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

- HubSpot Management -

- Marketing Support -

Implement HubSpot

Learn HubSpot

Tyler Samani-Sprunk

Cofounder & CMO @ Simple Strat

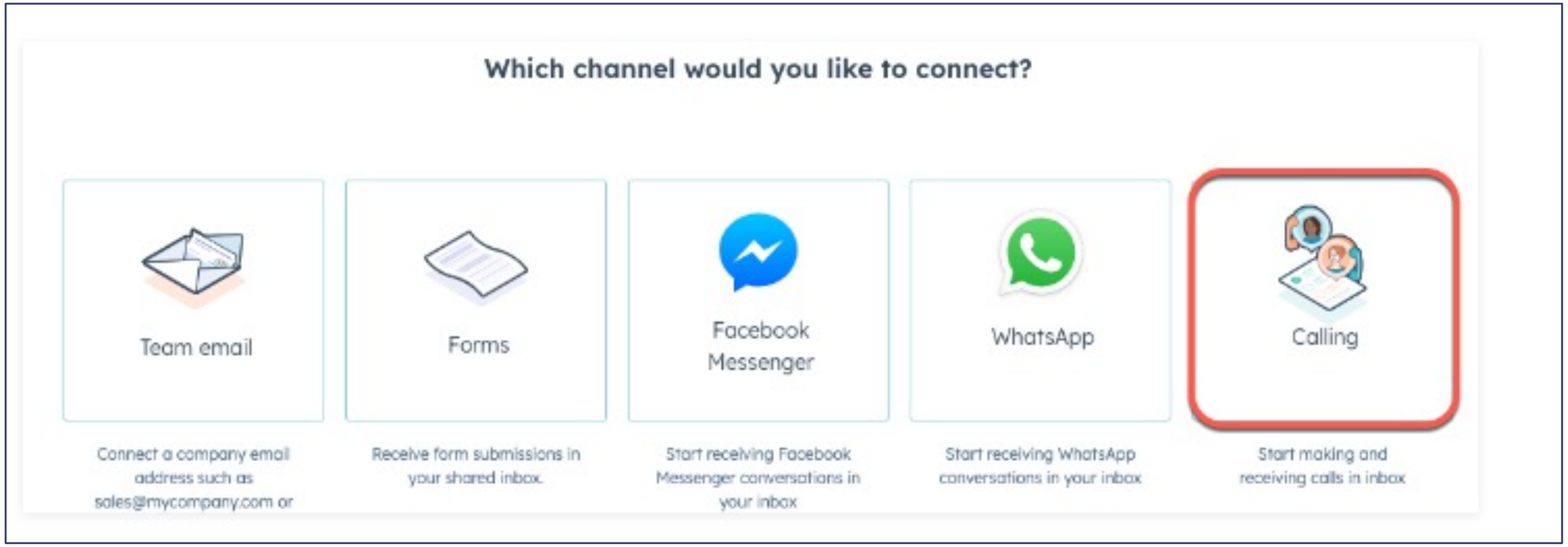
Cohost of HubSpot Hacks

Exciting New Features & Use Cases

What’s New:

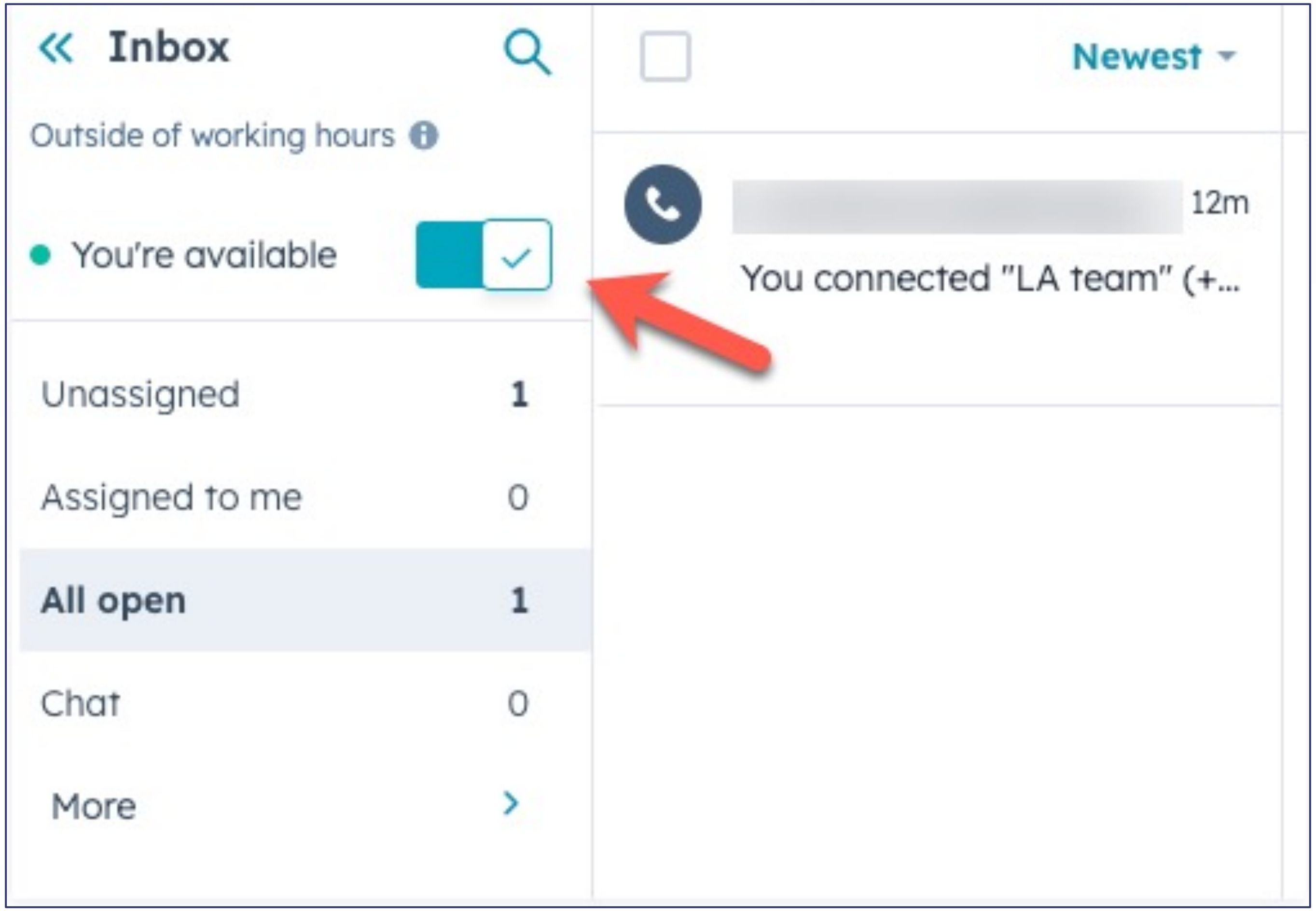
Calling as a Channel in Inbox

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



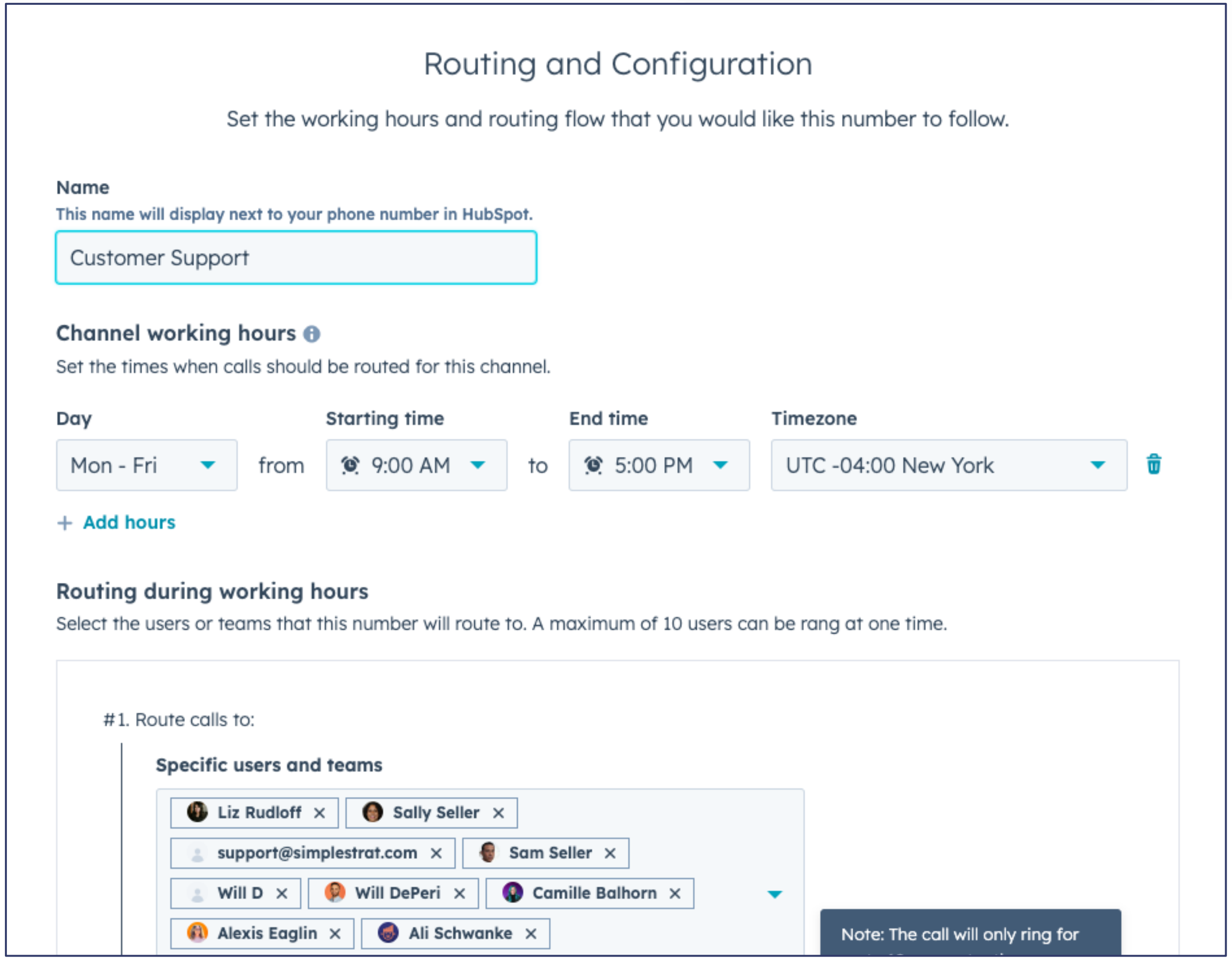
Use Calling Channels Now: Route to Available Rep

- 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



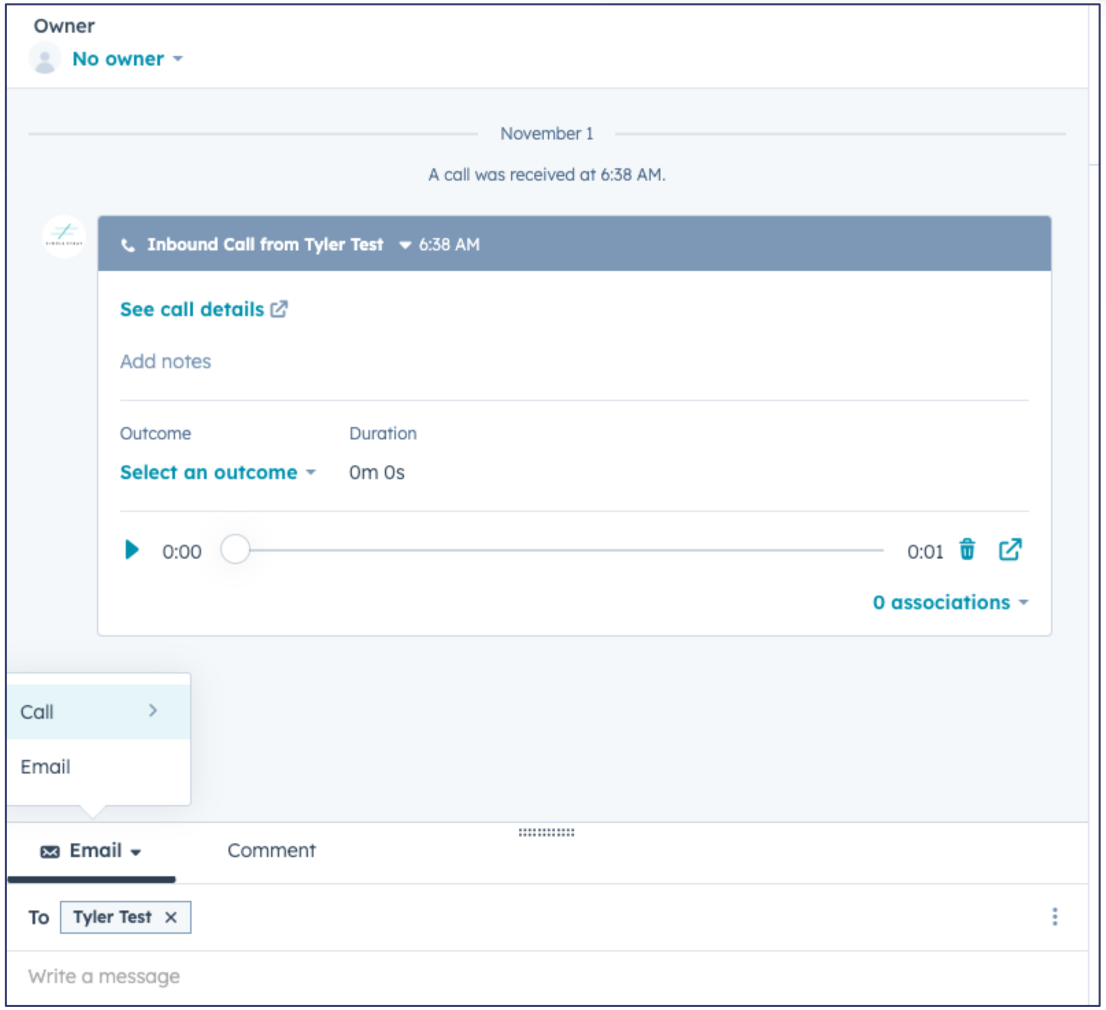
Use Calling Channels Now: Reduce Numbers Used

- 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



Use Calling Channels Now: Manage Missed Calls Quickly

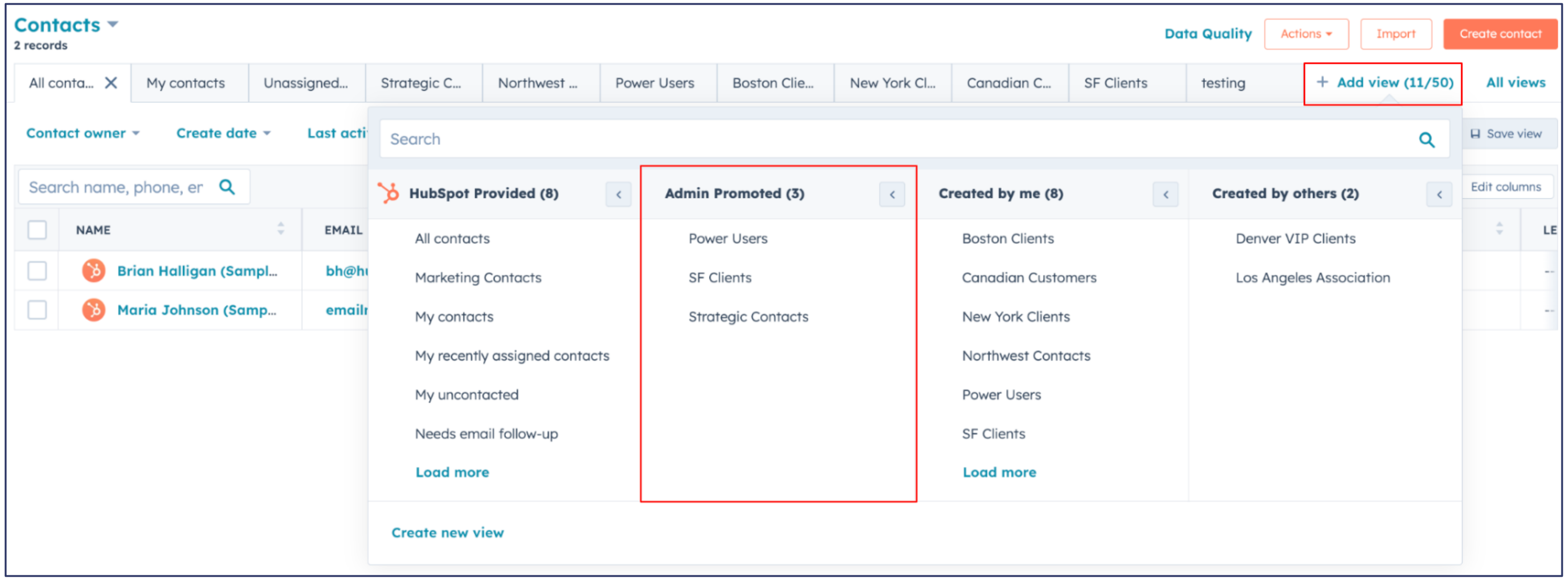
- Unanswered calls will prompt caller to leave a voicemail
- Missed calls will create a new thread in the conversations inbox
- All users assigned to that calling channel will be notified and next available user can assign the thread to themselves
- User can easily call the person back or send an email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



What's New:

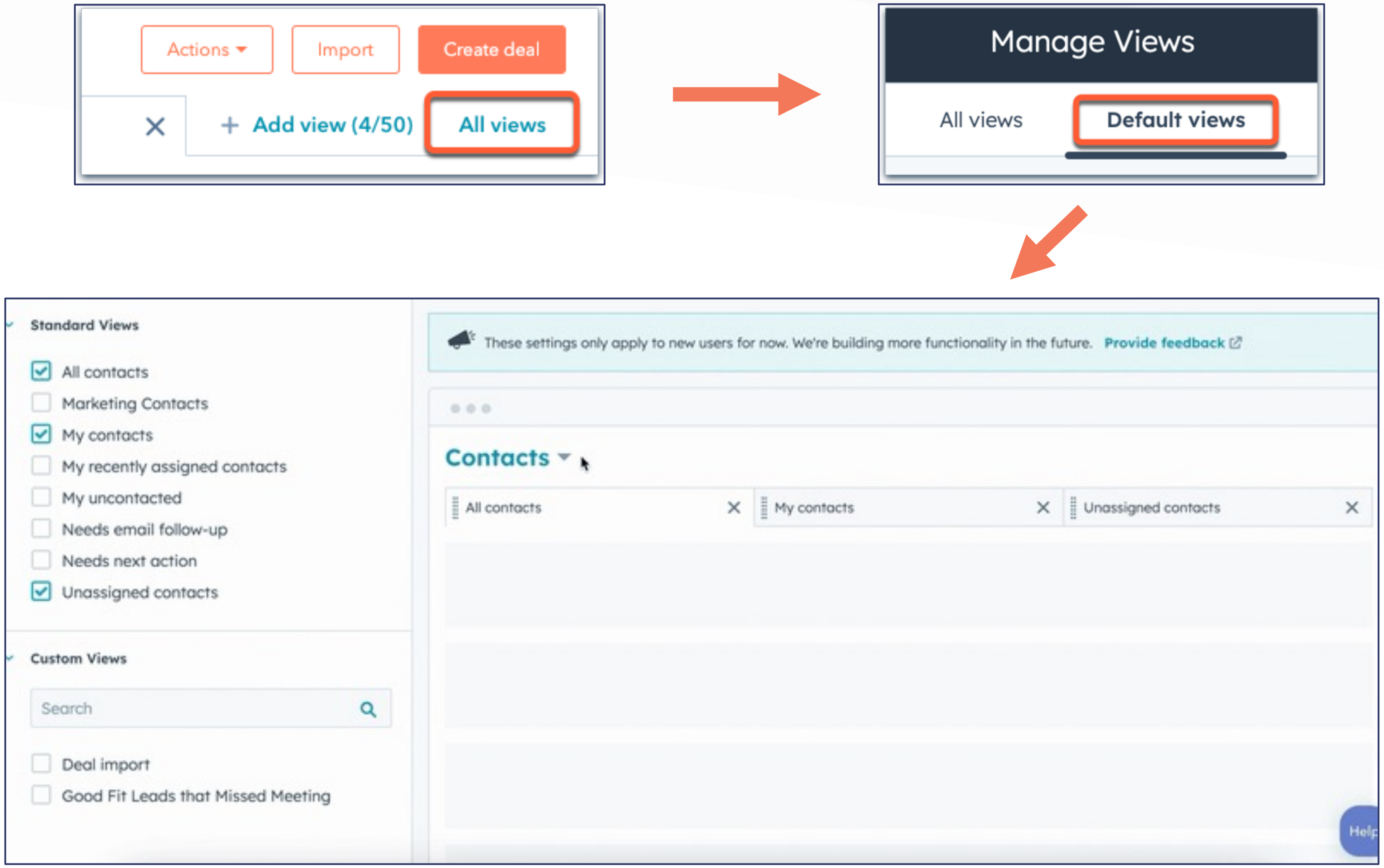
Admin 'Default' Views in the Add View Modal

- 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

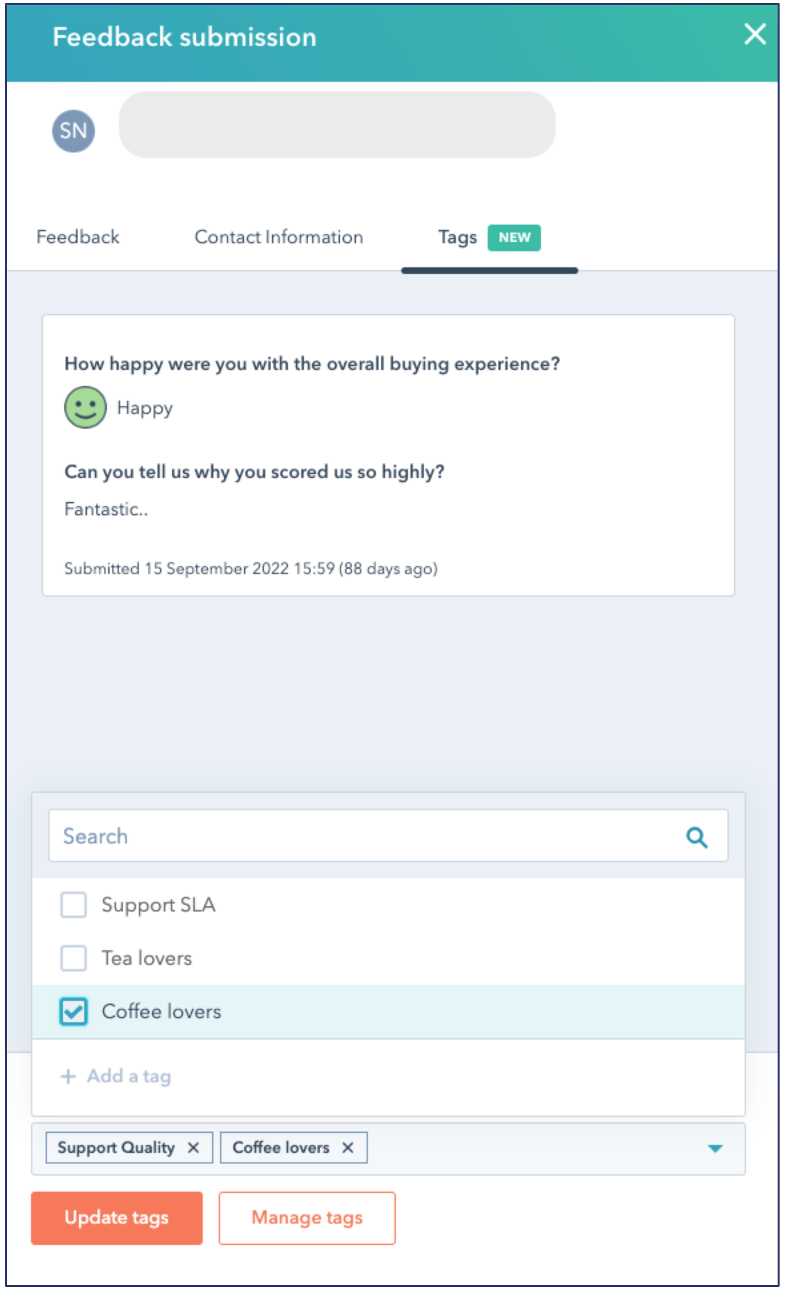


What’s New:

Feedback Submissions Tagging

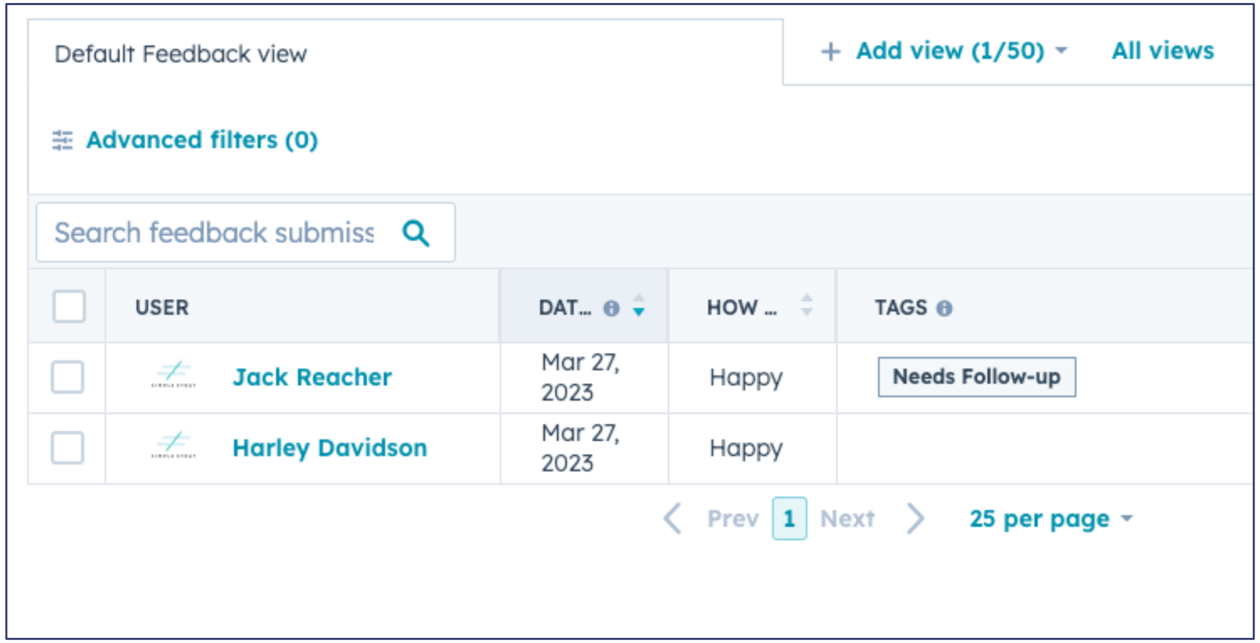
- Public Beta
- Service Hub
- Pro & Enterprise

Diamond HubSpot SOLUTIONS PARTNER PROGRAM



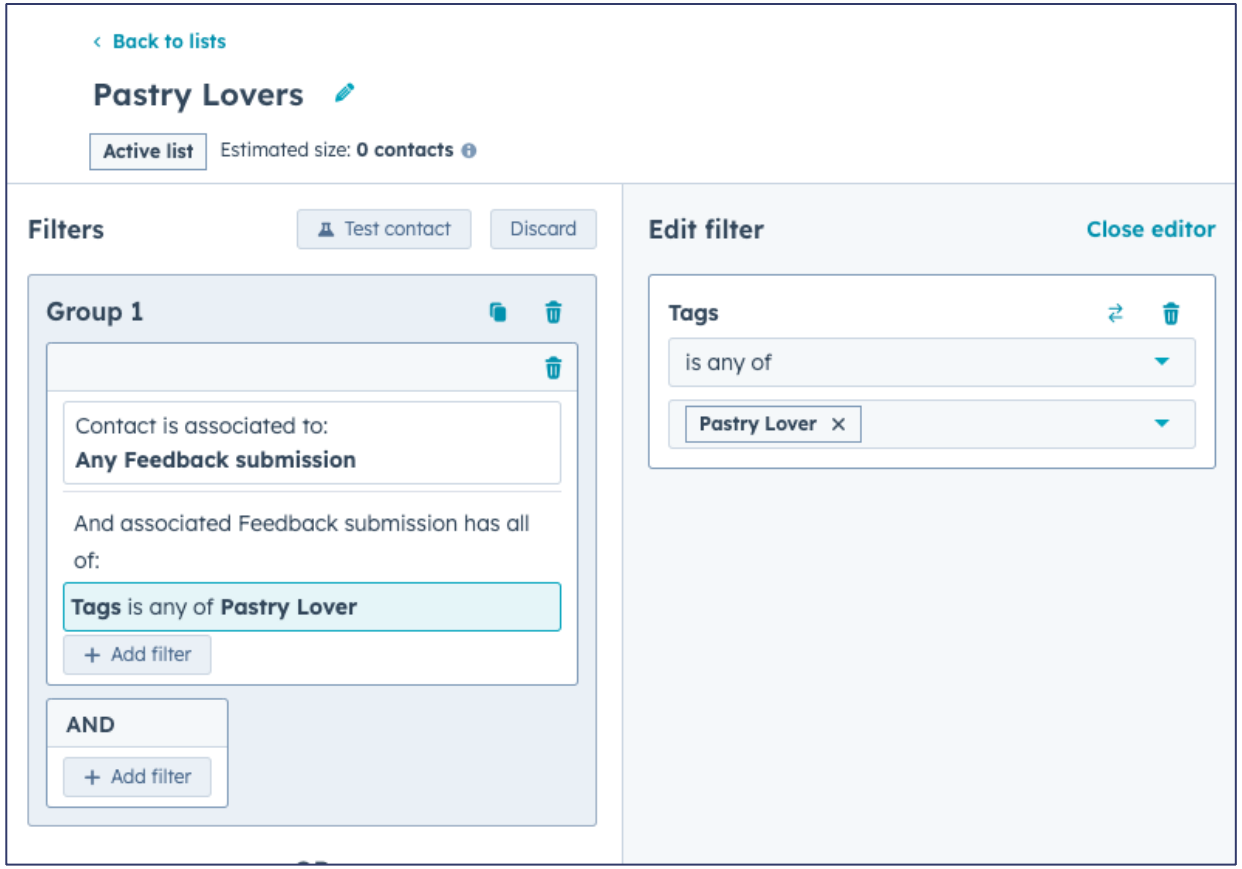
Use Feedback Tagging Now: Categorize Feedback

- 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



Use Feedback Tagging Now: Streamline Reporting

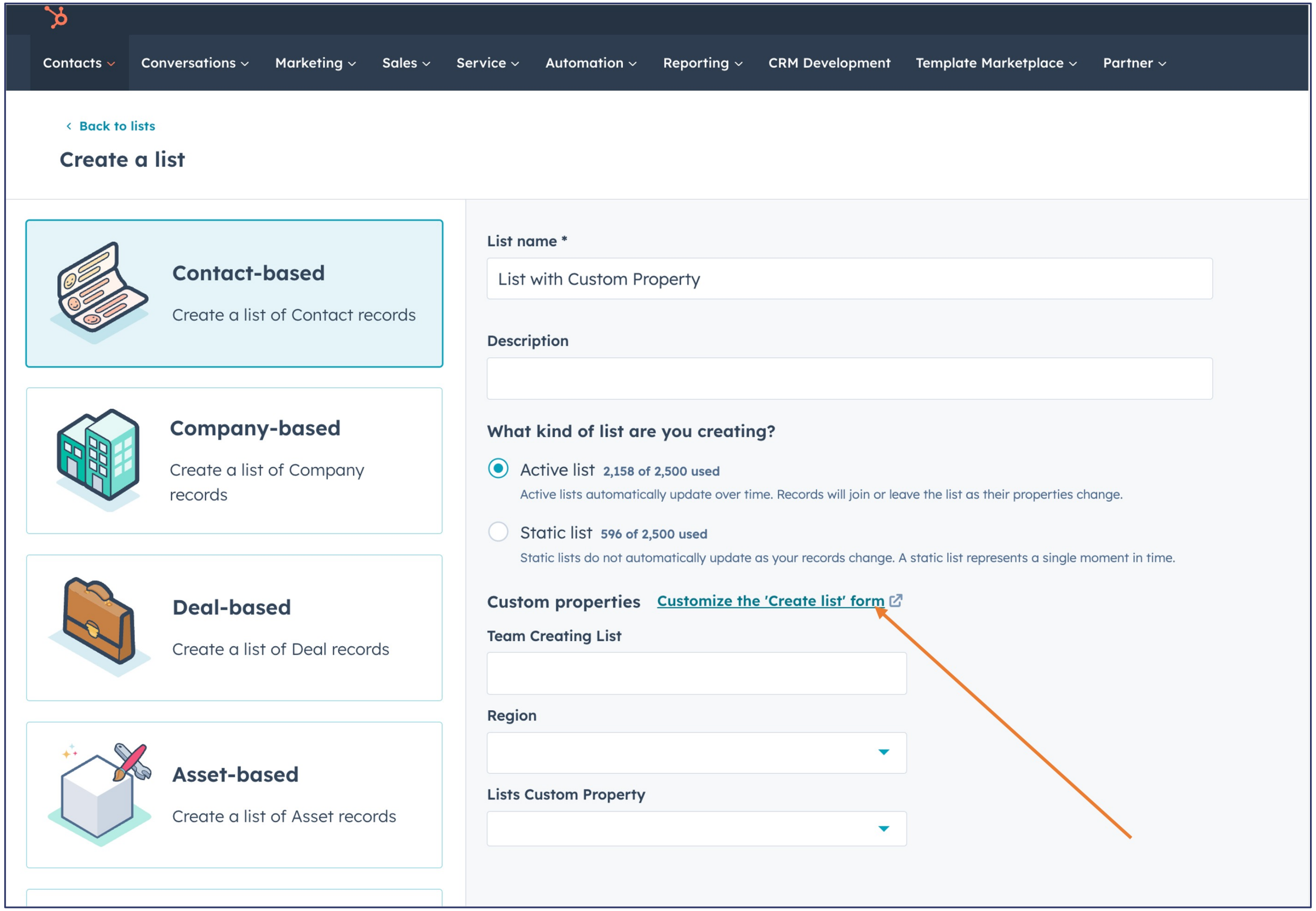
- Create saved views of feedback submissions by tag
- Create lists of contacts based on those contact's feedback submission tags
  - Pro-tip: use these lists for marketing
- Create bar-chart reports for feedback categories for dashboards, stakeholders



What's New:

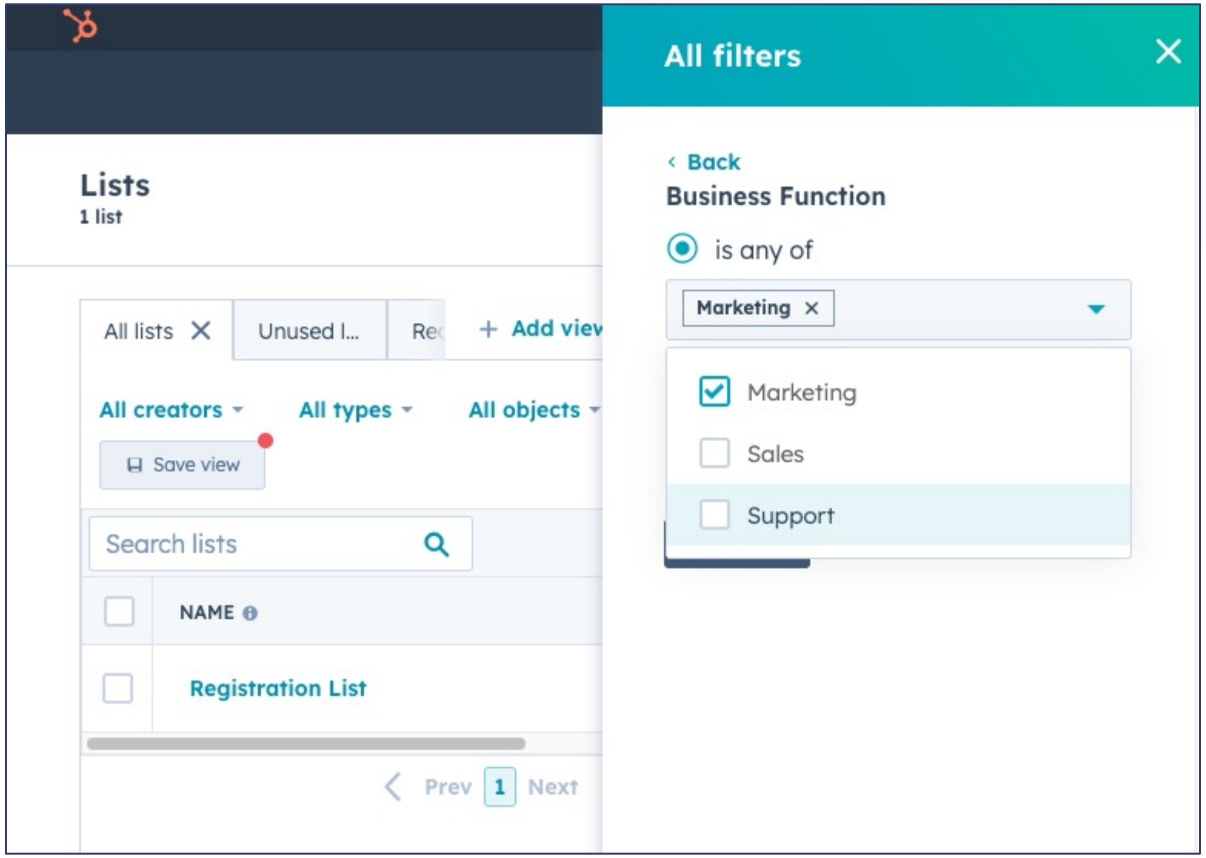
Custom Properties & Description Field for Lists

- Public Beta
- All Hubs
- All Tiers



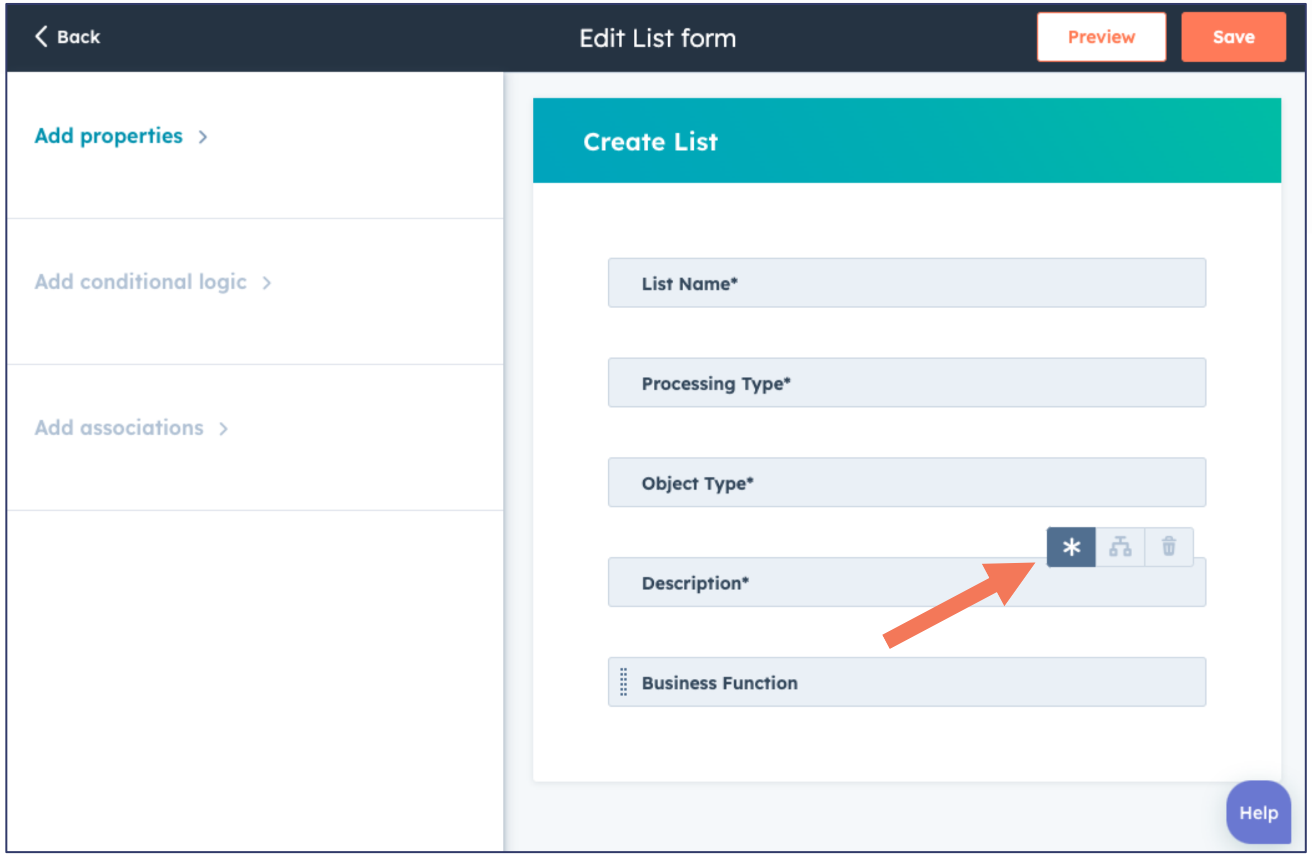
Use List Properties Now: Organize Lists

- 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

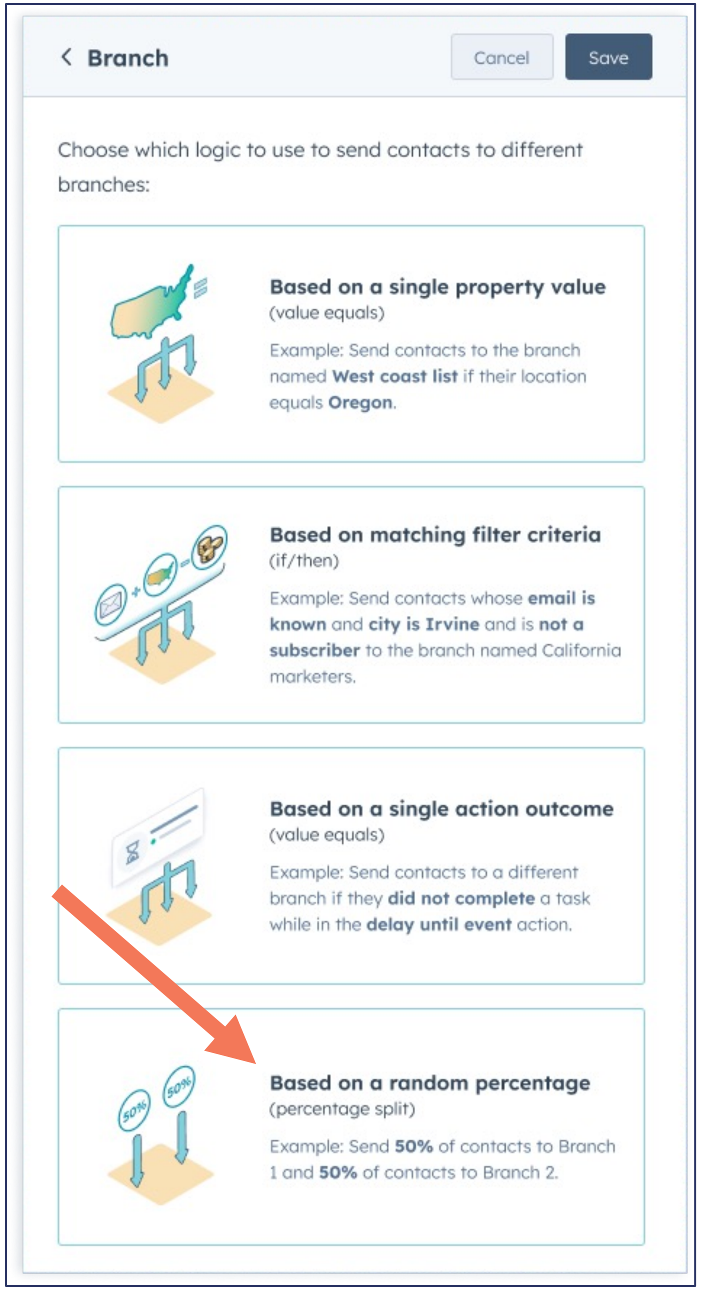
- Add descriptions to existing lists
  - Update properties while you're at it
- Require descriptions for new lists
  - Settings > Objects > Lists > "Customize the Create list form"



What's New:

Random Split Branch in Workflows

- Live
- Marketing Hub
- Pro & Enterprise

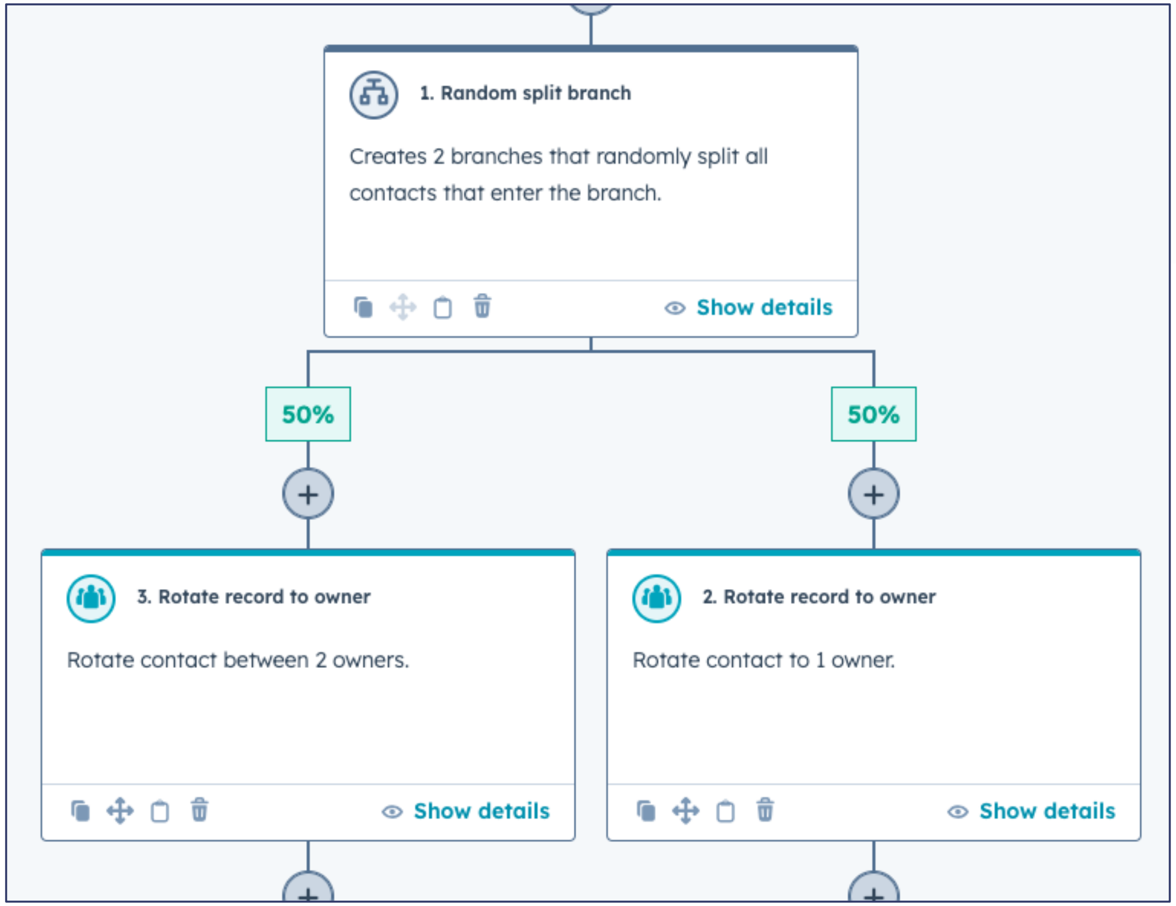


Use Random Branches Now: A/B Testing

- 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

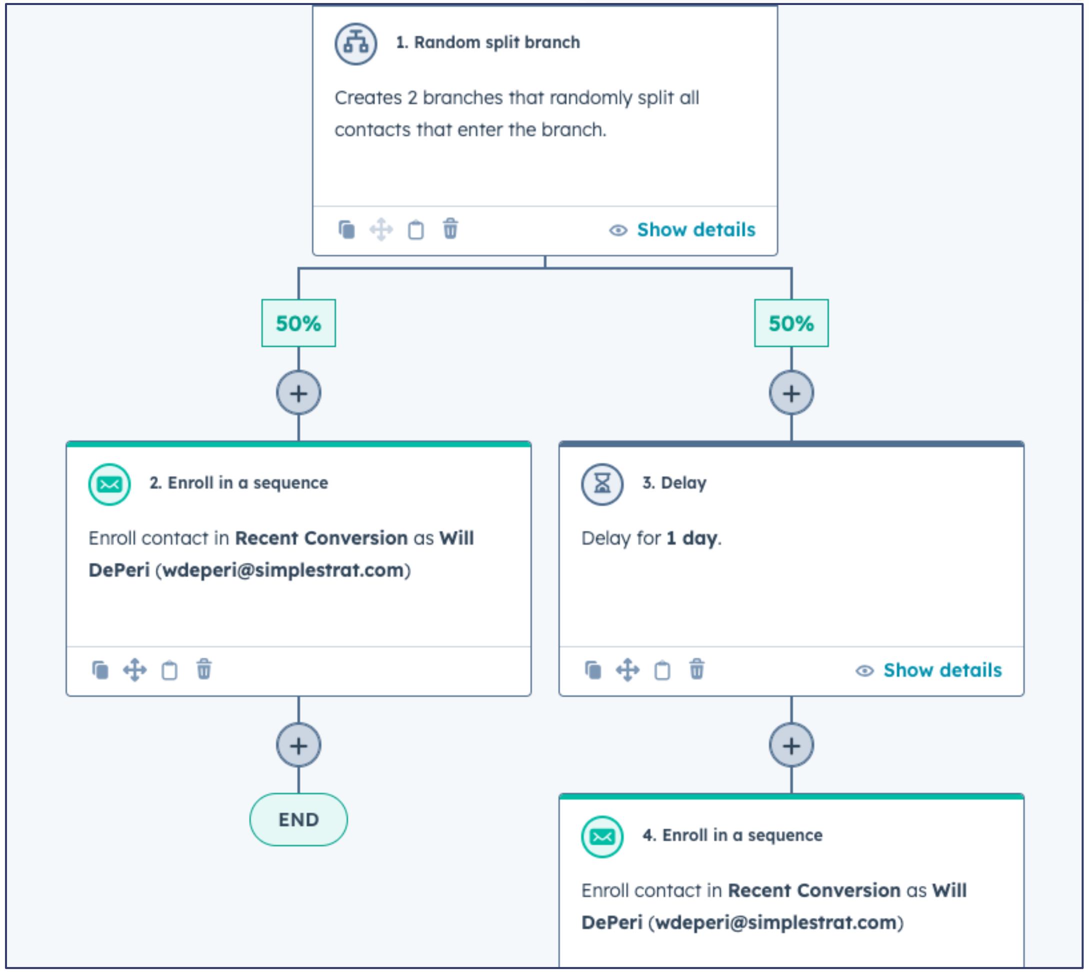
Use Random Branches Now: Weighted Routing

- 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

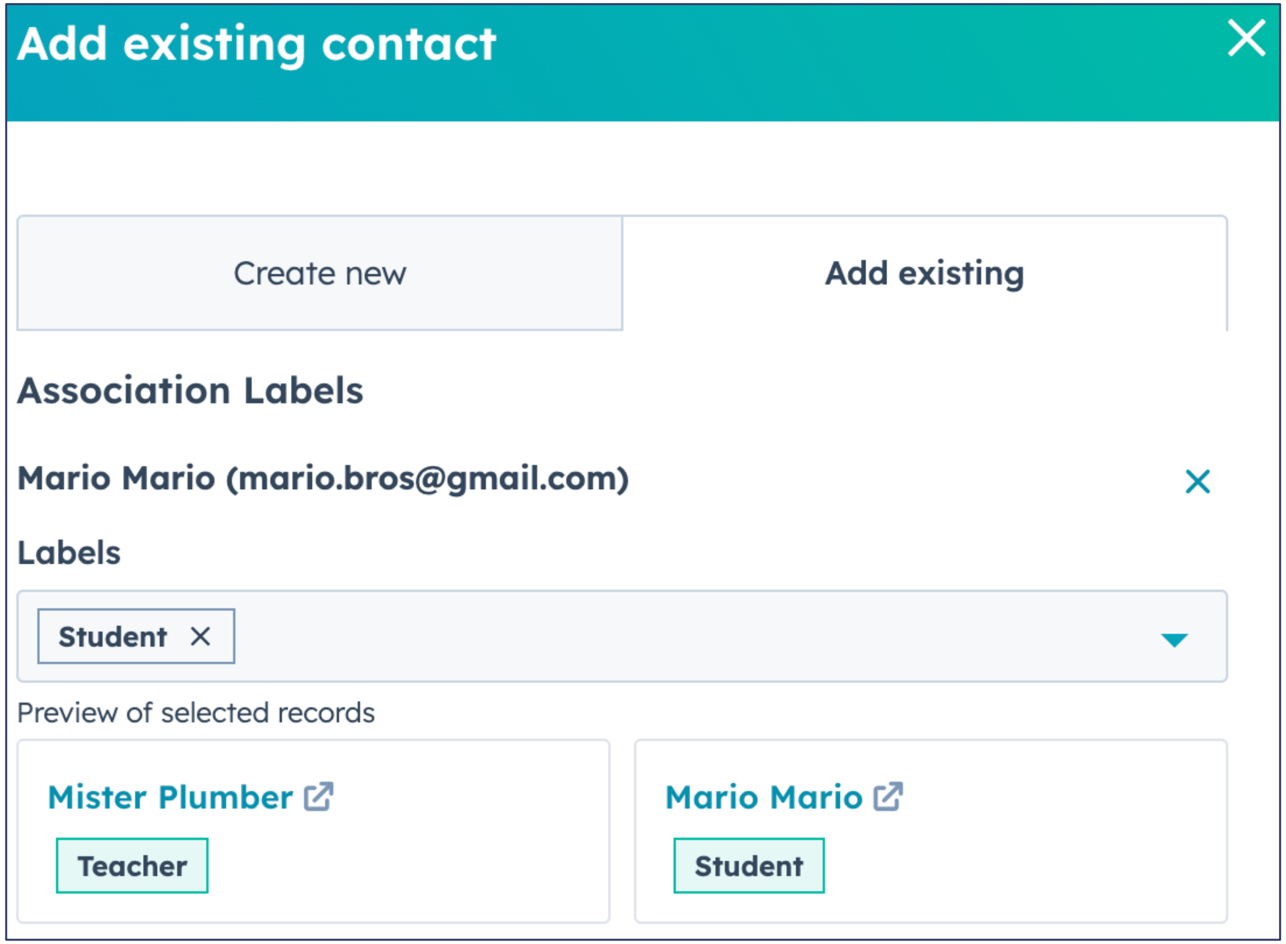


What's New:

Associate Records of the Same Object Type

- Public Beta
- All Hubs
- All Tiers*

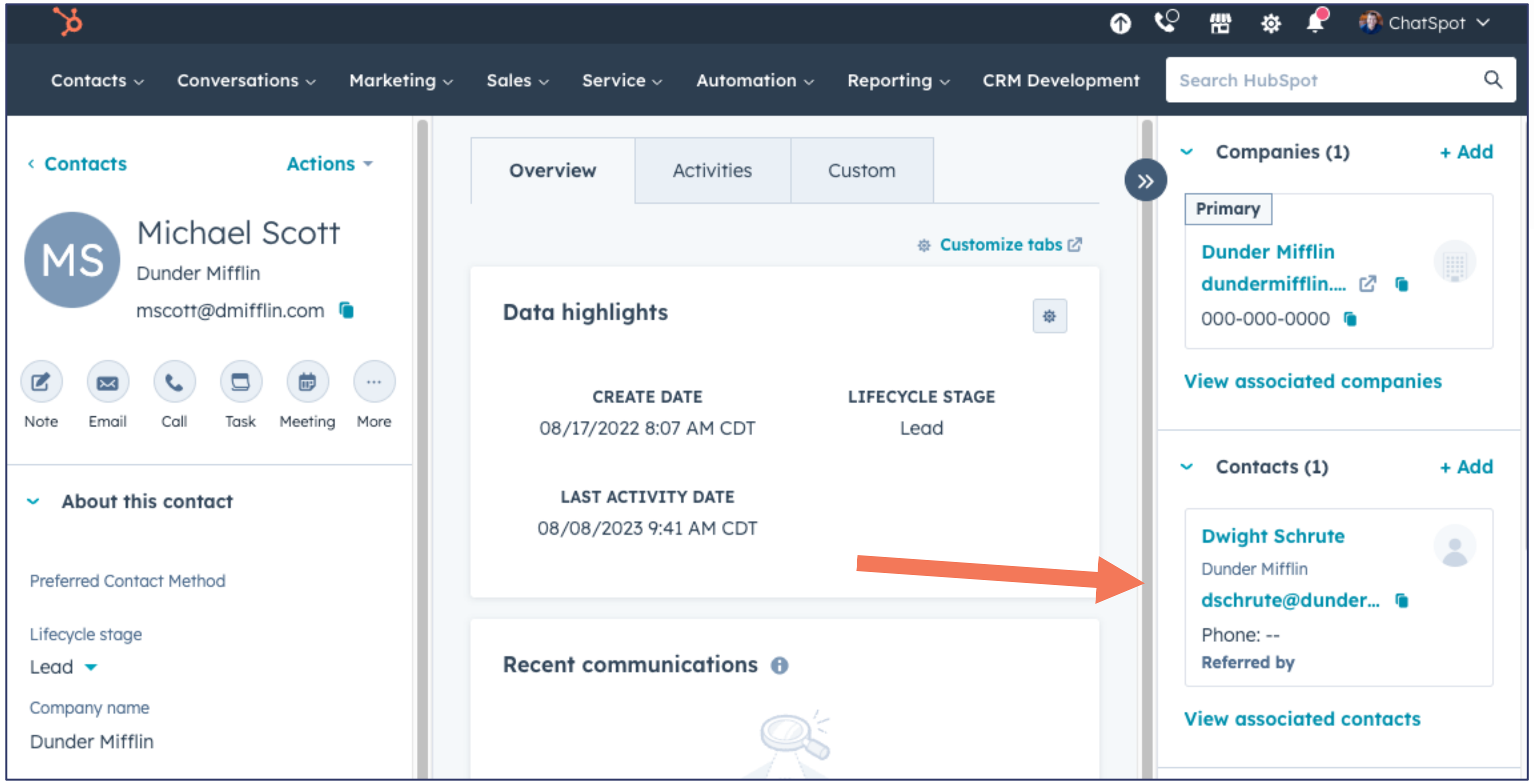
**Labels are only available to Pro+*



Diamond HubSpot SOLUTIONS PARTNER PROGRAM

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

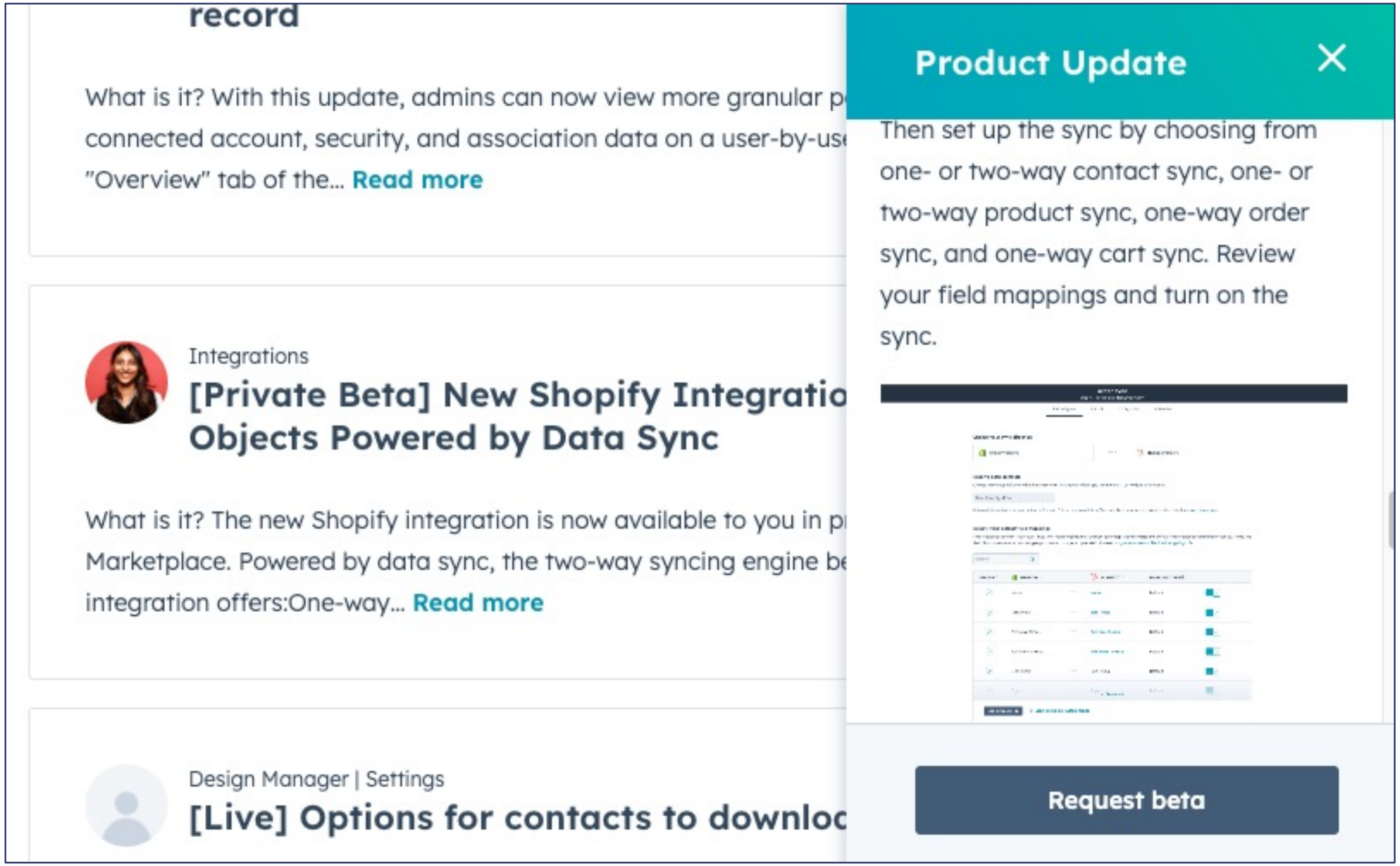


Small But Mighty Updates

What's New:

Can Now Enroll in Private Betas from Within Portal

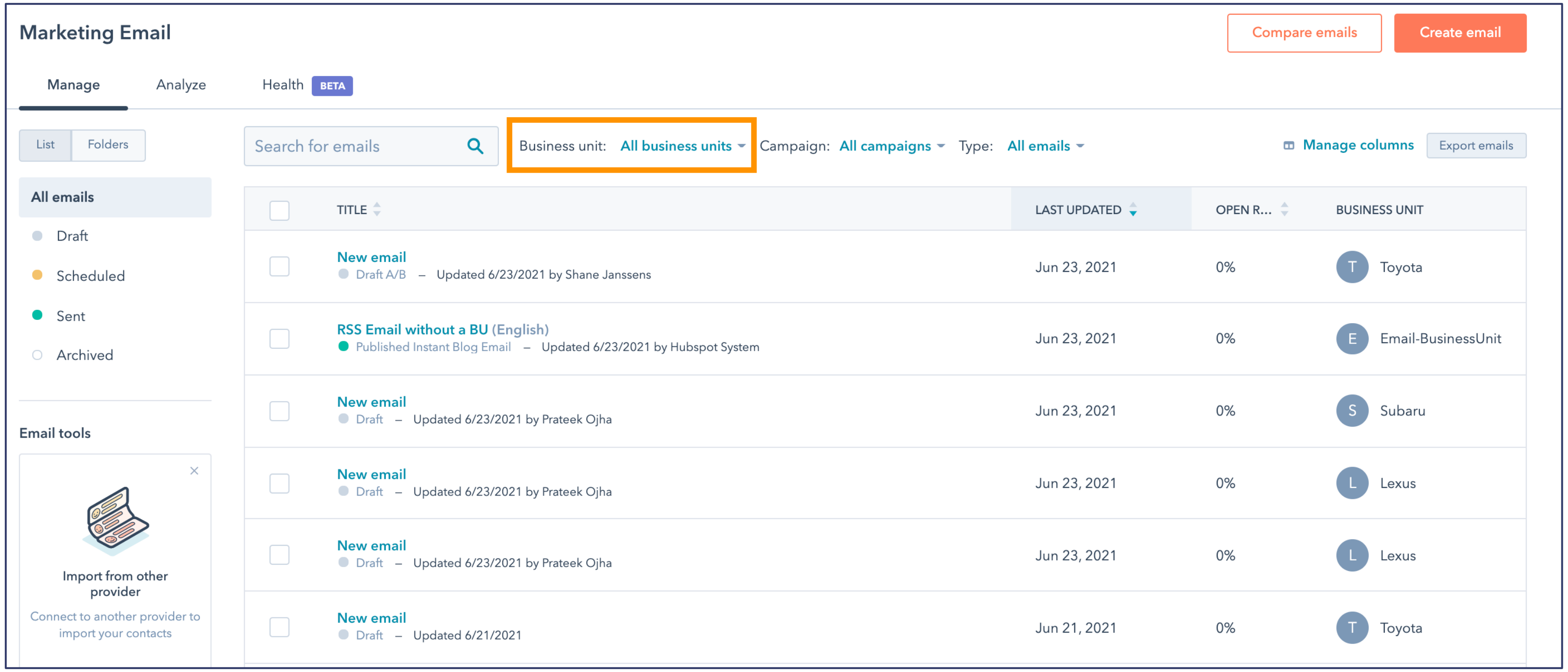
- Live
- All Hubs
- All Tiers



What’s New:

Associate Emails to Business Units

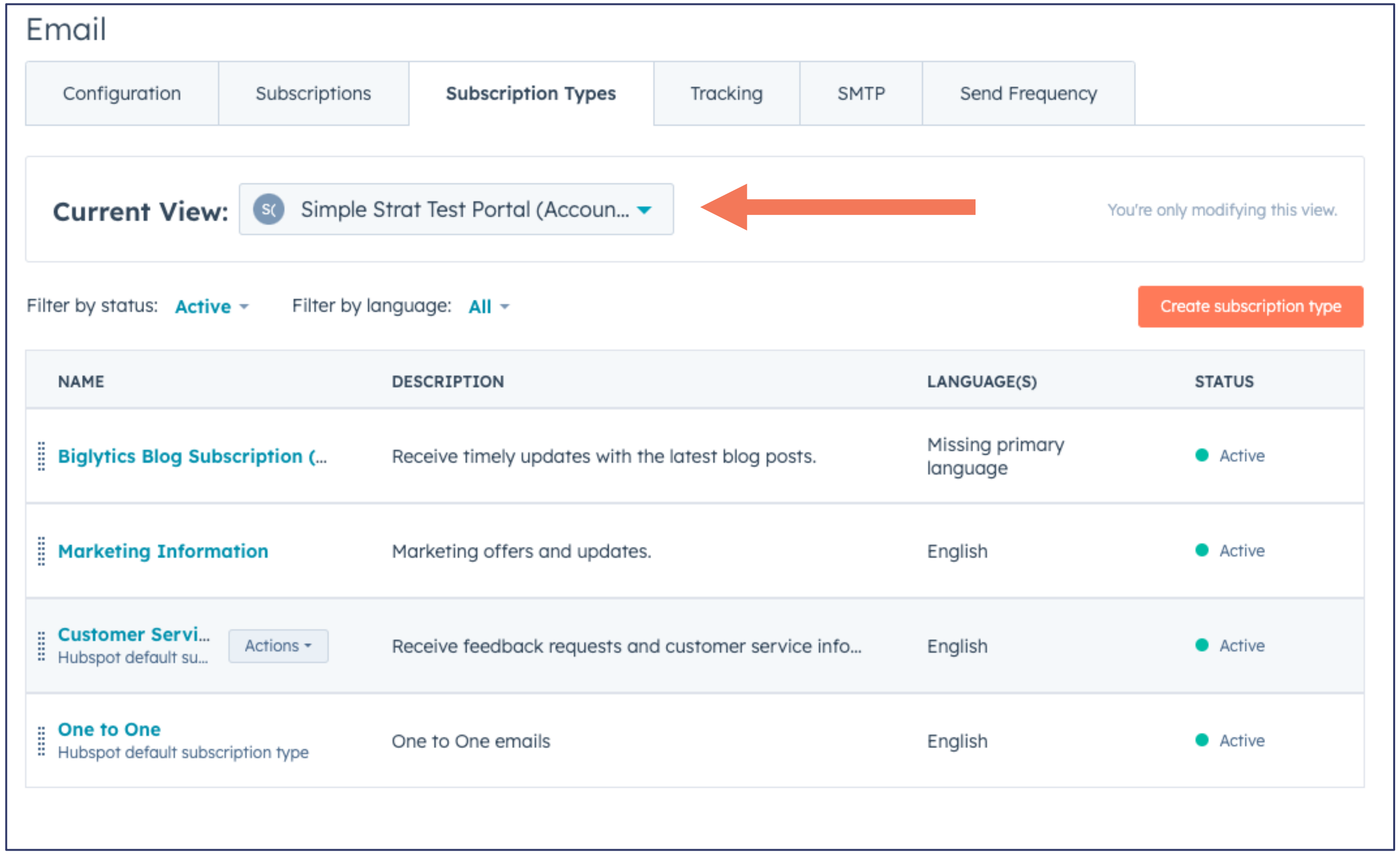
- Private Beta
- Marketing Hub
- Enterprise + Business Units



What's New:

Manage Subscription Types and Statuses Across Business Units

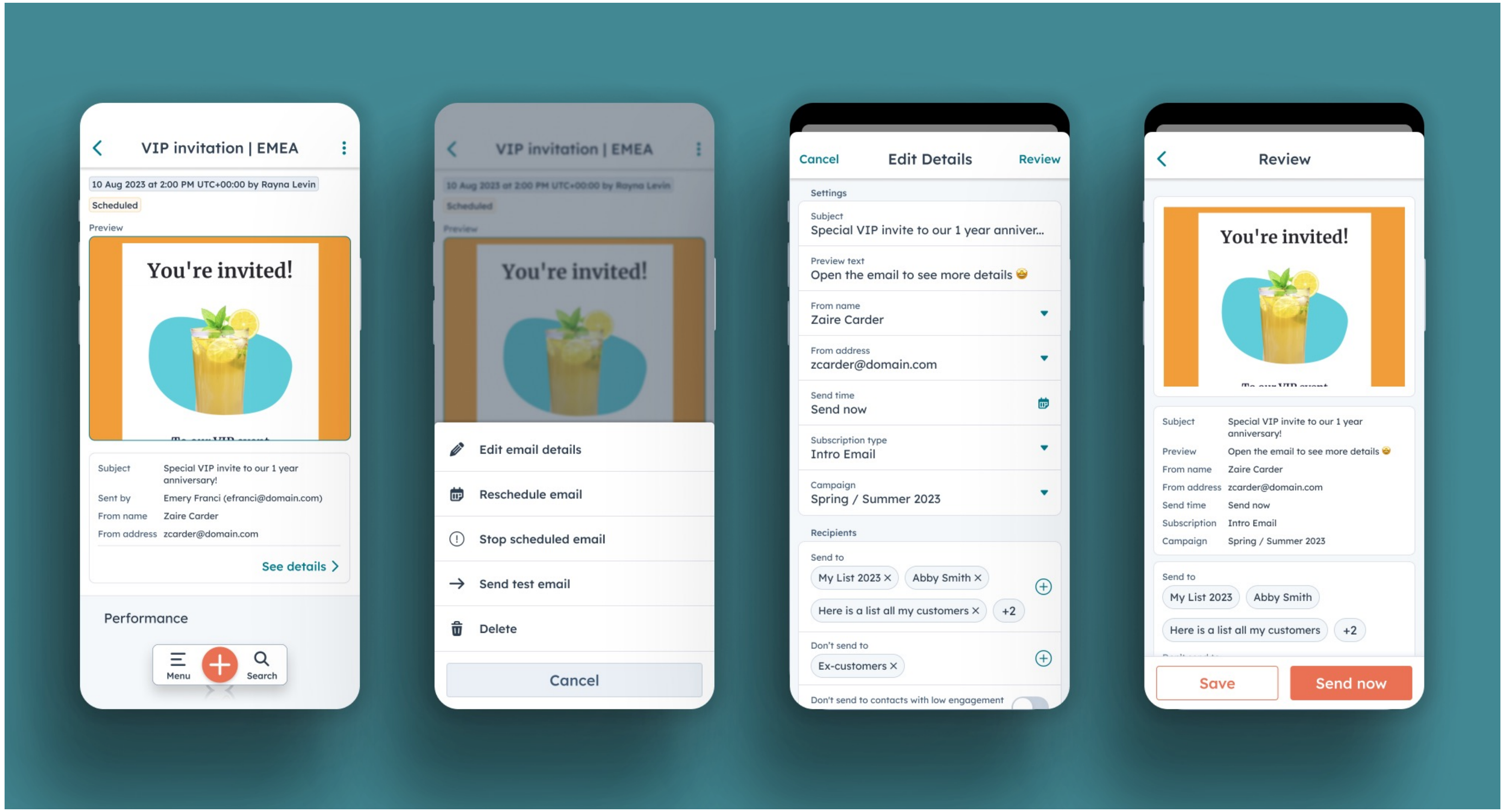
- Public Beta
- Marketing Hub
- Enterprise + Business Units



What's New:

Edit Marketing Emails on Mobile

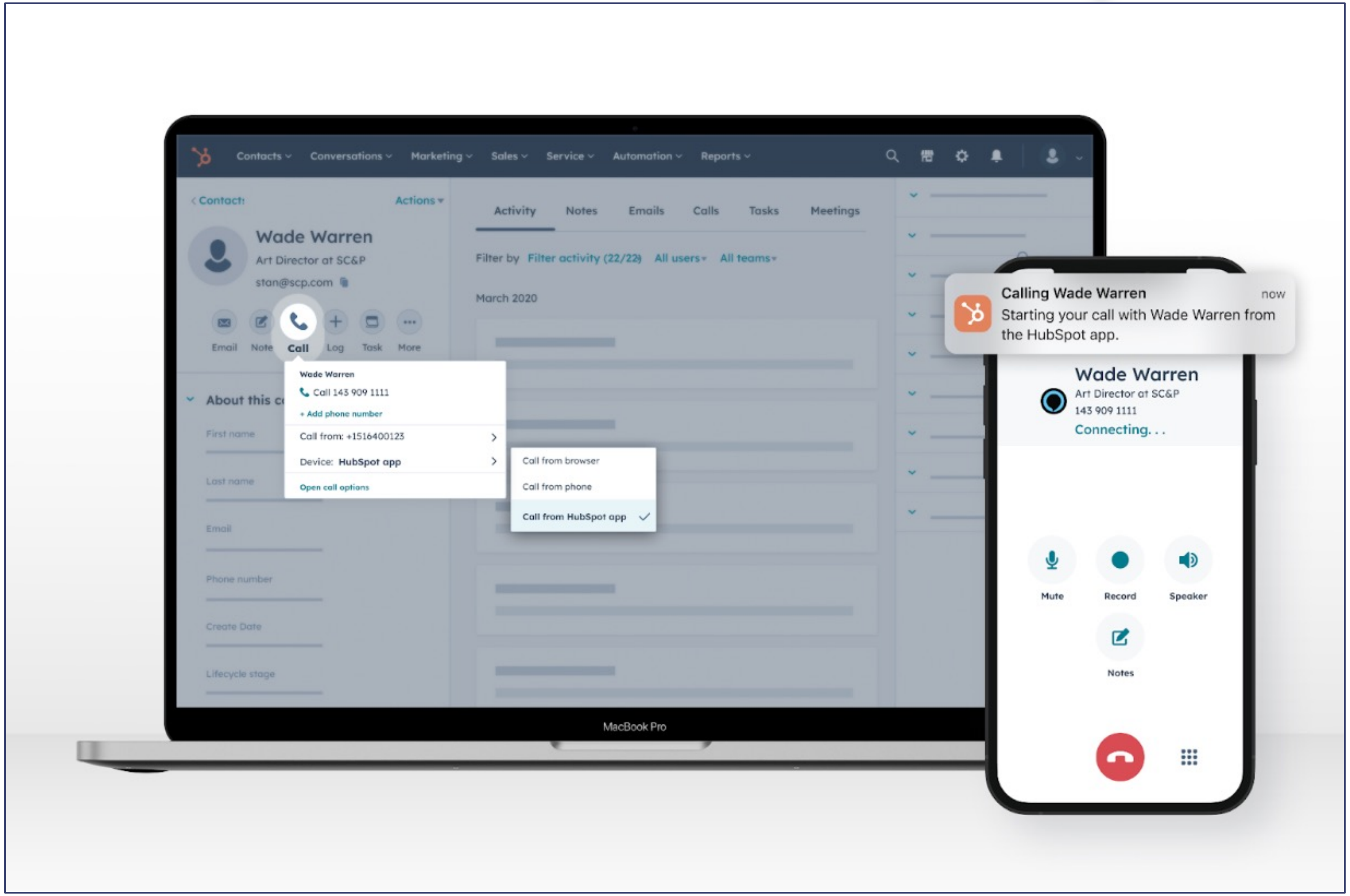
- Live
- Marketing Hub
- Starter, Pro & Enterprise



What's New:

Call from HubSpot Mobile App

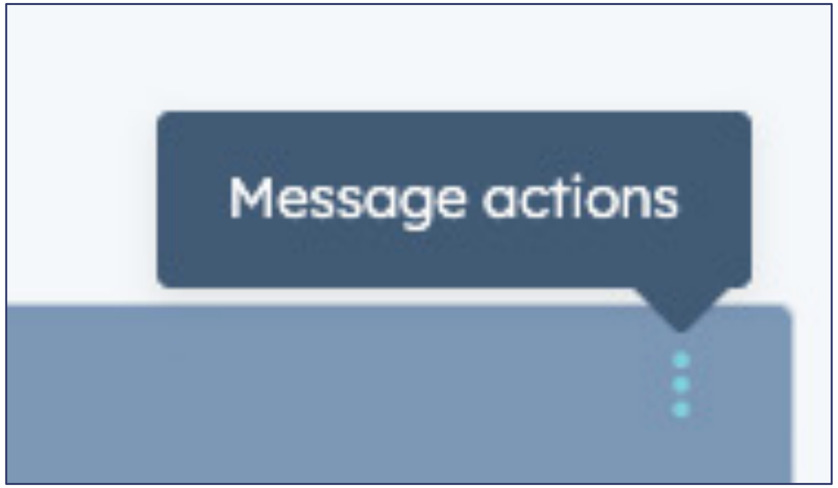
- Public Beta
- Sales & Service Hubs
- Starter, Pro, & Enterprise

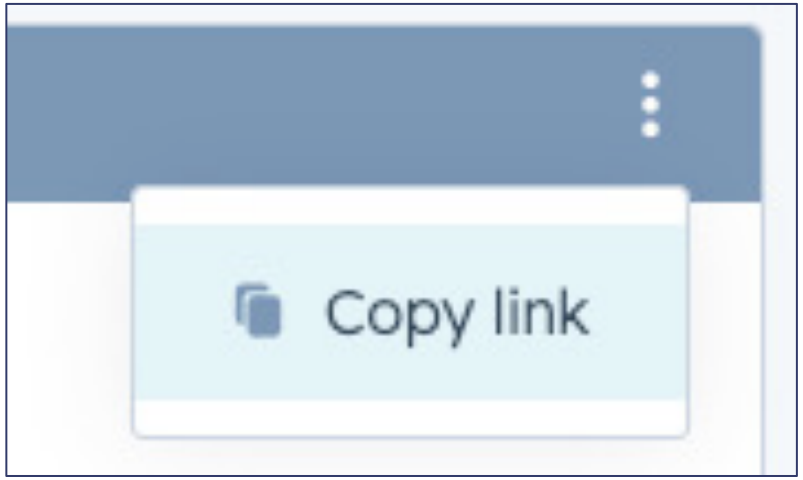


What's New:

Sharing a Link to Messages in the Conversations Inbox

- Live
- All Hubs
- All Tiers

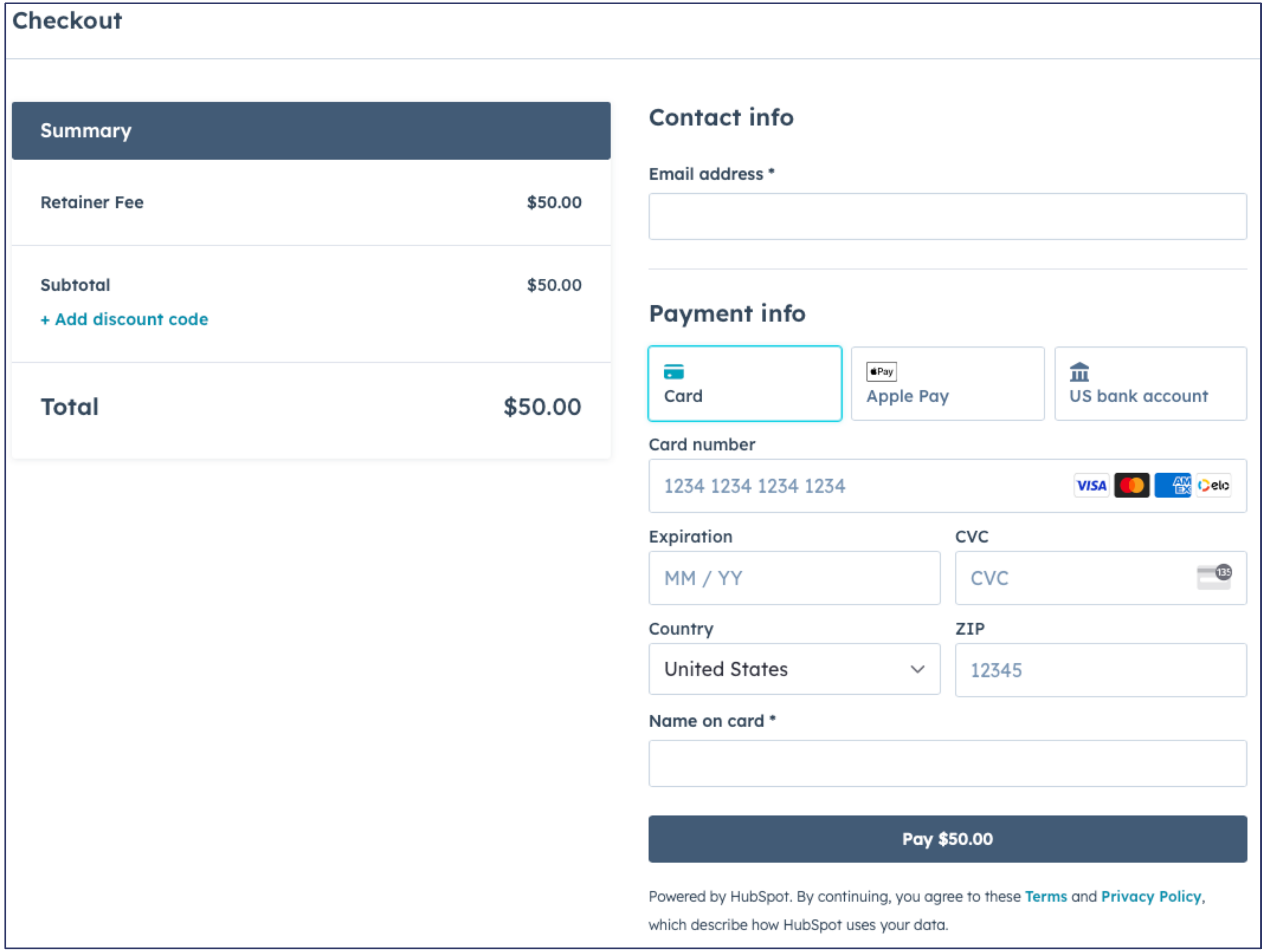




What’s New:

Updated Checkout Page with Apple Pay & Google Pay

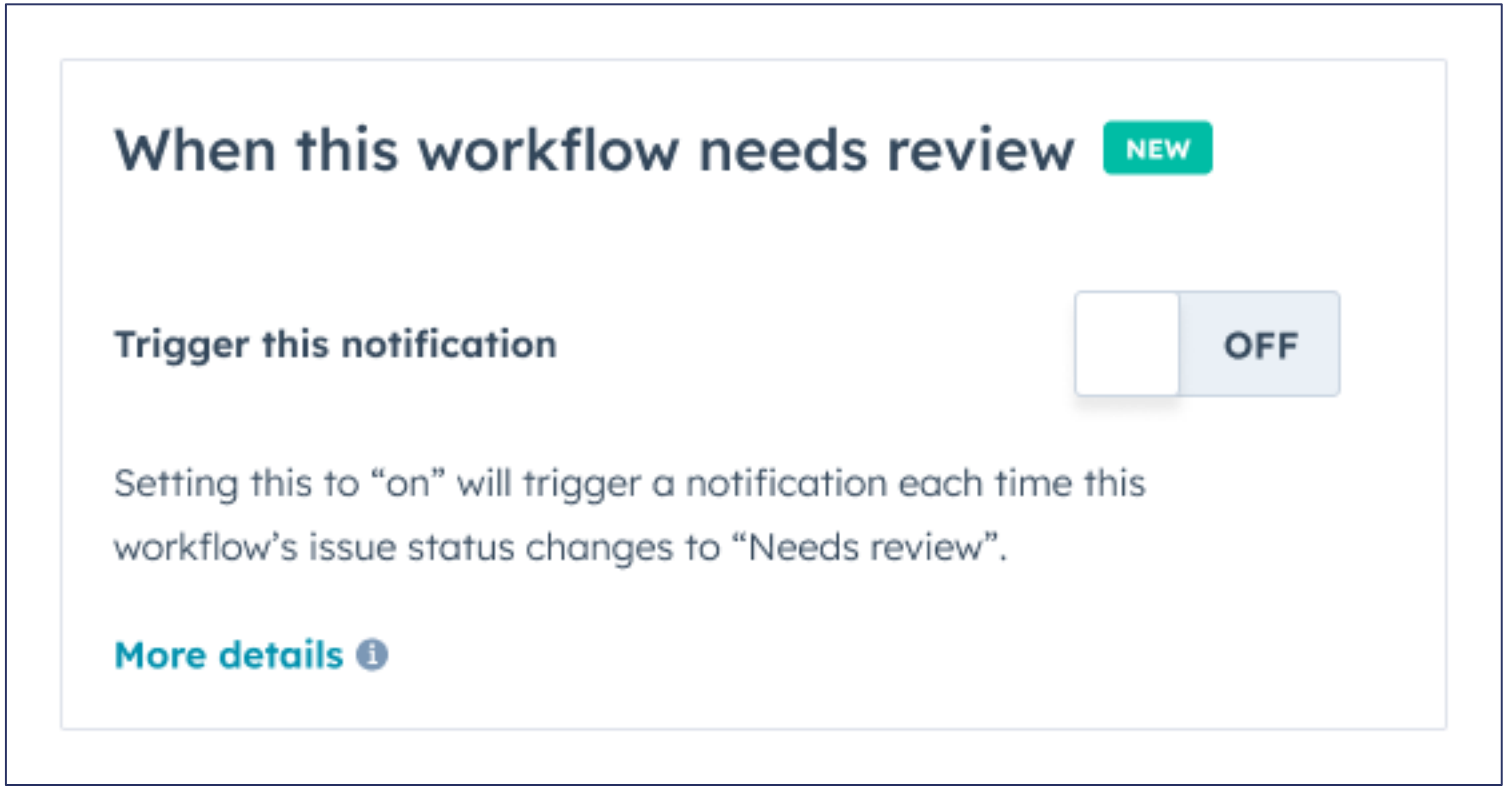
- Live
- All Hubs
- Starter, Pro, & Enterprise



What's New:

Notifications for Workflow Issues

- Public Beta
- All Hubs
- Enterprise



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

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