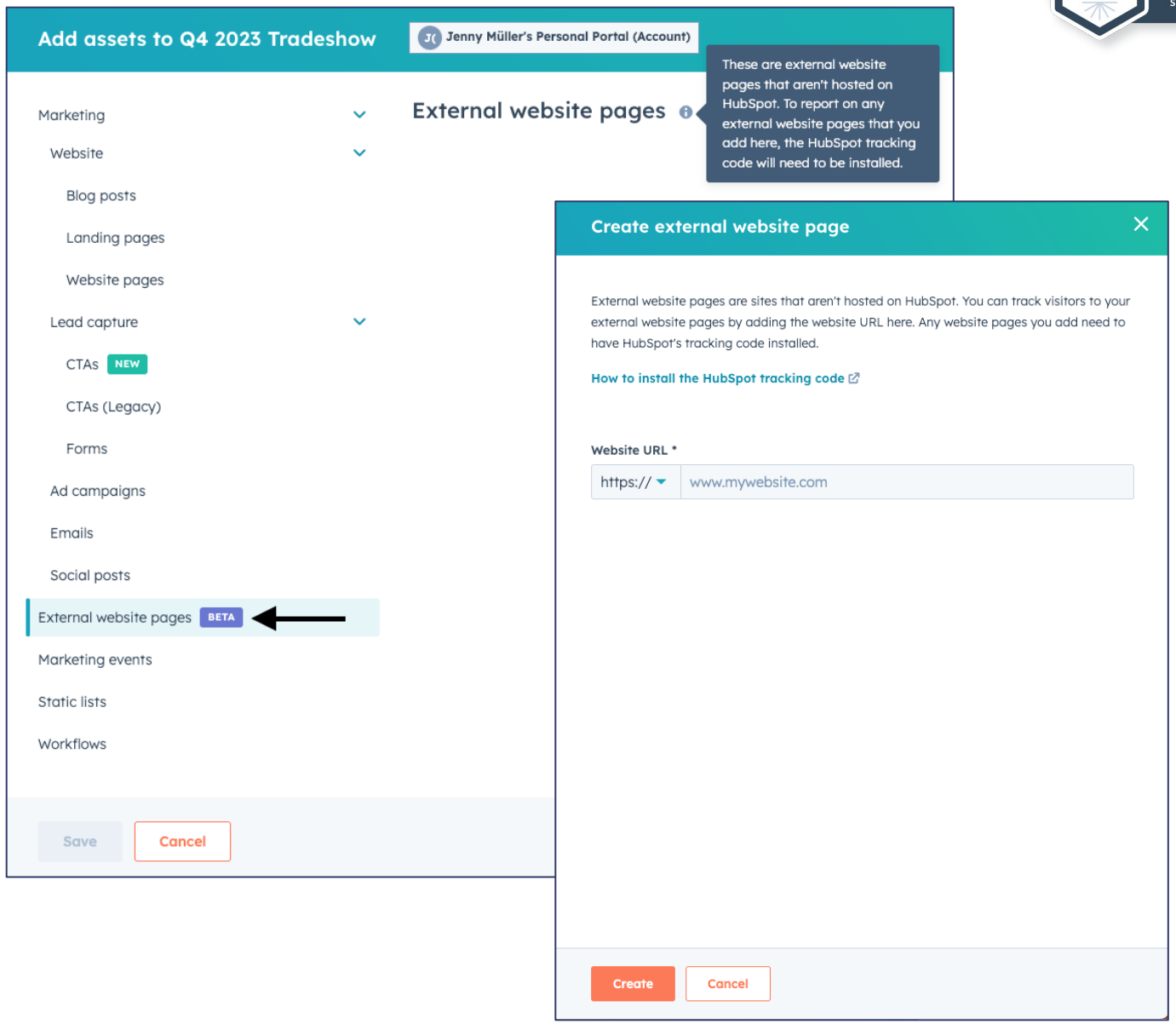
What's New:

You can now add 'external website pages' to your campaign(s)

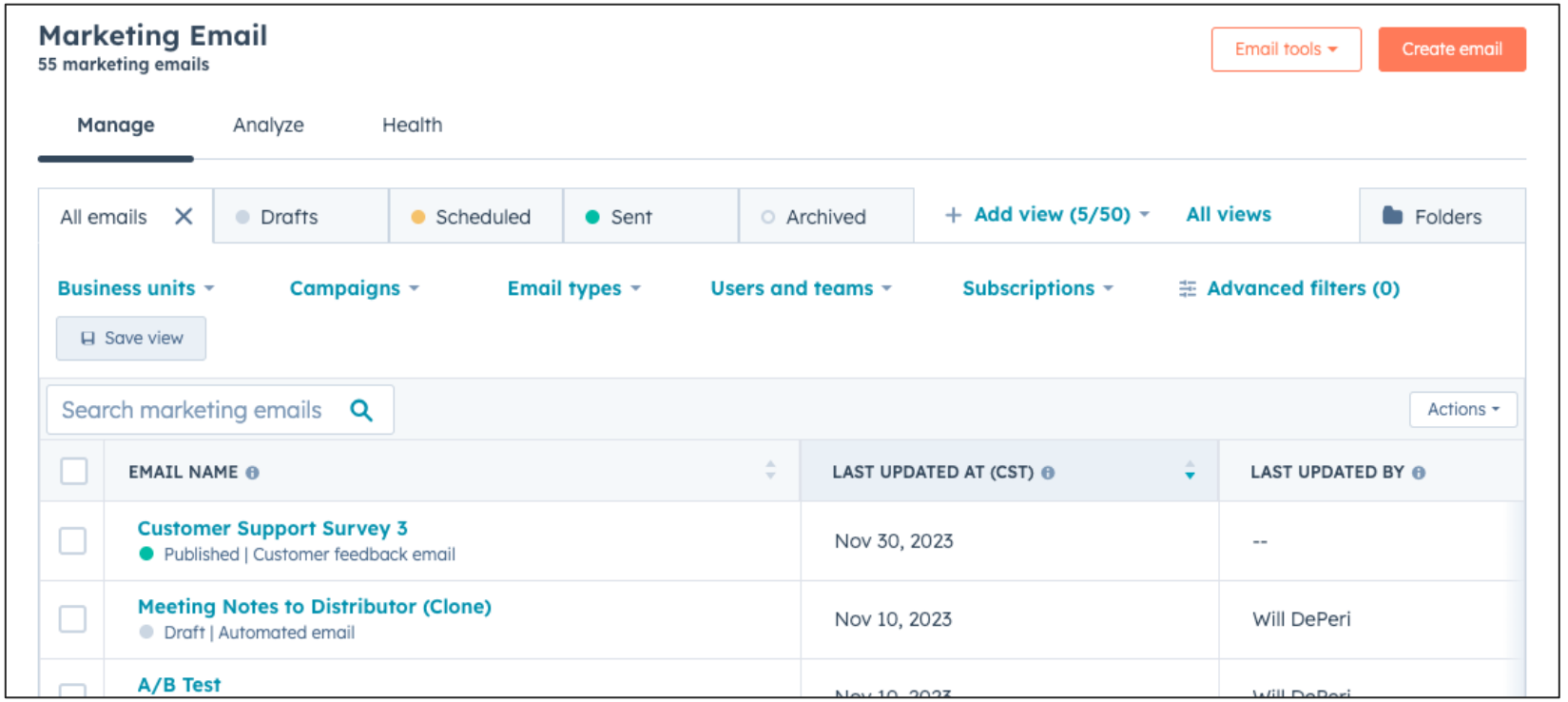
- Public Beta
- Marketing Hub
- Pro & Enterprise



What's New:

New Marketing Email Manage Page

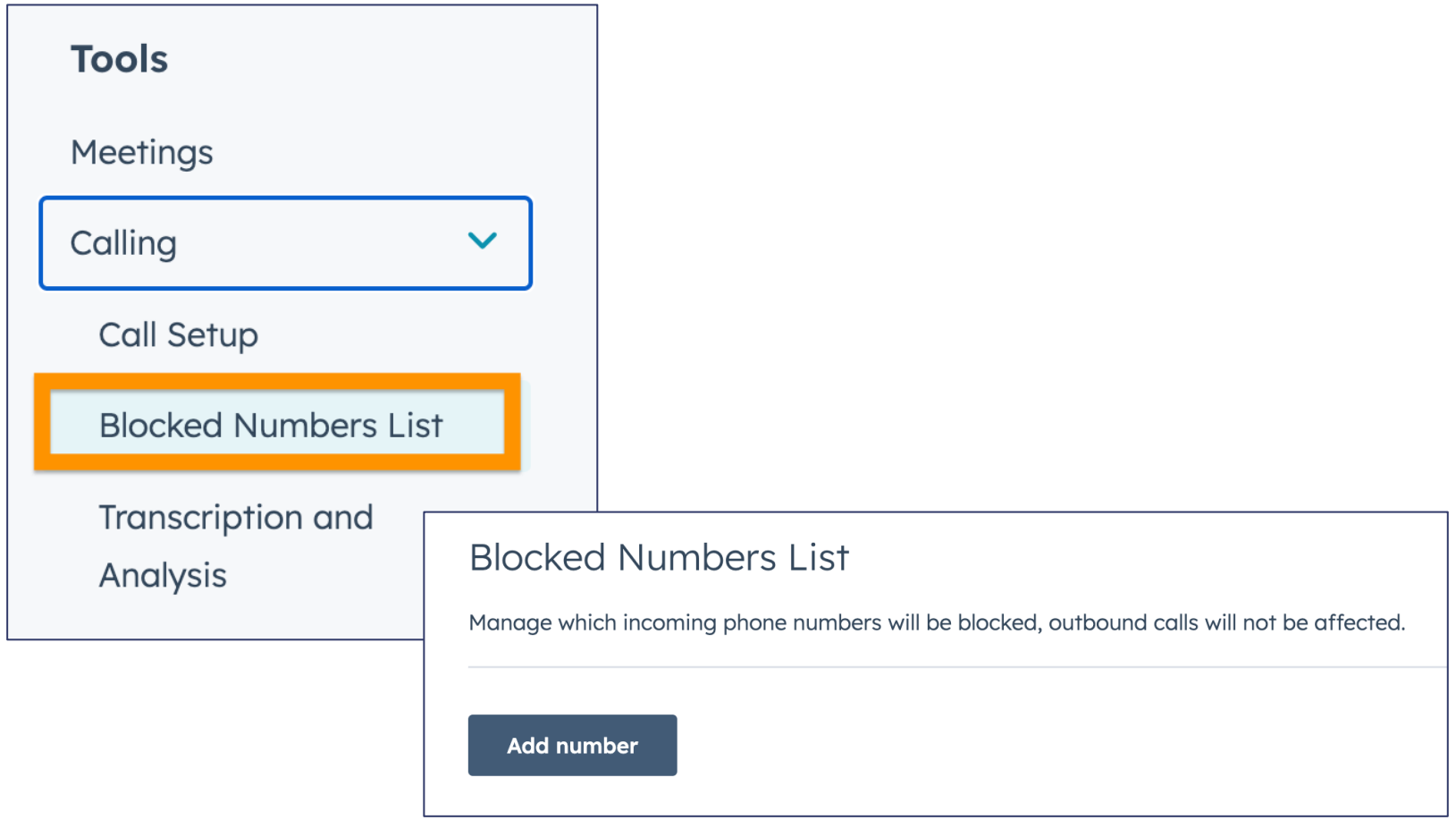
- Public Beta
- Marketing Hub
- All Tiers



What's New:

Blocked Numbers List

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



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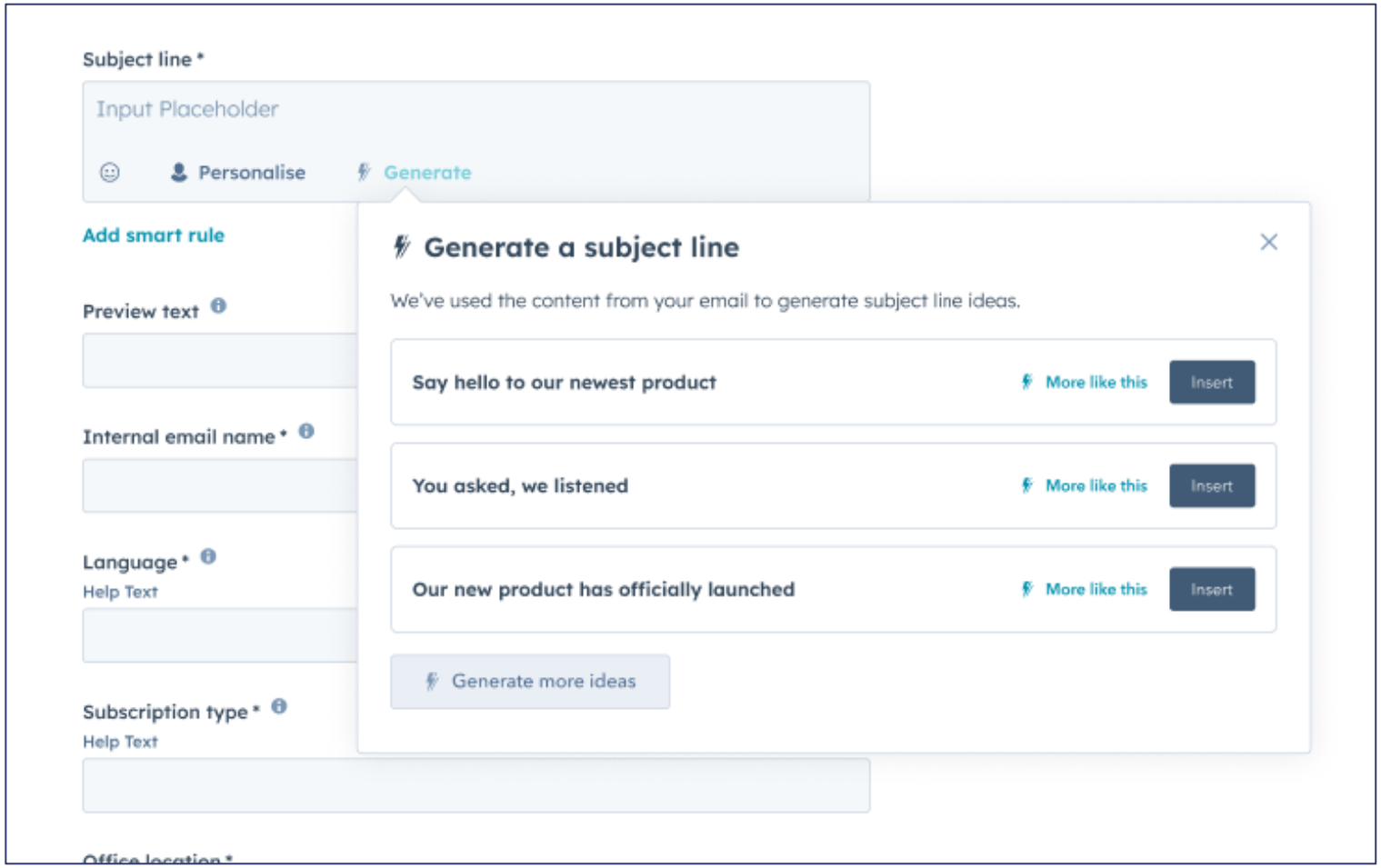
What's New:

AI Assistant: Subject Line Generation

- Public Beta
- Marketing Hub
- All Tiers



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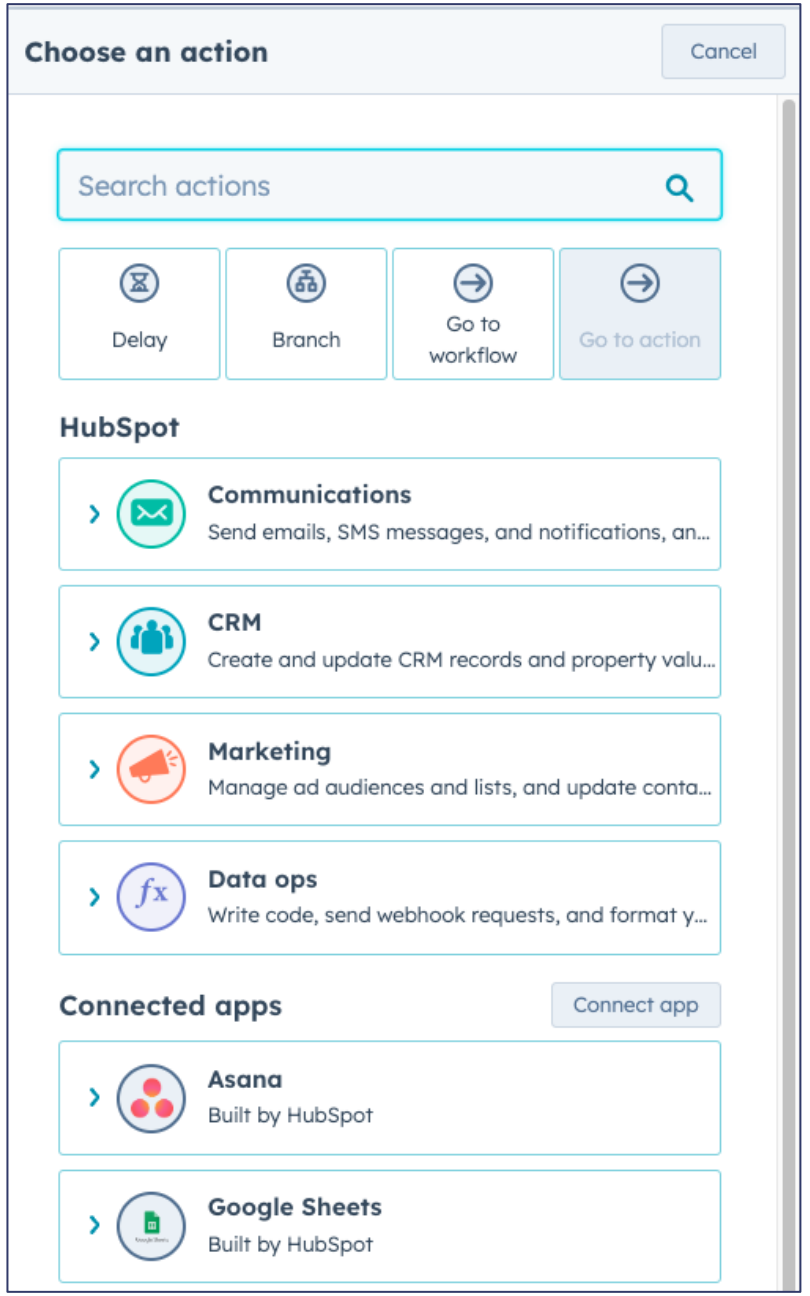
What's New:

Redesigned Workflow Experience

- Public Beta
- Marketing, Ops, Sales, & Service Hubs
- Pro & Enterprise



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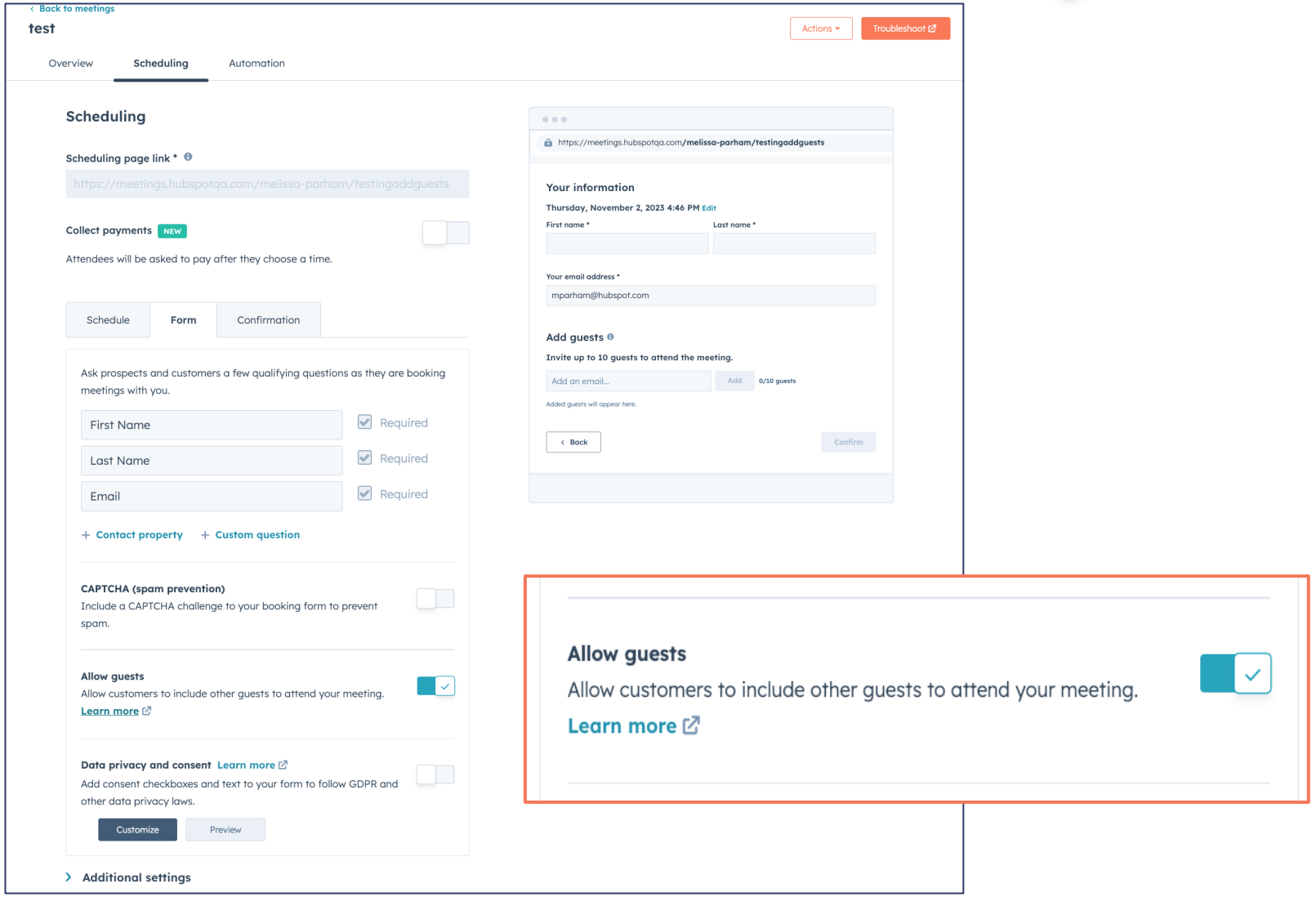
What's New:

Add Guests to Meetings via Scheduling Pages

- Public Beta
- All Hubs
- All Tiers



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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 Again Soon!

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Questions & Answers