Webinar Deep Dive into HubSpot's Data Agent-20260610_100029UTC-Meeting Recording

10 June 2026, 10:00am

1h 0m 17s



Ryan Waters 0:05

Perfect. So give a couple minutes for people to join, shall we?



Nsovo Shimange 0:10

Alrighty.

Jared Wiltshire 0:10

Yeah.



Ryan Waters 0:10

How's everyone feeling?



Nsovo Shimange 0:11

Ding.

Good.



Ryan Waters 0:16

Amazing.

Jared Wiltshire 0:16

Pump that. This is going to be super cool. Super, super cool.



Ryan Waters 0:19

Very cool.

Great stuff.

Jared Wiltshire 0:25

The.

Okay.

Ryan Waters 0:28
I guess, give us a cue. When should we start?

Nsovo Shimange 0:33
Get to go anytime.

Ryan Waters 0:35
Perfect.

Jared Wiltshire 0:35
Mm.

Ryan Waters 0:37
All right, so let's get started, everyone. I just want to say thank you all for joining us today at the Deep Dive to HubSpot's Data Agent. I can't tell you how excited we are about this actual webinar, to be quite honest. There's a lot kind of going on with this kind of particular topic.
And I have to admit, I got so caught up in playing around in our demo environment to bring, showcase some of this power to you that I feel like I have spent less time on the slide deck, which I would have loved to have done, to be honest. But at the same time, I'm going to hand you over to Nsovo to kind of kick this off.
As I say, mind's blown, so much opportunity at our fingertips right now, and I'm really excited to kind of walk you through today's demo. So over to you, Nsovo, for some housekeeping.

Nsovo Shimange 1:28
All right, thanks. Thanks, thanks, Ryan. Okay, I'd also just like to welcome everyone and then thank you for joining us, taking time out of your busy days. As Ryan says, I'm Sohani Shimange. I'll be your host or anchor for today's session. And then let me just take you through the housekeeping items quickly.
So you'll notice that everyone's cameras have been turned off and the speakers are muted, but we do want the session to remain interactive. So please feel free to use the chat and the Q&A function throughout the webinar. And feel free to submit any questions as they come to mind. We'll address them at the Q&A session at the end.

Today's webinar is re-recorded. We'll make that recording available to you afterwards. And then your feedback is actually very valuable to us. It helps us improve. So we'll send out a short survey near the end of the session. So please take a moment to fill that out. And then please note that by attending this webinar, you've been opted into our marketing communication.
You can unsubscribe at any time. We won't hold that against you. And now that the housekeeping is out of the way, let's actually meet today's speakers. Joining me today are my 2 colleagues, Jared and Ryan. I'll just hand over to them to briefly introduce themselves, and then we'll go through the agenda of what we're actually going to cover today.
So, Jared, would you like to take us away?

Jared Wiltshire 2:55
Oh, awesome. Brilliant. So, I'm Jared. I'm A CRM implementation specialist here at Struto, and I'm typically also the AI administrator on most of our AI software that we use internally.



Ryan Waters 3:10
Perfect. Thanks, Jared.

Jared Wiltshire 3:10
Oh, that was nice and short. Hand over to Mr. Ryan.



Nsovo Shimange 3:12
Yeah.



Ryan Waters 3:13
Amazing. So, hi, I'm Ryan Waters, Head of Customer Success here at Struto, also a solution architect, a Power AI user in the business, I would say, and just super excited about today's topic, really.
using AI to update your CRM. You read the HubSpot, or here are the HubSpot strap line, a world where a CRM updates itself. And that's exactly what we're going to be showing you today. I think just a world of opportunities. So I can't stress it enough. So excited about today's call.

and walking you through what we have available today. But brilliant, over to you and Nsovo.



Nsovo Shimange 3:59

Thanks. Thanks, Jenn. Let me just take everyone through the agenda. Okay, so first of all, we'll start off by exploring the data challenges that many organisations face. I guess that's why incomplete and unstructured data continues to limit business performance.

We'll take a look at what HubSpot's data agent actually is, how that differs from Breeze Intelligence, and where it fits into the modern customer data strategy. After that, we'll have a look at some practical use cases. We've got a demo for you guys. We'll discuss some common pitfalls to avoid.

And then we'll finish off with some next steps and open it up for some Q&A. That's where we're heading today. So I think to kick it off, let's just start off with the challenge itself. I'm going to hand back to Ryan to walk us through the problem landscape of why incomplete, unstructured customer data

Continues to be a major obstacle for organizations, so please take us away.



Ryan Waters 5:01

Yeah, great. Thank you, Nsovo. And I think this is the thing, right?

The technology is one thing, but it's all about solving these real business problems, and working with HubSpot over the last sort of nine years, I've seen so many different CRMs in different industries and marketplaces, and quite often the bigger the teams, the more complex things happens.

you start to find these really rich CRMs with lots and lots of information. But I think that becomes really overwhelming and it's really often quite hard to actually understand, you know, where to find the data, where does it live, what does it mean? It's data coming from all sorts of places.

And also, you got these times where it just feels inconsistent and really hard to use it. So it's not about not having enough data for most businesses. It's about having too much in too many places, which makes it really hard to use. And you know, you typically find this, you know, with HubSpot specifically, the ability to obviously sync all of your communications, all of your

Think about your meeting transcript, call notes, your sales activities, all of that type of stuff. There's such a wealth of knowledge and information that lies within that, that

ideally should be informing all the actions that you take. So, in essence, if you think about how does that impact...
various different teams, you've got to think about your sales team might be wasting lots of time looking for context, trying to understand how to communicate with the next prospect. People often end up stop using the CRM because it doesn't really tell them the true story, so they end up having to kind of...
look in different areas to try and kind of get their knowledge up to speed. And the third part to this is it gets really hard to kind of personalise your outreach or segment properly. You know, think about automation opportunities if the data that you're leveraging isn't set up properly or it just leads to these inconsistencies with bad reporting and communications that are going out.
So the goal here really isn't to, you know, it's not about collecting more data. It's about how to simplify it, how to structure it in the right way so that it becomes much more useful and actionable to the business itself.
Next on the setup side of things, so Jared, do you want to take us away on how things are configured?

Jared Wiltshire 7:40
Yeah, sure thing, so.
Before we can really get stuck into the data agent and some of the other AI tools in HubSpot, there is some like initial core setup that is required.
Certain things need to be true in order for us to effectively get the most out of AI in HubSpot. And at a baseline, there's three core things we need to think about.
Initially, the AI context tool needs to be configured.
The AI context tool in HubSpot is essentially where you define certain business context so that when the AI is generating responses and outputs, it knows roughly who you are, what you're doing, what your offerings are, your products, your ICPs, all these kind of baseline things.
so that it has your kind of own business context to work from.
We need to configure knowledge vaults to a certain degree as well. So think about knowledge vaults essentially as a place to store perhaps more confidential documentation that you wouldn't necessarily want used willy-nilly. It's quite a controllable and governable way.

Ryan Waters 8:39
Right.

Jared Wiltshire 8:59
to give AI access to certain perhaps internal product documentation, for example, or give it access to your tone of voice or your personas.
The last piece that does also need to be true is having well-structured and deduped CRM data. And I say well-structured, really what I mean is don't have five different contacts, all without e-mail addresses, all with the same names, causing confusion. Ensure we've got that trimmed down
to the real valuable data that you will want to be kind of marketing to, prospecting to, selling to.

Ryan Waters 9:43
Thank you, Jared.

Jared Wiltshire 9:44
Brilliant.

Ryan Waters 9:45
So yeah, do you want to tell us about Breeze itself?

Jared Wiltshire 9:50
Yeah, so...
I just kind of spoke about just now some of the baseline things that we need to have in place. And the kind of second layer to that baseline really is this breeze idea of breeze intelligence.
Essentially, one of the core functions of Breeze Intelligence in HubSpot is being your kind of enrichment layer.
Think about things maybe like ZoomInfo, where you're pulling in contact data to enrich your contacts in CRM. HubSpot does have a nice out-the-box option for this. And it's really critical when we're thinking about our data strategy in HubSpot to have this enrichment layer.
Primarily because it, for one, saves your reps and perhaps marketing lots of time and

gathering contact data.
And also because it's one of the core drivers of the data agent and other agents within HubSpot. They're going to be drawing on your enriched contacting company data to generate new data points based on the context you give them.
The data that actually gets enriched by Breeze Intelligence is quite nice and customizable.



Ryan Waters 11:01
Great stuff.



Jared Wiltshire 11:08
You can decide which data points should be enriched. Maybe I don't want to enrich LinkedIn URL, for example, for whatever reason. You can decide how these things kind of get enriched. And as I mentioned, it's quite important to complement your usage of Breeze Intelligence with other third party data sources.
to build this kind of contextual window for your AI to look through and have all of the context it needs in order to actually deliver valuable outputs.
Maybe just a last note on that. Currently, Breeze Intelligence Enrichment is free to use. This is prone to change, etc, etc.



Ryan Waters 11:52
Okay.



Jared Wiltshire 11:52
Fantastic. And I think this leads us nicely on to the next slide, where Ryan is going to talk a bit more about the data agent.



Ryan Waters 11:59
So what is the HubSpot Data Agent, you might be asking? At a high level, it's a tool that's designed to help you turn raw customer context into structured CRM data. So it can research, interpret, organize, and store insights back into your CRM using the context that it's available to it.
That includes your CRM records, your business context, your domain knowledge, conversations, all the relevant sources. And why I think is important here, it's not just about filling fields for the sake of it. The real value is when it helps you answer

business questions. So for example,
you know, who is this contact really? What are their likely priorities or pain points? What buying role do they seem to play? Who should my team, well, I'm sorry, what should my team do next? And how should this record be segmented or routed? So instead of leaving valuable information buried in notes or transcripts,
The data agent helps you convert it into structured outputs that the team can actually work with inside HubSpot. And this is where it starts to become operationally useful rather than just interesting.
And what does the data agent do? I guess this is the next thing to think about. First is smart properties. These are the properties that can be populated or updated intelligently based on the context available in HubSpot. So rather than relying entirely on someone to manually type information,
the system can help maintain those fields in a more consistent way. Think about that. When we have to rely on our teams to have to go and fill in all these properties regularly, you know, we're all really busy people. At the end of the day, these smart properties can just literally update themselves on a schedule or triggered based on specific actions.
but it's about making sure that they're consistently maintained. The second is smart actions, which is triggered through workflows. And this is obviously where it becomes more operational. So it could be based on any kind of event or trigger, and HubSpot can then interpret
data using the data agent and inform it to make the next appropriate steps. So lots that you can actually do from that side of things, you know, making suggestions, updating properties, all sorts of things that could be available to you from that perspective. And the third is smart columns in the Data Studio.
And this is where your team can bring in Richard or additional data, join it together, and build special columns in your views so that you can obviously draw conclusions, have specific outputs. But in essence, it's another way of kind of leveraging a smart property, but more in like a spreadsheet kind of column kind of layout, if that makes sense. But
Really, really useful, I think, from a data interpretation perspective and a really nice, pleasant sort of data flow. And this matters really because the structure is actually what makes it usable. So rather than more noise in the CRM, the aim is to have a better signal.
So what does this, why does this matter in practical terms? Because for most teams, a

lot of time is still being spent on manual research, manual interpretation, and manual admin. The sales teams are checking LinkedIn, reviewing call notes, reading e-mail threads,
and trying to piece together who the buyer is and what matters to them.
Marketing teams need more reliable data for segmentation, targeting, and personalization. Let's face it, personalization is literally impossible if you don't have the right information in the CRM in the 1st place. You're going to start sending the wrong messaging to the wrong people. And then we've got service teams who need a clearer,
categorization, better routing, and stronger understanding of the customer's context behind the case or the inquiry. So the data agent helps to reduce some of that manual effort by taking unstructured inputs and turning them into structured CRM outputs.
A good example is called transcripts. Normally a transcript is useful, but only if someone has time to read through it, pull out what matters. The data agent, you can use that conversation data to identify pain points, qualification details, buying roles, goals, or next steps.
and even write them back into the CRM in a consistent format. That creates much stronger foundation for segmentation, workflow logic, automation, and reporting. So ultimately, this matters because it helps most teams spend less time interpreting data and more times actually acting on it.
That takes us to the common pitfalls, but I feel like I've been yapping on here, so I'll hand it back over to you, Jared.

Jared Wiltshire 17:24
Oh, there we go. On the unmute button. Thank you very much. Yeah.
So.
There are some things we need to be kind of diligent and careful of, again, as we're starting to pick up using AI, not just in HubSpot, but really as a whole as well.
And to kind of start, having a governance strategy in place is a key first step when we start thinking about AI. Right? If we don't have this governance strategy in place,
we'll wind up not knowing why we're making certain decisions to use AI.
and end up falling into some of these next pitfalls really.
One of the main ones I think as well here is doing too much too early and kind of getting confused along the way. If we're doing too much too soon,

Yeah, if we're doing too much too soon, once we have our governance strategy in place, we can then start thinking small first. So starting small, beginning with perhaps, say, the first stage of a process, looking at that process and mapping out where AI can actually deliver value.
before we kind of, if we don't have that governance strategy in place and we're doing too much too soon, all that's going to happen is we're going to start running before we can walk and we're going to land flat on our faces and have a bloody nose, which isn't ideal.



Ryan Waters 18:56
Mhm.

Jared Wiltshire 18:59
As we're kind of mapping out our certain...
AI properties or AI use cases against stages of our processes or our buyer journeys. we need to be very careful and thoughtful in how we prompt AI to do certain jobs. So when I think of prompting and prompting AI, I often think of the prompt as an additional contextual layer that we apply to give more flavour to the
job the AI is doing. And so prompts often end up containing things like what the AI's role is, what the steps the AI needs to do are, and what its overall job and outputs should look like.
Essentially, if we have four prompts.
our output quality will end up being lower. And all that's going to do is end up muddying your data. And so with our governance strategy in place,
and our clear strategy in place for when and where we're going to use AI, we can then start to think about rigorously testing our prompts and checking their outputs and then iterating upon those prompts to improve the quality of our outputs over time. So I always think of prompts and the outputs.
that we're generating initially as just an example. And as we build on that and improve our prompting and the job that needs to be done, the quality of those prompts improves, reaches a point where you're happy.
and then you can start thinking about other places where you might want to use AI along your journeys.
So essentially in summary, don't do things just because you can. Do them because it

delivers business value and makes your lives easier.
Brilliant.



Ryan Waters 20:55

Right. Thanks, Jared. That brings us over to the exciting part of the demo. Now, if we've got all the slides away, is actually to take you into HubSpot and show you around, show you some things. Lots to kind of walk through today, so I'm going to try and be efficient as much as possible. But in order to do that, I just need to stop sharing my screen real quick so I can get organized.
A few areas that we are going to focus on is the context tool, the domain knowledge vaults, how do we set them up. We're going to walk you through the call transcripts and structured qualification data. Then we're going to look at the trigger data agent and the right lifecycle stage to populate.
And then we're going to set up the automated ticket categorization side of things. So a few good use cases really to kind of walk you through and excited to kind of show you that. So just bear with me while I get my.
Screen organized.
So first things first, I've prepared a few screens to kind of look at. We're going to touch on the AI context. So I know if any of you were in our last webinar, we did touch on this slightly, but I think it's really important that when thinking about any AI inside HubSpot,
we need to make sure that your AI settings are configured properly. This really helps HubSpot to understand what you do, how you do it, all of that type of good stuff. So within, and you'll see on the navigation here, we've got the Breeze Studio, and we have these two sections within that. First of all, it's the context section.
And then second of all is the knowledge vault. So we're looking at the context section right now, and it's got, well, aggregates or brings together a few different settings from inside your portal. So all of your brand identity stuff that you put in there, if you're a multi-brand setup, it will bring your other brands in too.
It brings in your identity and classification information. It brings through your location and scale.
And then when you look at the business profile, and I think this is probably where it really starts to get interesting, is where you kind of want to go and fill out your business description, your unique value propositions, what your business model is, what your primary business goals are, your mission, your vision, social responsibility,

and customer sentiment.
Please note that this is in our demo portal right now, but I did use a little bit of Struto's information, but obviously it's not exactly everything that ties back to Struto. Full disclaimer there. But I did want to kind of help understand this with the real business, if that makes sense. Then you've got a section to kind of put in your competitors. So I've got a few fictional competitors in here.
You've got your stakeholders, which people do you talk to in that business. But in essence, gives you the ability to get really granular on these types of things. It helps you configure different technology stacks. Obviously, it does populate a lot of this automatically, but helps you bring a bunch of that stuff together.
And then the other part to this, which is really helpful, is if you're selling products or services, you can kind of list out all the products, give it some really detailed descriptions, and helps HubSpot to really all the AI in HubSpot to understand. Exactly what you saw, so...
Step number one to any job or any configuration is really to go and get a lot of the stuff kind of configured correctly. Then after that, you want to go and set up your ideal customer profiles. So I've kind of set up a fictional one in here. We've got a scaling SaaS company.
There's a description you want to put in a type, put in some job titles of the people that work in that business, what the interests might be, the industries they work in, maybe some locations, the company size, the annual revenue, and the age range. So that then allows you to kind of give it a go.
Good, clear indicator. You can start start working with your segmentation and things like that later on, but ideally you want to kind of map out and build out all of your ICPs within the section over here. Now, once that's done, there's a bunch of context like drawn down on. I'm going to move on to the to the...
knowledge vaults next. And knowledge vaults are really interesting because you can give it more enhanced information and you can draw on information from lots of different areas. So you can actually create different knowledge vaults for different reasons and apply them to different segments or groups of people within the business. So
I've done a IEX, which is just for the demo purposes, but the aim behind it is to help salespeople sell this product, right? So it's tied into an assistant inside HubSpot, and it gives you the ability to upload a bunch of training files.
So, you know, I've given it some standard type stuff. Let's explain what the product is.

What are some of the discovery questions? What solution patterns do you get? What sort of objections and responses might you get from the customers? What's the common problems and fit? How to follow up with personal templates? And then also some
case examples. So the idea is you want to train it with lots of really great information and that will then be available to you to kind of draw down on from inside the system. The other thing here is you can actually configure it to read data from inside HubSpot as well.
So you might have specific blog posts that are related to that product. You might have landing pages, some website pages, specific knowledge base articles. And I think knowledge base is a big one because this is something that you typically want to have a maintenance rhythm kind of built into it. So as soon as you're updating and adding more like FAQ,
question and answer type content that goes in and starts to really inform the knowledge faults, automatically updating it. And again, the other thing about that is if it's indexed in the right way, starts to train all the LLM models externally so that they can obviously start appearing more in the from an AEO perspective. So.
Lots of value benefits in that kind of concept, but that's a whole topic for another day. And again, you can segment this to specific contacts, maybe contacts that are interested in Stutter IX could make this type of knowledge available so that they can start querying and asking questions related to it.
Lots of capabilities there is what I would say. So the thing is, once you've got your AI settings configured, I think normally how Streeta helps businesses, we go through a series of workshops, help you compile and gather this information together. Sometimes we can run workshops to help you, you know, generate this types of information.
But in essence, the goal is really about getting it configured properly and giving your business the ability to kind of maintain and keep that up to date. Once that's in place, we can actually move into the data agent itself. So that kind of forms in the navigation under data management. We've got the data agent area.
And it tells you a lot of information about what it is and how it works and the likes of that. Now the thing about it is it's really, really clever. So if I go into a prompt library, what it's doing right now is it's trying to inspire me.
for different particular prompts that we might want to use in our portal. Now, the thing about it, and I encourage every one of you that has this or a HubSpot user, go

into your portal and have a look at the types of prompts that are available. You'll see that they are very customised to your portal.
They're personalised suggestions, really. And these suggestions are, as I say, when I look in some of my clients' portals, completely relevant to them versus what we see in ours. But the ability here is we can store these data points on all types of objects, really.
and it can draw information from specific areas. So a good example of this might be from the activity side of things. And just to show you like an idea here, based on sales, emails, call notes, CRM, marketing automation, we want you to
tell us what the company is currently using. Are they using HubSpot, Salesforce, what is the CRM software? So you can get really clever and the idea is that when you have conversations and you start to find this information out, it will automatically go and populate this property. So as I say,
A whole big.
A library of suggestions that you could start to use.
Once you've decided to use some of these, I click into manage, and you can actually see your prompts that you've designed for the CRM all coming together in one place. Now, what's interesting is it tells you what it does. It shows you is this something that's automatically filled.
What object is this on? Notice I've got some on the contact, I've got some on the deals. I've got sources of information. Some of these sources are coming from activities, some are coming from properties, some can be web research. So lots of capabilities to kind of get information.
And you know, where does it draw down on the information to populate that property itself? So really interesting from that perspective. It gives you a fill rate. It tells you how many times it's been run, how many times it was successful, how many errors. I think just really good visibility on how it's all coming together. But.
a nice dashboard and Admin UI to help you kind of manage this once it's been implemented is the thing to think about. And what I want to do next is going to go into a real world fake example, if that makes sense, where Jared and I have been playing nicely in the background to kind of bring some of this
concepts to life, right? So first of all, what we've got here is we've got Jared's contact record in our dummy portal. He carried out a meeting, actually had this meeting with himself, but he basically invited the HubSpot note taker to that call.
Just to kind of give you a click into that cool recording itself, HubSpot's note taker

works the same as, you know, a lot of these other third-party note takers where you have a meeting, the note taker gets invited. Once it joins the meeting, it will obviously generate a transcript for you. It will take a summary based on the conversation that was carried out. It can create some notes, but in essence, there's a whole bunch of rich information that's stored against this contact. Now, what that does next is we have the ability to kind of draw down and
have AI read this, interpret it in certain ways, and do something off the back of it, right? So how does it take this information and store it and structure it in the right way to make it helpful and useful to the business? Now, don't get me wrong, summaries are great. We've got a good insight into what happens.
But even a summary gets buried, right? It's a note that's hidden on the record, disappears off into the yonder, and you have to physically go and search for it afterwards. So off the back of that, what I'll do is just kind of show you how a smart property might take that information and actually put it to use.
So you'll see that I've created, first of all, a spot property CRM card. And there are a couple of properties that I've created just for a quick kind of use case here. But first of all, we've got the agreed next steps.
So in the call, it's saying there were no explicit agreed upon next steps in this particular scenario, but using the solution design as a guide for the future discussions and generally talked about and aligning the budget and constraints, it will in essence, as you have more and more calls, it will look at those calls and it will continuously update this property to try and figure out what the next steps are. So You know, these information is not always gathered in one go on the spot. It gets gathered as you start to engage and interact with people moving forwards in the likes of that. It also is pulling through some decision points. It's pulling through some sales notes taken from the call, so giving you a log there.
And the two I really wanna show you at the bottom here, which I think kind of aligns back to this concept of this concept of it being dynamic, and we wanna understand, you know, who's the buying role, like what when dealing with Jared and Jared's business?
What role does he play in this whole sales exercise? So, I've got 2 versions of the same property here, taken and drawing down information in different ways. One does a web research, so it looks Jared up, looks at the website, probably looks at LinkedIn, looks in...
anything web facing and makes a suggestion based on that. The other one is an

activities one. So that's more drawing down on did Jared, what's the conversations that we've had with Jared, like in the emails, in the calls and everything that I kind of showed you earlier, can it predict?
what sort of buying role Jared might have. So I'm going to just update these manually just to give you a quick sense of how that could be done. If you wanted to kind of do this, you wanted to do this on demand, I go to an action, I tell it to fill some smart properties. So I'm just going to go to.
Buying roll.
So we've got the activities buying role, and then I've got the web research buying role. I'm going to click update on those two properties right now. And we're going to wave a magic wand. We hit the drum rolls. It will take a bit of time in the background, but it will update them.
I'm probably going to refresh my screen. Ah, as I refreshed, you could see it starting to pull through there. But it set Jared as an influencer in this particular property and an influence in the other one. So its conclusion wasn't like miles apart based on those two different things happening.
But what I want to show you next is actually how these properties were configured and how did it actually get to that answer. And I think that's where it starts to get even more interesting. So if I go into property settings and I'm just going to go into buying role real quick.
So first of all, I'm going to do the suggested buying role property. Click into that. You'll see it still, although it's connected in the data agent, you can still access them in the same way that you can access any property in HubSpot. So I go into the property itself, you can see that it is a drop-down select.
some properties that have been added, some options taken from the actual buying role property itself. We can store some documentation against these properties now. And, you know, I actually just used the Breeze AI generator to generate these descriptions, but it starts to give it a lot more richer instructions. And I think this will also help kind of inform the CRM a little bit more about what it is and what it does. Equally, in the descriptions, we can get really quite clever about what the descriptions are and generate those through, you know, AI prompts as well. So lots of information regarding what it is.
We can then go and set some rules and conditional options in the same way that you would with any other property, manage the access. But when you go down to the data agent section, you start to see what that actually, what the prompts are that

enables you to kind of manage this property.
So first of all, I can choose to turn it on or off. I can choose where I want this information to come from. I'm saying it should come from activities and transcripts. It could come from another property, could come from the web research side of things. And it's now going to allow you to kind of pull that.
together. So if I obviously look at Jared as an example, and then let's go and look at maybe Sean's.
Any of you that might know Shaun?
We can look at their two records in parallel, can kind of do some tests here to just to cheque out what's happening. But in essence, it's going to make a suggestion and how it would actually, what sort of.
value it would return and pick Shaun up as a decision maker, which is truly, truly the case in our business. So it's done a very good job of understanding that and kind of applying that. And what I would say next is, now that you define what it does, next is Next is all about defining when does it get updated. And I think this is the critical piece. Well, it's not a critical piece, but it's an important piece, is that, you know, this is the data agent is out of beta, so it does charge you credits every time an update happens. I believe it is.
Was it 10 credits, Jared?

Jared Wiltshire 39:54
10 credits per run and I believe that equates to like 10 cents.

Ryan Waters 39:56
10 credits per run.
Exactly. So cost effective, but you know, if you were just to blow this on a whole CRM, there might be a whole bunch of unqualified data in there. You're going to use those credits up really fast, right? So you need to be thinking about how do we use this wisely? How do we, you know,
I would say, kind of invest our credits on the right records at the right time for the right reasons of all the things we kind of need to be thinking about. And if we look at the auto fill side of things, we can actually gives us a few additional options. So I'm just going to hit edit on this and I can choose to do it on a schedule.
I can choose to do it when a property value is changed, when it goes into a membership. There's some coming soon ones here based on buyer intent, so I think

that's quite exciting to look out for. If we do it on a schedule, I can pick a segment of contacts. So I've made a fictitious struto segment for this scenario, but
I can say, well, only apply it to this group of people, and I want you to do this daily, monthly, weekly, time of day, time of month, what time of day, so it can automatically go and run this regularly on your behalf. So one way of actually doing it. There are other ways though, we could do this programmatically, and we're kind of going to go into those in a little bit more detail in a second.
We're going to show you the operational side of like leveraging the workflows tool to kind of set these properties and just gives you a whole bunch of options. Now, I just want to kind of, I just want to touch on another way of doing this. So if we look at the other way of creating this particular property,
Right now, I have chosen that it pulls from the transcripts and the likes of that. If I go back to my other buying role one, which is based on the web research.
This one you'll see if I go into the prompt itself, it's pulling a web research and it's basically looking for any public available information, such as company websites, press releases, conference talks, news articles. What is his role in this?
Now, bear in mind, I made these prompts up automatically. It can suggest the prompt for you. If you weren't happy with the prompt that was there and you weren't getting the right sort of results back, you can suggest a bunch, add them on there, and obviously you can refine how it kind of approaches that exercise.
You're giving it detailed instructions on what you want to do, where you want to find it, and how it should be stored really is the kind of thinking behind a lot of this. So again, very powerful stuff. Now, before I give you back to Jared, I just want to just touch on one or two other real quick things here.
where in this scenario, Jared is also involved in a deal. And this deal had, there's a bunch of conversations happening. Think about how a natural sales process works. And what we can see here is I created some properties on the actual deal.
itself. So I don't know, think about your qualification frameworks, think about bands, think about budgets, authority, need timelines as an example. We can have the agent listen out to what you're saying and actually populate the budget fields for you automatically or set the goals. What are the goals?
What were the pain points? What were the challenges that we discussed? And in order to kind of set this aside, I actually didn't even use a note. I didn't even use the summary or the transcript. I actually went on and added a simple note to the timeline. So the thing to say here is, if you're using third party tools, third party note

taking tools as an example,
Those might be syncing and setting data on the activities timeline. It can also pull from that, right? It's not just from a meeting transcript, if that makes sense. You can get it from anywhere. Now, there's some real benefits there. One thing I would say, though, is having HubSpot's meeting tool in place, or, you know, having...
using calls and making sure your full call transcript is being logged to HubSpot, it actually draws down not just on a summary, but the full context of what was being discussed. So having the full transcripts in there is obviously advantageous, but not like a deal breaker. You can be feeding information in in other ways.
But again, think about that. Think about the opportunities. I have to admit, like when I was thinking through a lot of this, it just feels like there's an absolute infinite amount of ways that you could actually leverage this tool to kind of make sure your information is structured and gathered at the right time. So I think that's the big part here is how do we be very strategic about.
what we need to, what information we need to gather, and equally, how is that gathered, when is it gathered, and how is it leveraged once we've got it. So all of these pain points or these opportunities require a good deal of kind of strategic thinking and planning and the likes of that.
But yeah, that is that from my side at the moment. I think, Jared, I think you were going to talk them through how to do some automation around that. Do you want to, are you going to share your screen, take over, and I'll take it back at the end there.

Jared Wiltshire 45:34
Yeah, sure thing. Let me grab the screen off of you.
Here we go.
Is that visible?



Ryan Waters 45:51
Yes.

Jared Wiltshire 45:52
Fantastic.
Awesome, yeah, so...
Before I get too stuck into the automation side of things, I did just want to touch on

the data enrichment side. So within this kind of example that we're going to be looking at, there is a data enrichment step. And what I wanted to just touch on was this idea of customising what gets enriched.
and when to a certain degree.
We're currently in our settings in data enrichment on mappings here. And what essentially what we can see is I'm able to see what property is being enriched. So it's trying to enrich first name here, for example, on a contact record. And I can then map that to a HubSpot property.
So if I didn't want to use first name and maybe for whatever reason we're using a full name property instead.
Maybe that gets mapped to full name instead of first name.



Ryan Waters 46:51
Can I touch in there? Like the thing that's helpful there on that is there's some businesses we work with that actually like to enrich their data from multiple sources, right? So you might have a subset of data points, you know, for ZoomInfo as an example, a set of properties for the HubSpot's data enrichment tool.
That allows you to kind of draw from different places, make observations, and then set your standard primary result back from there. So this is a newer feature that's been added recently, but I think really, really nice uplift, I would say, on giving you a bit more control as to how the data is being ingested is what I would say.

Jared Wiltshire 47:12
****.
Yeah, 100%. And like to that point of control over when it gets overwritten or when it gets written to, we can control when these things get overwritten. So we can say, oh, I'd only like to fill empty values. Maybe I want to be allowed to fill empty values and overwrite existing ones. Or maybe I don't want to fill anything.
But this.
And we can control that at a contact level, but also at a company level as well. And you may notice there are 28 enrichment properties at a company level and 12 at a contact level.
Brilliant.
So what I want to look at now is just an example workflow where we are enriching a record.

Taking a look at some of the available context on that record.
And then off the back of that, setting a persona.
So what we have is our contact record. I'm going to use Shaun, for example, here.
And we have our different kind of personas that we might want to set. So there's a few examples here. We've got Operations Olivia, Finance Felix, so on.
And our goal is to review the different contexts on the record. So looking at enrichment fields more particularly. So for example, employment role, sub role, suggested buying role, these are all things that we might want to look at.
alongside any kind of notes or activities on the timeline, right?
First thing we need to do when we're thinking back to what we were talking about earlier, our context tool needs to be set up. We need that enrichment layer, and then we can run our data agent. In this example, what we're doing is having a look at a contact when it reaches a lead lifecycle stage. So if you think about lead, MQL, SQL, throughout the buyer journey there.
When it touches lead, what we're going to do is enrich that record. So the contact that falls into this workflow will be enriched. And on Shaun's record, we can see the record enrichment happening here. So we can see 11 different properties were enriched.
state region, country region, employment seniority, these things were enriched.
Off the back of our enrichment step in our workflow, we're going to run a custom prompt in the data agent. Now, I think in comparison to smart properties that Ryan was showing you,
This isn't a smart property, but we'll still populate a property via our next action that we perform. So this is just a slightly different way of approaching using the data agent. Instead of smart properties, we're going to try and generate the data in a workflow. If those of you who are familiar perhaps with some of the formatting data actions in workflows,
This might make even more sense.
So when I click into my action here, this is action 2, data agent custom prompt.
We've got our nice custom prompt written out.
with all sorts of additional context that we're providing. So I think quite importantly, we are outlining the personas within this prompt and giving some example descriptions of who they are, what roles they might have, what challenges they're facing, so on.
Importantly, at the bottom of our action, so below the prompts that we input, what

we do is we define action outputs that are then usable in other places in this workflow.
So as a standard, there's a success or failure, there's a response, and I've got a custom output here called persona.
And so what I'm asking it to do is return persona 6, 7, 8, 9, or 10, which map back to our personas that we're using.
Additionally, within here, I have some descriptions of maybe what an example persona might be and how it should be returned.
I can also specify the data format that this data should come back in. So I specifically want this to be an enumeration property. So think about a dropdown select, for example. But you can say, I actually want you to return a date, a Boolean, a number, pretext, a phone number.
These things can be extracted and then output as available data to use in a workflow. Off the back of our custom prompt, what we get is an available token to use in the workflow. And I'm using this token to set persona.
So this is the output of action two, data agent custom prompt action. And we can see that then being set on Sean's contact record here when we're looking at persona, he's been set as revenue Randy by the persona assignment workflow.



Ryan Waters 52:56
But now just, yeah, if you think about that, right, what are we doing here? We're making the salesperson's job easier, first of all, because it's easier to understand who they're talking to. Like, this is this type of persona, these are the types of things you should say, what role do they play? Think about my example, what role are they playing in this?

Jared Wiltshire 53:01
Yeah.



Ryan Waters 53:16
buying decision, completely different ways of speaking to that person. Equally, if you think about the marketing team now, they can start drip feeding the right information to these types of people in the buying journey. So lots of opportunities that would happen off the back of that. I know time is tight.
I do want to show one last example. This example is more on the service front, and

what we've got is a categorization field. What this is doing, and just looking at the property itself, it's instead of the first two where we were drawing information from.

Jared Wiltshire 53:54
Yeah.

Ryan Waters 53:56
activities, transcripts, or from web research, this is drawing information from another property. What it does is the ticket-based property, it's going to look at the ticket description and it's going to categorise what type of request this is based on the information that's actually in the ticket itself.
So, it's got a generated prompt here, and the thing about this is we need to kind of be specific about when this should get populated. So, I'm going to go into another workflow and just show you a very simple one, maybe a little bit more simple than what Jared was having to demonstrate in the previous one. What I've done here is I'm saying...
enrollment triggers, the record ID is known. I am saying that I only want to run this on the Struta IX product type because I wouldn't want to run it on another one. I wouldn't want to waste the budget. And we have a very simple action here that can obviously just simply fill.
empty values or overwrite the existing ones. So if you were only wanting to set it once, you'd only set it to fill existing values only. But then, you know, if we wanted to actually update and overwrite if this thing was happening regularly at the ticket level, we might choose the second option. We choose the property we wanted to fill out.
And then just to take you into the help desk, an example of what that means. It means we've got a couple of tickets here, all been sent in from different people. And within the descriptions themselves, there's the context of what was being said. And because the inquiry type is a Stuta IX type of inquiry, the workflow is triggered.
And that then handles the categorization of what type of ticket is this. So that could then be routed off to the right person, to the right department, all sorts of opportunities, I think, now that you know what category it is. But I just want to leave you with that.
so many different use cases that you could come up with for leveraging this technology. And I think it is right now about thinking about how to use it wisely,

what's the low hanging fruit, and how to make the most use of this. So that brings us to the end of the demo. I just want to kind of...

Jared Wiltshire 55:57
Ash.

Ryan Waters 56:14
Finish up with two more, one more slide, really, so bear with me.
So the next thing here really is now that we have all this information, how can Struta help you with this, right? We've got some dedicated services that applies for new and existing clients, but we've got some work streams that are all catered towards helping you get started with all of this.
So think about areas from helping you do like a complementary portal health cheque initially, so we can have a look at what's happening in the portal, make some AI-based recommendations. And then off the back of that, we can suggest maybe one of our AI-based outcome packs that can help you get up and running. So
With that, you know, we'd be thinking about AI readiness workshops, some guided ongoing success support in some of our support frameworks. But in essence, we can do deep dives and strategic workshops around helping your team get up and running and started with the technology that we've shown you today. So, yeah, with that,
Obviously, we very much look forward to kind of hearing from you, if anyone that's interested. So please reach out to us personally off the back of the demo and yeah, look forward to kind of getting started with you on that front. And I guess that brings us next to some Q&As. I know we've got a couple more minutes, so if we can maybe tackle a couple of those quickly.
That would be great.
Support.

Nsovo Shimange 58:00
All right, thank you, Jared and Ryan. Thanks both. I think that was very informative. We did have a question come through during the session. The question came from Nicholas, and the question is, how does context work if we have multiple brands on our HubSpot?

Can we have multiple contexts?
I think it's two questions; that is one question.

Jared Wiltshire 58:25
Minh.

Ryan Waters 58:25
Yeah.
So yeah, you can, so with the knowledge vaults, you can train them up from different brands perspectives. And then equally, you know, when we looked at that initial context panel, you can define the various different brands under the brand kits, if you will. Typically, you still are setting your overall business
context within that same context window. Maybe you wouldn't quite get down to the granularity of defining different competitors per brand and the likes of that just yet, but I have heard that that's part of HubSpot is going to scale to kind of be more relevant to different brands. But in essence, you saw how we could bring separate brands into that kind of
layout, if you will. So there are some clever ways that we can kind of enhance that a bit more is what I would say. But yeah, it can accommodate it. It's just not 100% built into the UI just yet to kind of enhance it as much as you know we'd like. But a lot of opportunities, I would say, to handle that.
From my perspective, I hope that answers the question.
Perfect.

Nsovo Shimange 59:37
Yeah, I think we've covered that. And then I think we can wrap up today's session. So I'd like to thank everyone for taking time to join us today. And then, yes, if you'd like to continue the conversation, please feel free to reach out to us. We're more than, we're looking forward to helping you out. And yeah.
Have a fantastic day and we'll see you at one of our upcoming webinars. Goodbye everybody.

Ryan Waters 1:00:02
All right, sir. Thank you very much. Bye, everyone.



Nsovo Shimange 1:00:05

Josh.

JW

Jared Wiltshire 1:00:05

Cheers, cheers. Thank you. Bye-bye.

stopped transcription