

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?



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



Implement
HubSpot



Learn
HubSpot

- HubSpot Management -
- Marketing Support -



Tyler Samani-Sprunk

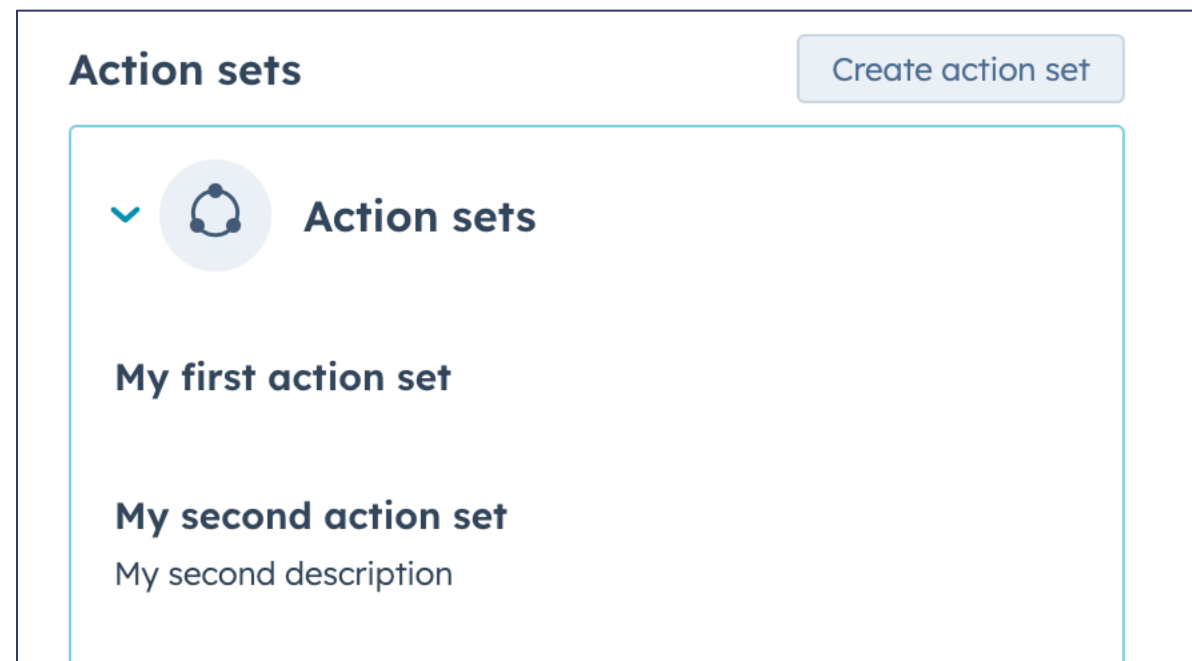
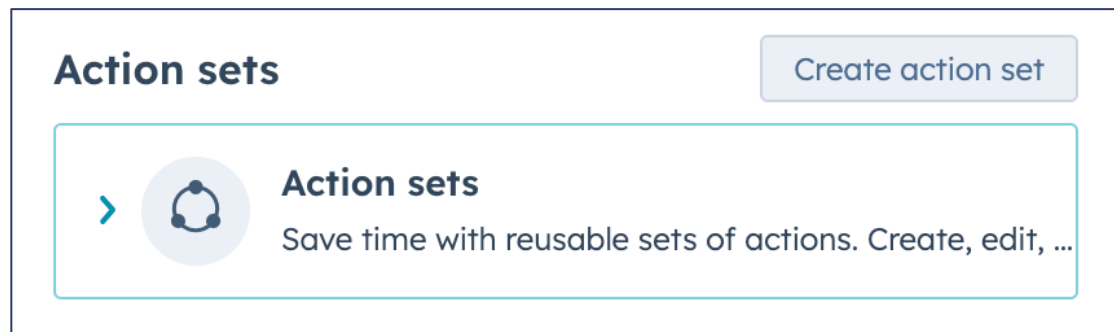
Cofounder & CMO @ Simple Strat
Cohost of HubSpot Hacks

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



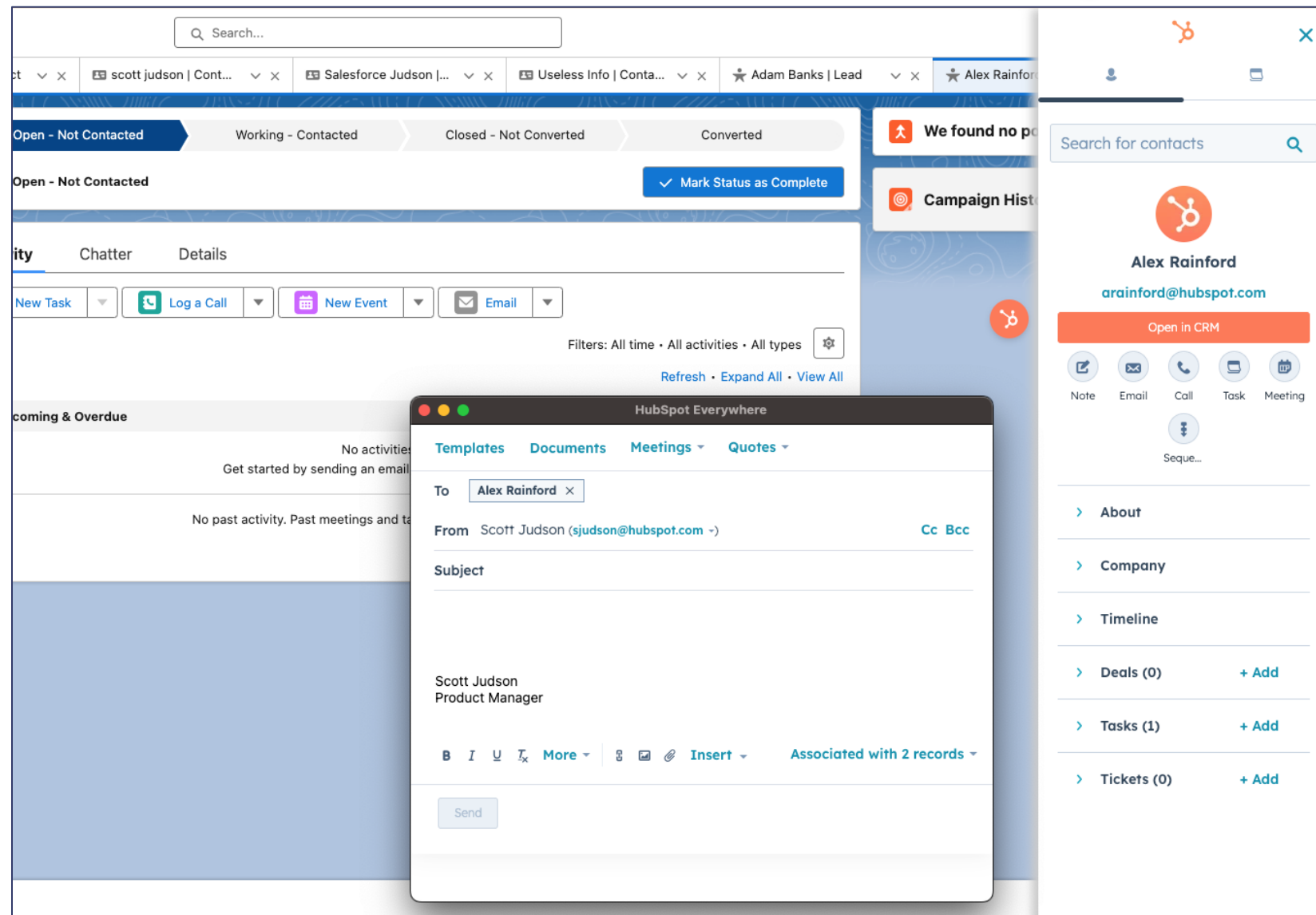
Use Action Sets Now:

- 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:

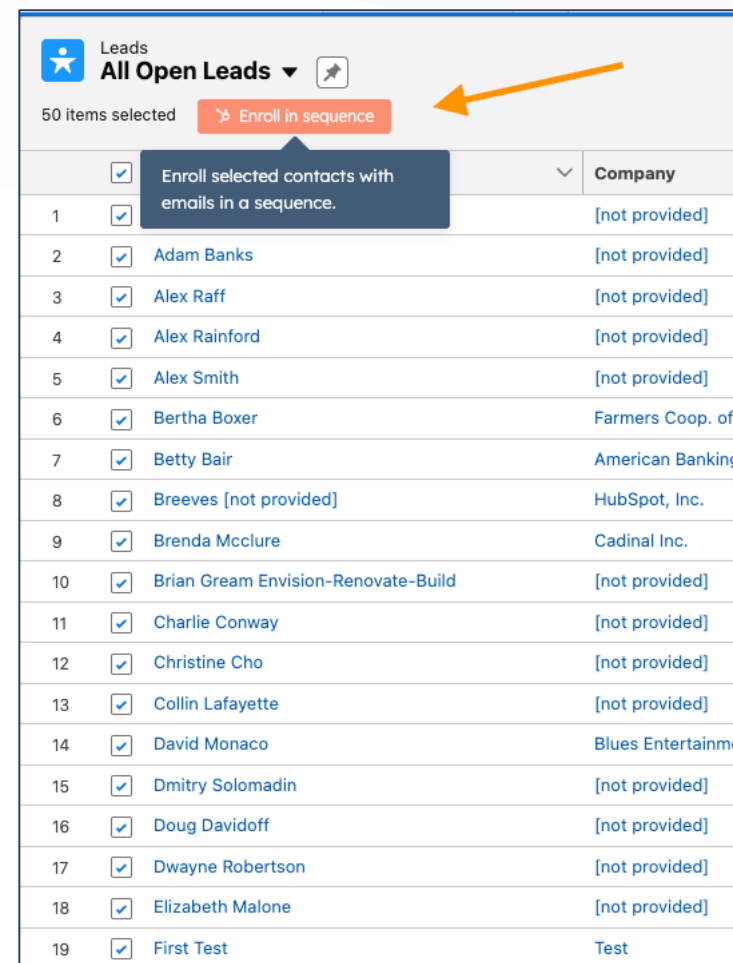
Use HubSpot Chrome Extension in Salesforce

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



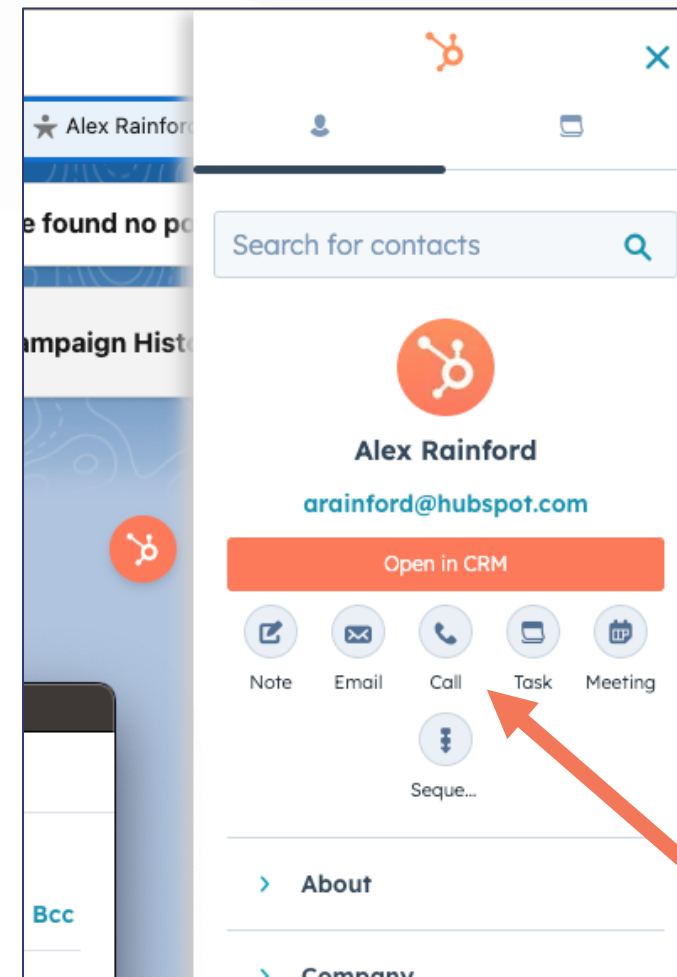
Use HubSpot in Salesforce Now: Send Email Sequences

- 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

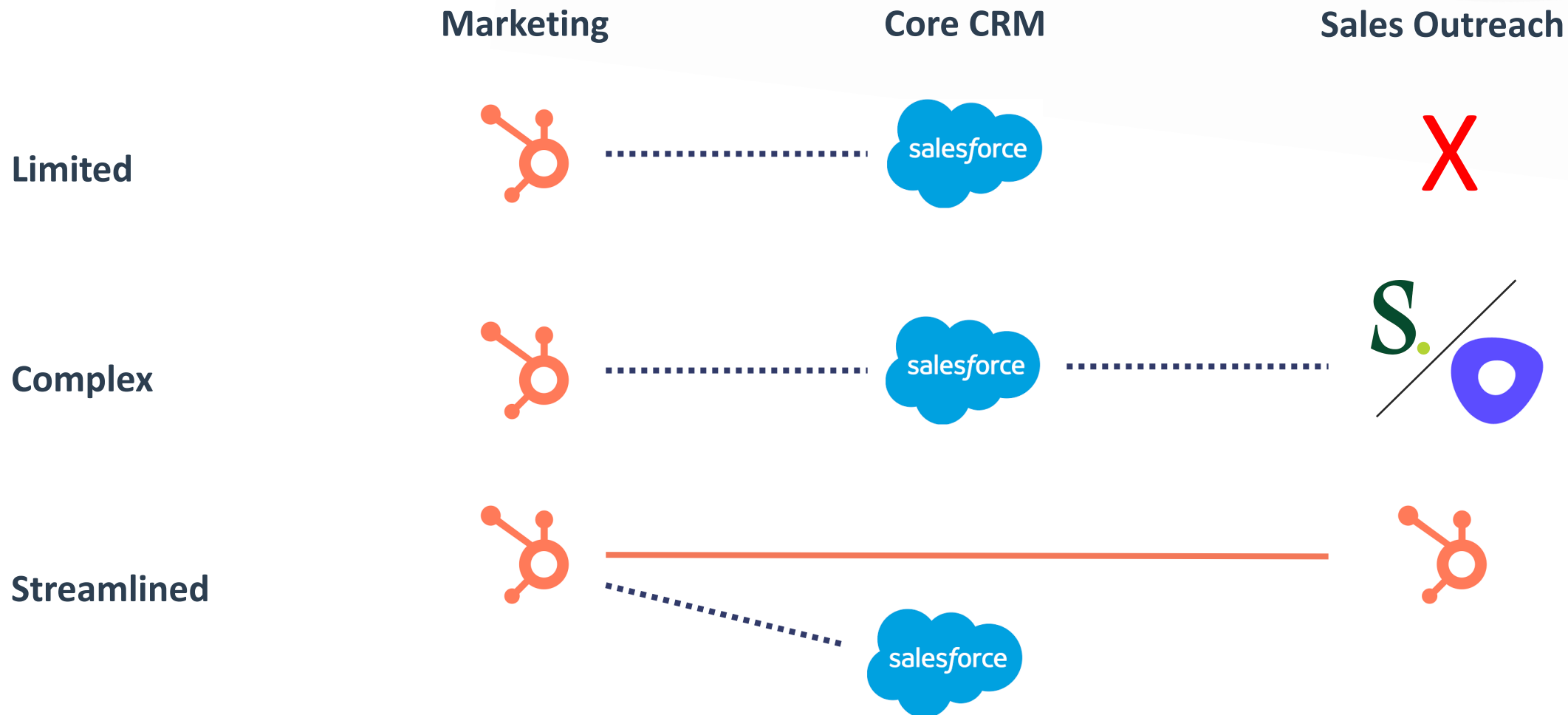


Use HubSpot in Salesforce Now: HubSpot Calling

- 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

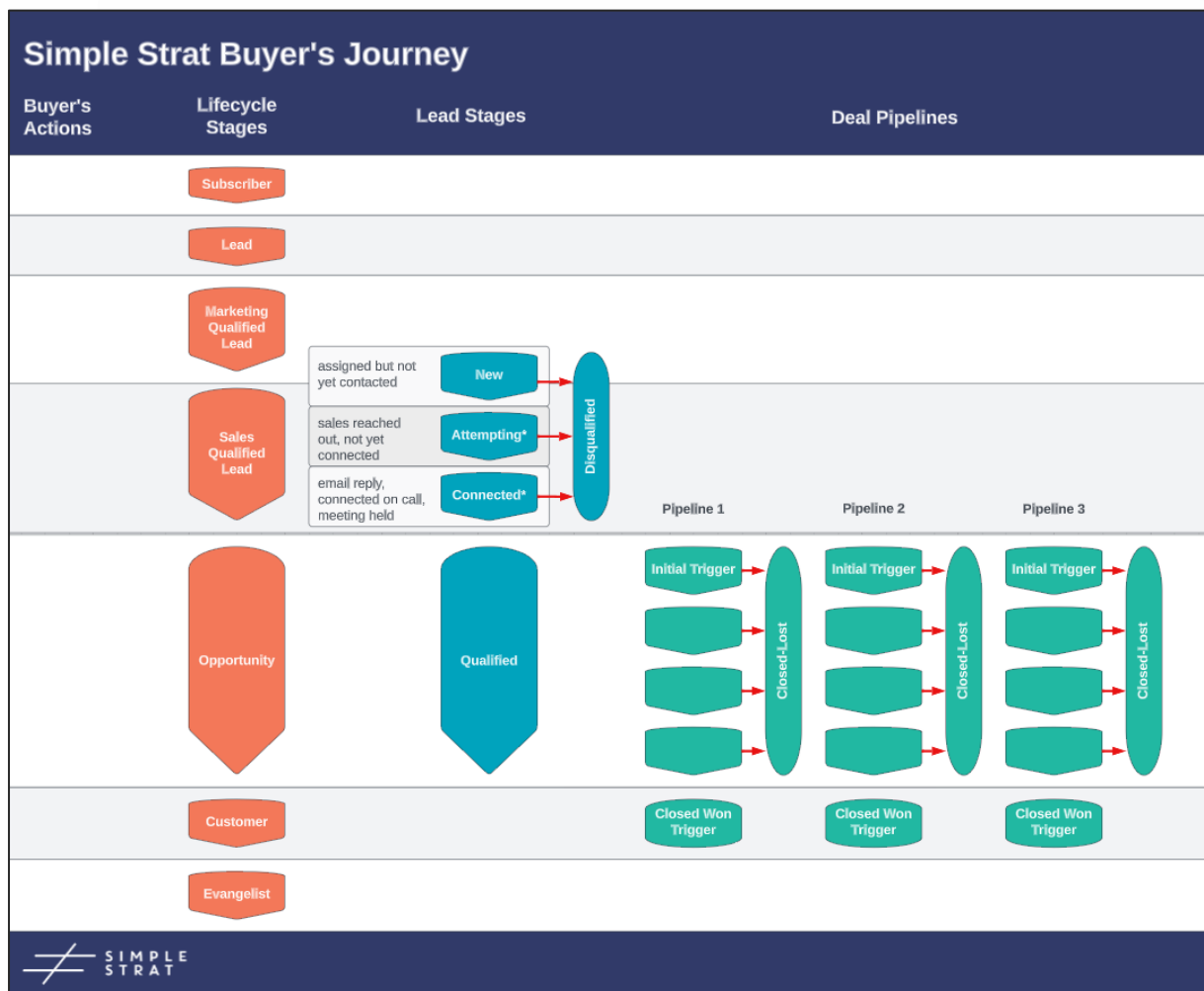
- Public Beta
- Sales Hub
- Pro & Enterprise

PIPELINE RULES	STAGES
<p>Limit deal creation to a single stage</p> <p>Users can only create a new deal in the selected stage.</p>	<p>Consultation Scheduled</p> <p><input checked="" type="checkbox"/> </p>
<p>Restrict deals from skipping stages ⓘ</p> <p>Users can only move a deal to the stage following its current stage.</p>	<p><input type="checkbox"/></p>
<p>Restrict deals from moving backwards</p> <p>Users can only move a deal forward in a pipeline.</p>	<p><input type="checkbox"/></p>
<p>Control deal editing access ⓘ</p> <p>Limit who can edit deals moved to select stages.</p>	<p><input type="checkbox"/></p>

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



SimpleStrat.com/Consult

What's New:

Recommended Enablement CRM Card

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

Recommended Enablement

Open Playbook

Alpha Corp. Battlecard

Alpha Corp. overview

Alpha Corp. supplies maintenance and repair services for heavy equipment.

< >

Products

Products are primarily subscription maintenance services for heavy construction equipment with some non-subscription offerings.

- Annual standard maintenance plan

2/3

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

Edit property

Label *

 </>

[Assign Users & Teams](#) ⓘ

Basic info Field type Rules (1) **Conditional options** NEW Used in (1)

Controlling property
Which property determines the values available for "Company Role"?

When controlling property equals

Property	Count
Product	2
Design	2
Engineering	2

Show these options for "Company Role"

All available options

Only these options:

Option
<input type="checkbox"/> Product Designer
<input type="checkbox"/> Software Engineer

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

Enrollment triggers

Cancel

Choose how to trigger this workflow:



When an event occurs

Example: When a website visitor **fills out a form** on the **contact page** of your website



When filter criteria is met

Example: enroll contacts whose city is **Reno** AND whose job title includes **Marketing**



Based on a schedule

Example: every **Monday at 8:30 AM**, send a reminder email to users on the **Sales team**

Advanced options:

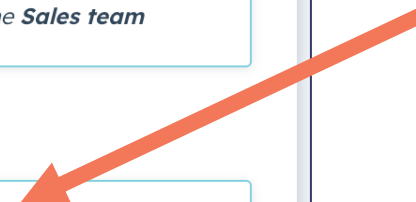
BETA



From a webhook

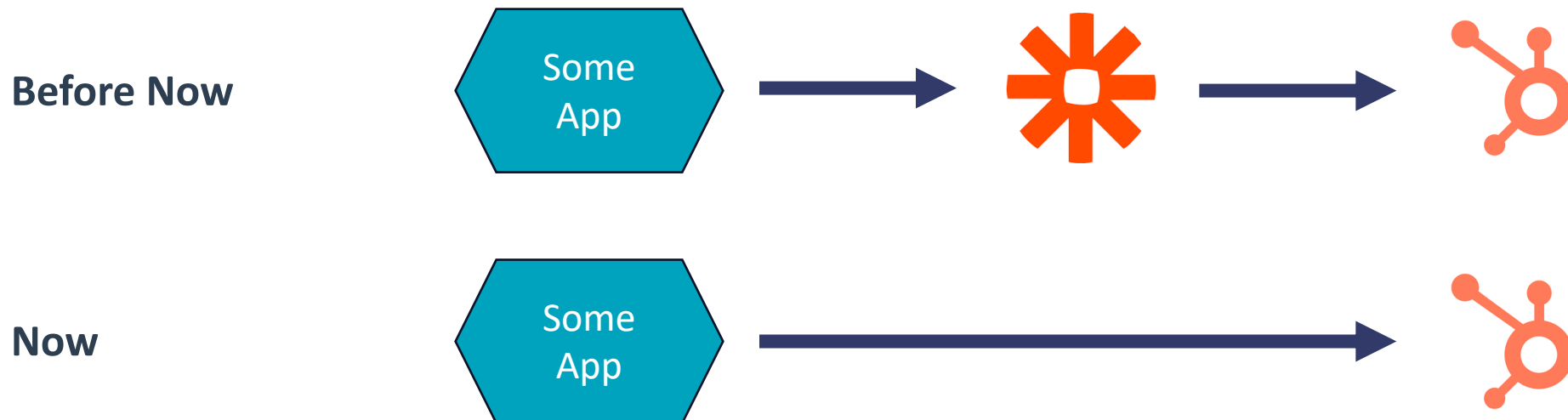
Example: when a webhook is received from a custom app after a new contact is created, run the workflow.

Requirements: this option requires knowledge of custom coding and API integrations



Use Webhook Triggers Now: Reduce Middleware Reliance

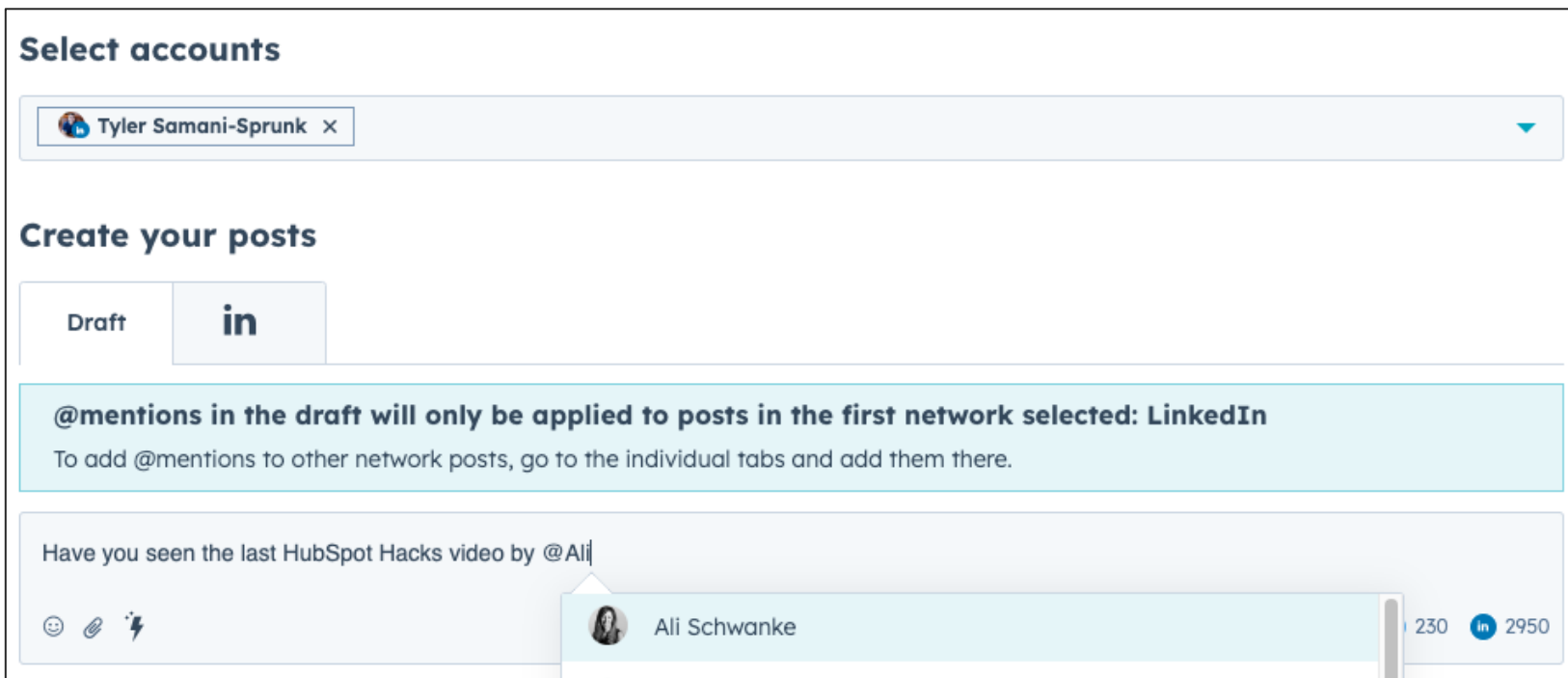
- Make your technical team aware of this update if:
 - You currently have integrations that rely on tools like Zapier
 - You want an integration with HubSpot you don't already have



What's New:

Social Publishing: LinkedIn Personal Profile Mentions

- Live
- Marketing Hub
- Pro & Enterprise



Select accounts

Tyler Samani-Sprunk ×

Create your posts

Draft **in**

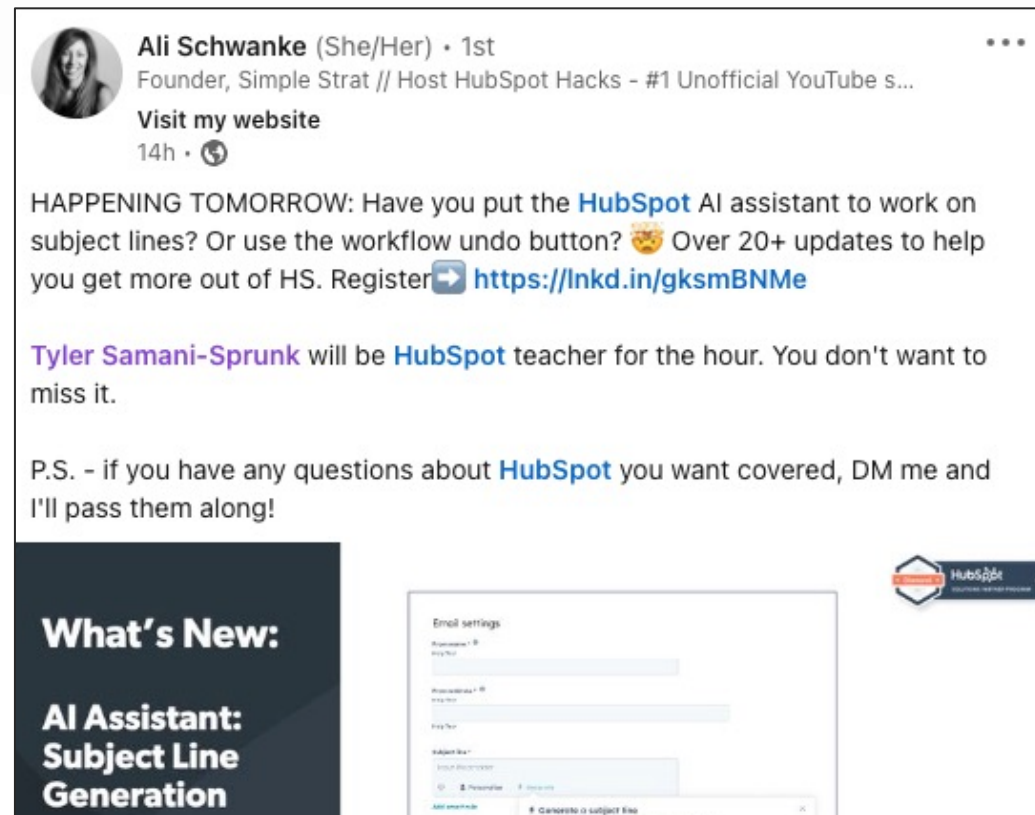
@mentions in the draft will only be applied to posts in the first network selected: LinkedIn
To add @mentions to other network posts, go to the individual tabs and add them there.

Have you seen the last HubSpot Hacks video by @Ali

Ali Schwanke 230 in 2950

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




Ali Schwanke (She/Her) • 1st
Founder, Simple Strat // Host HubSpot Hacks - #1 Unofficial YouTube s...
Visit my website
14h • 🌐

HAPPENING TOMORROW: Have you put the **HubSpot** AI assistant to work on subject lines? Or use the workflow undo button? 🤖 Over 20+ updates to help you get more out of HS. Register <https://lnkd.in/gksmBNMe>

Tyler Samani-Sprunk will be **HubSpot** teacher for the hour. You don't want to miss it.

P.S. - if you have any questions about **HubSpot** you want covered, DM me and I'll pass them along!

What's New:
AI Assistant: Subject Line Generation



Email settings

From: [redacted]

To: [redacted]

Subject: [redacted]

AI Assistant: Subject Line Generation


Small But Mighty Updates




What's New:







View Products Purchased from the Contact or Company Record

- Private Beta
- All Hubs
- All Tiers

< Companies Actions ▾




Big 5 Sporting Goods
big5sportinggoods.com  
4156814593 

 Note
 Email
 Call
 Task
 Meeting
 More

▾ **About this company**

Company domain name
big5sportinggoods.com

Industry 
Retail ▾


Company owner
Winnie Hien (Salesforce) ▾

Type

City
San Antonio

State/Region
California

Postal code
94132

Number of employees 
5,000


Deal	Quantity	Unit Price	Total	Last Purchased
Big 5 Medical Supply Order	2	\$1,696,250	\$3,392,500	May 23, 2023 2:20 PM CDT
Bike Order	1	\$100,000	\$100,000	May 31, 2023 4:19 PM CDT
Medical Supplies Large Order	4	\$285,500	\$1,142,000	May 22, 2023 2:28 PM CDT
Yellow Sports Car	2	\$665,000	\$1,330,000	Mar 14, 2023 9:22 AM CDT

< Prev **1** 2 Next >

Product history

Product history shows you an aggregated view of the products sold during the last 100 deals

Deal ▾



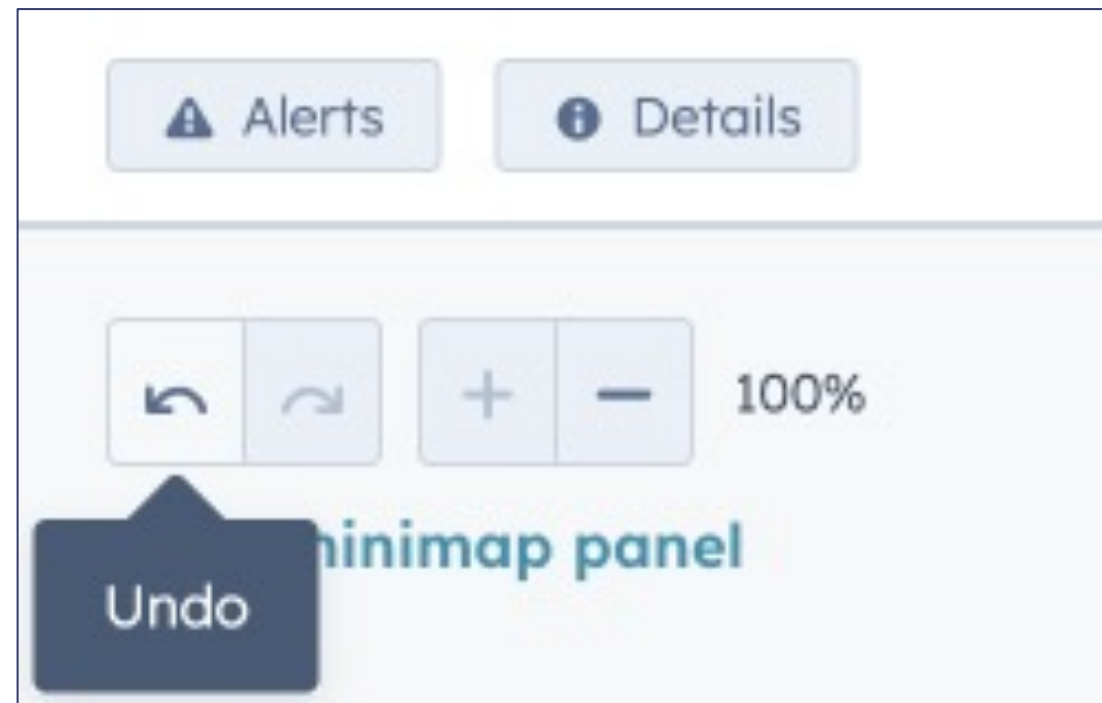
NAME	SKU	Quantity	UNIT PRIC...	TOTAL	LAST PURCH...
Green Bicycle	WAR00...	1000	\$40.00	\$40,000.00	05/22/2023
Serialized Components	KIT00002	200	\$6,793.75	\$1,358,750.00	05/23/2023
Medical Supplies	KIT00001	150	\$3,286.67	\$493,000.00	05/23/2023
Blue bicycle	WAR00...	100	\$900.00	\$90,000.00	05/22/2023
Large order of bikes	IGBLA0...	2	\$50,000.00	\$100,000.00	05/22/2023

< Prev **1** 2 Next >

What's New:

Undo or Redo Changes on the Workflows Canvas

- Live
- All Hubs
- Pro & Enterprise



What's New:

CRM Email Permissions

- Public Beta
- All Hubs
- All Tiers

Contacts	Everything ▾	Everything ▾	Everything ▾
Companies	Everything ▾	Everything ▾	Everything ▾
Deals	Owned only ▾ <input type="checkbox"/> Unassigned	Owned only ▾ <input type="checkbox"/> Unassigned	Owned only ▾ <input type="checkbox"/> Unassigned
Tickets	Owned only ▾ <input type="checkbox"/> Unassigned	None ▾	None ▾
Tasks	Everything ▾	Everything ▾	
CRM emails	Team only ▾ <input type="checkbox"/> Unassigned		
Notes	Owned only ▾ <input type="checkbox"/> Unassigned		
Invoices	<input type="checkbox"/>	<input type="checkbox"/>	

What's New:

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

- Public Beta
- Marketing Hub
- Pro & Enterprise

Add assets to Q4 2023 Tradeshow Jenny Müller's Personal Portal (Account)

Marketing

Website

Blog posts

Landing pages

Website pages

Lead capture

CTAs **NEW**

CTAs (Legacy)

Forms

Ad campaigns

Emails

Social posts

External website pages **BETA** ←

Marketing events

Static lists

Workflows

Save Cancel

External website pages ⓘ

These are external website pages that aren't hosted on HubSpot. To report on any external website pages that you add here, the HubSpot tracking code will need to be installed.

Create external website page

External website pages are sites that aren't hosted on HubSpot. You can track visitors to your external website pages by adding the website URL here. Any website pages you add need to have HubSpot's tracking code installed.

[How to install the HubSpot tracking code](#)

Website URL *

https:// www.mywebsite.com

Create Cancel

What's New:

New Marketing Email Manage Page

- Public Beta
- Marketing Hub
- All Tiers

Marketing Email
55 marketing emails

Manage Analyze Health

All emails X Drafts Scheduled Sent Archived + Add view (5/50) All views Folders

Business units Campaigns Email types Users and teams Subscriptions Advanced filters (0)

Save view

Search marketing emails

<input type="checkbox"/>	EMAIL NAME ⓘ	LAST UPDATED AT (CST) ⓘ	LAST UPDATED BY ⓘ
<input type="checkbox"/>	Customer Support Survey 3 ● Published Customer feedback email	Nov 30, 2023	--
<input type="checkbox"/>	Meeting Notes to Distributor (Clone) ● Draft Automated email	Nov 10, 2023	Will DePeri
<input type="checkbox"/>	A/B Test	Nov 10, 2023	Will DePeri


What's New:

Blocked Numbers List

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

Tools

Meetings

Calling 

Call Setup

Blocked Numbers List

Transcription and Analysis

Blocked Numbers List

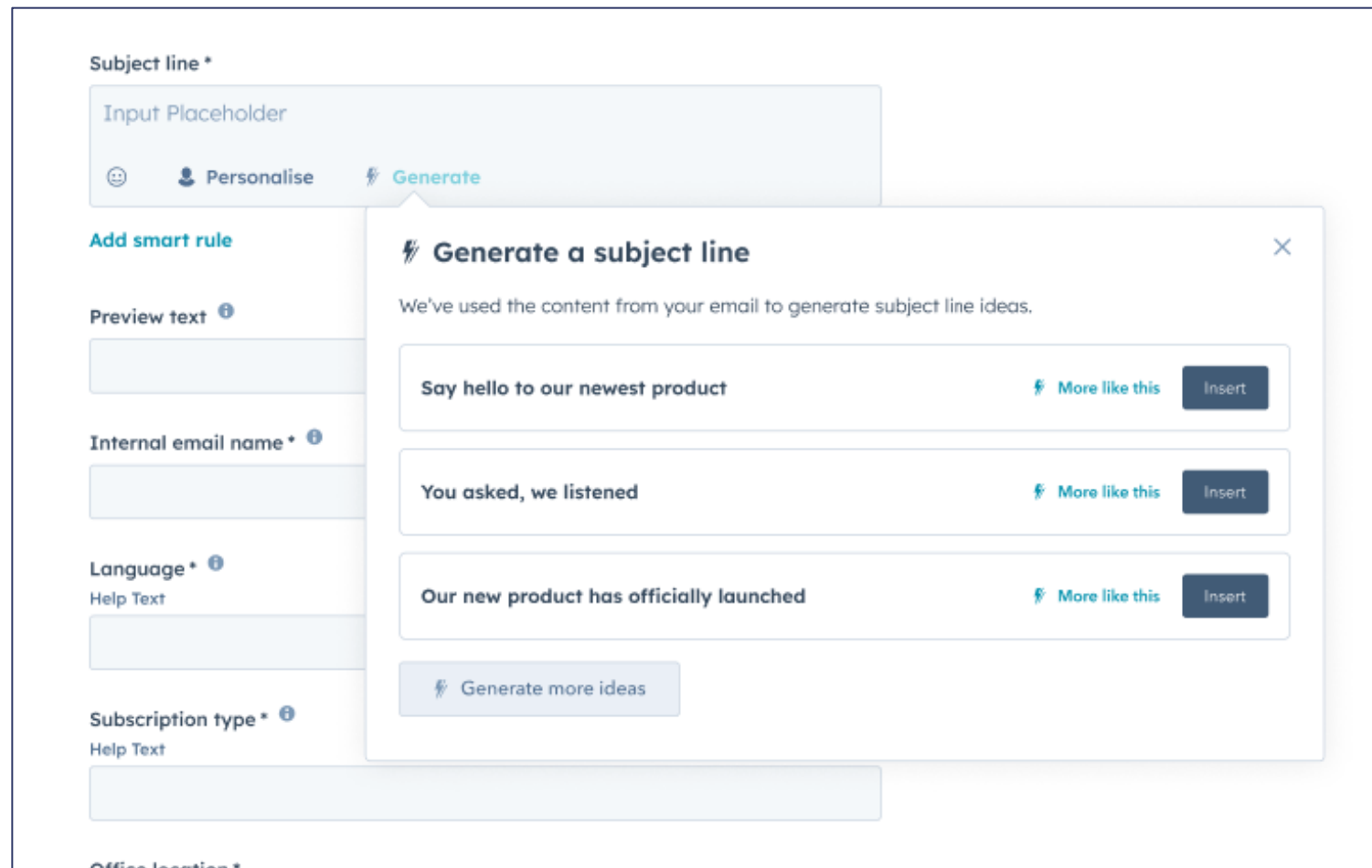
Manage which incoming phone numbers will be blocked, outbound calls will not be affected.

[Add number](#)

What's New:

AI Assistant: Subject Line Generation

- Public Beta
- Marketing Hub
- All Tiers



The screenshot shows the HubSpot AI Assistant interface for subject line generation. The main form on the left includes fields for "Subject line *", "Preview text ⓘ", "Internal email name * ⓘ", "Language * ⓘ", and "Subscription type * ⓘ", each with a "Help Text" link. A "Generate" button is visible below the "Subject line" field. A modal window titled "Generate a subject line" is open, displaying three generated subject line ideas: "Say hello to our newest product", "You asked, we listened", and "Our new product has officially launched". Each idea has a "More like this" link and an "Insert" button. A "Generate more ideas" button is located at the bottom of the modal.

What's New:

Redesigned Workflow Experience

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

Choose an action Cancel

Search actions

Delay Branch Go to workflow **Go to action**

HubSpot

- > **Communications**
Send emails, SMS messages, and notifications, an...
- > **CRM**
Create and update CRM records and property valu...
- > **Marketing**
Manage ad audiences and lists, and update conta...
- > **Data ops**
Write code, send webhook requests, and format y...

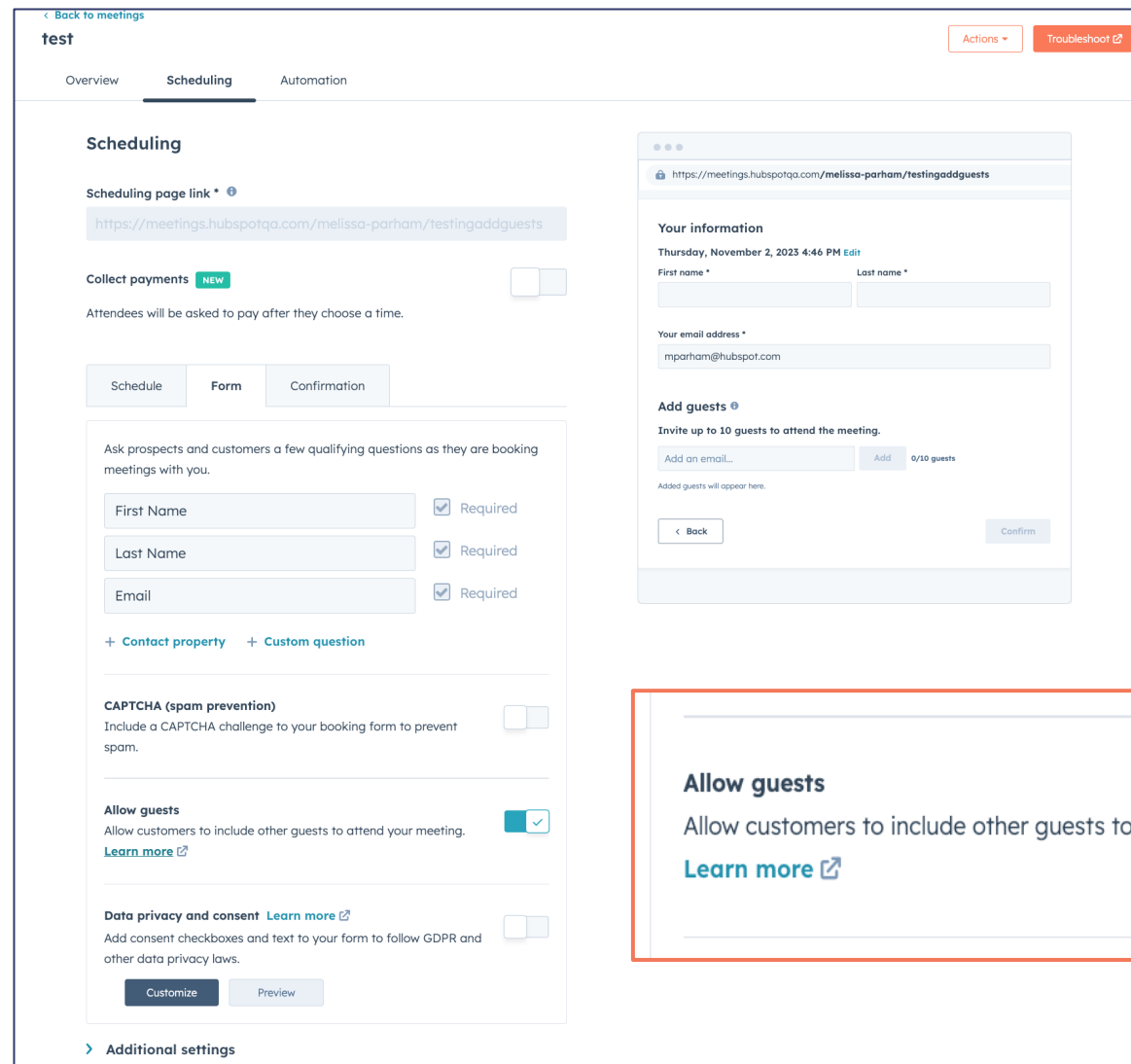
Connected apps Connect app

- > **Asana**
Built by HubSpot
- > **Google Sheets**
Built by HubSpot

What's New:

Add Guests to Meetings via Scheduling Pages

- Public Beta
- All Hubs
- All Tiers



The screenshot shows the HubSpot Scheduling configuration page for a meeting titled "test". The page is divided into two main sections: "Scheduling" and "Add guests".

Scheduling Section:

- Scheduling page link:** <https://meetings.hubspotqa.com/melissa-parham/testingaddguests>
- Collect payments:** A toggle switch is currently turned off. A "NEW" badge is present.
- Attendees will be asked to pay after they choose a time.**
- Form Configuration:**
 - Schedule:** Ask prospects and customers a few qualifying questions as they are booking meetings with you.
 - Fields:**
 - First Name: Required
 - Last Name: Required
 - Email: Required
 - Options:** + Contact property, + Custom question
 - CAPTCHA (spam prevention):** Include a CAPTCHA challenge to your booking form to prevent spam.
 - Allow guests:** Allow customers to include other guests to attend your meeting. [Learn more](#)
 - Data privacy and consent:** Add consent checkboxes and text to your form to follow GDPR and other data privacy laws. [Learn more](#)
 - Buttons:** Customize, Preview

Add guests Section:

- Your information:** Thursday, November 2, 2023 4:46 PM [Edit](#)
- First name:**
- Last name:**
- Your email address:** mparham@hubspot.com
- Add guests:** Invite up to 10 guests to attend the meeting. 0/10 guests
- Added guests will appear here.**
- Buttons:** < Back, Confirm

Additional settings: >

Allow guests

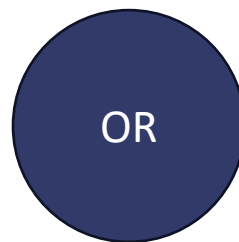
Allow customers to include other guests to attend your meeting. [Learn more](#)

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



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!



HUBSPOT USER GROUP

Leaning into the Leads Object

Tuesday, Dec 12, 2023
11am - 12pm EST

TYLER SAMANI-SPRUNK
SIMPLE STRAT
HUBSPOT HACKS

KYLE JEPSON
HUBSPOT
HUG LEADER

HUBSPOT ADMIN
HUG

Illustration of a funnel with three arrows pointing down into it, and a dollar sign icon inside the funnel.



THE NEW AND NOW SERIES

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

Wednesday, January 10, 2024
12pm CST / 1pm EST

PRESENTED BY TYLER SAMANI-SPRUNK

SIMPLE STRAT

HubSpot
Diamond
SOLUTIONS PARTNER PROGRAM

Portrait of Tyler Samani-Sprunk.

SimpleStrat.com/Webinars

Questions & Answers