

Getting the Most Out of HubSpot's September 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
 - New Property Features
 - More Powerful Reporting
 - Sequences On The Go
2. Small but Mighty Updates
 - Freezing columns
 - LinkedIn Video
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:

Conditional Property Logic

- Public Beta
- All Hubs
- Pro & Enterprise

Dependent properties ×

Your organization has chosen to show these properties based on your choice for "Priority". Some properties may be required to continue.

Priority

Low ▼

Original Source Type *

▼

Deal Type *

▼

Forecast category *

Commit ▼

Use Conditional Properties Now: Closed Lost Details

Edit property logic

Cancel Save logic

Edit logic

Property logic allows you to show and require properties based on the value in another property.

Controlling property

When this is true:

Closed Lost Reason

Equal to

Competition

Dependent properties (1)

Show these properties:

Competitor That Won Required ^ v

+ Add dependent property

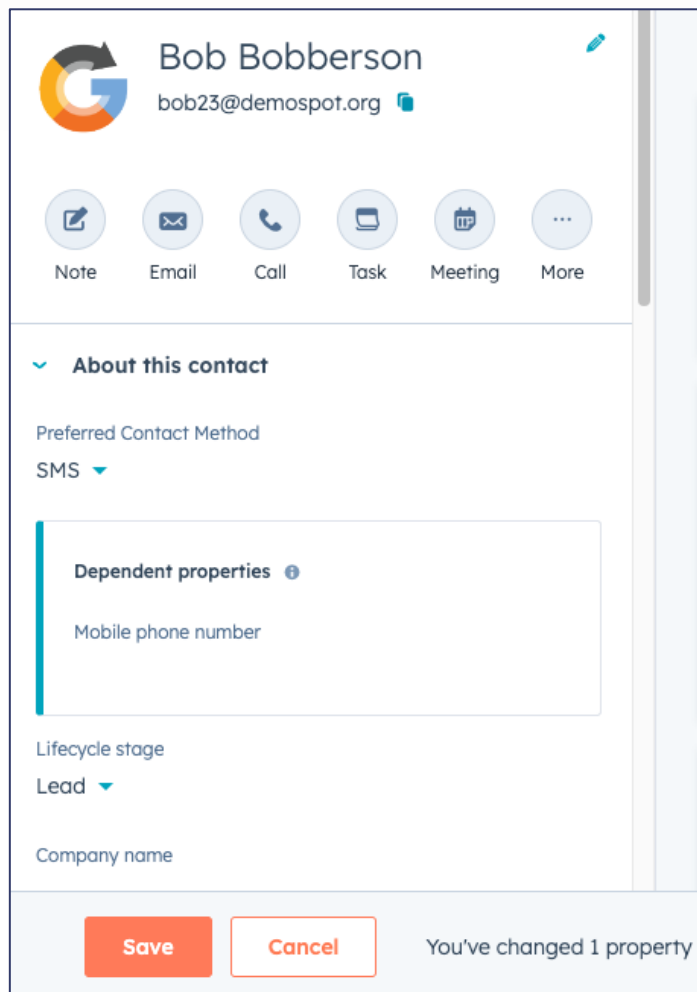
Preview logic

Closed Lost Reason

Competition

Competitor That Won

Use Conditional Properties Now: Preferred Contact Method



Bob Bobberson
bob23@demospot.org

Note Email Call Task Meeting More

▼ **About this contact**

Preferred Contact Method
SMS ▼

Dependent properties ⓘ

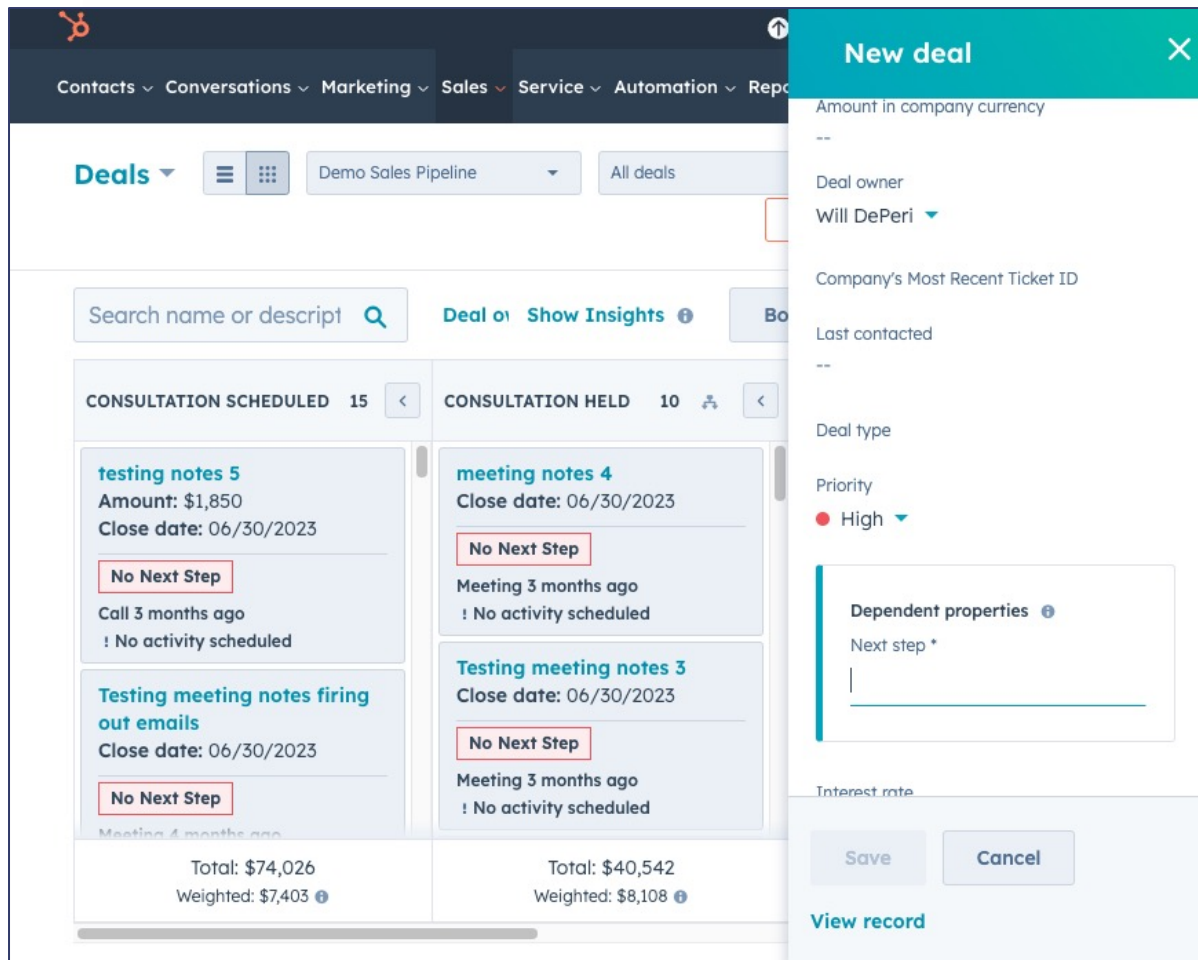
Mobile phone number

Lifecycle stage
Lead ▼

Company name

Save Cancel You've changed 1 property

Use Conditional Properties Now: Require Next Step for High Priority Deals



The screenshot displays the HubSpot CRM interface with a 'New deal' modal open. The modal contains several fields for deal configuration:

- Amount in company currency: --
- Deal owner: Will DePeri
- Company's Most Recent Ticket ID
- Last contacted: --
- Deal type
- Priority: High
- Dependent properties:
 - Next step * (with a text input field)
- Interest rate

At the bottom of the modal are 'Save' and 'Cancel' buttons, and a 'View record' link. The background shows a 'Deals' view with a search bar and two columns of deal cards. Each card includes a title, amount, close date, and a 'No Next Step' warning. Summary statistics at the bottom of the deal view are:

Total: \$74,026	Total: \$40,542
Weighted: \$7,403	Weighted: \$8,108

Use Conditional Properties Now: Streamline Your Setup

- There's a good chance you can reduce properties shown for:
 - Creating Records
 - Advancing Deal Stages
 - Advancing Ticket Stages
 - Index Views
 - Association Cards
- Audit these locations, remove properties from those views, and re-add through conditional properties where possible

Properties Export all properties

Properties are used to collect and store information about your records in HubSpot. For example, a contact might have properties like First Name or Lead Status.

Select an object: Deal properties Go to deals settings

Properties (111) Conditional property logic Groups Archived Properties (0)

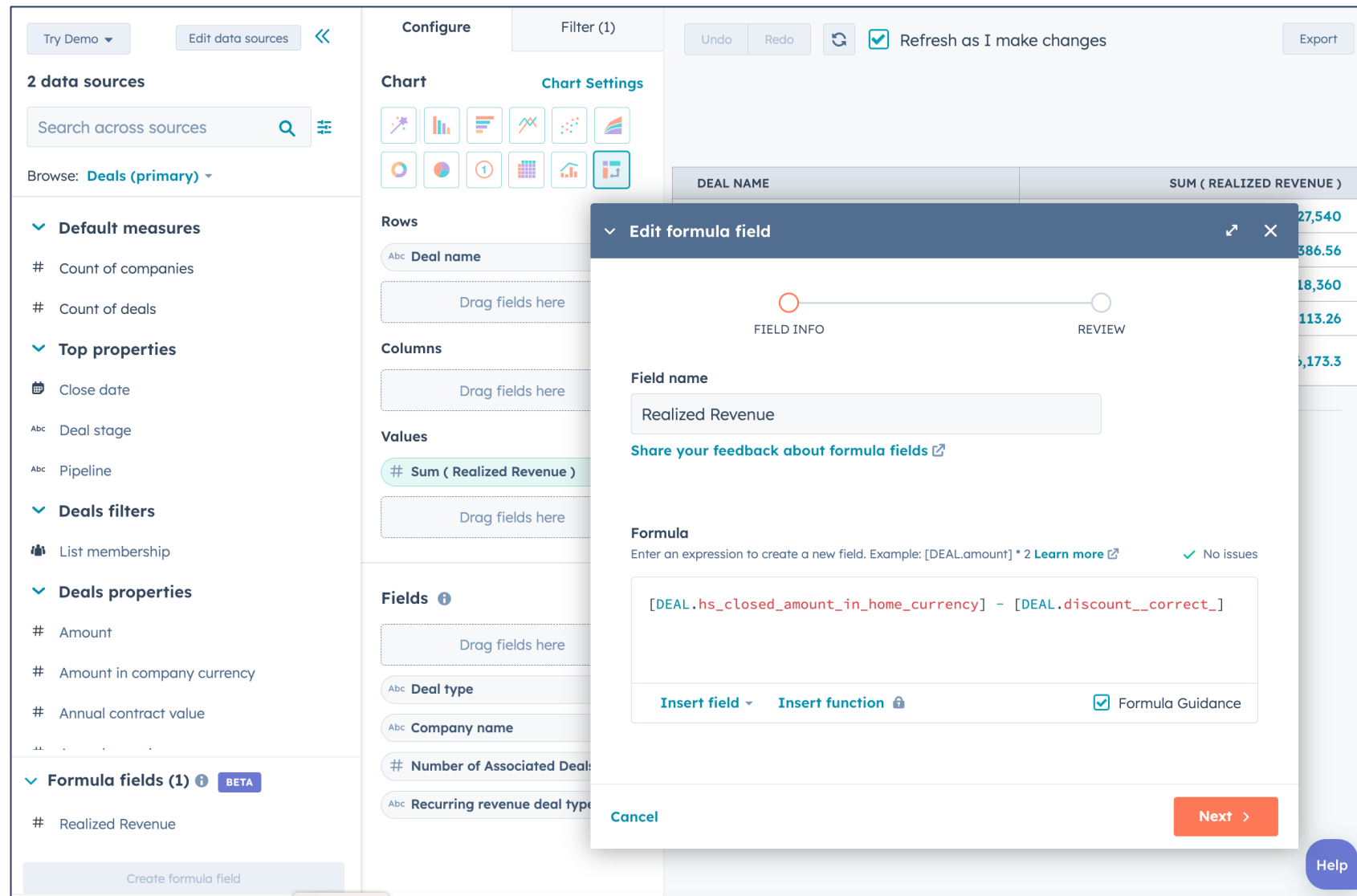
Search All controlling properties ▾ All dependent properties ▾ All users ▾ Create logic

<input type="checkbox"/>	CONTROLLING PROPERTIES ⬆	DEPENDENT PROPERTIES ⬆
<input type="checkbox"/>	From referral? is equal to "Yes"	Who referred this deal?
<input type="checkbox"/>	Priority is equal to "High"	Next step

What's New:

Formula Fields In Custom Report Builder

- Public Beta
- All Hubs
- Pro & Enterprise

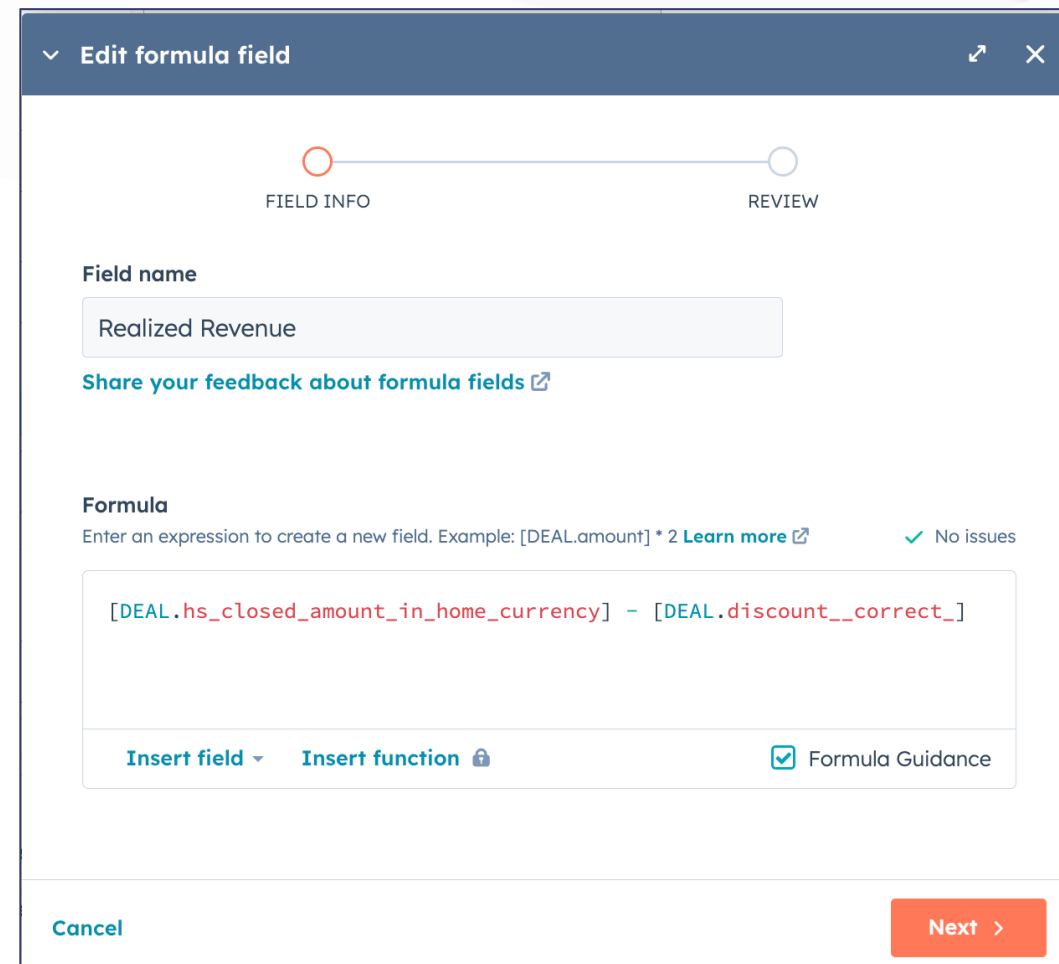


The screenshot displays the HubSpot Custom Report Builder interface. On the left, a sidebar lists various data sources and filters, including 'Formula fields (1) BETA' with a 'Realized Revenue' field. The main area shows a report configuration for 'Deals (primary)' with a table of columns: 'DEAL NAME' and 'SUM (REALIZED REVENUE)'. A table of data is visible in the background, showing values for these columns.

An 'Edit formula field' dialog box is open, showing the configuration for a new formula field. The dialog includes a progress indicator with 'FIELD INFO' and 'REVIEW' steps. The 'Field name' is 'Realized Revenue'. The 'Formula' field contains the expression: `[DEAL.hs_closed_amount_in_home_currency] - [DEAL.discount__correct_]`. The dialog also features 'Insert field', 'Insert function', and 'Formula Guidance' options, along with 'Cancel' and 'Next' buttons.

Use Formula Fields Now: Deal Revenue Math

- Gross Profit = Deal amount - deal costs
- Realized Revenue = Deal amount - discounts
- Commissions = Deal amount * commission percentage
- Revenue Per Day to Close = Deal amount / days to close



The screenshot shows the 'Edit formula field' interface in HubSpot. At the top, there is a progress bar with two steps: 'FIELD INFO' (active) and 'REVIEW'. Below this, the 'Field name' is set to 'Realized Revenue'. A link to 'Share your feedback about formula fields' is present. The 'Formula' section contains the expression: `[DEAL.hs_closed_amount_in_home_currency] - [DEAL.discount__correct_]`. A status indicator shows 'No issues'. At the bottom, there are buttons for 'Insert field', 'Insert function', and a checked 'Formula Guidance' checkbox. The interface concludes with 'Cancel' and 'Next >' buttons.

Use Formula Fields Now: Average Deal Size by Company

COMPANY NAME	TOTAL REVENUE	NUMBER OF ASSOCIATED DEALS	REVENUE PER DEAL
	\$62,625.00	2	31,312.5
	\$62,000.00	2	31,000
	\$57,600.00	2	28,800
	\$54,000.00	2	27,000
	\$128,850.00	6	21,475
	\$41,000.00	2	20,500
	\$20,475.00	1	20,475
	\$40,850.00	2	20,425
	\$20,000.00	1	20,000
	\$37,425.00	2	18,712.5

Edit formula field ↗ ✕

FIELD INFO
 REVIEW

Field name

Field 1

[Share your feedback about formula fields](#)

Formula

Enter an expression to create a new field. Example: [DEAL.amount] * 2 [Learn more](#) ✓ No issues

[COMPANY.total_revenue]/[COMPANY.num_associated_deals]

Insert field ▾
Insert function 🔒
 Formula Guidance

Cancel
Next >

Use Formula Fields Now: Event Attendance Percentage

v Edit formula field ↗ ✕

○ ————— ○
 FIELD INFO ————— REVIEW

Field name

[Share your feedback about formula fields](#)

Formula

Enter an expression to create a new field. Example: [DEAL.amount] * 2 [Learn more](#) ✓ No issues

[CONTACT.zoom_webinar_attendance_count]/[CONTACT.zoom_webinar_registra

Insert field
Insert function
 Formula Guidance

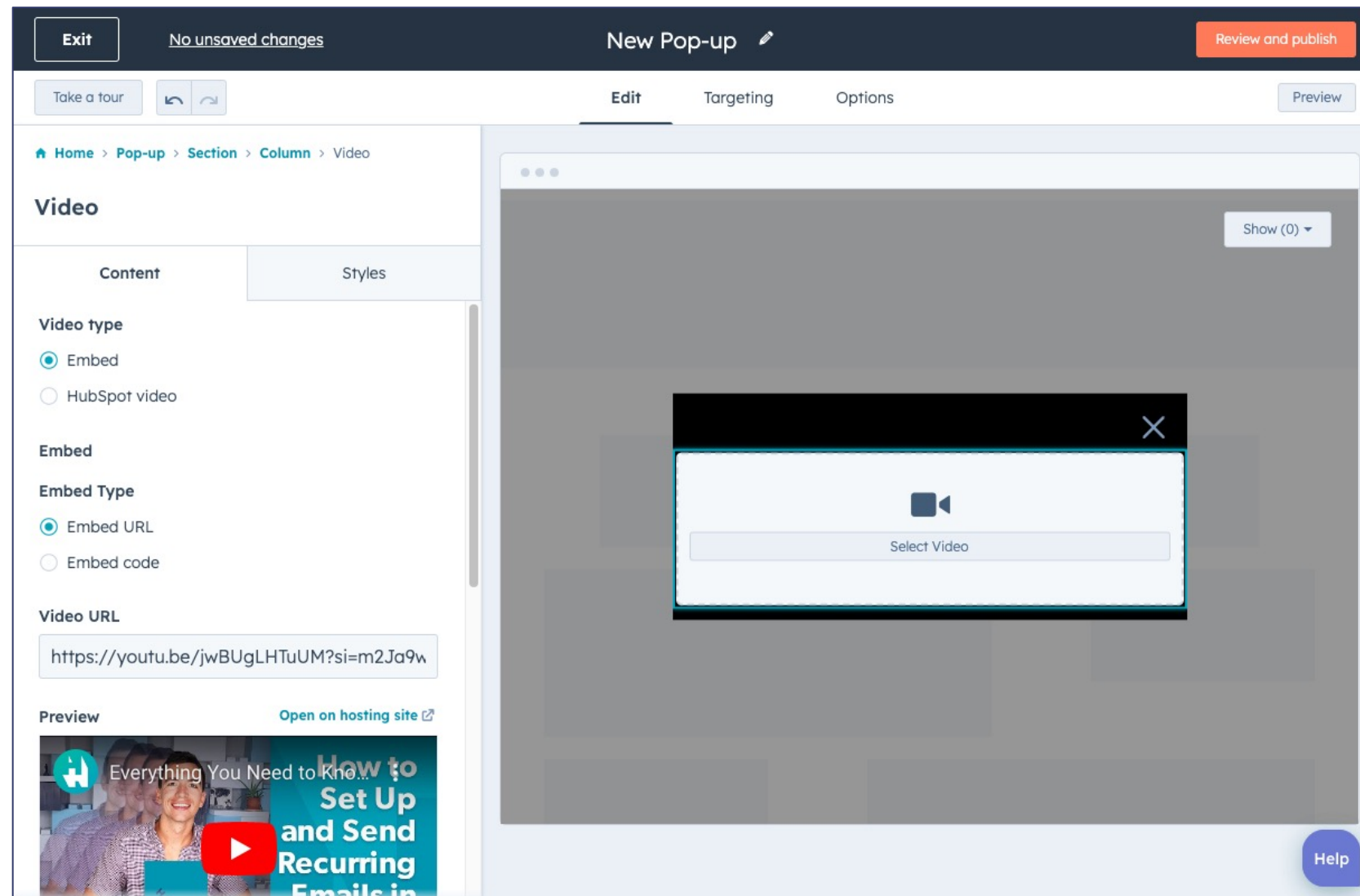
Cancel
Next >

RECORD ID - CONTACTS	TOTAL NUMBER OF ZOOM WEBINAR REGISTRATIONS	TOTAL NUMBER OF ZOOM WEBINARS ATTENDED	ATTENDANCE RATE
	9	5	55.56%
	8	7	87.5%
	8	3	37.5%
	8	5	62.5%
	7	1	14.29%
	7	5	71.43%
	7	3	42.86%
	7	4	57.14%
	7	5	71.43%
	6	2	33.33%
	6	5	83.33%
	6	4	66.67%
	6	(No value)	0%
	6	(No value)	0%

What's New:

Video Module in CTAs

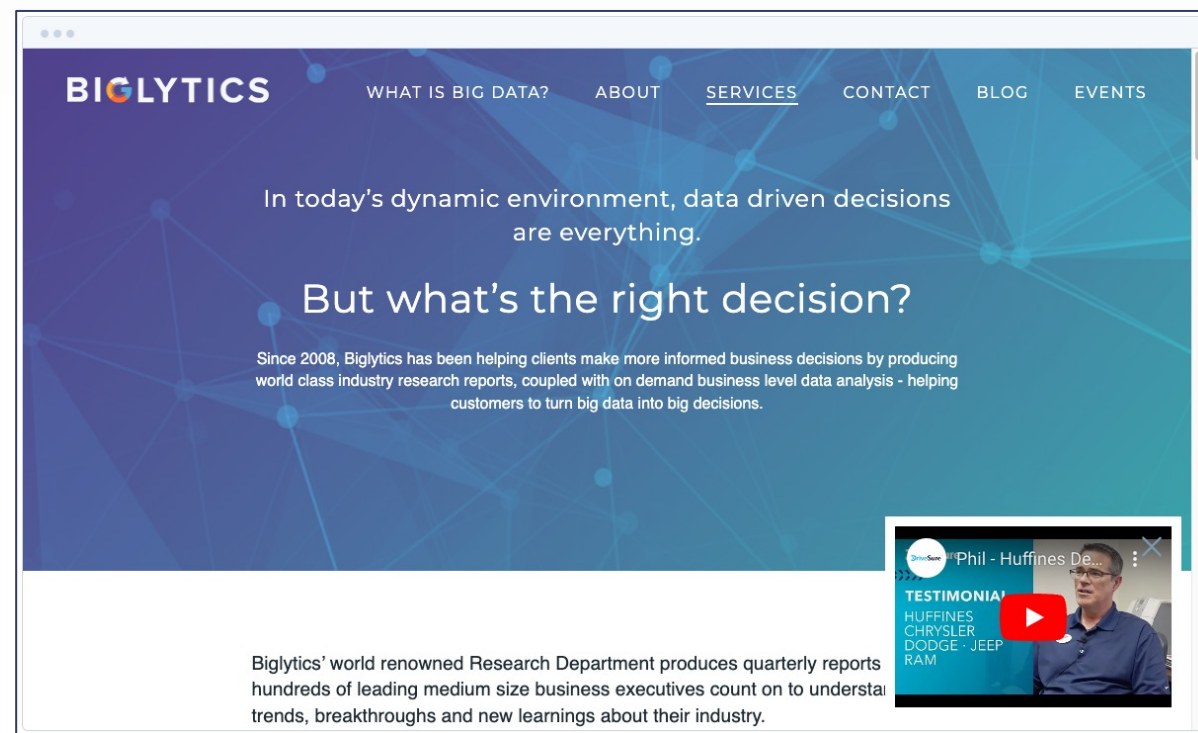
- Public Beta
- CMS & Marketing Hubs
- Starter, Pro, Enterprise



The screenshot displays the HubSpot CMS interface for editing a 'New Pop-up'. The top navigation bar includes 'Exit', 'No unsaved changes', 'New Pop-up', and 'Review and publish'. Below this, there are tabs for 'Edit', 'Targeting', and 'Options', along with a 'Preview' button. The breadcrumb trail shows 'Home > Pop-up > Section > Column > Video'. The main content area is titled 'Video' and has two tabs: 'Content' (selected) and 'Styles'. Under 'Content', there are sections for 'Video type' (with 'Embed' selected), 'Embed' (with 'Embed URL' selected), and 'Video URL' (containing the URL 'https://youtu.be/jwBUgLHTuUM?si=m2Ja9w'). A 'Preview' section at the bottom shows a video player with a play button and a 'How to Set Up and Send Recurring Emails in...' title. A 'Select Video' dialog box is overlaid on the video player, and a 'Help' button is visible in the bottom right corner.

Use Video CTAs Now:

- Pop up video on button click: [Click Here To Watch]
- Have a testimonial video slide in on a service page
- Have a video from a hiring manager slide in on a job opening page
- Add a short video to a newsletter subscription pop-up CTA
- Add a video to embedded CTAs for a more engaging request to register for a webinar, download a guide, whatever action you want them to take



What's New:

Contact Lifecycle Stage Properties

- Live
- All Hubs
- Pro & Enterprise

All properties Manage properties

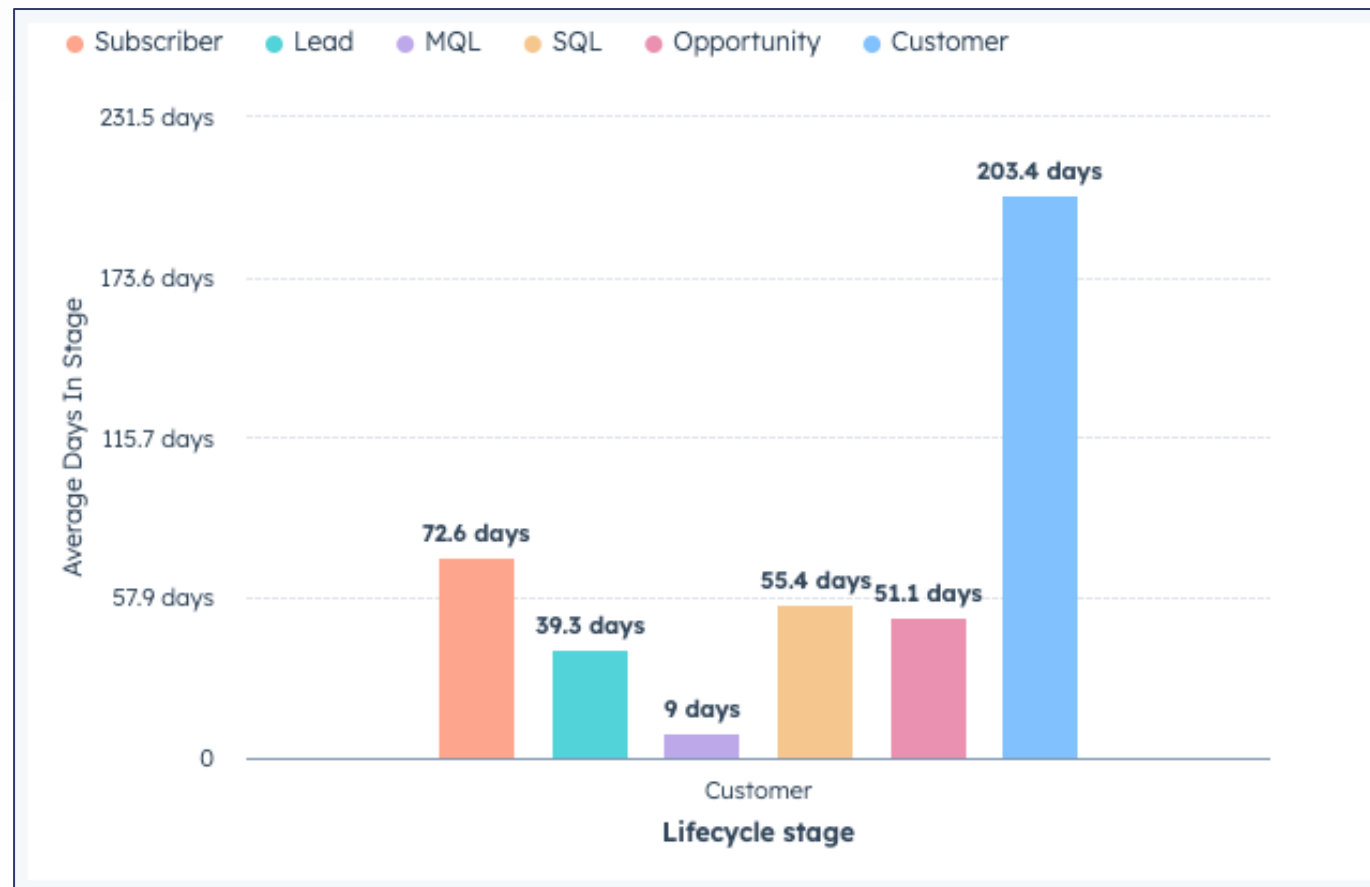
custom test × Hide blank properties

✓ **Contact information** 4 of 233 properties

- Cumulative time in "Custom Test (Lifecycle Stage Pipeline)"
--
- Date entered "Custom Test (Lifecycle Stage Pipeline)"
--
- Date exited "Custom Test (Lifecycle Stage Pipeline)"
--
- Latest time in "Custom Test (Lifecycle Stage Pipeline)"
--

Use New Properties Now: Avg Time In Stage Report

- Report shown is for all current customers
- Custom Report Builder > Contacts Object > Vertical Bar Chart
- Add Lifecycle Stage to X-axis
- Add “Cumulative Time in ____” properties to Y-axis
 - Rename & Set Aggregation to Avg
- Set filter to Lifecycle stage is any of Customer



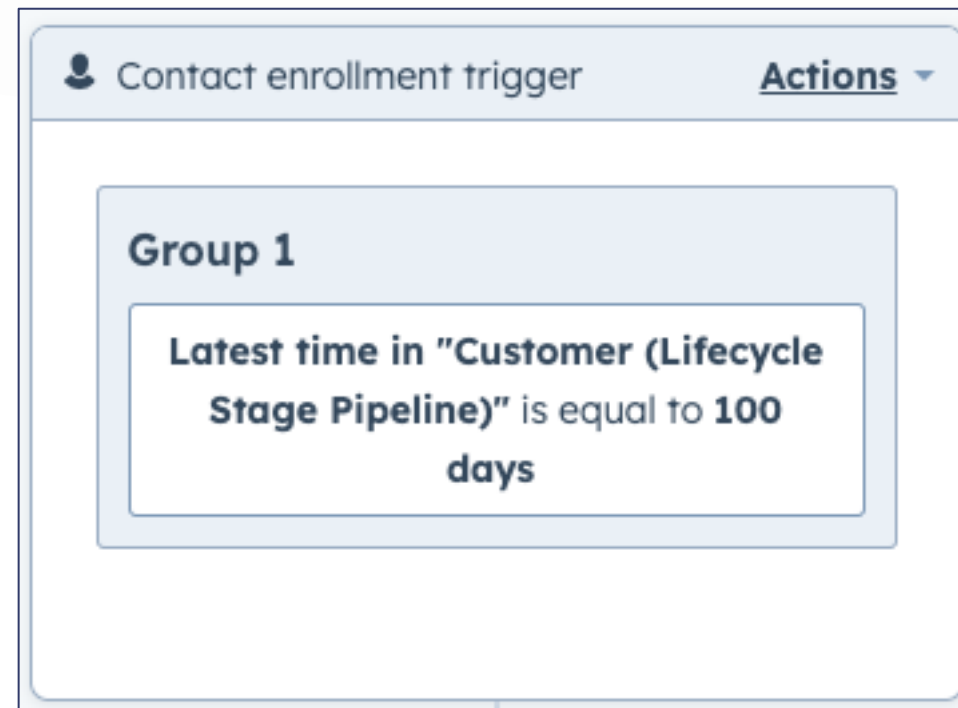
Use New Properties Now: Avg SQL Age by Rep Report

- Custom Report Builder > Contacts Object > Table
- Add Contact Owner and Cumulative Time in Sales Qualified Lead
 - Rename SQL field & Set Aggregation to Avg
- Set filter to Lifecycle stage is any of Sales Qualified Lead

CONTACT OWNER	SQL ⓘ
Ali Schwanke	6.7 days
Will DePeri	55.9 days
Tyler Samani-Sprunk	89.7 days

Use New Properties Now: Trigger Workflows

- New or more frequent drips when contact has been in a stage longer than the average
- Notify a sales rep when they have an SQL longer than average that it may be a good idea to recycle them back to marketing
- Celebrate with customers when they reach milestones like 100 days as a customer

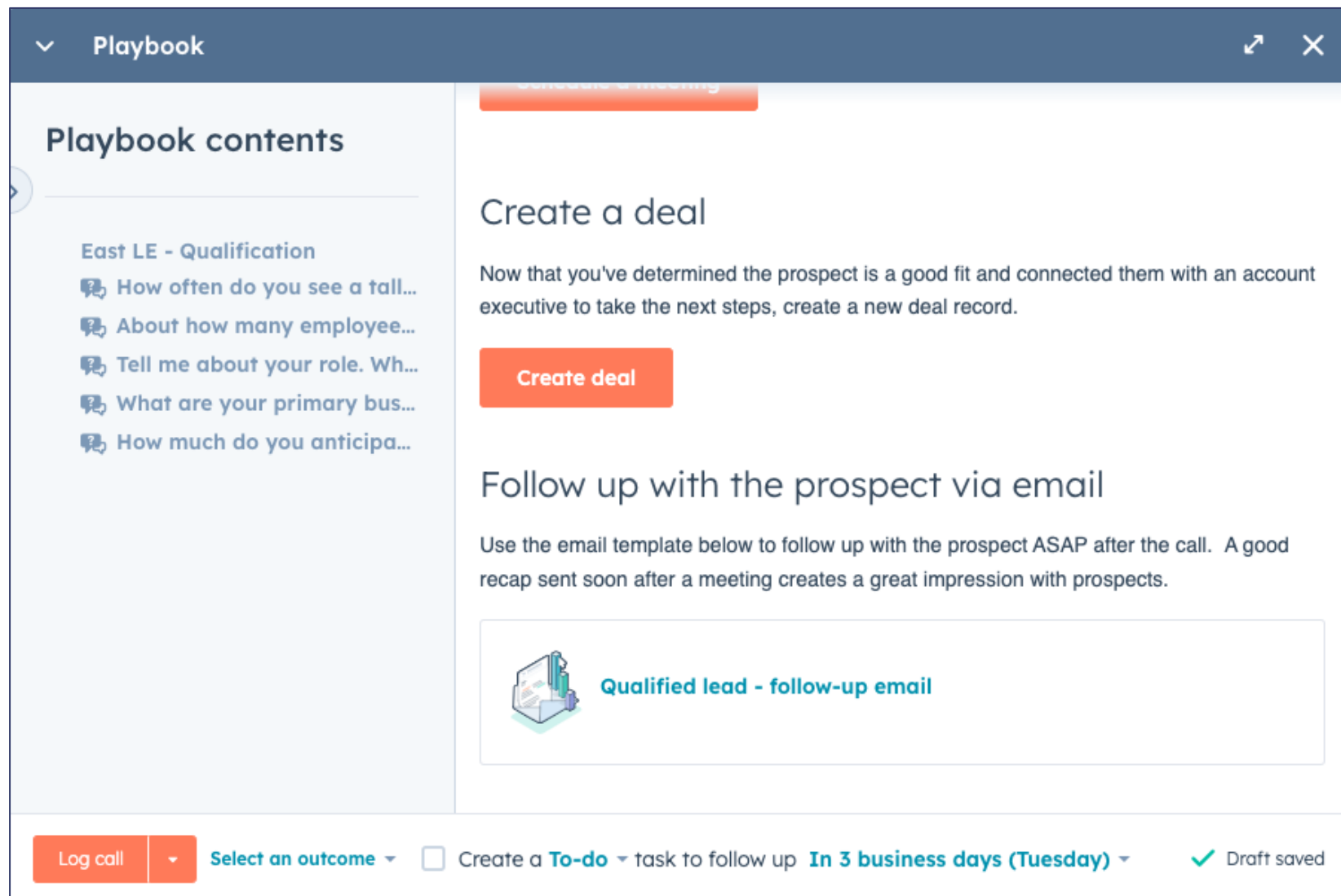


The screenshot shows a workflow configuration interface. At the top, it says "Contact enrollment trigger" with a user icon on the left and an "Actions" dropdown menu on the right. Below this, there is a section titled "Group 1" which contains a single trigger condition: "Latest time in 'Customer (Lifecycle Stage Pipeline)' is equal to 100 days".

What's New:

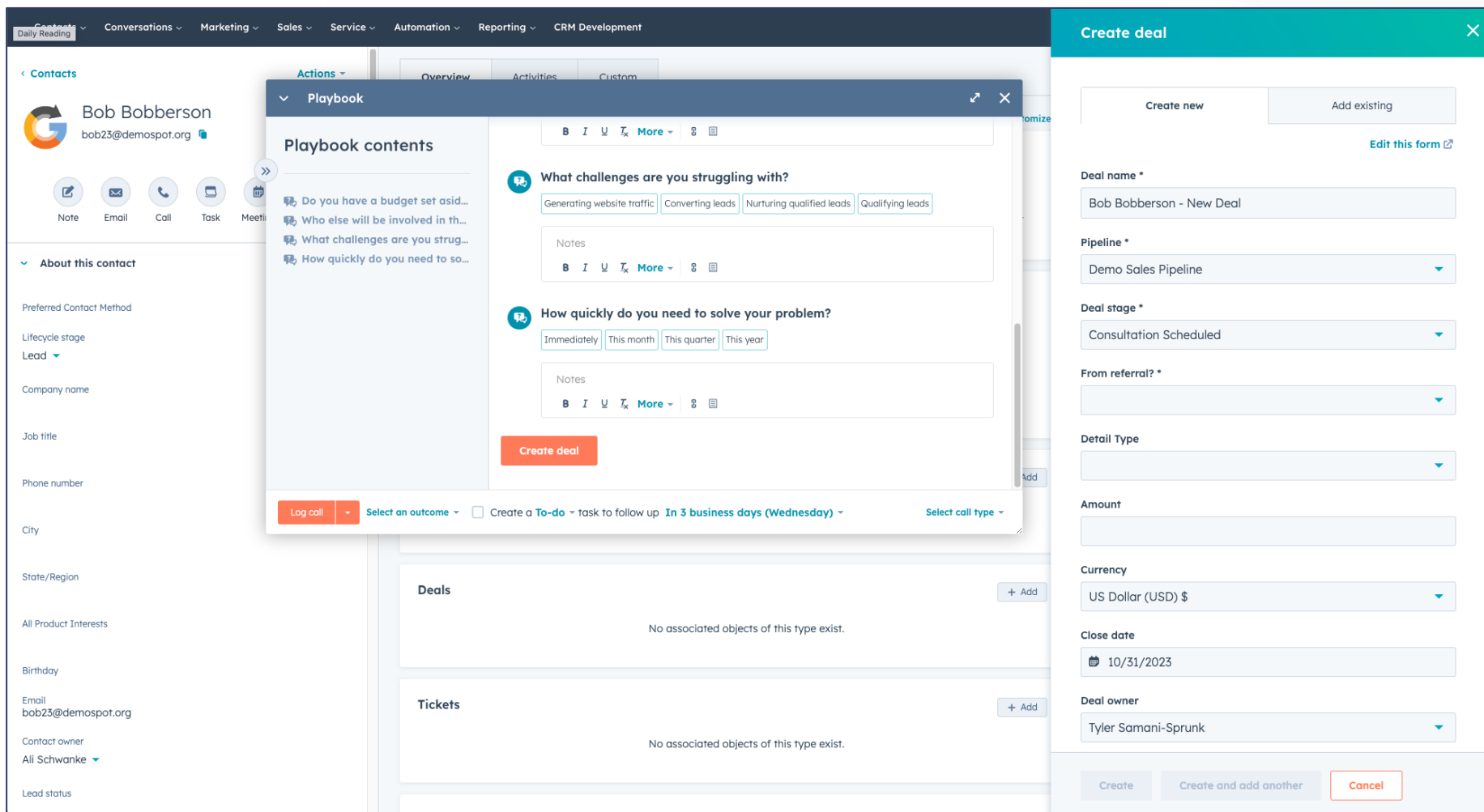
Create New Record From Playbook

- Live
- Sales & Service Hubs
- Pro & Enterprise



The screenshot shows the HubSpot Playbook interface. The top bar is dark blue with a 'Playbook' dropdown and navigation icons. The main content area is split into two columns. The left column, titled 'Playbook contents', lists several qualification questions under the heading 'East LE - Qualification'. The right column shows a step titled 'Create a deal' with a description: 'Now that you've determined the prospect is a good fit and connected them with an account executive to take the next steps, create a new deal record.' Below this is an orange 'Create deal' button. The next step is 'Follow up with the prospect via email', with a description: 'Use the email template below to follow up with the prospect ASAP after the call. A good recap sent soon after a meeting creates a great impression with prospects.' Below this is a placeholder for an email template titled 'Qualified lead - follow-up email'. At the bottom, there is a 'Log call' button, a 'Select an outcome' dropdown, a checkbox for 'Create a To-do task to follow up', a dropdown for 'In 3 business days (Tuesday)', and a 'Draft saved' indicator.

Use Record Creation Now: Create Deal After Initial Call

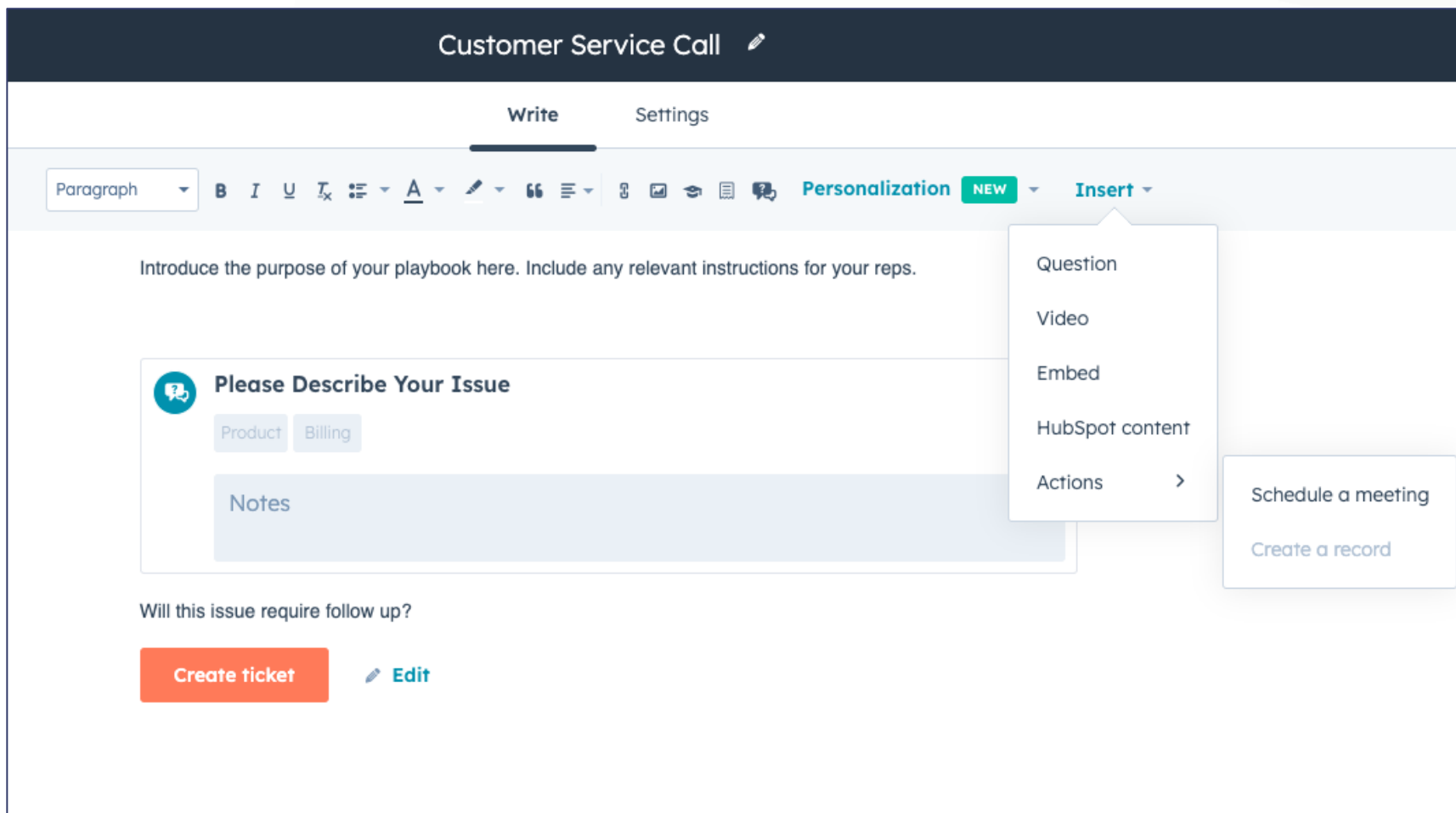


The screenshot displays the HubSpot CRM interface with a 'Create deal' modal window open over the contact record for Bob Bobberson. The modal window contains the following fields and options:

- Create new** / **Add existing** buttons
- Deal name ***: Bob Bobberson - New Deal
- Pipeline ***: Demo Sales Pipeline
- Deal stage ***: Consultation Scheduled
- From referral? ***: (Dropdown menu)
- Detail Type**: (Dropdown menu)
- Amount**: (Text input field)
- Currency**: US Dollar (USD) \$
- Close date**: 10/31/2023
- Deal owner**: Tyler Samani-Sprunk

At the bottom of the modal, there are three buttons: **Create**, **Create and add another**, and **Cancel**.

Use Record Creation Now: Create Ticket on Intake Call

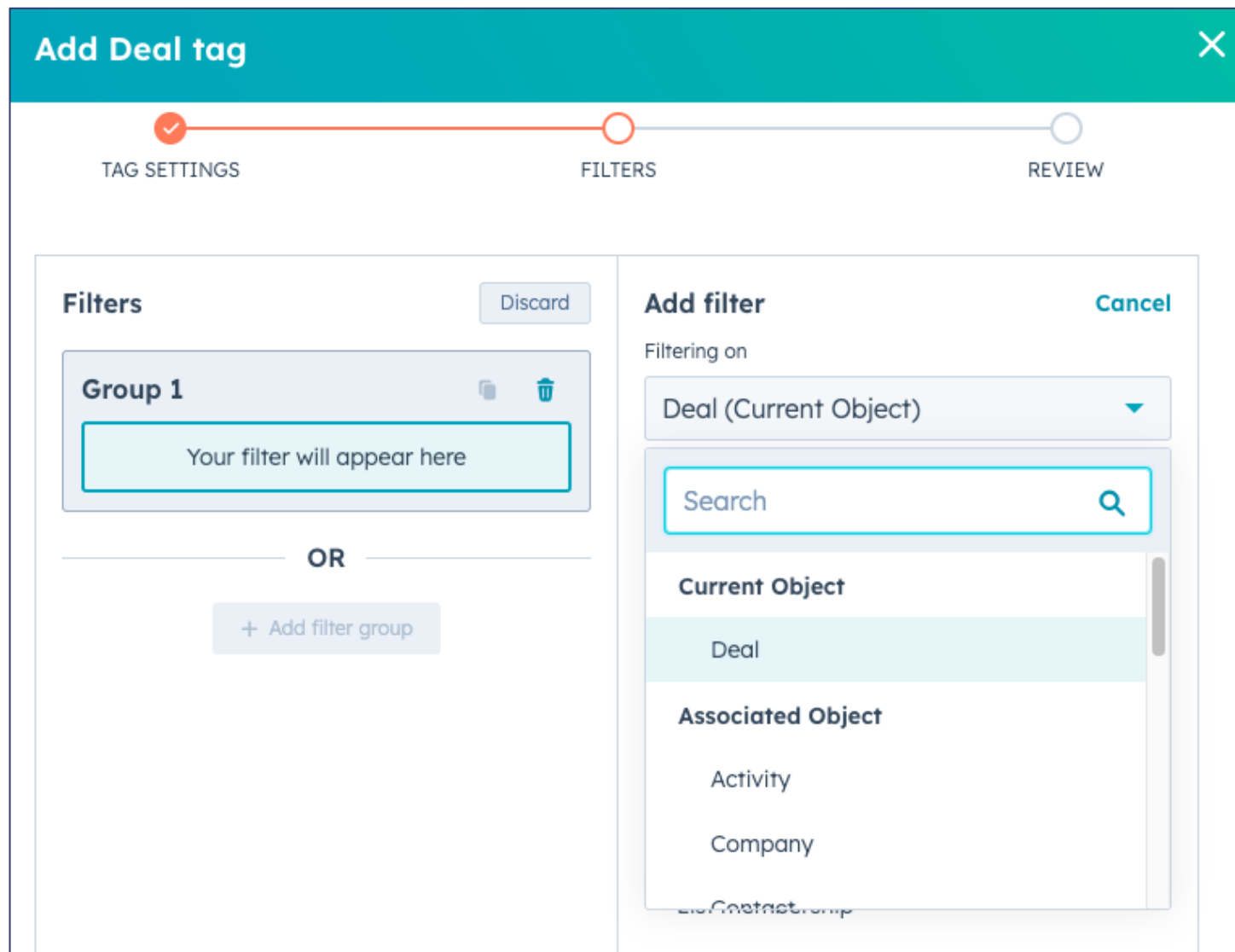


The screenshot displays the 'Customer Service Call' interface. At the top, there's a dark header with the title 'Customer Service Call' and an edit icon. Below this is a navigation bar with 'Write' and 'Settings' tabs. A rich text editor toolbar is visible, including options for Paragraph, Bold, Italic, Underline, Link, Unlink, Text color, Background color, Quote, Bulleted list, Numbered list, Indent, Outdent, and a 'Personalization' button with a 'NEW' badge. The main content area contains a text prompt: 'Introduce the purpose of your playbook here. Include any relevant instructions for your reps.' Below this is a form titled 'Please Describe Your Issue' with a speech bubble icon, 'Product' and 'Billing' tags, and a 'Notes' text area. A dropdown menu is open from the 'Insert' button, listing 'Question', 'Video', 'Embed', 'HubSpot content', and 'Actions'. The 'Actions' menu item is expanded to show 'Schedule a meeting' and 'Create a record' options. At the bottom, there's a question 'Will this issue require follow up?' and two buttons: 'Create ticket' (orange) and 'Edit' (blue).

What's New:

Object Tag Filter Enhancements

- Live
- Sales & Service Hubs
- Starter, Pro, Enterprise



Add Deal tag [X]

TAG SETTINGS [✓] FILTERS [○] REVIEW [○]

Filters [Discard]

Group 1 [Discard] [Trash]

Your filter will appear here

OR

+ Add filter group

Add filter [Cancel]

Filtering on Deal (Current Object)

Search [Q]

Current Object

- Deal

Associated Object

- Activity
- Company
- Contact

Use New Filters Now: Tag Deals from Target Accounts

Filters Discard

Group 1 Copy Delete

Deal is associated to:
Any Company

And associated Company has all of:
Target Account is equal to **True**

+ Add filter

Deals Menu Grid Demo Sales Pipe

Search name or description Search

CONSULTATION SCHEDULED 16 Left Arrow Right Arrow

Super Awesome HubSpot Deal
Amount: \$1M
Close date: 10/31/2023

Large Deal **No Next Step**

Target Account

Calendar Icon
No activity for a minute
! No activity scheduled

Use New Filters Now: Tag Tickets From Loyal Customers

Add Ticket tag ✕

TAG SETTINGS ✓ FILTERS ○ REVIEW ○

Filters Discard

Group 1 📄 🗑️

Ticket is associated to:
Any Contact

And associated Contact has all of:

Date entered "Customer (Lifecycle Stage Pipeline)" is more than 1,095 days ago

Lifecycle stage is any of Customer

+ Add filter

Edit filter Close editor

Lifecycle stage ↔️ 🗑️

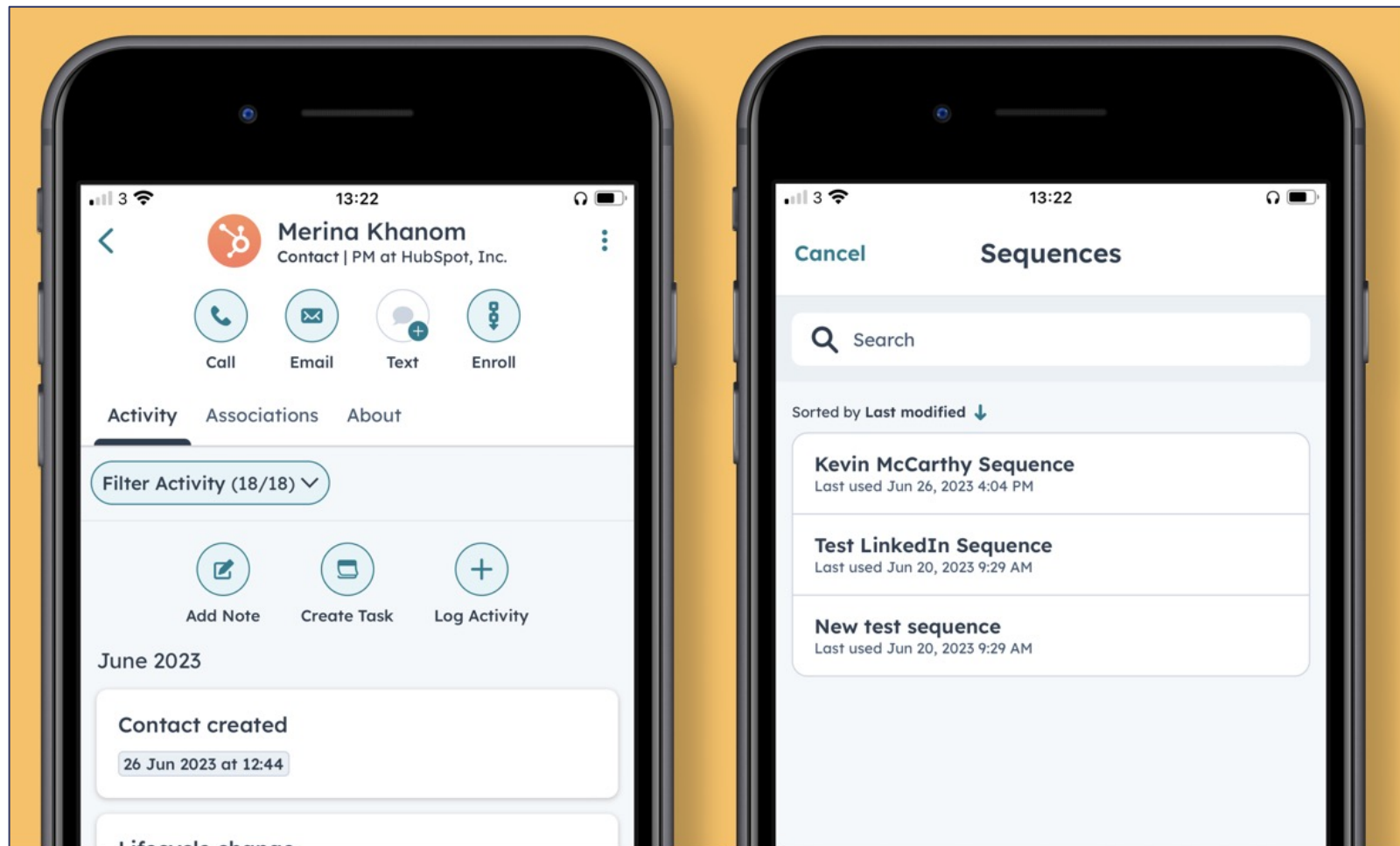
is any of ▼

Customer ✕ ▼

What's New:

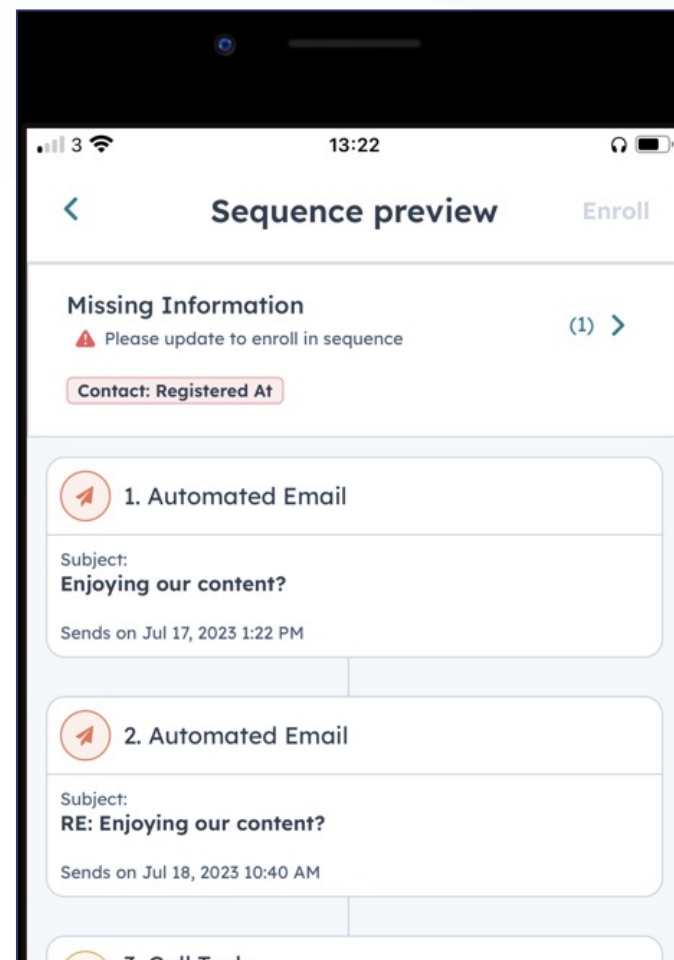
Sequences on Mobile

- Live
- Sales & Service Hubs
- Pro & Enterprise
- iOS & Android Apps



Use Mobile Sequences Now: Empower Reps in the Field

- Don't delay trade show engagement
 - Scan business card > enroll in sequence
- Immediate & consistent follow-up from sales meetings you travel to
- Start a helpful drip after an installation or service visit



Small But Mighty Updates

What's New:

From Address Now Requires Verification

- Sunset Oct. 26
- Marketing Hub
- All Tiers

Email settings

From name * ⓘ

Joe ▼

From address * ⓘ

joe@ ▼

Use this as my reply-to address

Make sure you're using a [HubSpot connected inbox](#) as your reply-to address to track replies

Verify address

What's New:

Updated User Table

- Public Beta
- All Hubs
- All Tiers

Users | Teams | Permission Sets | Presets

Create new users, customize user permissions, and remove users from your account. [Learn more about user permissions](#)

Invite Status ▾ Last Active ▾ Advanced filters (0) Create user

Search users

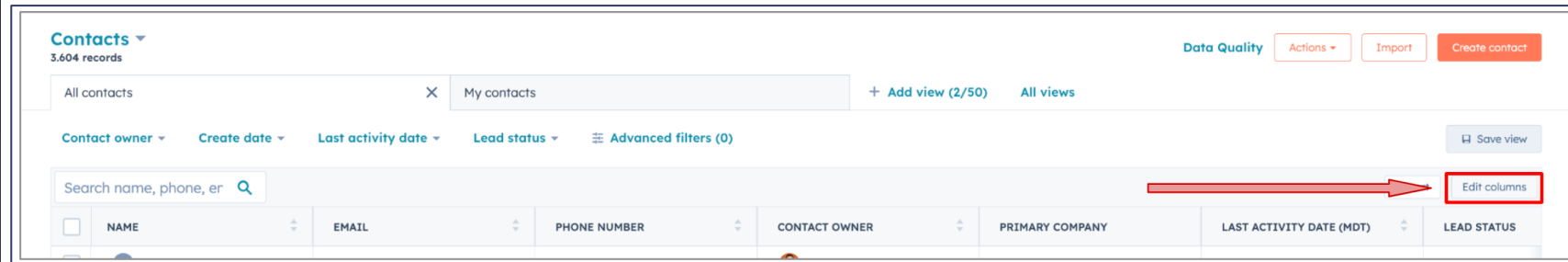
<input type="checkbox"/>	NAME	SEAT	PERMISSION SETS	ACCESS	MAIN TEAM
<input type="checkbox"/>	Jenna Feeney jfeeney@hubspot.com	--	--	--	Dream team
<input type="checkbox"/>	Barbie Roberts jfeeney+08232@hubspot.com	Core	--	Contacts Marketing Reports Sales Service	Dream team
<input type="checkbox"/>	Ken Carson jfeeney+0823@hubspot.com	--	--	--	--
<input type="checkbox"/>	Allan Sherwood jfeeney+321@hubspot.com	Core	Testing PS	Contacts Marketing Reports Sales Service	--

< Prev 1 Next > 25 per page ▾

What's New:

Freezing First Column of Index Pages

- Public Beta
- All Hubs
- All Tiers



Contacts 3,604 records

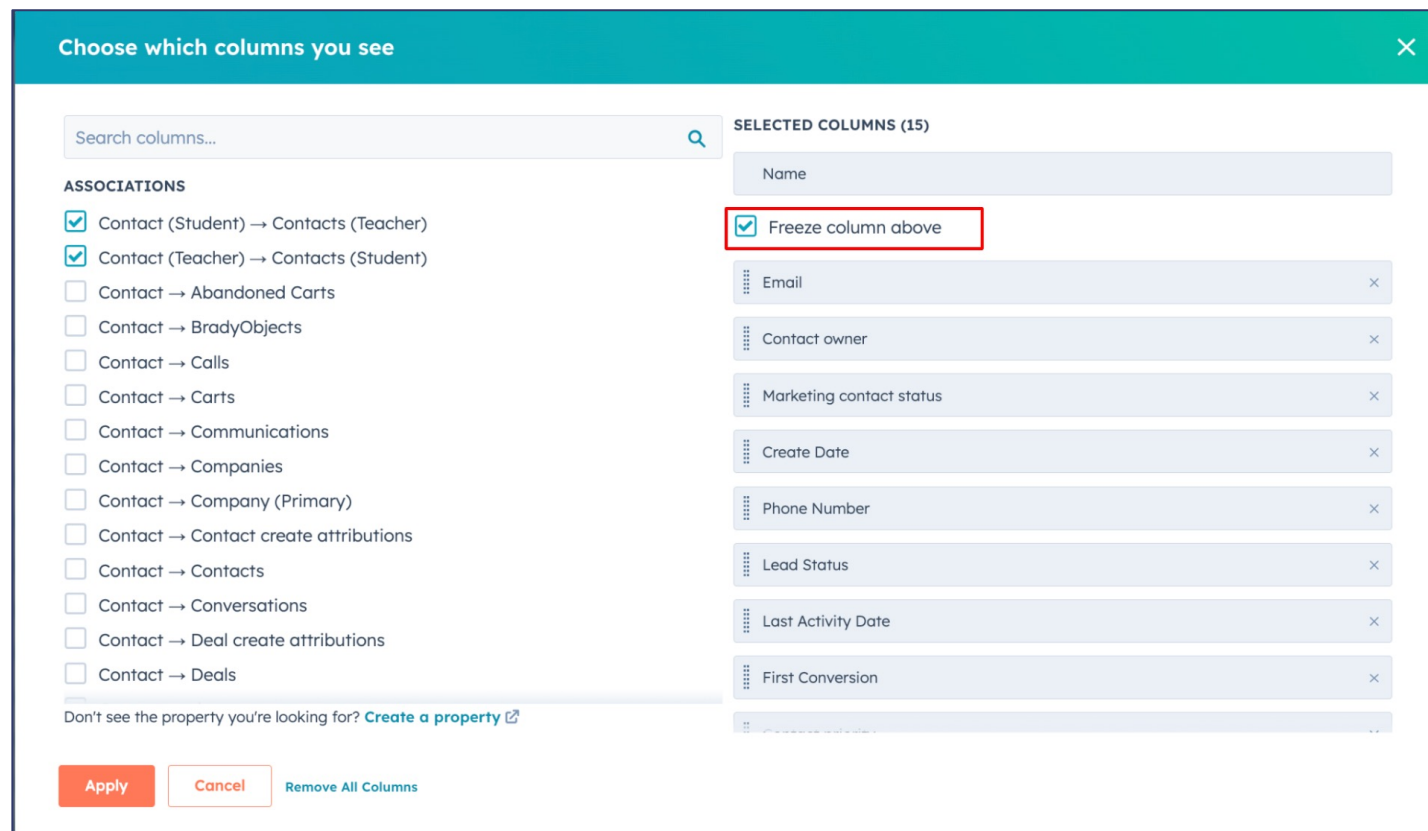
All contacts My contacts + Add view (2/50) All views

Contact owner Create date Last activity date Lead status Advanced filters (0) Save view

Search name, phone, or

NAME EMAIL PHONE NUMBER CONTACT OWNER PRIMARY COMPANY LAST ACTIVITY DATE (MDT) LEAD STATUS

Edit columns



Choose which columns you see

Search columns...

ASSOCIATIONS

- Contact (Student) → Contacts (Teacher)
- Contact (Teacher) → Contacts (Student)
- Contact → Abandoned Carts
- Contact → BradyObjects
- Contact → Calls
- Contact → Carts
- Contact → Communications
- Contact → Companies
- Contact → Company (Primary)
- Contact → Contact create attributions
- Contact → Contacts
- Contact → Conversations
- Contact → Deal create attributions
- Contact → Deals

Don't see the property you're looking for? [Create a property](#)

SELECTED COLUMNS (15)

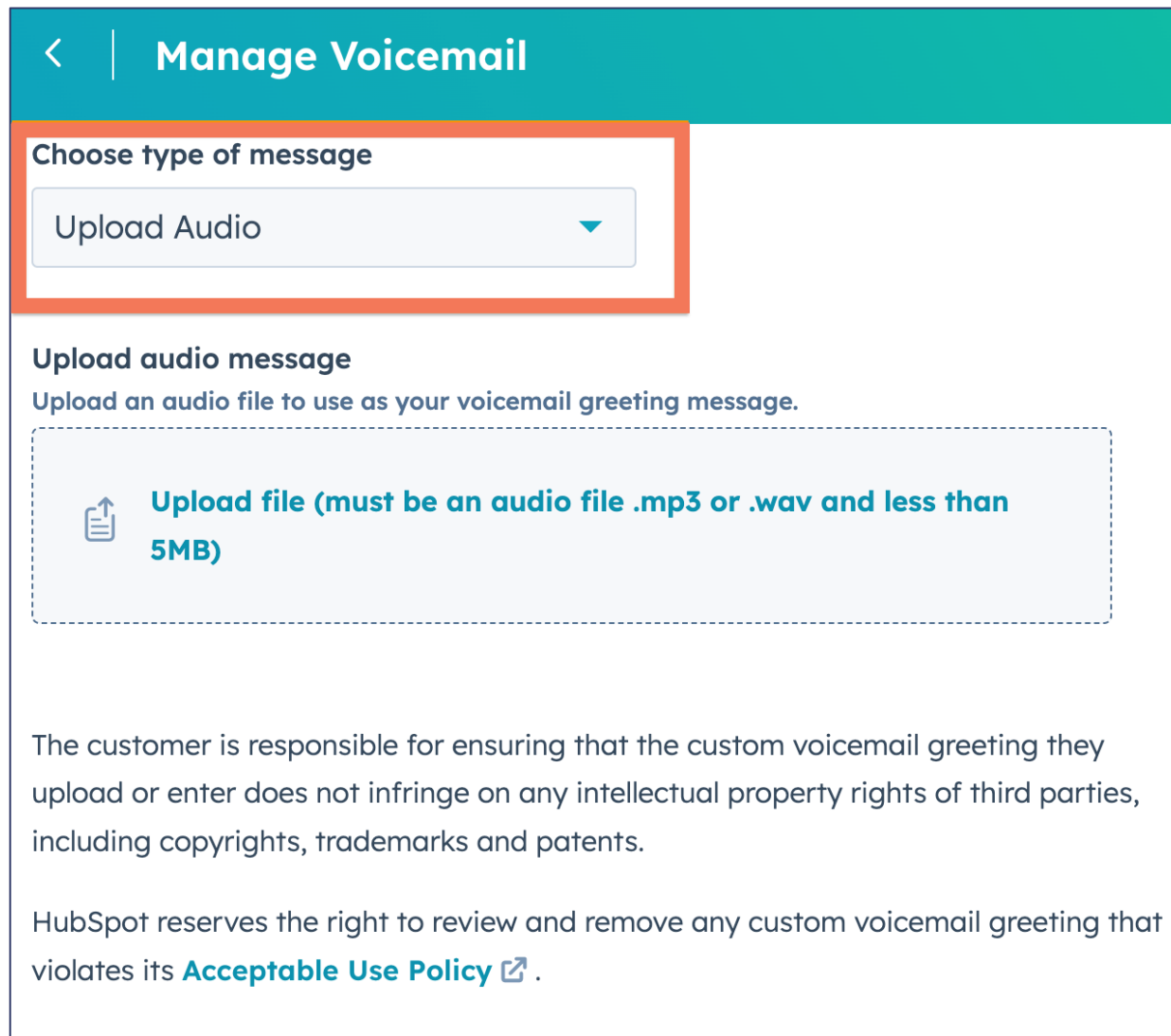
- Name
- Freeze column above
- Email
- Contact owner
- Marketing contact status
- Create Date
- Phone Number
- Lead Status
- Last Activity Date
- First Conversion

Apply Cancel Remove All Columns

What's New:

Custom Voicemail Audio

- Live
- Sales & Service Hubs
- Starter, Pro, & Enterprise




< | Manage Voicemail

Choose type of message

Upload Audio

Upload audio message
Upload an audio file to use as your voicemail greeting message.

 **Upload file (must be an audio file .mp3 or .wav and less than 5MB)**

The customer is responsible for ensuring that the custom voicemail greeting they upload or enter does not infringe on any intellectual property rights of third parties, including copyrights, trademarks and patents.

HubSpot reserves the right to review and remove any custom voicemail greeting that violates its [Acceptable Use Policy](#).

What's New:

Add Custom CSS to CTAs (HTML CTA Type)

- Public Beta
- CMS & Marketing Hubs
- Starter, Pro, & Enterprise


Get Started

Templates

HubSpot Templates


Start from scratch

Use in **All** ▾




Sticky Banner

A banner that is fixed to the top or bottom of your website. Stays in view as your visitor scrolls.




Pop-Up Box

A box that appears on a set schedule. Fill it with images, text, forms and much more.



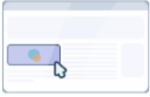
Slide-In

A banner that slides in from the corner of your website. Stays in view as your visitor scrolls.




Embedded

Create a beautiful, actionable banner, call-to-action or button and place it on your web page.



Embedded Image

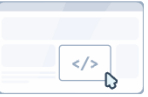
Create a beautiful, actionable image and use it anywhere on your website or email.



Embedded Button

Create a beautiful, actionable button and use it anywhere on your website or email.

▼ **Advanced options** NEW



Embedded HTML

Create a purely HTML CTA and apply your own themes or custom CSS

What's New:

Gauge Visualizations in Reports

- Public Beta
- All Hubs
- Pro & Enterprise

← Back to create report Average Deal Amount ✎ Debug mode Sample reports Save report

Try Demo ▾
Edit data sources <<
< Done
Undo Redo ↻ Refresh as I make changes
Export

1 data source

Search across sources 🔍 #

Browse: Deals (primary) ▾

Default measures

- # Count of deals

Top properties

- 📅 Close date
- Abc Deal stage
- Abc Pipeline

Deals filters

- 👤 List membership

Deals properties

- # Amount
- # Amount in company currency
- # Annual contract value
- # Annual recurring revenue
- Abc Business units
- Abc Campaign of last booking in meetings tool
- 📅 Close date

Gauge chart settings

Show Data Labels

Color Palette

Alert - Red to Green ▾

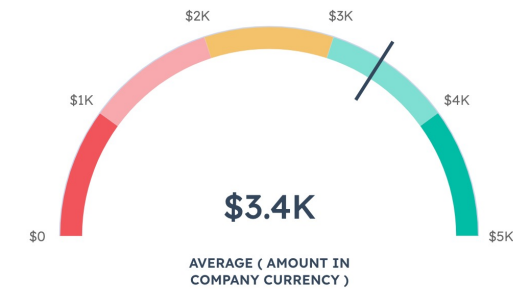
Min **Max**

Bands

From	To	Color	✕
<input type="text" value="Auto"/>	<input type="text" value="1,000"/>	■	✕
<input type="text" value="1,000"/>	<input type="text" value="2,000"/>	■	✕
<input type="text" value="2,000"/>	<input type="text" value="3,000"/>	■	✕
<input type="text" value="3,000"/>	<input type="text" value="4,000"/>	■	✕
<input type="text" value="4,000"/>	<input type="text" value="Auto"/>	■	✕

[+ Add band](#)

● Average (Amount in company currency)



\$3.4K

AVERAGE (AMOUNT IN COMPANY CURRENCY)


Help

What's New:

QR Codes for Payment Links

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

Payment Links

Search all payment links  State: **On** ▾

LINK NAME ▾		LINE
Test Payment Link	Copy link	Hub Hub
Testing upsells	Actions ▾	
Pitch Deck		
Sales Email Template		

Edit

Clone

Preview

Open link in test mo

View QR Code

What's New:

AI Assistant for Workflow Descriptions

- Public Beta
- All Hubs Except CMS
- Pro & Enterprise

Edit workflow name and description ✕

Name *

Description

Updates contact's marketing status, adds contact to Zoom webinar, sends email, and manages email subscription status.

Re-generate Rate description 😊 ☹️

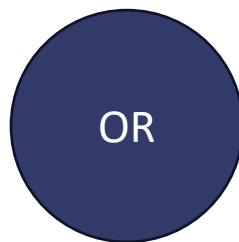
Save **Cancel**

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!

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