

Getting the Most Out of HubSpot's October 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
 - Easier list management
 - New workflow testing options
 - Same-object associations
2. Small but Mighty Updates
 - More powerful business units
 - New tools for mobile
 - Workflow alerts
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:

Calling as a Channel in Inbox

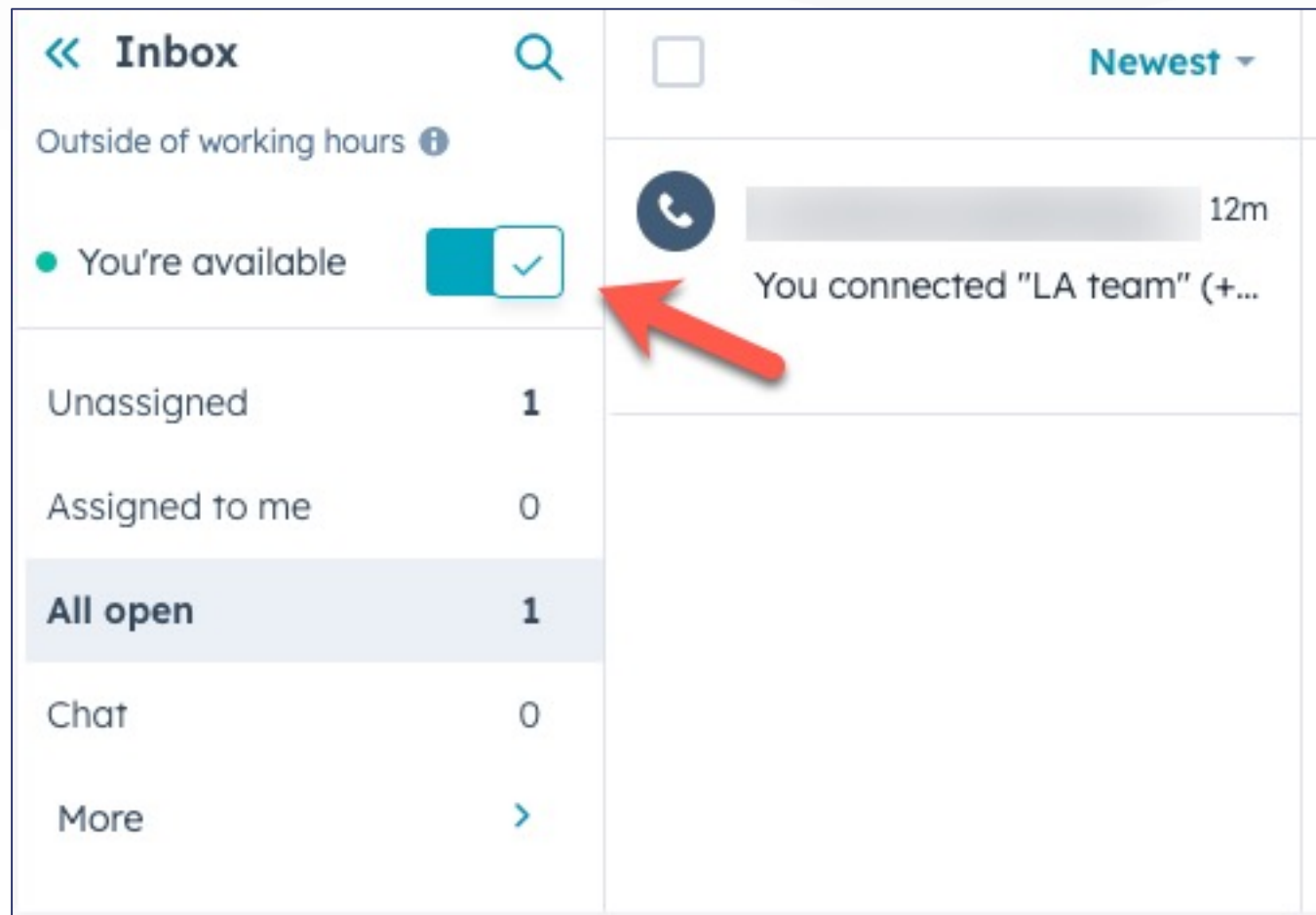
- Public Beta
- Sales & Service Hubs
- Pro & Enterprise

Which channel would you like to connect?

 Team email	 Forms	 Facebook Messenger	 WhatsApp	 Calling
Connect a company email address such as sales@mycompany.com or	Receive form submissions in your shared inbox.	Start receiving Facebook Messenger conversations in your inbox	Start receiving WhatsApp conversations in your inbox	Start making and receiving calls in inbox

Use Calling Channels Now: Route to Available Rep

- Great for both marketing and sales
- Rings up to 10 reps at a time, but more can be assigned to the number
- Individual users can also manually control their availability
- Quickly follow up via email from same inbox thread



The screenshot shows the HubSpot inbox interface. On the left, there's a navigation menu with 'Inbox' selected. Below it, there's a status indicator 'You're available' with a toggle switch that is turned on (indicated by a checkmark). Below the status indicator, there's a list of filters: 'Unassigned' (1), 'Assigned to me' (0), 'All open' (1), 'Chat' (0), and 'More' (>). On the right, there's a list of messages. The top message is a call notification with a phone icon, a red arrow pointing to the 'You're available' toggle, and the text 'You connected "LA team" (+...)'.

Use Calling Channels Now: Reduce Numbers Used

- Don't have to use as many HubSpot phone numbers
- One number on your website can route to full team
- Team members can share a non-personalized number in their email signature, business cards, and collateral

Routing and Configuration

Set the working hours and routing flow that you would like this number to follow.

Name
This name will display next to your phone number in HubSpot.

Customer Support

Channel working hours ⓘ
Set the times when calls should be routed for this channel.

Day	Starting time	End time	Timezone
Mon - Fri ▼	from 🕒 9:00 AM ▼	to 🕒 5:00 PM ▼	UTC -04:00 New York ▼

+ Add hours

Routing during working hours
Select the users or teams that this number will route to. A maximum of 10 users can be rang at one time.

#1. Route calls to:

Specific users and teams

👤 Liz Rudloff ×
👤 Sally Seller ×

👤 support@simplestrat.com ×
👤 Sam Seller ×

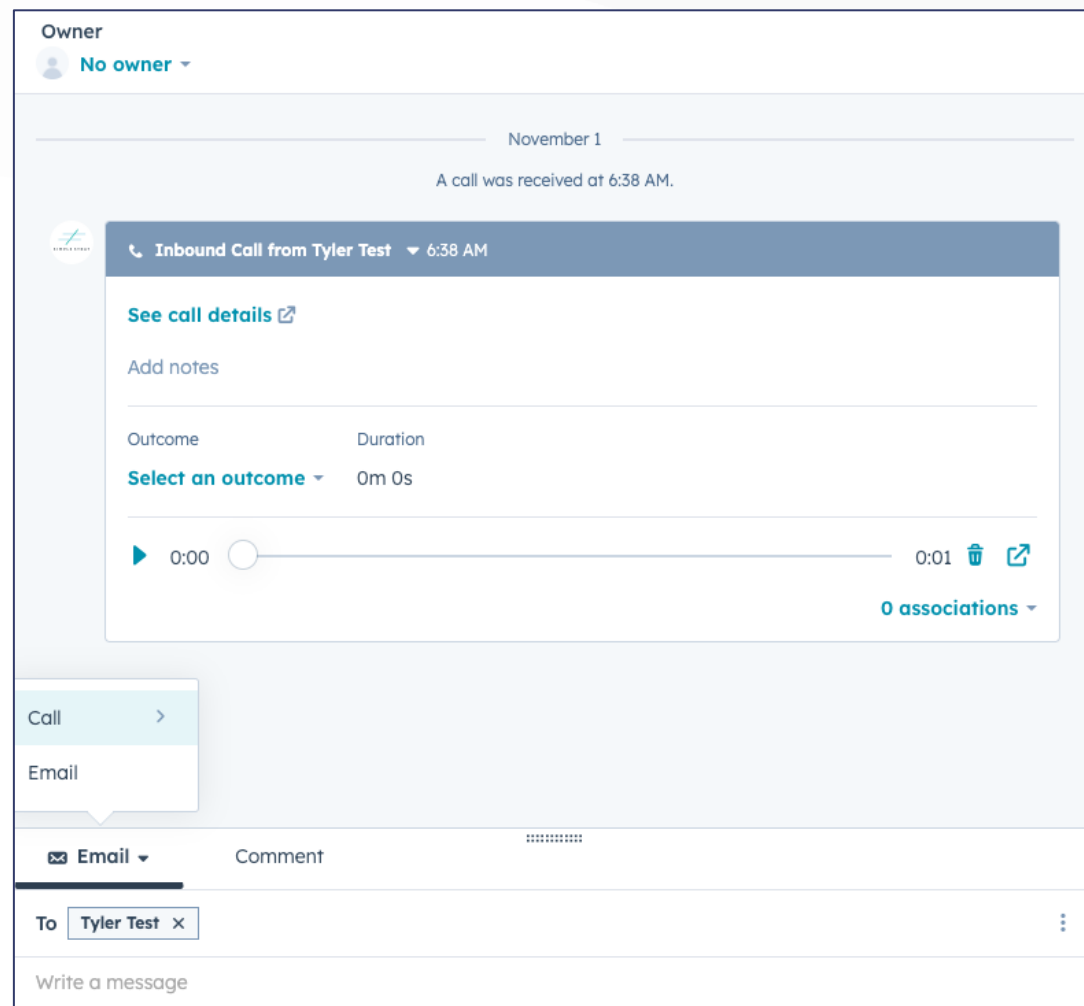
👤 Will D ×
👤 Will DePeri ×
👤 Camille Balhorn ×

👤 Alexis Eaglin ×
👤 Ali Schwanke ×

Note: The call will only ring for

Use Calling Channels Now: Manage Missed Calls Quickly

- Unanswered calls will prompt caller to leave a voicemail
- Missed calls will create a new thread in the conversations inbox
- All users assigned to that calling channel will be notified and next available user can assign the thread to themselves
- User can easily call the person back or send an email
- Note that returning calls from numbers not already associated to a contact is a bit clunky

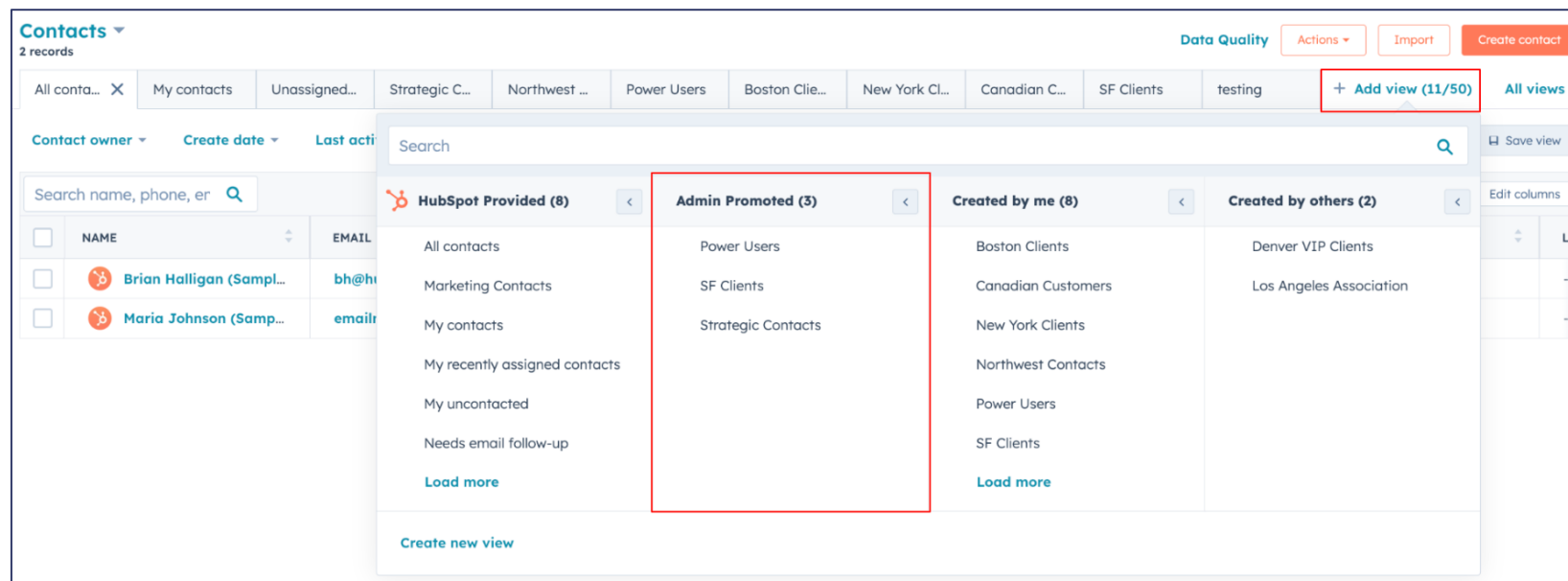


The screenshot displays a HubSpot interface for managing a missed call. At the top, it shows 'Owner: No owner'. A notification for 'November 1' states 'A call was received at 6:38 AM.' Below this, a modal window titled 'Inbound Call from Tyler Test' at 6:38 AM is open. The modal includes a 'See call details' link, an 'Add notes' field, and a table for call outcomes. The table has columns for 'Outcome' and 'Duration', with a 'Select an outcome' dropdown and a '0m 0s' duration. A play button and a progress bar are visible, along with a '0 associations' link. A bottom menu offers 'Call' and 'Email' options. At the very bottom, there is an 'Email' dropdown, a 'Comment' field, and a recipient list with 'Tyler Test' selected.

What's New:

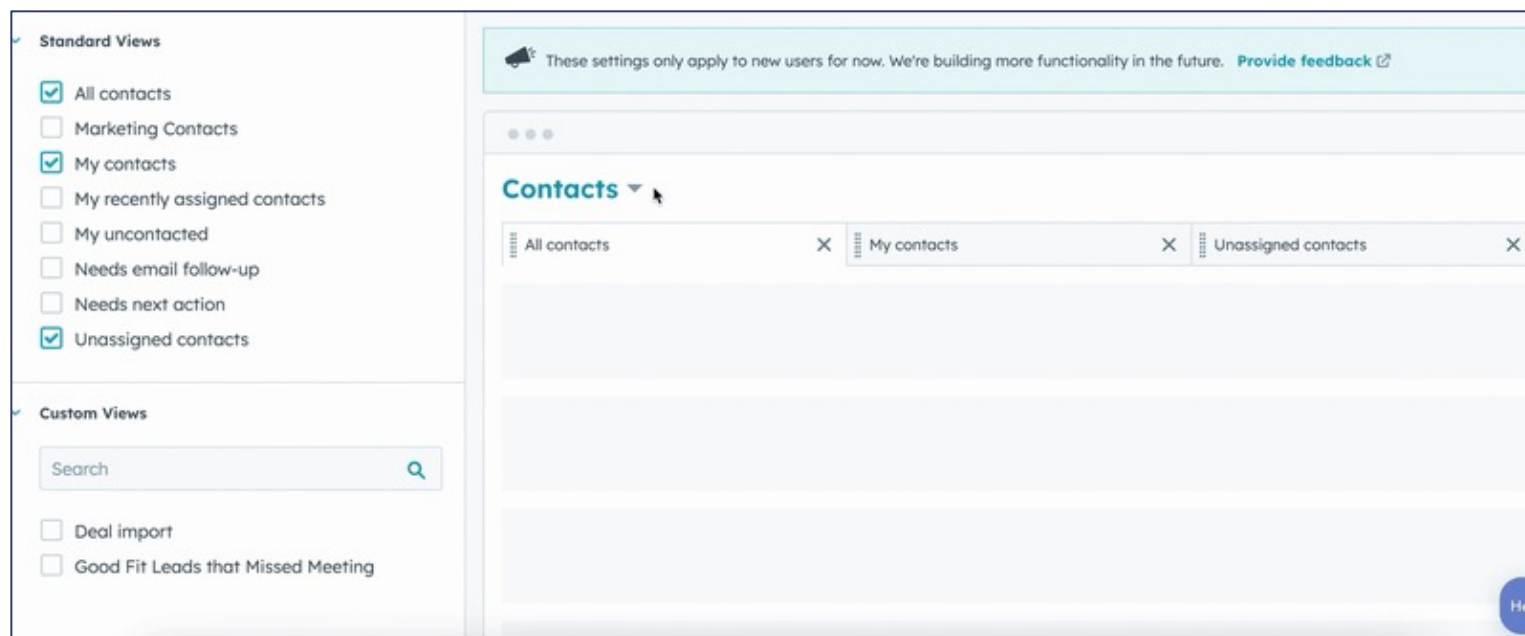
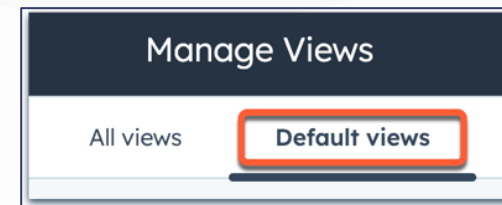
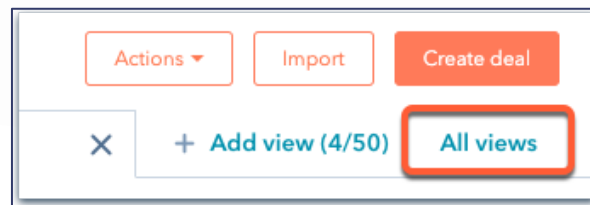
Admin 'Default' Views in the Add View Modal

- Public Beta
- All Hubs
- All Tiers



Use Admin-Promoted Views Now:

- Admins: Click All Views > Default Views to manage
- Unassigned leads up for grabs
- Leads or customers that haven't been contacted in X days
- Current customers
- Leads that have visited the website today
- Leads over a certain lead score
- Deals past their close date



What's New:

Feedback Submissions Tagging

- Public Beta
- Service Hub
- Pro & Enterprise



Feedback submission

SN

Feedback Contact Information Tags **NEW**

How happy were you with the overall buying experience?

😊 Happy

Can you tell us why you scored us so highly?

Fantastic..

Submitted 15 September 2022 15:59 (88 days ago)

Search

- Support SLA
- Tea lovers
- Coffee lovers

+ Add a tag

Support Quality X Coffee lovers X

Update tags Manage tags





Use Feedback Tagging Now: Categorize Feedback

- Tag feedback that requires follow-up
- Tag feedback that’s particularly valuable for a certain team (e.g. product team or sales)
- Tag feedback by satisfaction level
- Tag feedback that mentions something you want to track
 - Example: You just rolled out a new feature and want to tag all feedback that mentions it
- Tag feedback to add context to customers
 - Example: You run a coffee shop and tag your pastry lovers

Default Feedback view + Add view (1/50) ▾ All views

☰ **Advanced filters (0)**

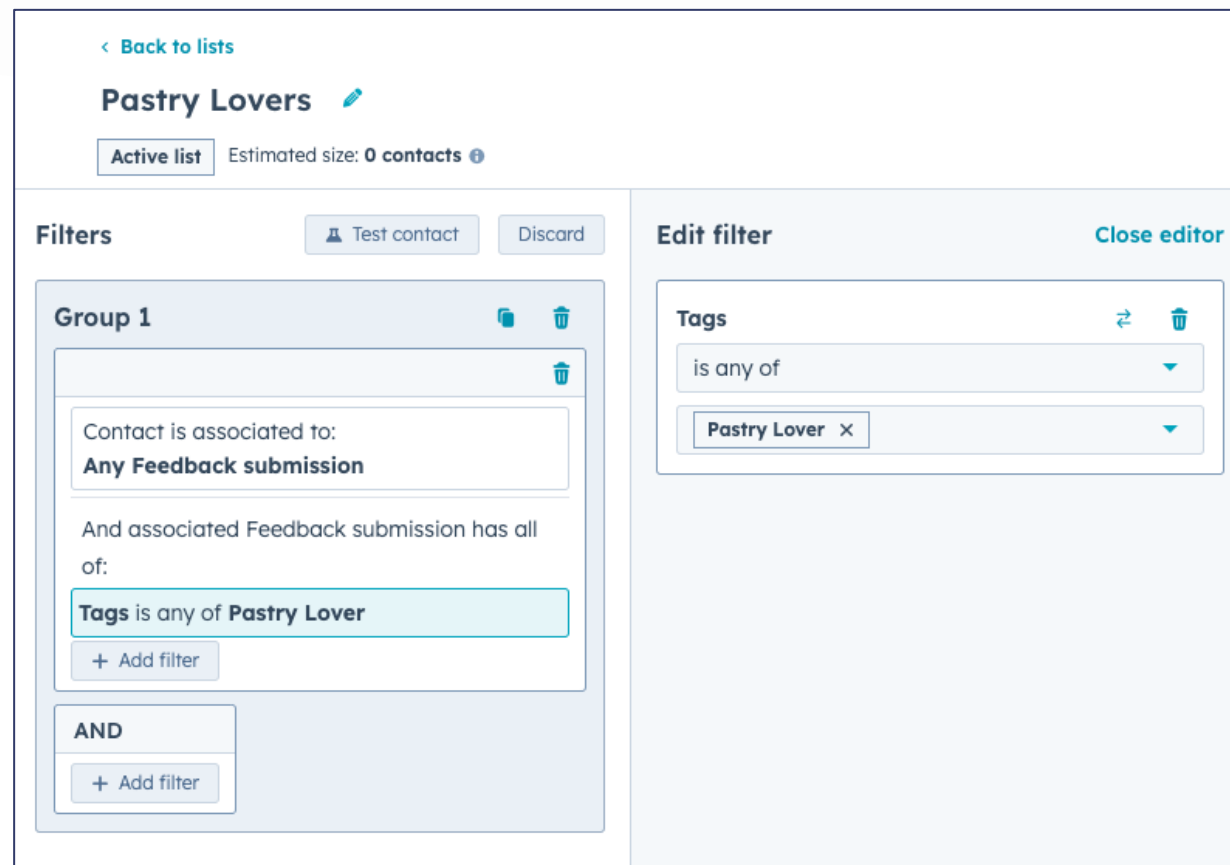
Search feedback submit

<input type="checkbox"/>	USER	DAT... <input type="text"/>	HOW ... <input type="text"/>	TAGS <input type="text"/>
<input type="checkbox"/>	 Jack Reacher	Mar 27, 2023	Happy	Needs Follow-up
<input type="checkbox"/>	 Harley Davidson	Mar 27, 2023	Happy	

25 per page ▾

Use Feedback Tagging Now: Streamline Reporting

- Create saved views of feedback submissions by tag
- Create lists of contacts based on those contact's feedback submission tags
 - Pro-tip: use these lists for marketing
- Create bar-chart reports for feedback categories for dashboards, stakeholders



The screenshot displays the HubSpot interface for a contact list named "Pastry Lovers". At the top, there is a "Back to lists" link, the list name "Pastry Lovers" with an edit icon, and a status bar indicating "Active list" and "Estimated size: 0 contacts". Below this, the "Filters" section is active, showing a "Test contact" button and a "Discard" button. The filter configuration is as follows:

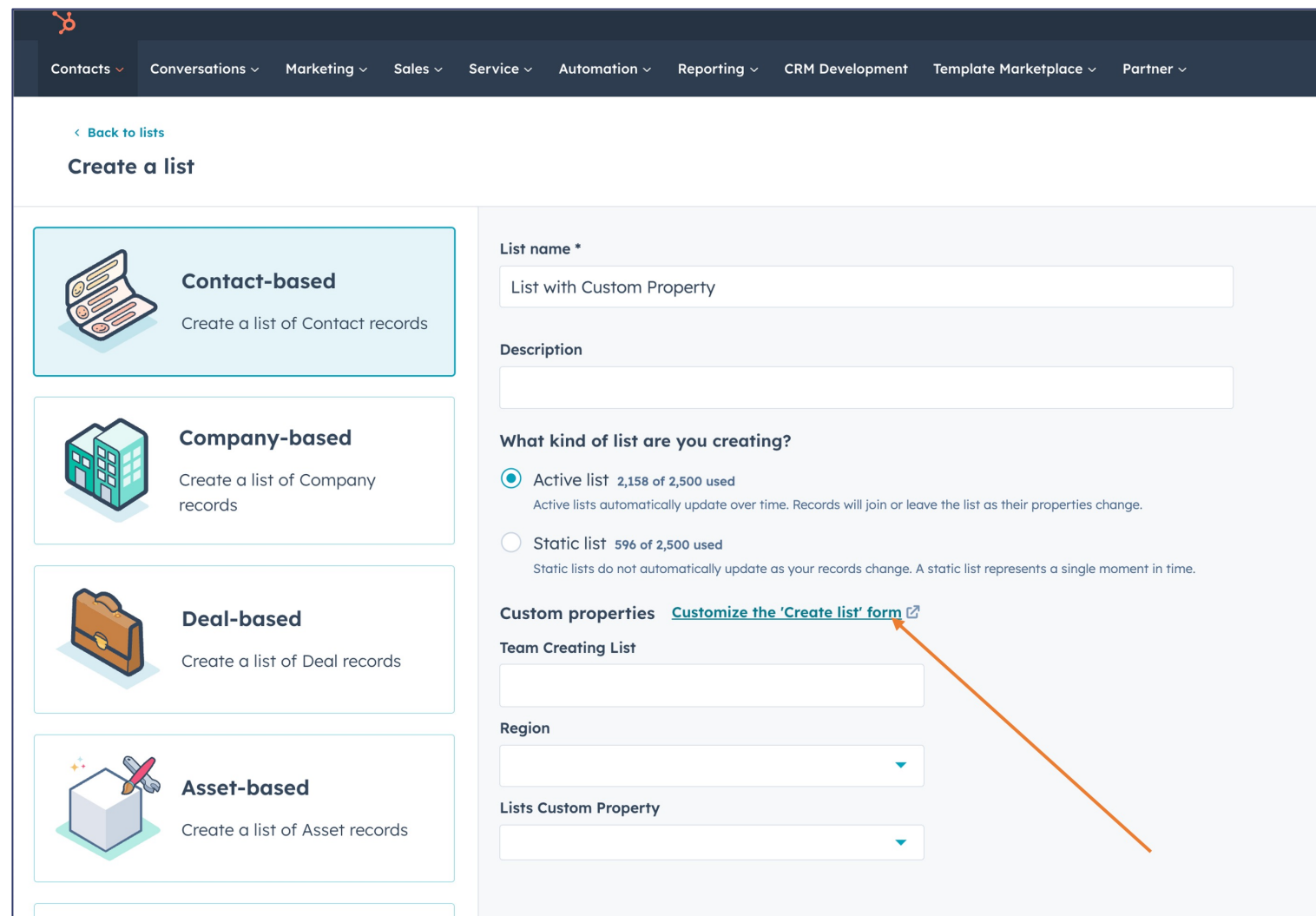
- Group 1:** Contains a filter rule: "Contact is associated to: **Any Feedback submission**". Below this, it specifies "And associated Feedback submission has all of:" followed by a filter: "Tags is any of **Pastry Lover**". There is an "+ Add filter" button below this rule.
- AND:** A section for additional filters with an "+ Add filter" button.

The "Edit filter" panel on the right shows the configuration for the "Tags" filter, with the operator set to "is any of" and the selected tag "Pastry Lover". There are "Close editor" and "Close" buttons in the top right of the edit panel.

What's New:

Custom Properties & Description Field for Lists

- Public Beta
- All Hubs
- All Tiers

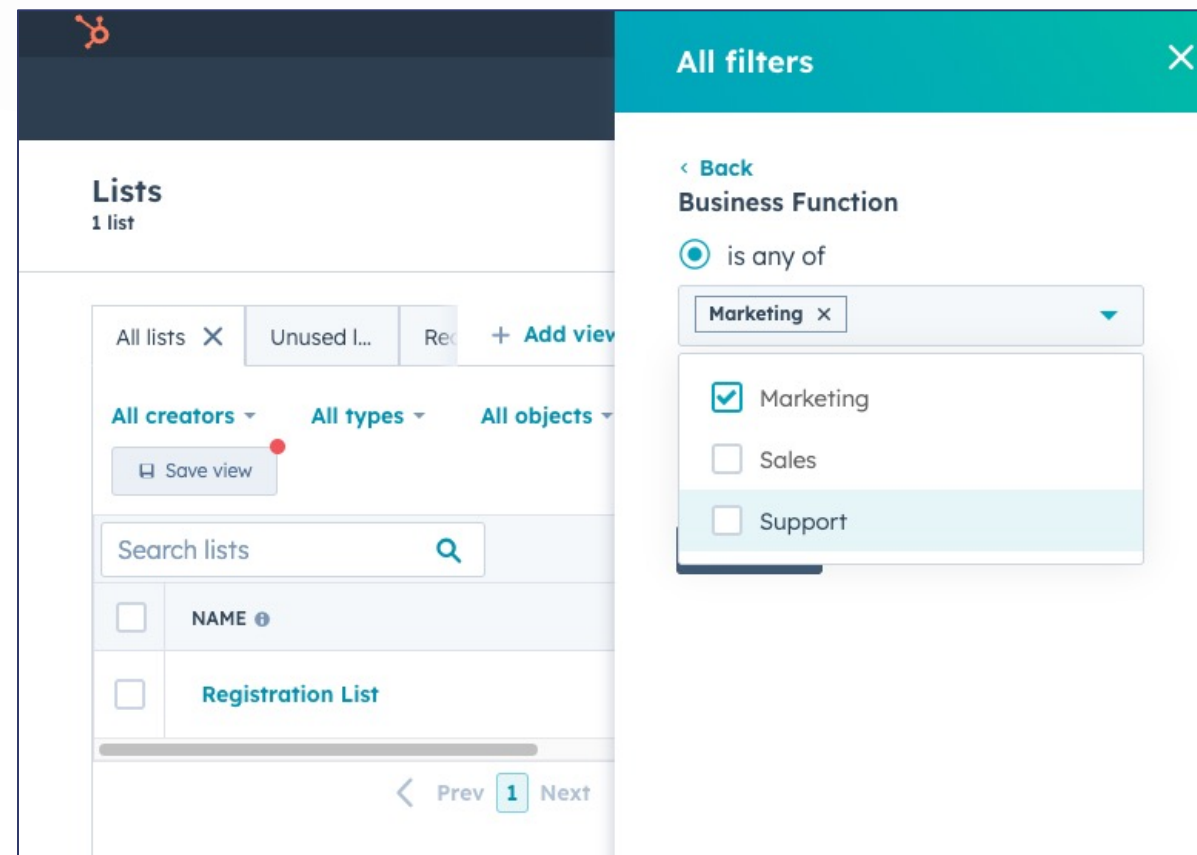


The screenshot shows the HubSpot 'Create a list' interface. On the left, there are four list creation options: Contact-based (Contact records), Company-based (Company records), Deal-based (Deal records), and Asset-based (Asset records). The 'Contact-based' option is selected. On the right, the configuration form includes:

- List name ***: A text input field containing 'List with Custom Property'.
- Description**: An empty text input field.
- What kind of list are you creating?**: Two radio button options:
 - Active list** (selected): 2,158 of 2,500 used. Description: 'Active lists automatically update over time. Records will join or leave the list as their properties change.'
 - Static list**: 596 of 2,500 used. Description: 'Static lists do not automatically update as your records change. A static list represents a single moment in time.'
- Custom properties**: A link labeled 'Customize the 'Create list' form' with an external link icon, highlighted by an orange arrow.
- Team Creating List**: An empty text input field.
- Region**: A dropdown menu.
- Lists Custom Property**: A dropdown menu.

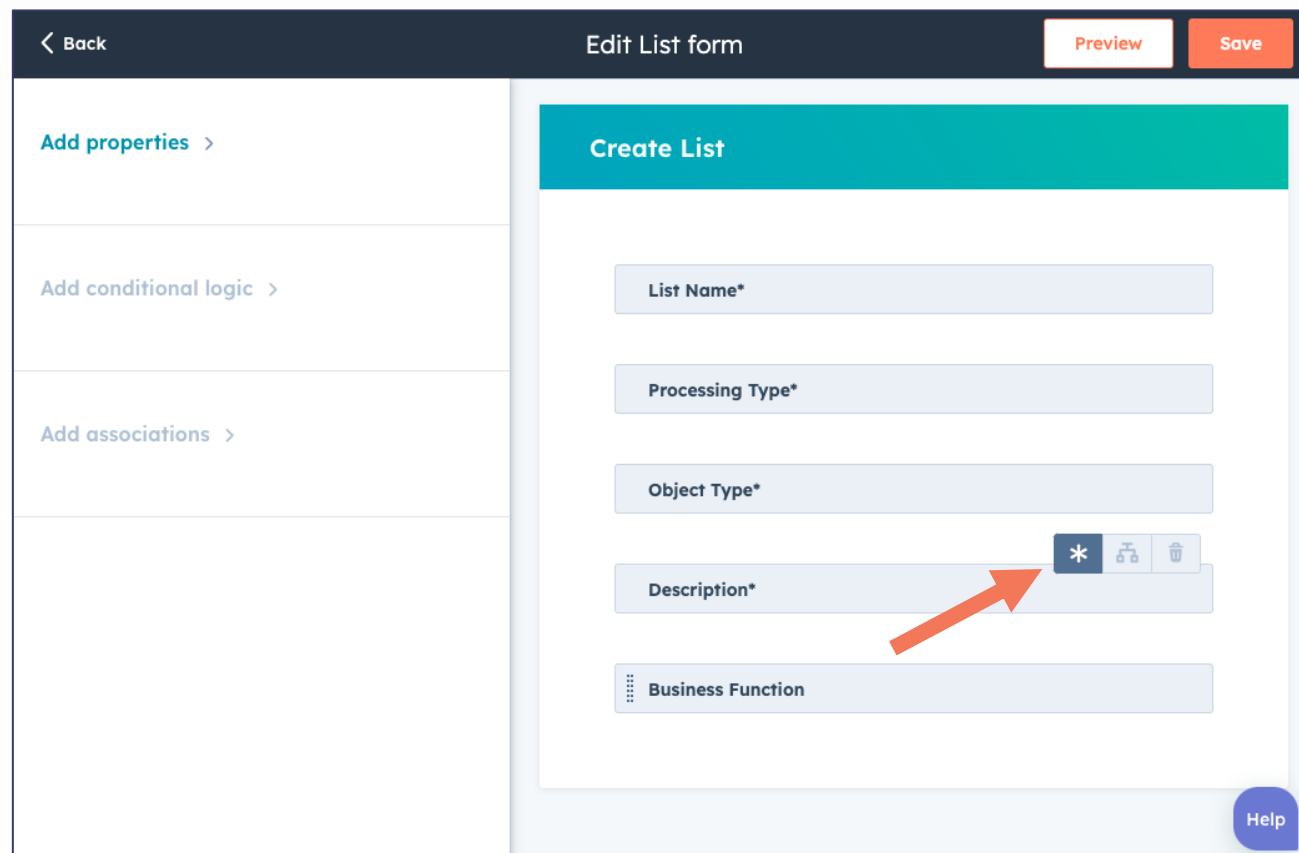
Use List Properties Now: Organize Lists

- More reliable than naming conventions
 - Enforceable through required properties
 - Eliminate misspellings & inconsistencies
 - Don't rely on memory or documentation
- Property ideas:
 - Business function using list (e.g. sales)
 - Campaign name
 - Asset type the list supports (e.g. email, workflow)
 - Place in the buyer's journey (e.g. Awareness)
 - Estimated sunset date



Use List Descriptions Now: Help Future You

- Add descriptions to existing lists
 - Update properties while you're at it
- Require descriptions for new lists
 - Settings > Objects > Lists > "Customize the Create list form"



Back Edit List form Preview Save

Add properties >

Add conditional logic >

Add associations >

Create List

List Name*

Processing Type*

Object Type*

Description* *

Business Function

Help

What's New:

Random Split Branch in Workflows

- Live
- Marketing Hub
- Pro & Enterprise

< Branch Cancel Save

Choose which logic to use to send contacts to different branches:

- 

Based on a single property value
(value equals)
Example: Send contacts to the branch named **West coast list** if their location equals **Oregon**.
- 

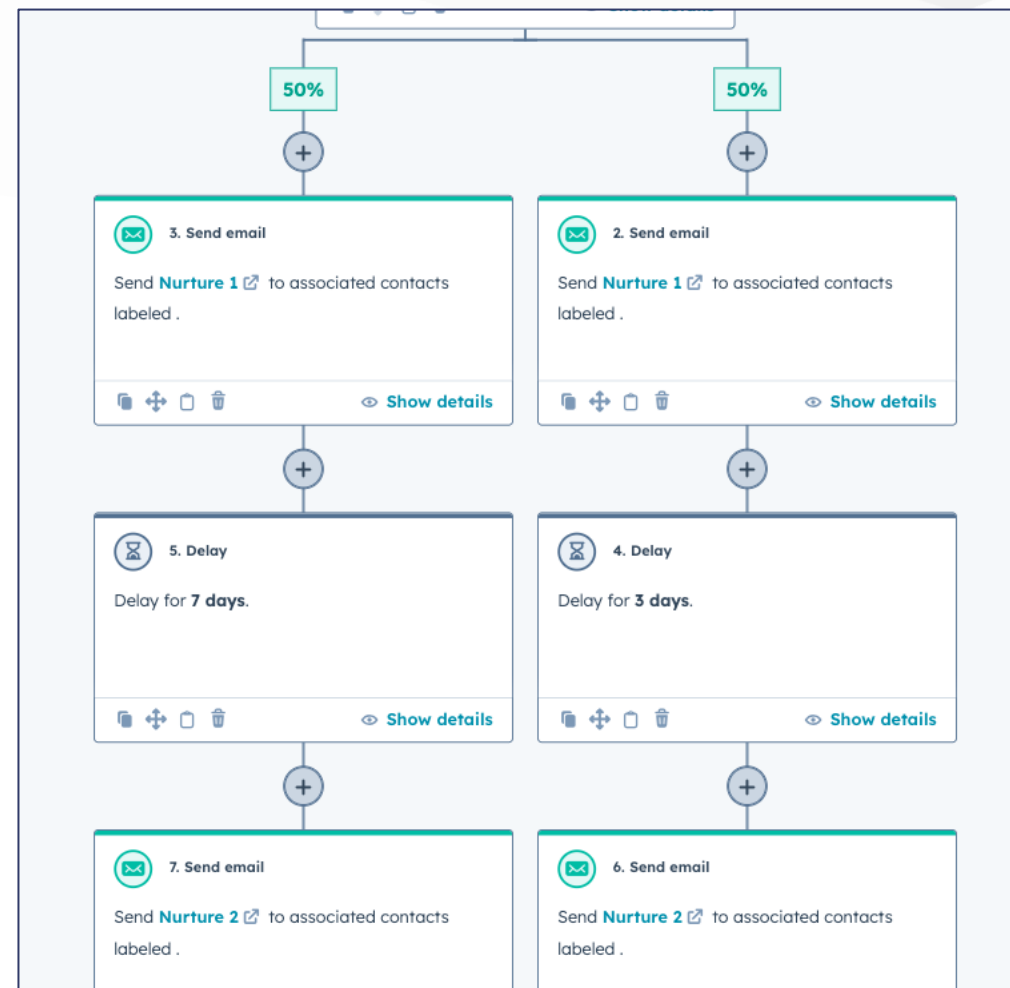
Based on matching filter criteria
(if/then)
Example: Send contacts whose **email is known** and **city is Irvine** and is **not a subscriber** to the branch named California marketers.
- 

Based on a single action outcome
(value equals)
Example: Send contacts to a different branch if they **did not complete** a task while in the **delay until event** action.
- 

Based on a random percentage
(percentage split)
Example: Send **50%** of contacts to Branch 1 and **50%** of contacts to Branch 2.

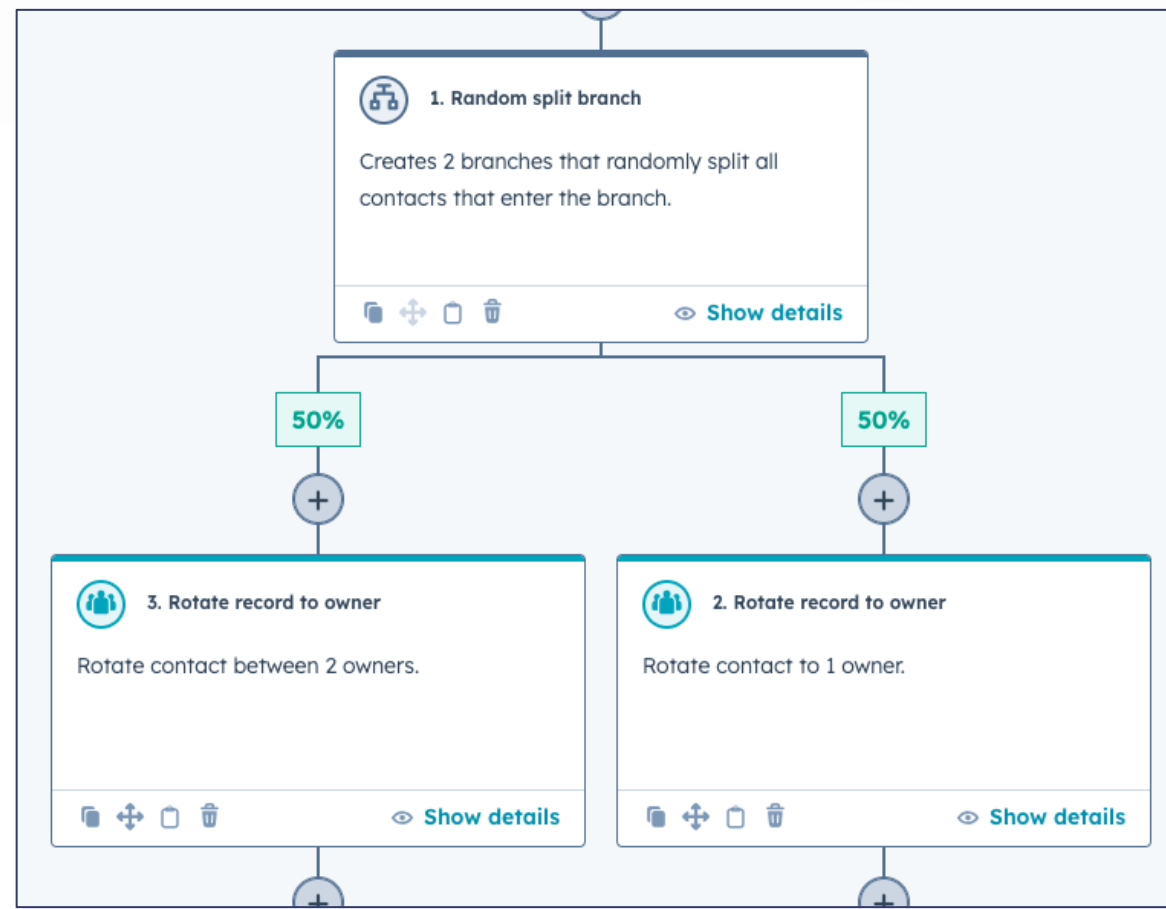
Use Random Branches Now: A/B Testing

- Add a random split branch and test variations between the branches:
 - Email vs SMS
 - Different delay lengths
 - Order of nurturing emails
- Reporting on this is still challenging
 - Can see some analytics within the workflow building tool (eg. click rate for emails)
 - Create static lists for each branch and add objects to the right list as step 1 under the branch
 - Stamp object properties with branch info



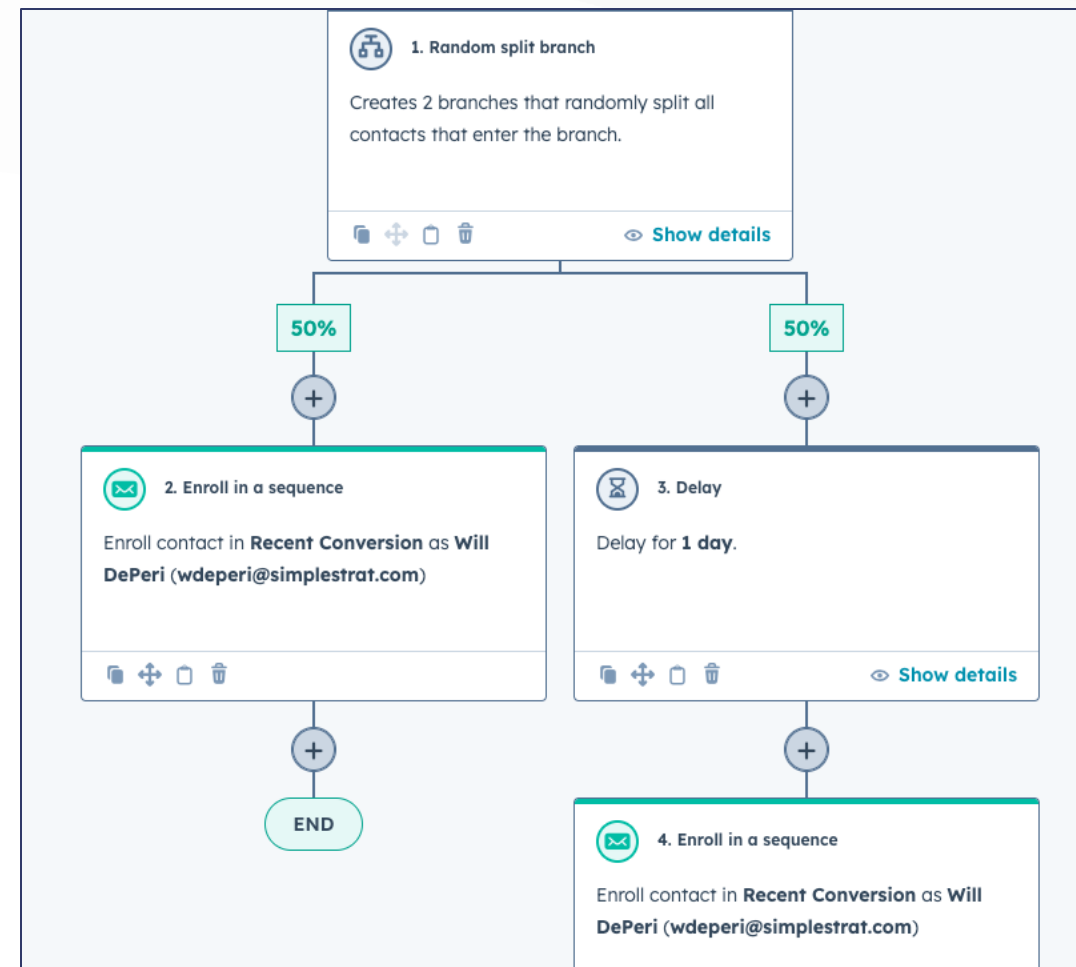
Use Random Branches Now: Weighted Routing

- Use stacked random branches or unequal rotations to route contacts to owners unevenly
 - Example: full-time reps get more, high-performing reps get more



Use Random Branches Now: Avoid Hitting Limits

- Some tools like sequences (enterprise) and SMS tools may have daily/weekly limits
- Splitting up leads may help avoid hitting the limits (especially when expecting a large number of enrollments during specific time periods)
- Use random split branches + delays



What's New:

Associate Records of the Same Object Type

- Public Beta
- All Hubs
- All Tiers*

**Labels are only available to Pro+*

Add existing contact ✕

Create new Add existing

Association Labels

Mario Mario (mario.bros@gmail.com) ✕

Labels

Student ✕ ▼

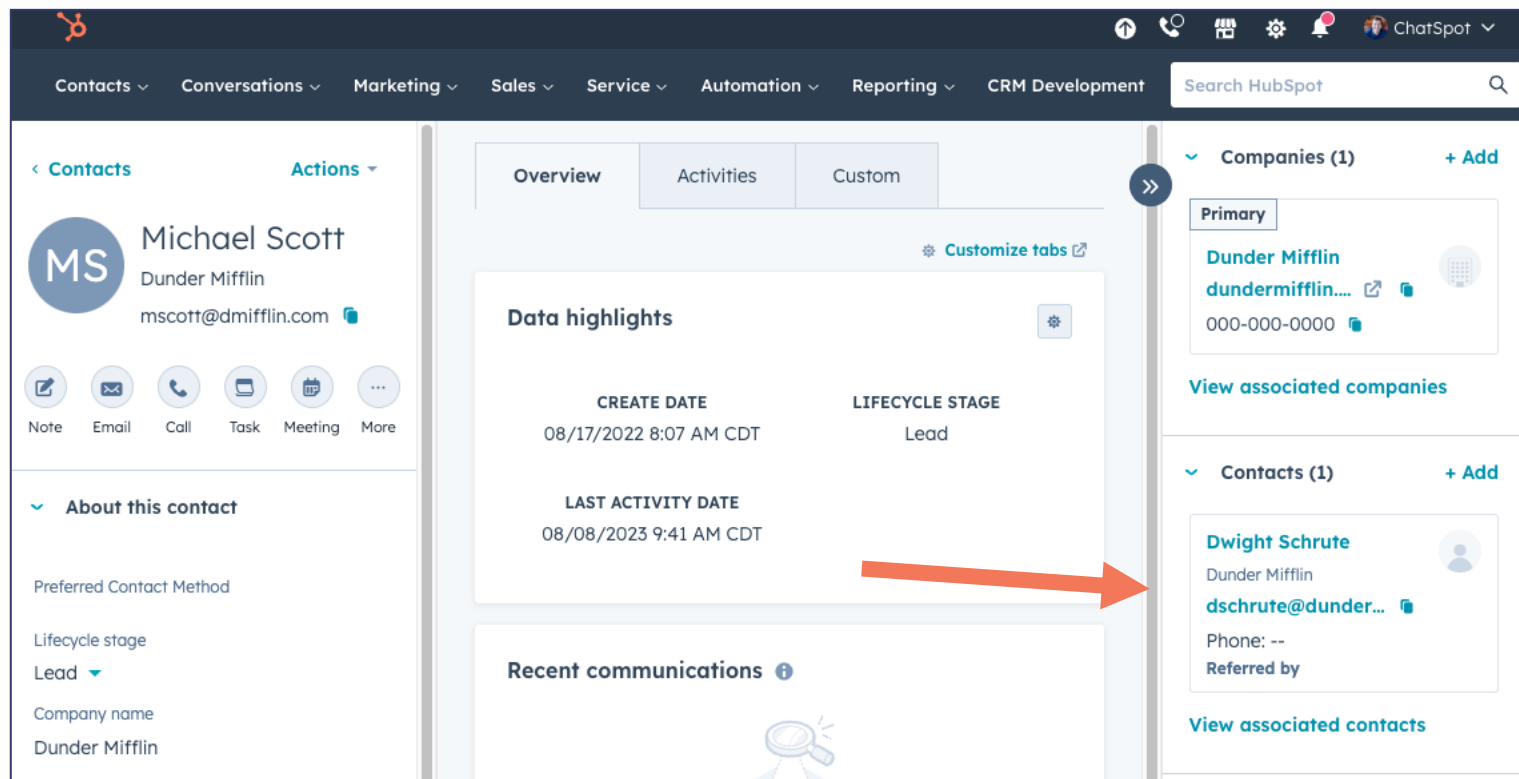
Preview of selected records

Mister Plumber 🔗
Teacher

Mario Mario 🔗
Student

Use Same-Object Associations Now:

- Associate contacts within same household
- Associate referring contact with the contact they referred
- Associate original deals and renewals or upsells
- Associate different types of companies:
 - Vendors and clients
 - Partners and clients
 - Resellers and customers



Small But Mighty Updates


What's New:

Can Now Enroll in Private Betas from Within Portal

- Live
- All Hubs
- All Tiers

record


What is it? With this update, admins can now view more granular p...
connected account, security, and association data on a user-by-use...
"Overview" tab of the... [Read more](#)



Integrations

[Private Beta] New Shopify Integration Objects Powered by Data Sync

What is it? The new Shopify integration is now available to you in p...
Marketplace. Powered by data sync, the two-way syncing engine be...
integration offers:One-way... [Read more](#)



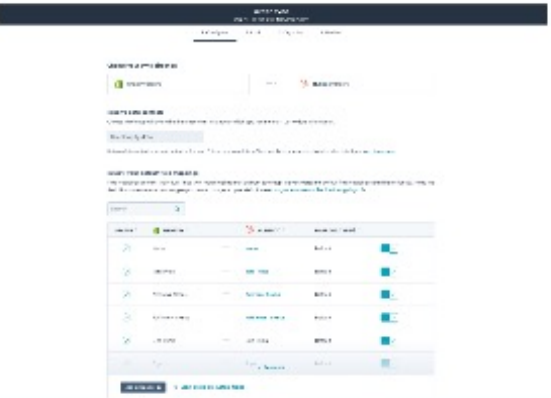
Design Manager | Settings

[Live] Options for contacts to downlo...

Request beta

Product Update ✕

Then set up the sync by choosing from one- or two-way contact sync, one- or two-way product sync, one-way order sync, and one-way cart sync. Review your field mappings and turn on the sync.



What's New:

Associate Emails to Business Units

- Private Beta
- Marketing Hub
- Enterprise + Business Units


Marketing Email Compare emails Create email

Manage Analyze Health BETA

List Folders Search for emails Business unit: All business units Campaign: All campaigns Type: All emails Manage columns Export emails

<input type="checkbox"/>	TITLE	LAST UPDATED	OPEN R...	BUSINESS UNIT
<input type="checkbox"/>	New email Draft A/B - Updated 6/23/2021 by Shane Janssens	Jun 23, 2021	0%	T Toyota
<input type="checkbox"/>	RSS Email without a BU (English) Published Instant Blog Email - Updated 6/23/2021 by Hubspot System	Jun 23, 2021	0%	E Email-BusinessUnit
<input type="checkbox"/>	New email Draft - Updated 6/23/2021 by Prateek Ojha	Jun 23, 2021	0%	S Subaru
<input type="checkbox"/>	New email Draft - Updated 6/23/2021 by Prateek Ojha	Jun 23, 2021	0%	L Lexus
<input type="checkbox"/>	New email Draft - Updated 6/23/2021 by Prateek Ojha	Jun 23, 2021	0%	L Lexus
<input type="checkbox"/>	New email Draft - Updated 6/21/2021	Jun 21, 2021	0%	T Toyota

Email tools



Import from other provider

Connect to another provider to import your contacts


What's New:

Manage Subscription Types and Statuses Across Business Units

- Public Beta
- Marketing Hub
- Enterprise + Business Units

Email

Configuration Subscriptions **Subscription Types** Tracking SMTP Send Frequency

Current View: Simple Strat Test Portal (Accoun...  You're only modifying this view.

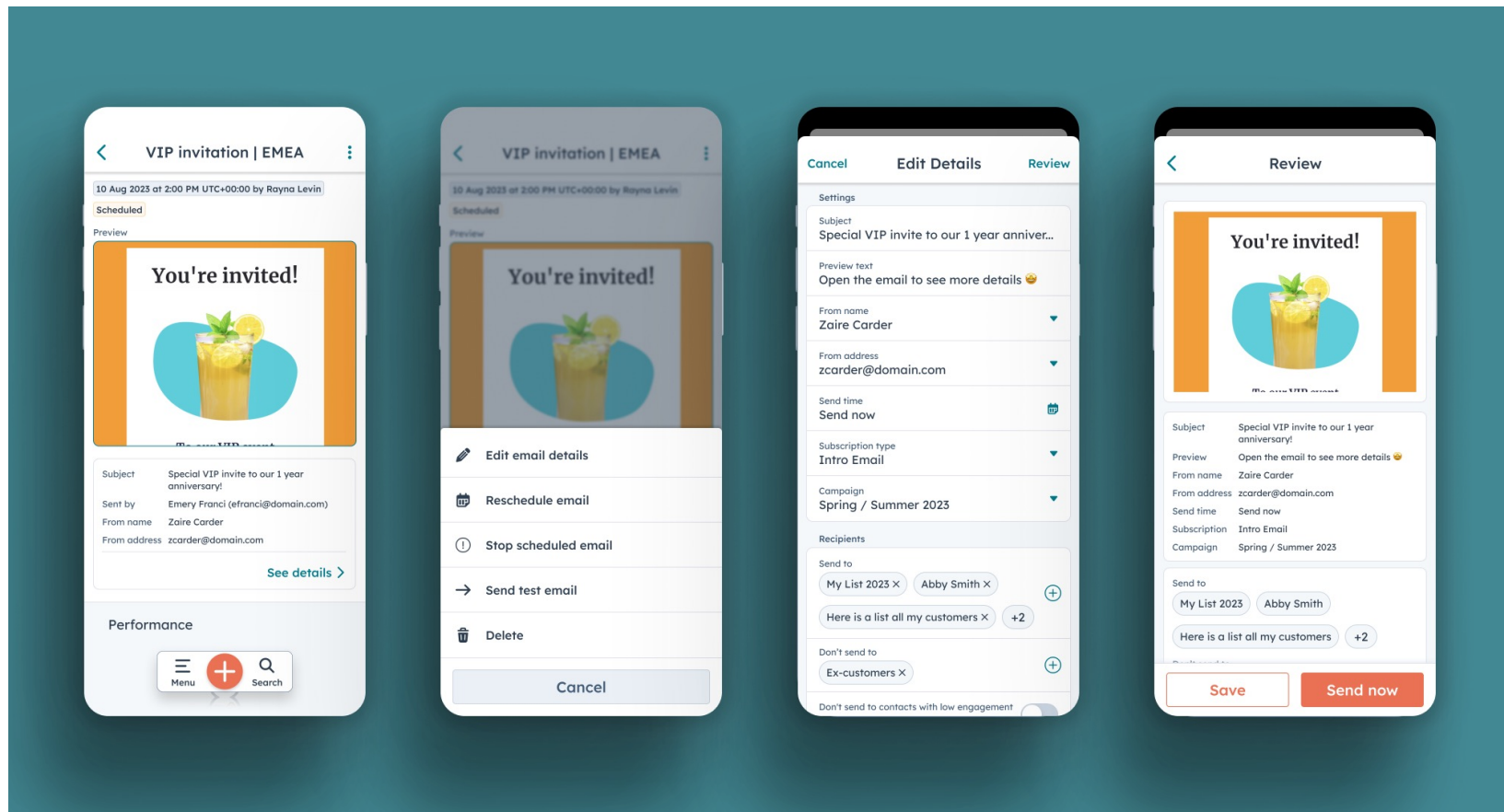
Filter by status: **Active** Filter by language: **All** [Create subscription type](#)

NAME	DESCRIPTION	LANGUAGE(S)	STATUS
Biglytics Blog Subscription (...)	Receive timely updates with the latest blog posts.	Missing primary language	Active
Marketing Information	Marketing offers and updates.	English	Active
Customer Servi... Hubspot default su... Actions	Receive feedback requests and customer service info...	English	Active
One to One Hubspot default subscription type	One to One emails	English	Active

What's New:

Edit Marketing Emails on Mobile

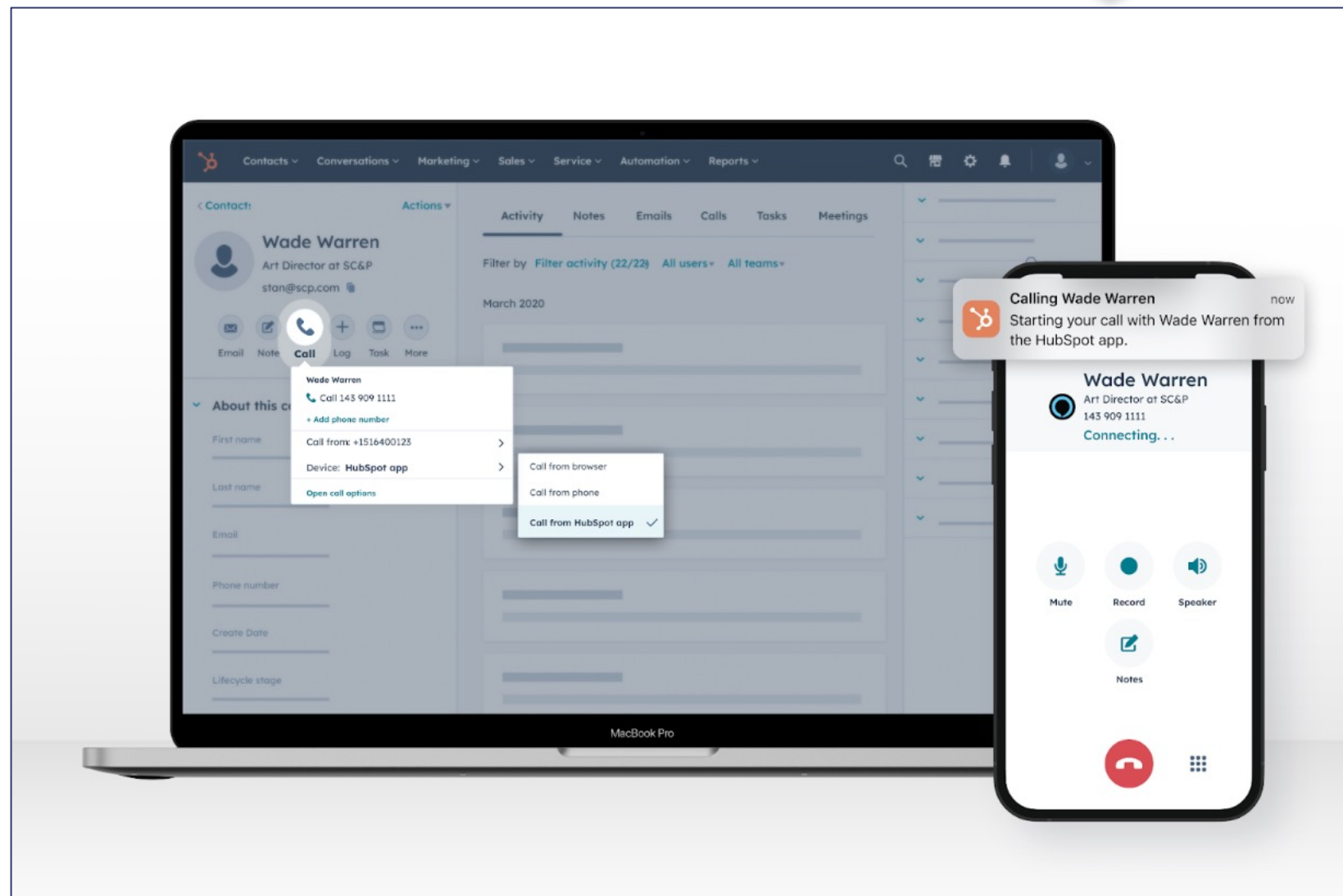
- Live
- Marketing Hub
- Starter, Pro & Enterprise



What's New:

Call from HubSpot Mobile App

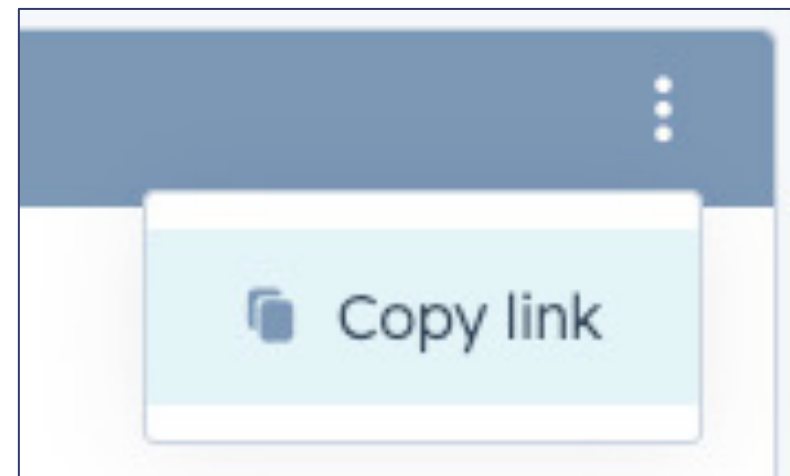
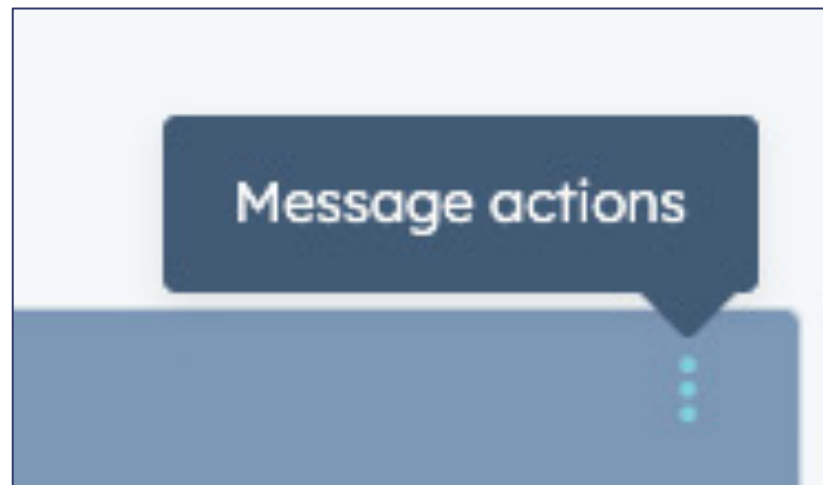
- Public Beta
- Sales & Service Hubs
- Starter, Pro, & Enterprise



What's New:

Sharing a Link to Messages in the Conversations Inbox

- Live
- All Hubs
- All Tiers



What's New:

Updated Checkout Page with Apple Pay & Google Pay

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


Checkout


Summary	
Retainer Fee	\$50.00
Subtotal	\$50.00
+ Add discount code	
Total	\$50.00


Contact info

Email address *





Payment info


 Card


 Apple Pay


 US bank account

Card number

Expiration CVC

Country ZIP

Name on card *

Pay \$50.00

Powered by HubSpot. By continuing, you agree to these [Terms](#) and [Privacy Policy](#), which describe how HubSpot uses your data.

What's New:

Notifications for Workflow Issues

- Public Beta
- All Hubs
- Enterprise

When this workflow needs review NEW

Trigger this notification

 OFF

Setting this to “on” will trigger a notification each time this workflow’s issue status changes to “Needs review”.

[More details](#) ⓘ

On Our Radar

 Business Wire

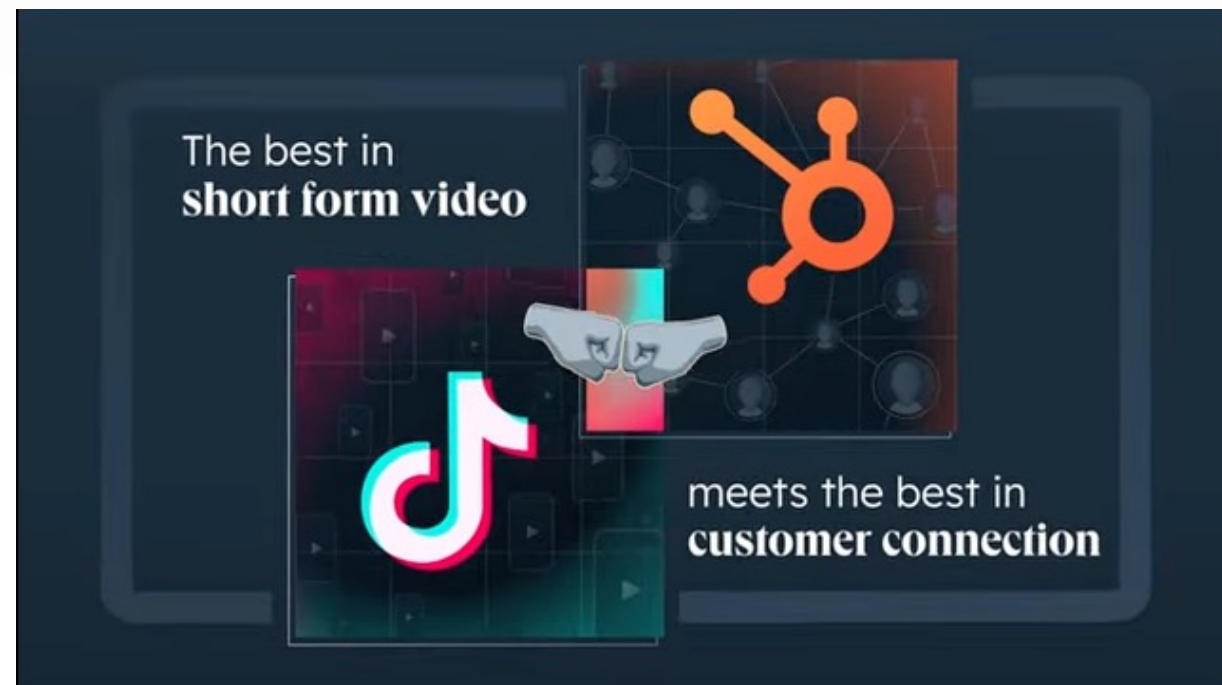
HubSpot to Acquire B2B Intelligence Leader, Clearbit

HubSpot

+



Clearbit

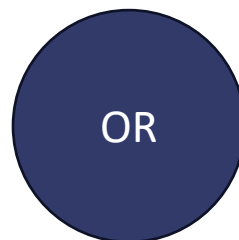


Next Steps

- 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!

FLYWHEEL FUEL SERIES 

17 Ways to Get More Leads Using HubSpot

Wednesday, November 15
12pm CST / 1pm EST



PRESENTED BY
ALI SCHWANKE



THE NEW AND NOW SERIES 

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

Wednesday, December 6, 2023
12pm CST / 1pm EST



PRESENTED BY
TYLER SAMANI-SPRUNK



SimpleStrat.com/Webinars

Questions & Answers