Webinar Maximise HubSpot's AI Tools with Jared & Ryan-20260513_100012UTC-Meeting Recording

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56m 58s

Nsovo Shimange 0:14

All right.

Good to go.

Ryan Waters 0:16

Hey, everyone.

Nsovo Shimange 0:20

Hey, Ryan, how are you?

Ryan Waters 0:20

Let's give it a good man. Let's, I think we give it a few more minutes. What do you reckon? See, get people to just join the room. Maybe give them a couple of minutes, maybe one or two minutes extra. Just going to let everyone in. Exciting, exciting discussion today. Really looking forward to exploring this with everyone.

Nsovo Shimange 0:23

Yeah.

Okay, cool.

Ryan Waters 0:40

I hope the mood is good across all the people in the room right now. And yeah, hoping you're going to have lots of value and getting lots of really interesting information from this particular presentation that we're going to be walking you through today. So yeah.

Let's give it maybe one more minute and then we can click into it.

Nsovo Shimange 1:05

Okay, cool.

Ryan Waters 1:07

Perfect.

That night, let's go. Let's go. Can't wait another minute. Let's just get into it. Do we get to go? Brilliant. Over to you and Nsovo.

Nsovo Shimange 1:11

Have some like elevator music.

Alrighty.

I think.

All right, I think we're good to go. Okay, so welcome everybody, and thank you for joining us today. Today's webinar is all about maximizing HubSpot's AI tools and exploring practical ways to work smarter across marketing, sales, and service. My name is Solos Shimange. I'm the Inbound Marketing Manager here at Struto. Before we do get going, we do have...

a few housekeeping notes. So you'll notice that your lines are muted and the cameras have been turned off. This does help us maintain the flow of the webinar. Please feel free to use the chat feature or the Q&A function throughout the session if any questions do come up. This webinar is being recorded and you will get a copy or a copy will be made of

available afterwards in the Stuart universe. Your feedback is really valuable to us, so please keep an eye out for the survey form that we'll send out just before the end of the session. And finally, please note that by attending today's webinar, you've been opted into our marketing communications. You may unsubscribe at any time.

We won't hold that against you.

And I guess with the housekeeping out the way, let me introduce our host for today. As I mentioned, my name is Sullivan Shimange. I'm joined by my colleagues, Jared and Ryan. I'll just hand over to them. Jared, you can do a quick introduction and then Ryan will follow and then we'll jump into what's on today's agenda.

Jared.

Jared Wiltshire 2:45

Awesome. Thank you very much. So I'm Jared. I'm A HubSpot implementation specialist and AI administrator here at Struto, typically working in kind of managing

our own AI assistants and agents inside and outside of HubSpot.
Ryan.

Ryan Waters 3:05
Awesome. Thanks, Jared. Thanks, Nsovo. Sorry about jumping the slide too early there. So, yeah, I'm Ryan. I am newly appointed Head of Customer Success at Struto. I am probably one of our bigger doctors of AI in the business. I use it regularly in my day-to-day.

Jared Wiltshire 3:10
Ding.

Ryan Waters 3:25
And just really excited about this topic. I know it's particularly popular at the moment, but I think there's a lot of value that we could give. And really the idea is just to take it back a step. Let's look at this holistically and we can start thinking about what the next steps might look like.
But yeah, I have it to you, Nsovo.

Nsovo Shimange 3:47
All right, thanks, Lince, for introducing yourselves. Let's take a quick look at today's agenda. So we'll begin by unpacking why there's still so much caution around AI, particularly in business environments. From there, we'll explore the HubSpot Breeze ecosystem. We'll look at practical use cases across marketing, sales, and service teams. And importantly, we'll spend some time demystifying commercials, credits, and how the pricing model actually works. Then we'll wrap it up with some guidance around how to get started and next steps. And then we'll open up the floor for some Q&A at the end of the session. Before I ramble on too much, let me hand it back to Ryan, who'll take us through our first topic.

Ryan Waters 4:29
Yeah.

Nsovo Shimange 4:31
why customers are still cautious about AI.

Ryan Waters 4:31

Brilliant.

Well, thanks so much, Nsovo, and again, welcome everyone. And, you know, we've been having a lot of discussions with our clients at the moment, and there's either a lot of excitement, but also there's a lot of valid hesitation. And if you're feeling like this, you're not alone. It's quite easily, quite easy to be stuck right now.

People are worried about unpredictable costs, losing control of their messaging, and where to actually get started. One of the biggest risks is at the bottom of the slide, and it's a term known as shadow AI. So if you don't provide your team with approved safe AI tools, there's a good chance that they'll be

using public LLMs, think about like your free ChatGPTs, and potentially feeding your company's intellectual property into them. That obviously presents a real risk area is what we would think. And ideally, you want to be setting your team up with a very safe and controlled way of handling that.

Now at HubSpot specifically, you know, one of the good parts about HubSpot's AI is it does provide a secure ring-fenced environment within the platform. So your CRM data is not being used to train public LLMs outside of HubSpot. It stays yours is the reality of it.

Now, let's talk about the ecosystem. HubSpot's unified all of its AI under the Breeze brand. And to make it easy, you want to think about this in three layers. First, you've got the assistant. This is you querying AI to help you do your job faster. Second,

is the agents. This is AI doing the job for you autonomously. And the third is the intelligence layer. This is the data engine working in the background to ensure your records are actually accurate. And I want to pause there on that one because the reality is to ensure that...

HubSpot and the agents within HubSpot to do a good job, it's ensure it's really important that it's contextually relevant. So having a very clean up-to-date CRM is really important when it comes to all of that. And then to package all this together, we have what is called the Breeze Studio. And this is the management layer.

So if you think about, you know, the marketing hub is a hub for marketers, the Bree Studio is where you control and Gavin the AI itself.

Over to you, Jared.

Jared Wiltshire 7:05

Awesome, thank you. So I think here we just want to kind of expand upon what Ryan was saying a little bit more and kind of break down what it means for an assistant to be in HubSpot, what an agent means in HubSpot, and then that kind of data layer that sits

Ryan Waters 7:05
Yeah.

Jared Wiltshire 7:25
Above and beneath both of those things.
So we can look at AI as a kind of few different tools, really. We have assistive AI, which kind of works with people. You're talking to it, you're querying it. I think the most common example that people might already be familiar with would be something like
like ChatGPT, where you're asking it questions, it's giving you responses, and maybe you take that response and use it somewhere else. The in-HubSpot example of this would be something like the Breeze Assistant, where you're maybe querying your HubSpot data and kind of gathering information on
on your own HubSpot data and maybe asking it questions of HubSpot as well.
We have this idea of autonomous AI, or agentic AI is another term you may hear used. And as Ryan said, it does the work for you. Autonomous or agentic AI performs end-to-end tasks, delivering a specific outcome.
The in HubSpot example of this would be something like the customer agent or the prospecting agent. And then let's use the customer agent for example here. Its outcome is that it's resolving a ticket.
And in the event that it can't resolve a ticket, maybe it's handing it off to a human agent.
The kind of layer that then sits above and below these things, and as Ryan alluded to, is that kind of data-driven layer, or more so maybe it's driving data.
in that you're looking to improve the CRM data quality and context through things like breeze intelligence or enrichment and gathering buyer intent. But also we have things like the data agent and smart properties in HubSpot,
which is generating data based on context. Now, you'll see that that word context is in bold, and that's because I like to use the phrase context is king. Context is what drives all AI performance

across the board, right? And context may be your CRM data, it may be your ERP data, and it may be your product knowledge or tone of voice. And so if the context isn't right, then you're going to start to have issues when you're trying to adopt an assistive or an autonomous type of AI.
That leads me quite nicely onto the next slide, if you would, Ryan.

Ryan Waters 10:09
Effect.

Jared Wiltshire 10:10
where we can start to think about where we should be focusing first when we're trying to adopt AI in HubSpot.
And as I said, context is king. And so we start to think about the kind of data side of things first. Data is what drives our AI performance.
We can look at Debris Studio, where we govern and set up our AI agents and assistants in HubSpot.
And you can have multiple different types of AI agents and assistants. You could have an agent doing targeted ICP sales outreach. You could have an assistant that helps people find certain types of data.
And this is all driven by the idea of the knowledge vaults.
So knowledge vaults within HubSpot is typically where you're going to store.
Lusted knowledge.
that is potentially product specific or ICP specific or buyer persona specific to say drive certain types of agents or assistants within HubSpot.
Naturally, this leads us to the data agent and Breeze intelligence for ensuring that the data that we're working with is up to date. Imagine trying to do sales outreach when 90% of your contacts don't have a buyer persona set. It simply doesn't work.
You're going to be reaching out to a massively reduced list of
people and the messaging isn't going to be accurate. And so the idea of a data agent and breeze intelligence in HubSpot is to ensure that your data is right to enable the assistance and agentic actions.
And so we see things like the Breeze Assistant used in everyday productivity, querying your HubSpot data, asking it questions, where can I find this? What does this contact record look like in summary?
And then we start to see the usage of the customer agent and perhaps the

prospecting agent to deliver on support ticket resolutions for the customer agent and doing sales research and outreach on the prospecting agent.

Ryan Waters 12:30

So think about the one thing here, HubSpot's strap line, I think, is imagine a CRM that updates itself. And I think this is obviously a reality. You can configure HubSpot to be very clever and help you do things. And I think, yeah, leads me on to the next slide, really. So thank you, Jared.

The thing that I want to touch on here, and I saw this shared by Yamini, HubSpot CEO, and what I like about it, I think I saw it on LinkedIn actually, and what I like about it is it's to stop looking at features and really start thinking about these things from a bio journey perspective. And I think that's at the heart of everything that we do. We want to create really good experiences.

We can now use, you know, deliver those experience through various memes, if you will. AI can form a part of that strategy, helping you to attract, you know, generating content that allows you to attract the right people, helps you to generate information to engage them, and equally.

answer questions and delight them from a delight perspective. So if you look at how this is broken down, I think it's quite interesting. Some of these, you know, agents aren't actually available right now. So I have been looking in the ecosystem. I imagine that these are things that will be available in the future.

But this idea of an agentic customer platform is a really exciting opportunity. So when it comes to thinking about maybe your biggest bottleneck might be in the attract stage, using AI to help you create content. Think about inbound, think about your strategy of trying to attract

creating the right information and pulling people into your site. Today's day and age, AEOs become a much bigger thing, right? We now not only need to think about structuring our website with the right information, but we also want to think about what information should we make available to LLMs.

so that they start to refer people to you. And I think there's a big piece there. And the thing that I really talk about a lot here, we jump to the other side of the journey here on the delight stage, the information that you should be creating and storing in HubSpot, think about knowledge bases.

and things like that. They're all the questions and answers that your prospects and customers will likely be asking throughout the buying journey. So you create content

for the customer agent that naturally works to attract people through the attract phase because of AEO referrals. So
Think of this as a holistic picture really, and think about different agents and different assistants that can perform a role in helping you orchestrate this customer journey and really focusing on creating that amazing customer experience underneath the hood.
Now, let's look at this as practical use case across your teams. If you think about sales, first of all, and I do this all the time myself now, it's making sure that HubSpot's got all the right context about your customers, about your meetings, so that...
When you're actually going into a call, you don't have to spend 20, 30 minutes trying to get up to speed on everything that's been going on. You can simply go into your company record, go into your deal record, use the Breeze Assistant, prompt it, and get you some really good insights into...
You know, tell me about the last five calls and outline my next steps. It completely removes the heavy lifting and that challenge of context switching between meetings and you know the likes of that, so very powerful to help inform the sales team to have the right conversations, always picking up from the last.
Conversation, recapping, summarizing, extremely powerful in what we do, and then if we think about your marketing team, it's about consistent application. Now, this is something I really think a lot about, but how many marketing people out there go out and do this amazing job of defining their personas?
defining their ICPs, they put it in a PowerPoint slide, stick it in SharePoint, and it's gone. Like, it gets looked at in a year or two's time when they have to redo those things. And I think at the heart of it, that information only becomes useful if you're actually acting on it. So.
Imagine HubSpot automatically applying personas to your contact records based on conversations that you're having, right? If we're relying on people to go and maybe set a persona, they might not know enough information, they might not understand the criteria. You could have AI listening to your call transcripts.
feeding into HubSpot, building up a picture, and then applying personas further downstream. Doesn't get away from maybe your team defined buying roles from an ABM perspective, but think about that. You know, HubSpot can potentially automatically update itself so that you've got the right segmentation.
to enable you to deliver personalization at scale. And then the last part to this is the service side of things. If you think about your service teams, the customer support

agent, or customer agent, sorry, I keep calling the support agent, but it can resolve your tier 1 tickets autonomously.
Now, I'll pause on that because what does that mean? You know, with a service hub, you can connect multiple channels to HubSpot, right? So you could be thinking about connecting emails, you could be thinking about connecting your support ticketing forms. It could be, you know, all sorts of different mediums to generate a ticket.
And what HubSpot's customer agent can do is automatically respond to those queries on your behalf using information from your knowledge base. So you've got to train it, you do have to provide it with the right info, but at the end of the day, it has this ability to have an attempt at answering a question on your behalf.
And anything it can't answer, it will hand it over to someone in your team to ensure that, you know, you are actually providing the right information. Another good thing about that is all these questions that can't be answered actually form part of your content and marketing team strategy.
to generate new information to help solve all these questions and pain points and problems that customers might be facing. So you start to end up with this complete feedback loop and some information that helps drive and guide your content strategy across the board. So it's all about context. It's all about...
ensuring you train HubSpot with the right information so that it can provide really good answers back in different stages. Those answers could be to your current team or could be to the customers or prospects alike.
Now, let's get to the commercial reality of this. And I think this is something that, you know, I think everyone's definitely a bit hung up on. HubSpot's got this universal currency within the platform, which it calls credits. And this resets monthly. It's literally use it or lose it.
So most of you probably have these sitting in your portal already today, and I'm curious to know how many of you are actually taking advantage of that, which seems silly, right? And you know, they've got all of this opportunity at your fingertips, and they're there to make use of. So that gives us a good place to actually start testing and.
and using up tokens like in a controlled way is the way that I would think about it.
The other benefit is HubSpot's recently moved to this pay for outcomes model. So you only pay when AI successfully completes a task. So this is a really good update, obviously not.

burning down credits as much as it was before, just on every single prompt, it was always using credits up. Now HubSpot bills in USD, so my information did come through like as dollars, but if you think about $10 per thousand credits, which is roughly about 8.
8 pounds. So, and you do get different tiers of credits based on the license that you have. So I believe a pro license gives you about 3000 credits currently, and an enterprise license will give you 5000. So they're there at your fingertips to use. And if we think about the outcome based costs, I've tried to put this together using information
that I found across HubSpot. But the way that this is coming across at the moment is from a customer agent perspective, you would use 50 credits, which is more or less around about 40p for resolved tickets. And this is only if a ticket is resolved, not if it's handed over to a human. Handed over to a human.
you don't pay for it. Again, going back to that outcome idea. Prospecting agent, 100 credits, or 80 pence actually, when it recommends A qualified lead. So that's a powerful thing. Think about all of the time that goes into generating a lead for a business.
And then we've got the Data Agent and Breeze Intelligence, which costs around 8p to generate a custom CRM report or enrich a record. There's another feature within there which we call Smart Properties, and it's less than 1p to automate a property update. So super powerful, really, really cost-effective from that perspective.
And I think the good thing here is if you hit your limit, the service simply pauses. You won't get a surprise bill at the end of the month unless you explicitly turn on a feature which is a pay-as-you-go feature and allows you to kind of draw down for more credits. So yeah, moving on to the next one.
I think that's over to you, Jared.

Jared Wiltshire 22:56
Thank you very much, Gavin.
So with everything we've kind of discussed in mind, what really do we need in place to be able to start using HubSpot AI? And as Ryan and myself have been banging on about its context as the kind of priority.
So first things first, the quality of your data.
We need to ensure that you're not ******* with duplicate records and that you have accurate lifecycle stages on your contacts and companies. Think about things like

setting your buyer personas and ensuring your ICPs are defined.
We then look towards knowledge and content grounding in that you need to be auditing your knowledge bases or your knowledge vaults as well. Your knowledge bases being perhaps more your customer facing knowledge and your knowledge vaults perhaps being more so your kind of domain knowledge, your knowledge. and ensuring things that you're, sorry, ensuring things like your brand voice are defined and stored in your knowledge vaults.
We can then start to look at how your CRM is structured and what the governance around that looks like. Thinking about standardizing property names, ensuring permissions are set correctly, and so that your data quality improves, but also AI should be able to read your data in a comfortable
comfortable AI way.
Lastly, we start to think about some kind of an integration strategy, thinking about things like connecting external ERPs or billing systems where appropriate so that your AI has a more full picture and can better respond to queries and provide outcomes.
To the next.

Ryan Waters 24:52
Okay. Thanks, Jared. So, we've talked a lot about HubSpot, but we know that in reality, not all of your data lives in HubSpot. You might have pricing logic in the ERP or your customer knowledge in a system like Confluence or ClickUp. The reality is,

Jared Wiltshire 24:57
Yes.

Ryan Waters 25:11
data is in an ecosystem and often disconnected. So we've got a strategy that can help with that. And Jared, do you want to take it over and explain what we're thinking from that perspective?

Jared Wiltshire 25:25
Yeah, so I mean, the way we look at AI and the way everything fits together with data being inside and outside of HubSpot and spread around, it's in Snowflake, it's everywhere.

What our goal is, really, is to connect your front office to your back office with an agentic orchestration layer, managing business outcomes between those two things. So think about not necessarily pushing your Snowflake data into HubSpot or not necessarily pushing your ERP data into HubSpot.
but instead putting in place some kind of an integration layer to allow agentic processes, autonomous processes, to run on your data without necessarily just kind of flinging it both ways in full.
So that actually leads us on nicely to the next slide. So

Ryan Waters 26:19
Perfect.

Jared Wiltshire 26:26
How do we really go from some kind of an understanding to action and how can Sruta help you along that journey? So
We look to provide complementary portal health checks, auditing your data, your property schema, and your readiness for AI deployment. Think about the four pillars that we discussed earlier in that your data quality, your knowledge, your CRM structure, and your integration strategy all kind of roll up to one thing.
And that's kind of how we'd look at your AI readiness.
Additionally, we'd work with you in AI readiness workshops to take a deep dive and kind of strategic session into mapping your AI usage and where and what needs to be used and when against your customer journey that kind of Ryan touched on in that you have your attract.
engage and delight phases, where does AI fit along the journey?
We look to kind of touch on kind of AI outcome packs. How can we rapidly deploy these kind of mini projects to set up, test, and ground specific agents to get the ball rolling? And typically, while we do have an example here of the prospecting agent or customer agent, the place you want to start is your data.
So how can we kind of get the ball rolling on your data so that you can start looking towards the prospecting agent or the customer agent?
Lastly, the guided ongoing success support framework, where...
If you think about AI as a one-stop thing where you build it and it's done, it's not the case. AI is something that needs continuous improvement and refinement as your strategy changes, as your products develop,

The context that you give to AI is going to change. And so how can we support you in kind of working through and making sure that your AI setup is up to date and working as best as possible?

Ryan Waters 28:38

Great. Thanks, Jared. And as we said here, you know, most of you could get started today with a portal health check. We've got an AI lens on that and we will review how your AI usage is currently in play. And in essence, I think the goal is to have a conversation

Jared Wiltshire 28:40

Yeah.

Ryan Waters 28:56

And start thinking about, you know, where do you need support and are there any areas that we can assist with? So, next I'm going to take you into some useful links, but what we're gonna do is we'll share these over after the actual session itself. We did bring through some important areas that we think are really helpful.
how do credits work, what does the service catalog look like, little look into the academy. We've got a prompt library as well. And then also previous webinar that we ran, which is all about securing your business in the age of ChatGPT. So I think that's a good session for those of you that didn't actually get to see that.
But what I'm going to do next is actually...
kill the PowerPoint presentation and jump into HubSpot. And what we're going to do is just spend a little bit of time working through, you know, what does this all mean? Let's actually look at it in the platform and start thinking about, you know, some of these areas and maybe give you the idea of exploring it in your own portals as well.
So when you log into HubSpot, you'll see that there is a breeze section in your left-hand sidebar. There's an overview tab. We have the studio, the knowledge vaults that Jared mentioned earlier, and a marketplace. So all of these features are all built into the front end of it.
Another thing just to touch on on the right hand side, if you click on your portal and you'll notice that there are credits mentioned within this actual portal itself. This particular one is our demo account has 2000 credits available on a monthly basis.
When you go into Breeze, you are presented with this get started page and it gives

you the complete solution, gives you some videos on how it all comes together, touches in on the assistants and the agents, recommends some featured agents, and looks at some learning.
areas where you can obviously get started. So looking at some of the academy courses, some knowledge base articles, the community, and an ROI calculator. So there's a whole bunch of stuff in here that's worth spending time getting your head around. Once you've done that, you'd want to go into your dashboard and try and get an understanding of how this comes together.
What's nice here is it tells you how many features you're using, the agents created, the hours saved, assistants that have been created as well, having a look at some of the agents in the portal, allowing you to analyze the performance, looking at the features and assistants. So really clever and helpful to help you keep on top of what's going on.
And then when it comes to configuring Breeze, you'd be in your settings. So I've just opened this tab up, but in essence, whoops, I was in the tab earlier. Let me go back to, if you notice inside your portal settings, once you click on the cog icon, you scroll down to settings.
There is some configuration opportunities that you can do inside here. So controlling who has access to it, can it access conversational data, can it access files, can you give your users access to the assistant, and then a toggle for model training as well. And then the data sources is probably a really important area to focus on. So it's where you're doing some initial high level optimization, feeding AI to help it understand who you are and what you do. So you've got this concept of developing brand kits. You want to set your company profile up so it understands what your business is.
You want to go and define your ideal customer profile, get a glimpse of who they are and their features and what are their challenges, their goals, that type of thing. And then there's also an area where you can go and define your products. So just to show you an example of this, we've got a value proposition.
We've got some pain points that we want to kind of put in here, and then listing out the various products or services that you offer as a business. All of this information being leveraged contextually and helping inform who you are and what you do, basically. And then from inside there, I'm going to touch.
in on the studio again, well, let's actually go into the knowledge hubs. So we've got a vault kind of been built, and these vaults are built on various data points. So if I click

on create a vault as an example, well, I'm actually editing a vault right now.
You can add various files into the vaults that it uses or draws on to help you, you know, obviously train whatever the assistant is or the agent that might be doing various things. So you can upload files. You can also add content so that content can come from your blog posts.
your landing pages, your website pages, any calls that you've had, all the knowledge base. And I think that's the big thing here, structuring your knowledge bases in a very clever way so that you have different layers of knowledge and different knowledge bases to serve different communities. So you'd be building these vaults up for different purposes.
Perhaps you have a vault for customers and a different vault for prospects as an example. Then the benefit of linking a knowledge base or linking any of your HubSpot assets means that whenever you add a new knowledge base article, it's going to instantly feed into the knowledge of this particular vault, right? So it allows you to maintain, keep it up to date.
and can be really useful from that perspective. You can also add segments in here, so various segments from your database so that you're applying this knowledge to specific audiences from inside your portal, if you will. So really useful, they're connected.
When you build out agents, they allow you to tap into various knowledge bases and allows you to orchestrate that from there. What I'm going to do next is kind of go into the studio. So if you have a look in the studio, you've got this intro area where you can go and add agents, add assistants, create new ones.
I'm going to go into the marketplace shortly, but there's a whole bunch of agents like pre-built for you that you can literally install and try out. You know, some of them may be a bit more complicated to install or configure, I should say, but there are definitely some low-hanging fruit opportunities within the agents.
Or marketplace itself, I should say. The other thing to note here is that if I go into assistants, you can see I've developed a few assistants here, given it a good few examples. These assistants can be configured, so when you configure them, you are literally...
giving them a welcome message, giving them some instructions.
And then you are able to start some conversation starters, but also define where is it getting its information from when addressing or having a conversation with it. So you can be adding knowledge from your knowledge vaults that I mentioned earlier.

They can be pulling from your...
brand kits, your ideal customer profiles, with products and services, for example. So really clever about how you train them up, but in essence, giving you the ability to really guide how these agents come together. Assistance, I should say. So I'm getting my words muddled up.
And now how would you use an assistant? Maybe that's a question to kind of tap onto at this point. You'll see that at the top of your navigation bar, I click on assistant here, and within that I can actually choose which assistant I'd want to talk to. So you're seeing them pull through.
So if I wanted to talk to a specific assistant that's maybe geared towards sales support, I can have a sales-focused conversation. Or if I wanted to have maybe a guided customer success assistant as an example, I could have a very dedicated conversation about how to manage my accounts.
how to provide the right sort of feedback to the customers and so forth. So really, really powerful, giving you lots of control about how you kind of set these things up and how do you make them as helpful and useful to your internal teams as possible.
One other area I want to show you on the Breeze Assistant side.
is you are able to connect other apps to this assistant itself. So if I click into this, you can see that I can tap into a whole marketplace of connectors. So here we've got Google Drive, we've got Microsoft Teams, SharePoint.
Confluence, Asana, and I think the thing here is, let's say Confluence, for example, if you were to connect Confluence to the assistant, you could start as a HubSpot user, you could start asking it questions inside HubSpot about information that's not even in the system.
delivered from Confluence itself. So that could be your SOPs, it could be all sorts of user behavior type documents, but really powerful ensuring that your users aren't having to switch between systems continuously, giving them a window to ask questions, you know, where they need to write from inside HubSpot itself.
So really powerful, I would say, from that perspective. Next, I'm going to go into the agents and let's have a little look through the marketplace.
So I'm not sure the exact number of agents they have in here at the moment, but there are quite a few. And we've got the data agent, we have the customer agent, the prospecting agent. These are the three flagship, I would say, agents that you have. Probably the ones that need.
the most kind of thought when configuring them. But you do have other agents in

here, like company research agents. I've used this as an example where maybe I want to, and in fact, I'm gonna just open that up real quick.
It allows you to do various things where you might want to understand anything about a business, right? So you put in a URL, you can train it as well. So what I'd say is I'm just going to go into edit this.
But you can train it up to give it specific information to say what you want it to do. So it has some default agent instructions kind of built into the tool itself. But I can follow up by giving it some additional extra instructions. So like here, I'm saying, well, in addition to what we have.
You know, I also want to know who the buying committee is. I want you to predict the buying roles and try and give me some links to their LinkedIn accounts with their job titles, so that you know my team, maybe the SDRs doing outreach, that type of thing, will have all this information.
with inside a note, say one of the actions is to create a note, so that when they go into the company record, they can get a good understanding of who the business is, what the latest news, what is their buying committee or potential buying committee look like, gives them a starting point so that when they start reaching out, trying to talk to people.
They've got the full picture, so really, really powerful tool, really easy to configure, something that you know anybody can get started with today, really, is my point.
Another thing about it is you can automate this, so you can decide when does this agent happen.
And yeah, as I say, super useful. If I go back to the marketplace, just to kind of look at a few more of these within there.
We've got things like call recap agent. Call recap agent literally listens to your calls, does meeting notes, does follow-up emails. Amazingly powerful. The big thing I like to say about this is with HubSpot, you want to be storing your full transcript inside the system.
Sometimes a note is too condensed, if that makes sense, meaning you're only getting some bulleted highlights. If it doesn't have the full context, you're not going to be able to drill down on all of that external or additional insights that you might be getting that a note doesn't cover, if that makes sense. You've got things like... the ability to do sales to marketing feedback, customer health agents, handing off between customers, blog researching. We've got a cross-sell and upsell agent, an RFP agent, developer tool and testing agent, a knowledge base agent.

Shopify store performance agent, video clip agents. I'm not going to read through all of them, but you get the gist. There's quite a lot in here to kind of go and start testing with today.
What I'm going to do next is just a quick look at the data agent, and I want to kind of touch on a few of these areas as well. I think they're really helpful. Now, when you go to the data agent, you'll notice that it can do various things like web research. It can look at your calls, your transcripts and activities.
Again, if you're using HubSpot's new note taker as an example, all of your meeting notes and transcripts are being synced to HubSpot itself. If you think about calls, you could be using HubSpot's calling tools. You might be using a third party tool like Aircall, very popular.
You want to be thinking about how does that call get recorded? How does that information get stored inside HubSpot so that your team can drill down on it? Also, your meeting notes, summaries, that type of thing, all drawing in from the transcripts itself. I think that this data agent will be thinking about.
taking that information in the transcripts and actually populating them in specific properties on the, you know, the company record or the deal record that it might be associated to. So really powerful. If you go into the prompt library, it gives you some examples of prompts that you could potentially start with today.
And the thing about these prompts is this is very much personalized to your portal, right? So depending on the type of business that you have, the way that your portal is structured, it actually recommends potential prompts that could be useful in your context. I find that super amazing, to be honest. Looking at some of my clients' accounts,
and looking at how powerful some of these properties could be, it's a great place to get started with trying to kind of understand this and maybe implement some of these areas. Now I'm just going to touch on some different categories, but let's look at it from an activities perspective as an example. So
What does this do?
HubSpot services needed. So from an engagement content. So it looks at your company checkboxes, looks at activities. In fact, sorry, I want to pick something that's maybe more of a call recording.
Last call summary as an example. You could have a property that summarizes your latest and last call, puts it in a text field, stores it on the company object, pulls it from your activities record. So it's literally looking at various areas, tapping into them,

pulling that information forward.
and storing it accurately or consistently in the same way across all of your records in your portal. So I think you get the point here, really powerful, lots of opportunities. You can create your own smart properties with your own prompts, but I would like you to kind of take this away of a, like how would you implement this in your business?
think about maybe some of these really important things that you might want to stay on top of. Maybe it's an admin burden for a salesperson or someone managing an account or a record to keep on top of. It's a CRM that updates itself, pulling this information so it's available to the right person at the right time when they actually need to pull on that information.
Last but not least, before we jump into some Q&As, what I'm going to do is just touch really quickly on the billing and usage section. So HubSpot does do it as introduced the place within the account and billing that looks at your credits and gives you a breakdown of your usage.
It helps you understand how they're being used and the likes of that. So I think the benefit here is it really allows you to stay on top of your usage, your spend, keeps you up to date, and is really transparent on how things are being leveraged within that. So hopefully putting your mind at ease.
you know, just to kind of get you off the ground, get you started, and you know, tapping into some of these maybe more advanced features.
So I think that's that on that end. I'm going to maybe pause at this point, maybe jump back to the slide deck, so bear with me.
leads us into maybe the next Q&A section. So yeah, I think at this point, any questions, anything that you guys might have for us will be great to hear from you. We can start to tap into maybe some questions, some thoughts, and let's see if we can maybe get a conversation going at this point.

Nsovo Shimange 47:56
All right. Thanks, Ryan, Jared. That was extremely insightful. I think while we wait for some questions to come through, I'll kick us off with some common questions that we do hear from customers around AI adoption. I just...
Go ahead and ask the most common question we hear. So this question is, where should we start if we are interested in HubSpot AI but have not used any of it yet?

Ryan Waters 48:25
You want to take that one, Jared, or you want me to take that?

Jared Wiltshire 48:29
Yeah, sure, I can take that. So, I mean...
I think we've banged on about it quite a lot throughout this session, but really like the data quality and kind of context aspects should be a starting point. If you're just looking at maybe kind of getting the ball rolling and testing out AI itself and you want to interact with it in the HubSpot, I think the Breeze Assistant is a great place to start.
just kind of querying your HubSpot data in general and asking questions of it.

Ryan Waters 49:01
Yeah, I think that's true. I think the other area there, like to agree with Jared, I think it's making sure your portal is up to date as well. I think about the context, that's really critical. So that you want your data hygiene to be good and accurate. Rubbish in, rubbish out, they say. So
trying to ensure that your portal is like as clean and legible as possible, thinking about maybe some of these opportunities to automatically update and build this consistent segmentation within the portal are all really good opportunities within that data agent side of things as well.
Breeze Assistant, obvious. You can add in summaries like today. I don't know if all of you have them, but you get CRM cards for summaries. You want to summarize a company record or contact record as soon as you jump in. Those are other areas which you can obviously take use of, make use of.
I don't believe that actually charges you any tokens, so it's totally free to use and just makes sense to give yourself that quick bird's eye view. As I said earlier, I use it a lot when I go between meetings. Sometimes it might be other people in my team that have had the previous calls. I want to understand where they're at in the conversation.
So I might be going in and prompting using Breeze to summarize what's happened in the past, who are the people I'm talking to, what are their roles, what should I be thinking about in my next meeting so that I can quickly get a bird's eye view and think on my toes as to how I engage in the next.

conversation.
Perfect, alright, and Sullivan, next question.

Nsovo Shimange 50:45
Thanks so much. I know we covered this in the.
than the presentation, but I think it's worth going over again. So another common question that we get is like, how do we make sure that AI generated outputs do stay accurate, that they're useful, and that they're aligned to my company's brand voice?

Jared Wiltshire 51:06
Yeah, maybe I should like kick that one off.

Ryan Waters 51:08
Yeah, go for it.

Jared Wiltshire 51:11
So.
It's kind of like a bit of a two-parter, right? So the first kind of aspect to consider is grounding your AI assistants and agents in knowledge documentation. So ensuring that in the Data Studio, you have your kind of branding set up, your brand voice set up, what's the tone of voice that's going to be used. And I think this is a bit more
pertinent when it's kind of external facing AI. So think about like the customer agent and prospecting agent, perhaps sending sales outreach or replying to tickets. If you don't have your tone of voice and things of the like set up, then it's going to use its own kind of.
AI tone of voice, which isn't what you want, right? It should be aligned to the kind of company brand voice.
And then the kind of other aspect there is is this kind of governance layer, so...

Ryan Waters 52:39
Exactly.

Jared Wiltshire 52:39

prospecting agent, but also allowing me to kind of look at what kind of content or what kind of sales outreach it might be generating and to who.

Ryan Waters 52:48

Yeah, I've also got good ways of those tools. I've got like testing mechanisms as well built into them. So you can obviously do some thorough UAT before going live with anything. And as Jared said, it does allow you to kind of review all the messaging before it's being sent out. So you do have a lot of control at your fingertips there. And I think about this, like we're all, I think, I don't know if you're like me, we're all worried about our jobs disappearing one day, is AI going to take over the world and what are we all going to do? But I think about governance and human interaction around all of this. So I can definitely see a world where, you know, people in your business will be a...

responsible for managing your information. You know, some of this information is internal and external information. Think about marketing teams controlling your voice, your brand, your tone, but all of that has to be maintained, right? So you want to be thinking about maybe governance and mechanisms to ensure that

Some of your information that might not be evergreen is looked after regularly with the right sort of feedback loops to ensure that it's current and up to date. And think about content that might not need to be evergreen. Things might need to get retired over time. As your product and business changes, you're going to need to stay on top of some of those areas is the way that I would think about it. So

Definitely some food for thought, I would say there, but really important to think about your company's information and how it's being orchestrated and delivered to the right people at the right time.

Jared Wiltshire 54:24

Yeah, I think it is, it's AI working with people. I think, I can't remember what the statistic was, but there's this great example of where in the medical field, doctors are kind of utilizing AI to kind of give

What's the right term? Prognosis or...

Nsovo Shimange 54:49

Moses.

Jared Wiltshire 54:51
Yeah, I'm going with prognosis. Give prognosis to conditions, diagnosis, thank you, Louis, give a diagnosis to certain conditions. And when they work with AI, the rates at which they're able to accurately kind of give these diagnoses goes up massively. And so it

Nsovo Shimange 54:53
Alright.

Ryan Waters 54:53
Baah.

Jared Wiltshire 55:09
really is a case of people and AI are better than just people and better than just AI. So working together with AI, I think, is really the way forwards.

Ryan Waters 55:20
Like giving us superhuman powers in weird ways, like expanding your mind, giving you information faster than ever. I think it's validating and making sure the information is correct as part of the problem we have right now. But then, you know, as a business, you want to be able to produce content and information quickly. but put your own layer on top of that so that it's owned by you, it's in your own narrative, and it's validated and vetted to ensure that anyone else reading it is getting the right information right. So it's this whole kind of content queue and administration process that really needs to tie into everything.

Jared Wiltshire 56:00
Yeah.

Ryan Waters 56:00
Excellent. Amazing. Any other questions there? Sorry, I can't see the questions in the queue, so I'm leaning on you then, Nsovo.

Nsovo Shimange 56:02

Alright, yeah.
Yeah, no, I think that's it for today, Ryan. So you'll see that we have sent out the survey. Just take a moment to fill that out. It does really help us. We do read the feedback. It helps us deliver more valuable webinars in future. And if today's session did spark some ideas on how AI could fit in your business,

Ryan Waters 56:13
Perfect.

Nsovo Shimange 56:28
or if you need some clearer understanding of where to start or looking for a complimentary health check, our team is more than happy to chat to you further. So please get in touch with us. Thank you again, everybody, for taking the time to join us today. We really appreciate it. We hope that you found it valuable and enjoy the rest of your day.
See you on the next webinar.

Ryan Waters 56:48
Excellent. Thanks everyone. Brilliant.

Jared Wiltshire 56:50
Thank you all, ciao ciao.

Ryan Waters 56:52
Byatt.

Nsovo Shimange 56:52
Bye.

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