FALL '24

Spotlight

PRODUCT ROUNDUP WEBINAR

Thursday, Sept 26 — 1 PM ET | 10 AM PT

HubSpot

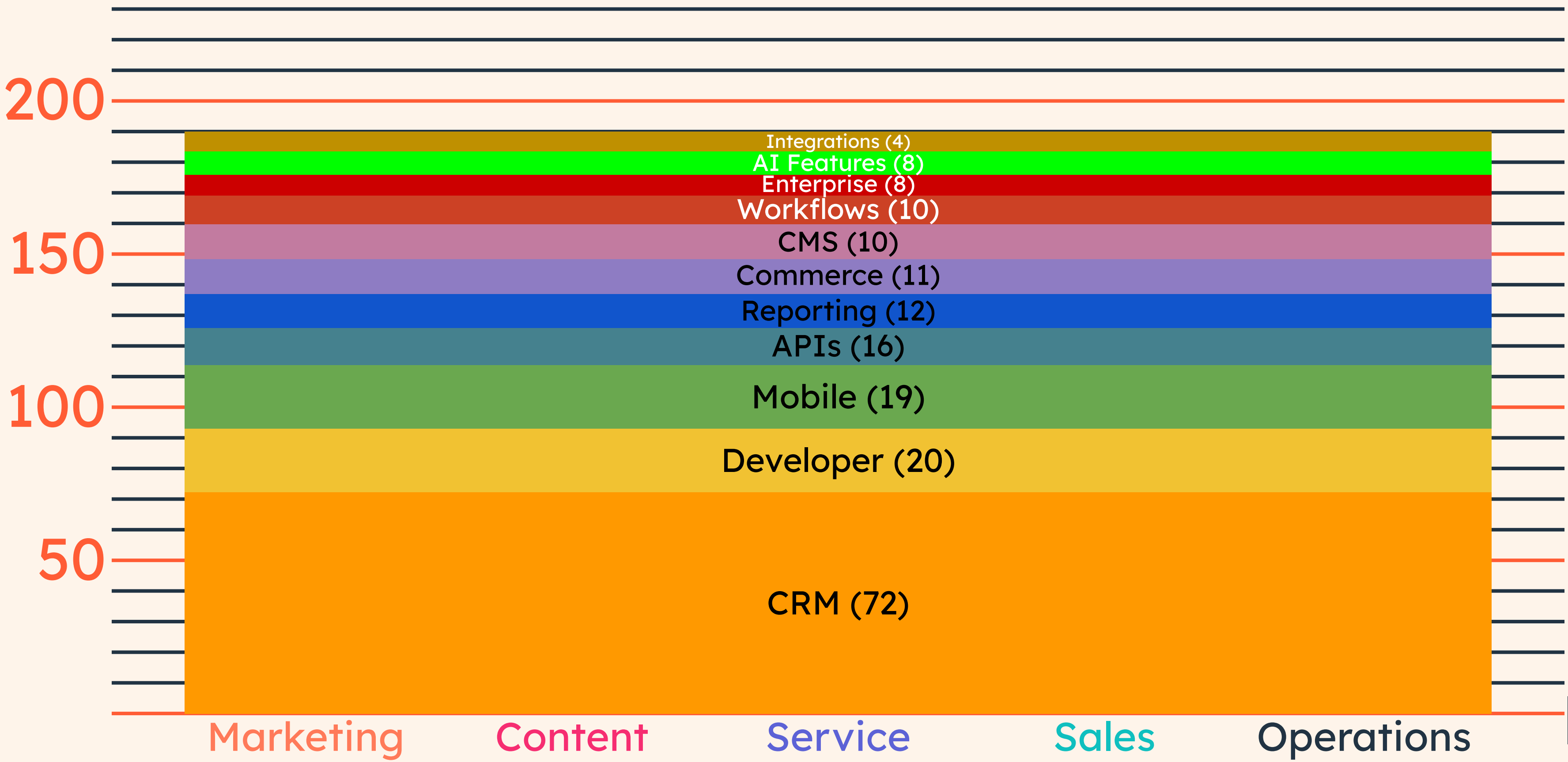
HELLO!

Kyle Jepson

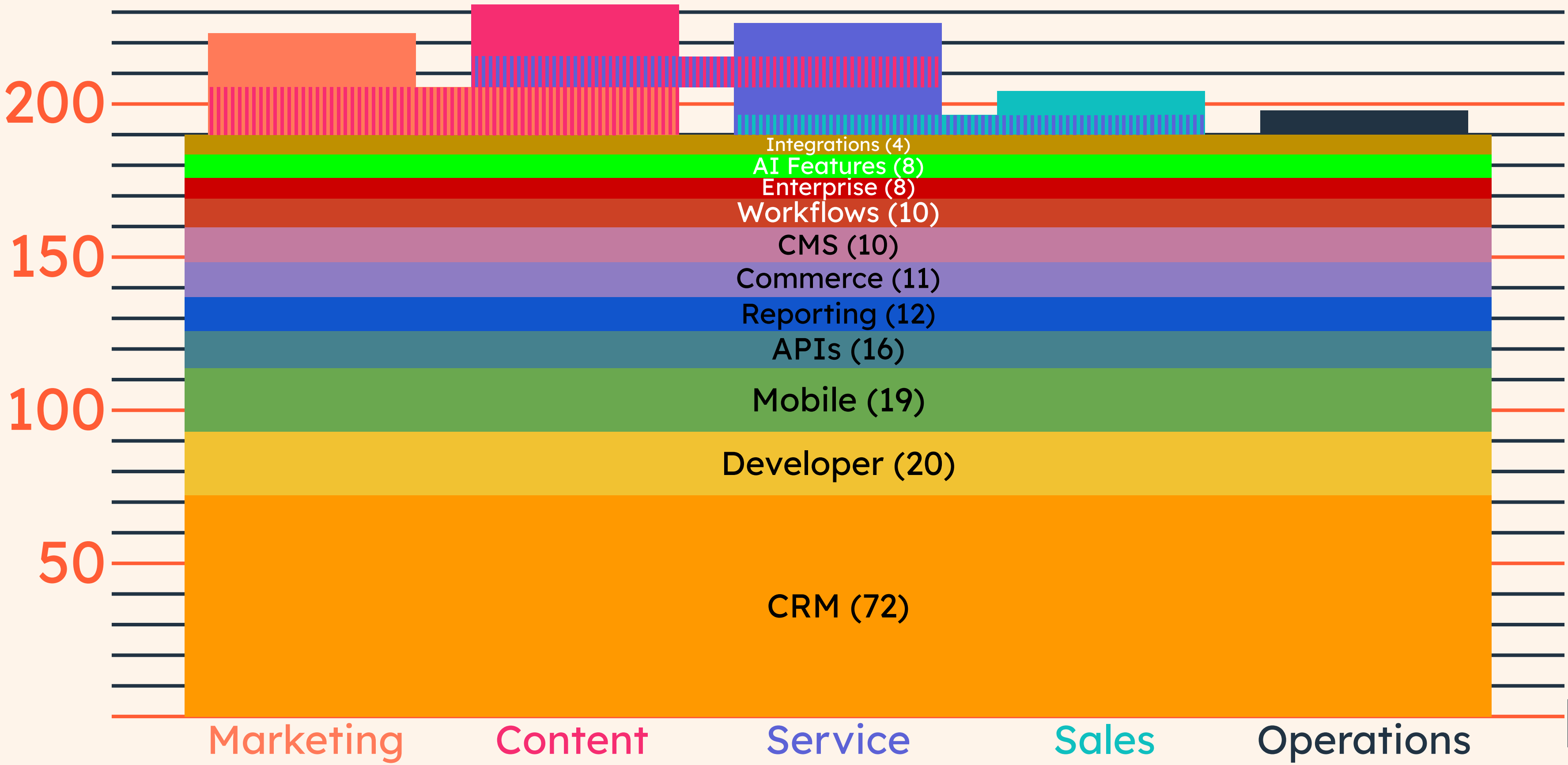
HubSpot Evangelist

Agenda

Which Hub Got the Most Updates?

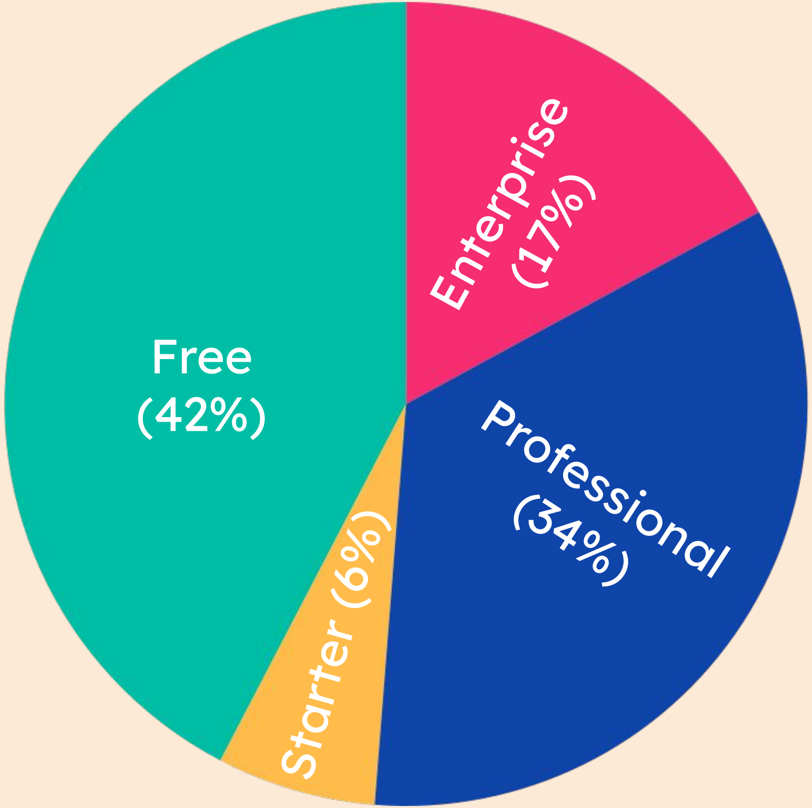


Which Hub Got the Most Updates?



Which tier got the most updates?

IN 24



Which tier got the most updates?

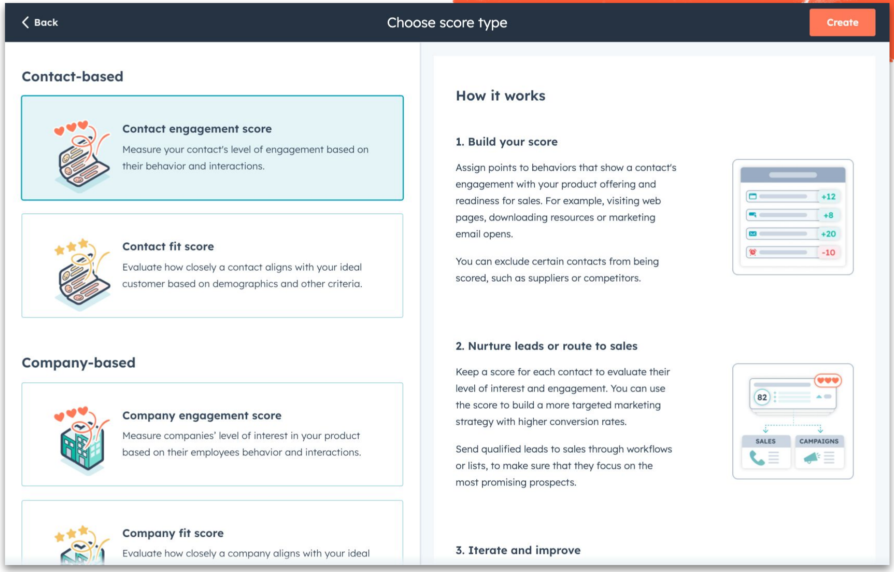
IN 24

Marketing Hub®

Marketing Hub®

LEAD SCORING

A tool that combines manual engagement scoring with AI fit recommendations to recommend best MQLs. Designed to help Marketing and Sales teams identify and prioritize the most promising leads, no matter the scale.



USE CASE

Helps marketers identify leads most likely to make a purchase based on their past behavior, campaign interactions and demographic data.

LAUNCH REGION: GLOBAL

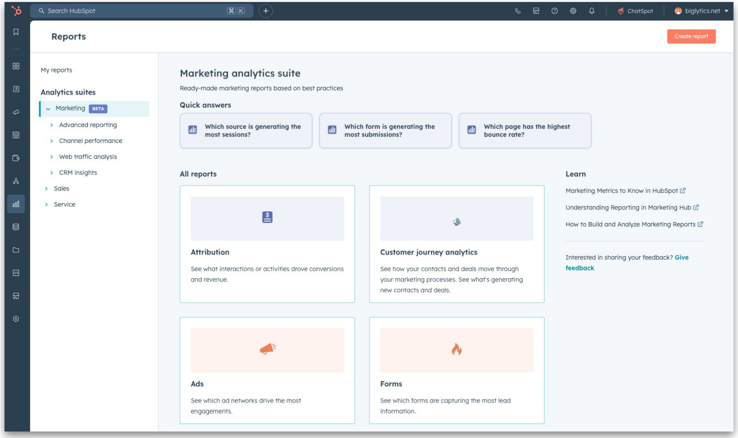
FREE STARTER **PRO** **ENTERPRISE** **PUBLIC BETA**

Marketing Hub®

MARKETING ANALYTICS SUITE

The Marketing Analytics Suite consolidates all of your channels into distinct sections:

- **[Ent]** Advanced reporting: Provides premade multi-touch attribution model reporting templates and premade customer journey analytics templates
- Channel performance: Dive into Ad, Lead capture, and Marketing Email effectiveness
- Web traffic analysis: Evaluate web traffic metrics and gauge the success of your website content
- Contact insights: Gain insight into the origin and characteristics of contacts your team generated through marketing efforts



USE CASE

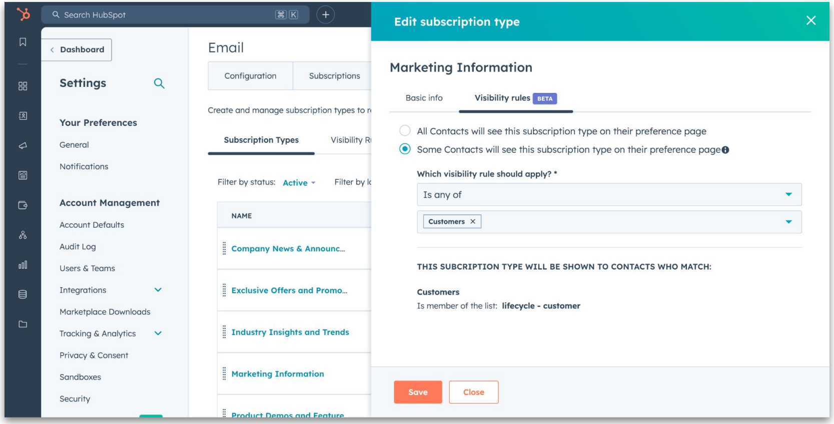
Marketing Analytics Suite is HubSpot's first dedicated solution designed to streamline key marketing metrics and reports into one place.

LAUNCH REGION: GLOBAL

FREE | STARTER | PRO | ENTERPRISE | PUBLIC BETA

PERSONALIZED SUBSCRIPTIONS

With “Subscription Rules”, marketers have the flexibility to create personalized preference page experiences for their different contact segments so that their contacts only see relevant options based on who they are, their interests and where they are in their lifecycle stage. HubSpot is also expanding our “Subscriptions API” functionality enabling HubSpot customers to seamlessly set and sync preferences from external sources (like external preference pages, notification centers, lead-gen forms, etc.).



USE CASE

A more personalized, targeted preference page approach prevents contacts from seeing/subscribing to content that is not relevant to them as well as eliminates the clutter of preference pages, helping improve subscriber discovery of important content and overall reducing “unsubscribe all” actions.

LAUNCH REGION: GLOBAL

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Marketing Hub®

SOCIAL AGENT

An innovative AI-powered tool designed to optimize content creation for marketers. Marketers can now expedite their content process with the Social Media Agent. The Social Media Agent automatically producing effective social posts tailored to your business, audience, brand voice, and social media accounts.

USE CASE

The Social Media Agent works for marketers by consistently generating effective social media posts. The Social Media Agent will consider your:

- Social media accounts past performance data
- Business details, brand voice, industry, audience, value proposition, and other marketing assets
- Marketing and industry best practices

LAUNCH REGION: GLOBAL

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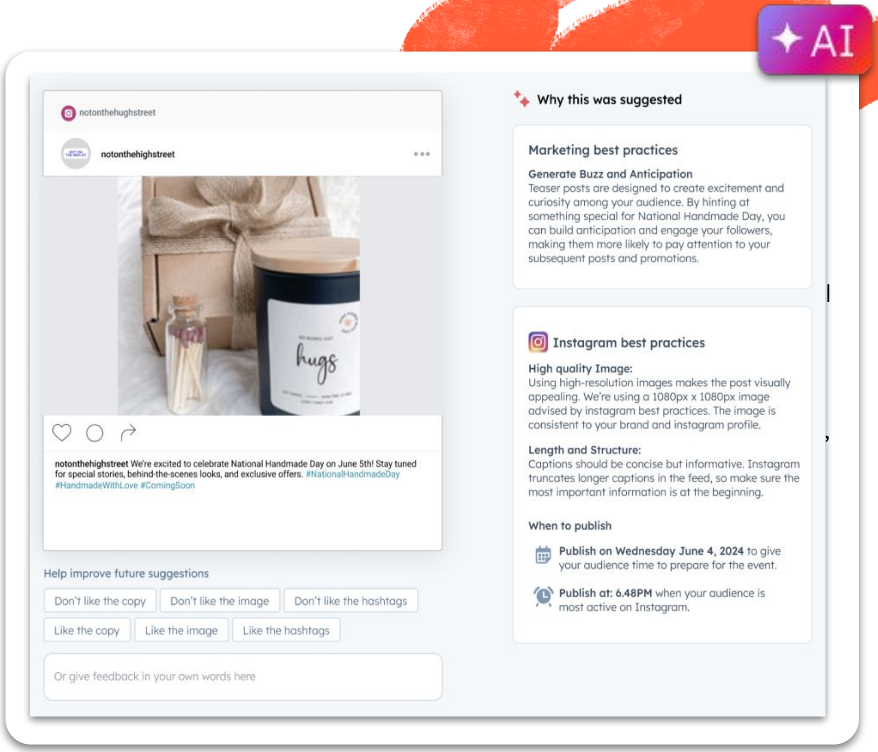


Content Hub™

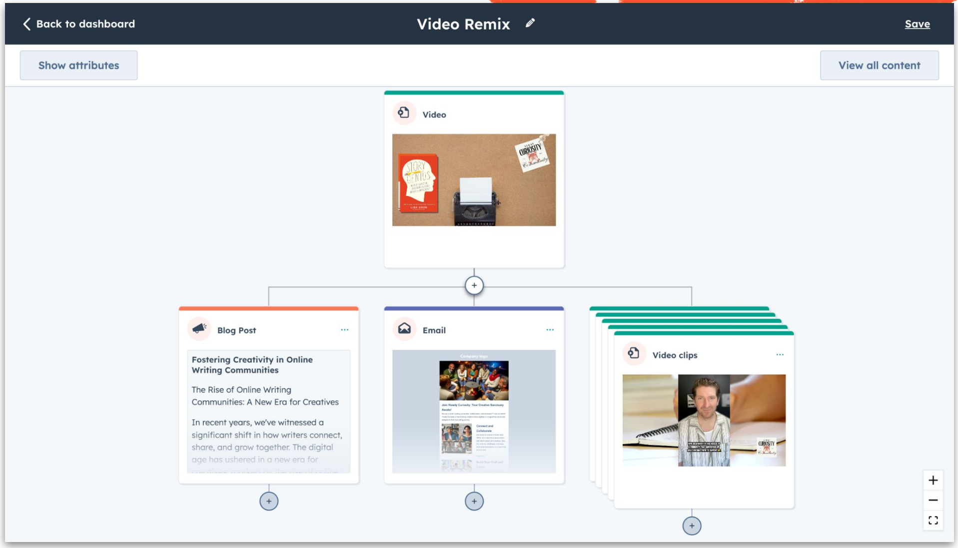
Content Hub™

VIDEO CONTENT REMIX

Video remixing is a new feature set coming to Content Remix that allows you to repurpose your video assets across all of your marketing channels and effortlessly create share-worthy video shorts with our new AI-powered video clip creator and transcript-based video editor.

USE CASE

Take your product tutorials, webinar recordings, and other video assets and effortlessly convert them into video shorts, blogs, marketing emails, ads, social posts, and more with the power of AI and a simple transcript-based video editor. If you can edit a text doc, you can edit videos with Video Remixes.



LAUNCH REGION: GLOBAL

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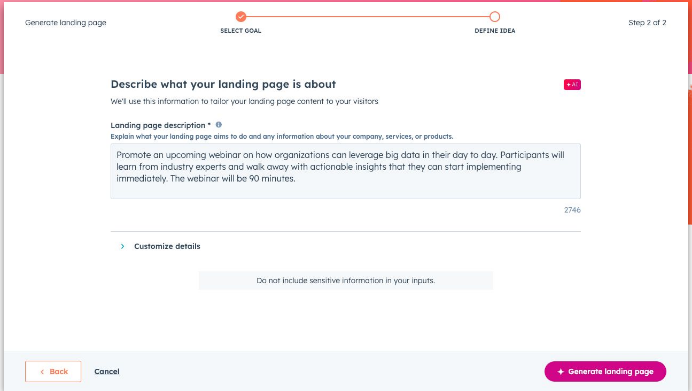
Content Hub™

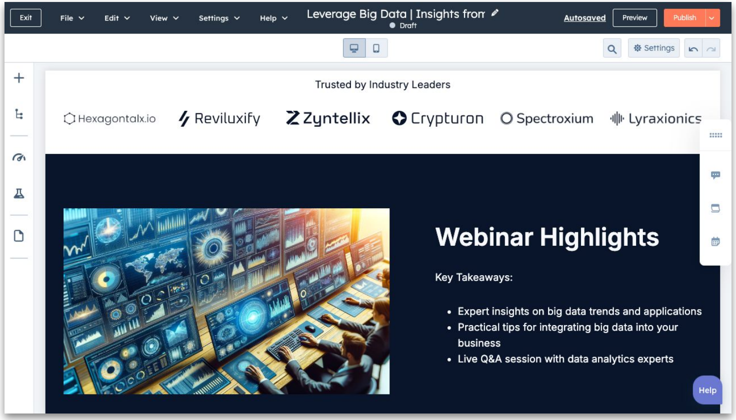
CONTENT AGENT

Breeze Content Agent uses AI to create engaging content in a snap, powered by your CRM data. It helps marketers quickly produce different types of content that attract visitors and generate leads.



USE CASE

- Expand your content marketing efforts with a consistent flow of ideas and topics
- Generate high-quality landing pages, podcasts case studies and blogs
- Combine your brand voice with CRM data to create targeted content



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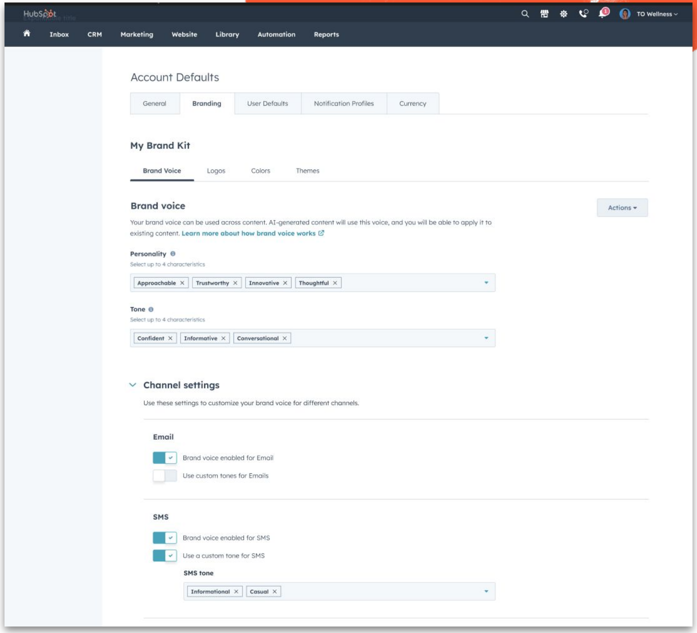
Content Hub™

BRAND VOICE V2

For V2, brand voice will support the following features:

- Enable multiple channel voices across different distribution channels for tone adjustments and deeper customization
- Introduce multi-language support for French, German, Spanish, and Portuguese
- Automatically gather existing content for brand voice analysis from your existing content hosted with HubSpot
- Create a writing guide: capture rules for brand-specific terminologies, approved words, phrases, punctuation, inclusivity, and more



USE CASE

Personalize content with our AI-powered new Brand Voice tools! These tools will help you analyze and adapt content to your brand's unique voice, enhancing your social media posts, emails, blogs, websites, and SMS messages.

LAUNCH REGION: GLOBAL

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Sales Hub®

Alex Rainford

Principal Product Marketing Manager

Sales Hub®

SALES WORKSPACE

The enhanced sales workspace drives efficiency by giving salespeople a single view of their work, complete with all the tools and data they need to execute in all stages of the sales cycle, without ever having to switch between apps.

USE CASE

- View AI-recommended next-best actions as well as open tasks, deals, and leads
- Utilize the new AI meeting assistant and sales queues to prep and follow-up faster
- Build pipeline easily through the leads tab, with a refreshed UI and new customization options
- Close deals more effectively with the addition of deals in the workspace.

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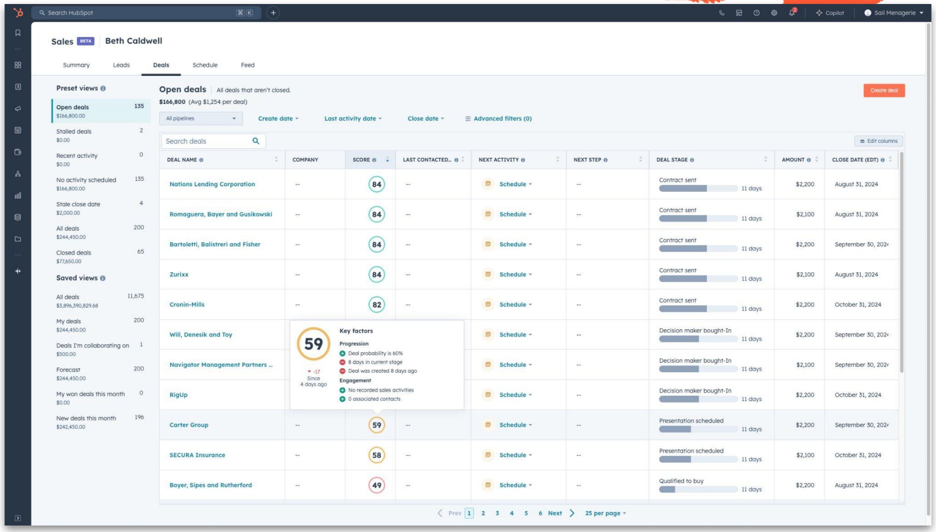
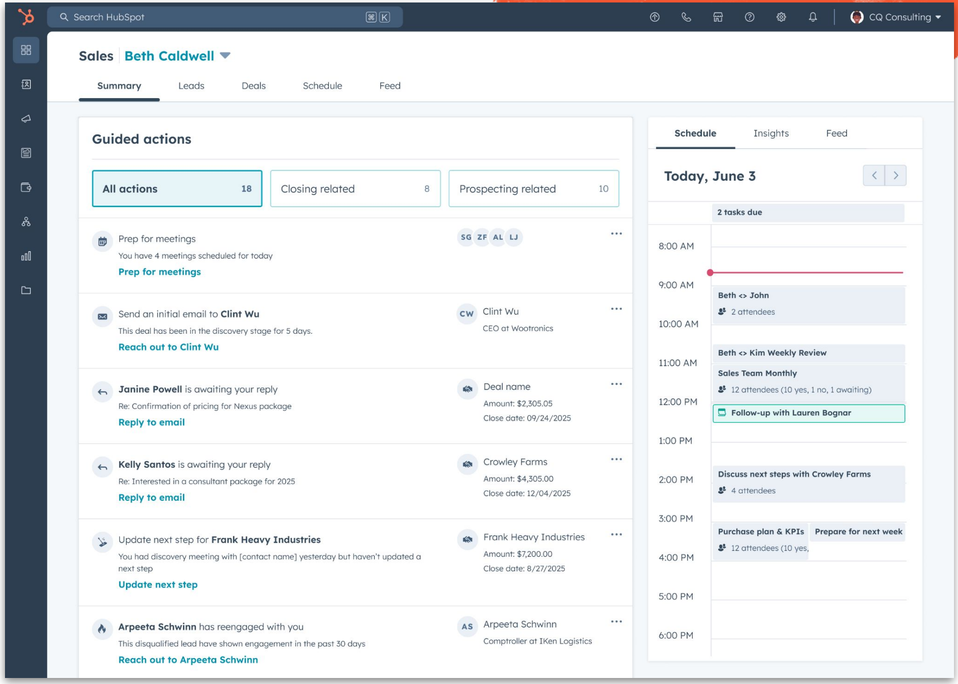


Sales Hub®

GUIDED ACTIONS

Sellers need a way to prioritize the most impactful actions in order to build pipeline and close deals. Without the right insights, poor prioritization leads to missed opportunities and lost deals! Guided actions help sellers cut through the noise and focus on what really matters.



USE CASE

- Quickly action high-impact to-dos curated automatically using AI, buyer engagement insights, and lead and deal data.
- Streamline outreach to new leads, prioritize the best deals, prep for upcoming meetings, and more!

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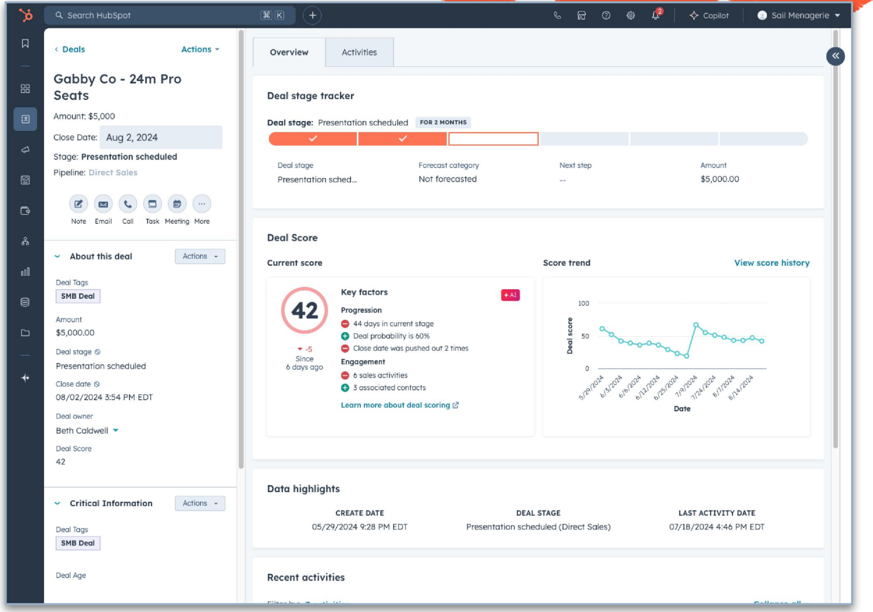
Sales Hub®

PREDICTIVE DEAL SCORE

Easily assess the health of your pipeline and prioritize what matters most with predictive deal scores. Powered by AI, the score is based on several different factors including recent activities, deal property values and more.

You can view scores and score trends in the sales workspace, on deal records, or in your deal pipeline



USE CASE

- Check deal scores from within the sales workspace to easily assess the health of your pipeline
- Use deal scores to prioritize the most promising opportunities
- Use deal scores to power automation, reports and segmentation

LAUNCH REGION: GLOBAL

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SALES PROCESS ENFORCEMENT AND CUSTOMIZATION

Build an efficient, repeatable sales process and ensure data completeness with Sales Hub and HubSpot's Smart CRM.

USE CASE

All effective, efficient sales teams have one thing in common: a tried and true process that's repeatable, customizable and tailored to meet the needs of their customers.

- **[Pro]** Create rules in deal pipelines to ensure processes are followed and deal data is complete
- **[Pro]** Enforce data completeness and correct processes in your prospecting process with rules and requirements
- **[Ent]** Configure an approval process that ensures deals are reviewed and approved before they progress stages

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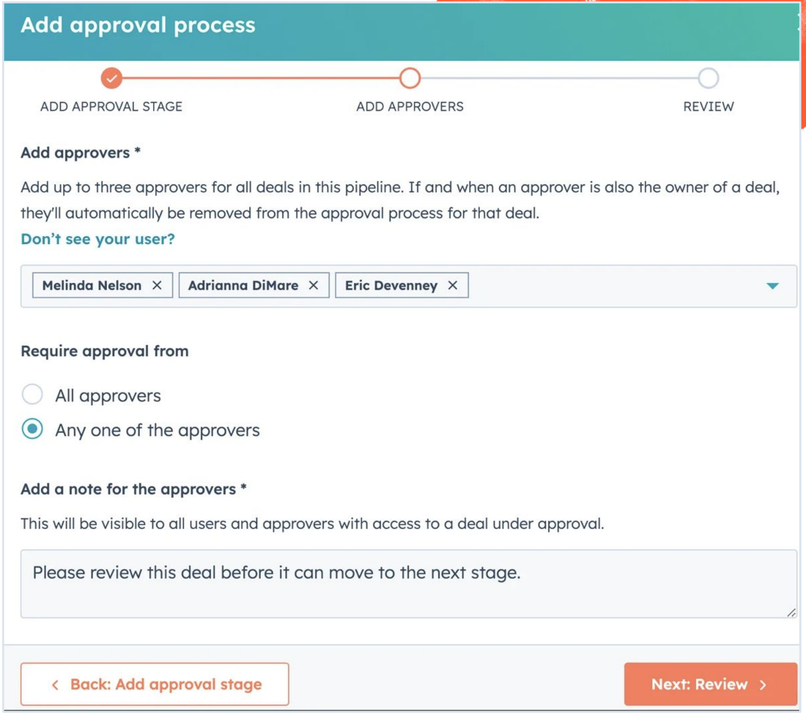


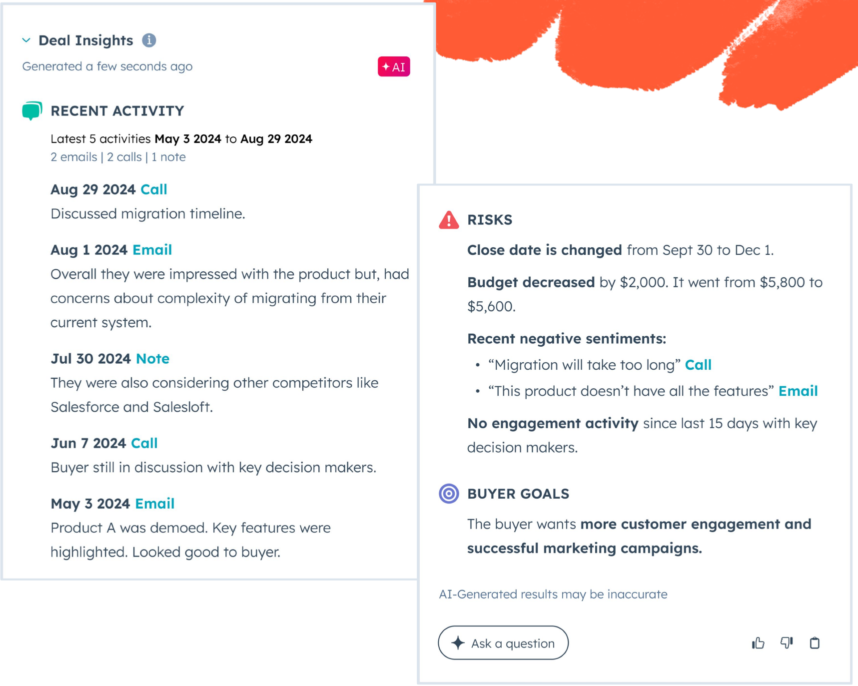
Sales Hub®

DEAL INSIGHTS

Modern salespeople work many different deals concurrently - each with their own set of varying needs, contexts, and challenges. Sellers need a streamlined way of grasping key information about their deals - and quickly!

USE CASE

- Easily understand the history of your deals, and get caught up easily before your next engagement
- Leverage AI-powered buyer goal summaries to understand how you can best position your offering
- Prep more efficiently, without filtering and scrolling through a timeline



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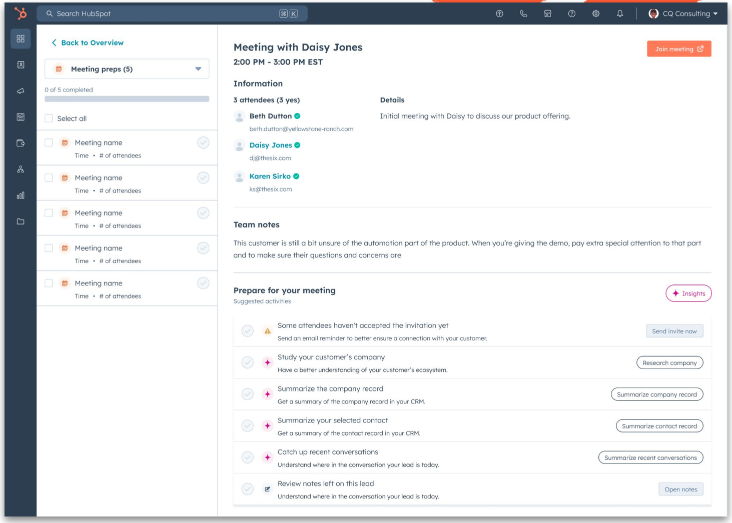
Sales Hub®

AI MEETING ASSISTANT

HubSpot's AI Meeting Assistant uses data from the Smart CRM, the history of your sales activities and more to help reps prepare for upcoming conversations and execute efficient follow up after the meeting has ended.



USE CASE

The assistant provides detailed attendee information and action prompts, such as:

- Suggested activities to help you with your upcoming conversation
- Shortcuts that allow reps to quickly reach out to attendees that have yet to accept the meeting invite
- Meeting insights and action items reveal summaries of past calls and emails, and highlight action items from calls

LAUNCH REGION: GLOBAL

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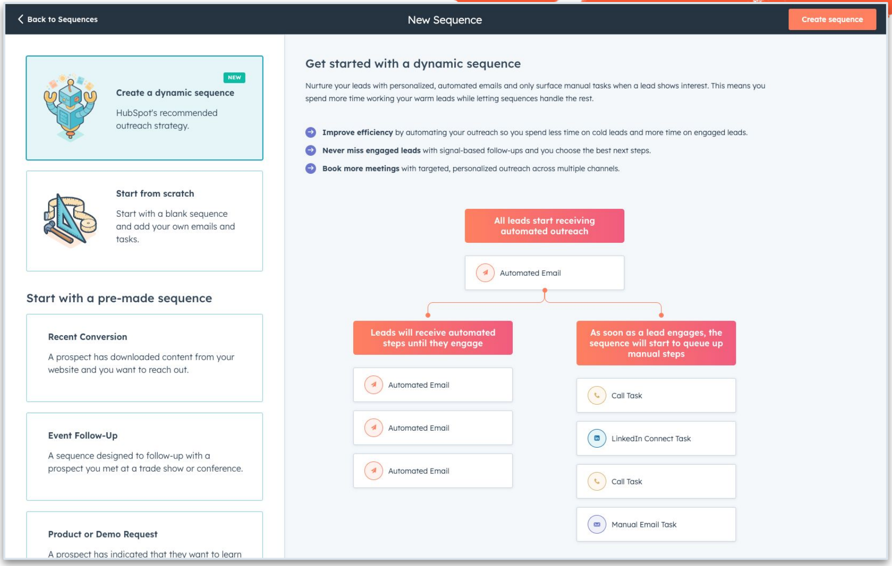
Sales Hub®

DYNAMIC SEQUENCES

With dynamic sequences, you can create powerful customized and personalized multi-channel messaging strategies that automatically adapt based on how, when and where prospects engage with your outreach.

USE CASE

- Automatically generate tasks for sales reps when prospects open or click an email
- Configure conditional sequence steps based on prospect engagement
- Enroll contacts automatically based on intent signals



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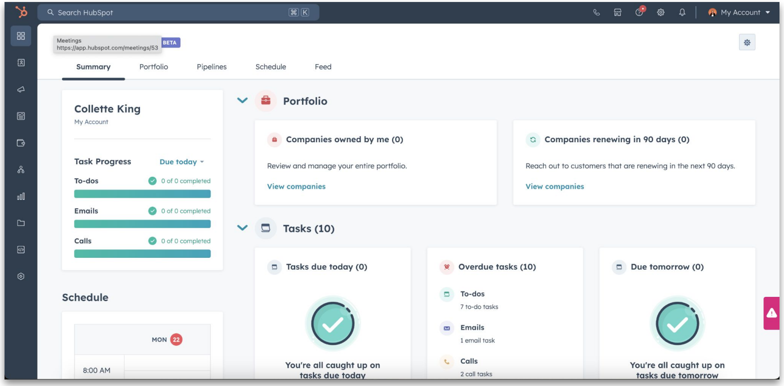
Service Hub®

Collette King

Product Lead

CUSTOMER SUCCESS WORKSPACE

This is a dedicated workspace designed to help customer success managers stay organized. This workspace reminds CSMs of their daily tasks, allows them to create custom views of their most important segments to prioritize reach-outs and helps them monitor activities from their key accounts. Now, customer success managers in HubSpot can start to see the information they need all in one place.



USE CASE

Customer success managers don't have dedicated tooling or home inside of HubSpot. Instead, they spend a lot of time bouncing around, hunting for the information that they need to do their jobs. The customer success workspace will provide a dedicated home base and starting point for CSMs in HubSpot. The workspace will keep CSMs organized and focused, allowing them to address the needs of more of their customers.

LAUNCH REGION: GLOBAL

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HEALTH SCORES

Customers with a health score can now use a new CRM card on the right sidebar of the company record to show the current health score and status, the direction of the score change as well as the last few events that caused the score to change. This score card will link out to a panel view that shows the history of that score, as well as the list of events that changed the score.

USE CASE

CSMs want to know how happy their customers are with the products they've purchased, but the overall trend matters more than a single point in time. These changes will help CSMs see the recent trends as well as the history of the score at a glance. This can be used when planning reach outs, preparing for customer calls or forecasting renewals.

LAUNCH REGION: GLOBAL

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Operations Hub®

Nick Carbone

Principal Product Marketing Manager

ENROLLMENT ANOMALY DETECTION

Stay informed about your enrollment rates with HubSpot's AI-powered monitoring feature. You can choose which workflows you want HubSpot to monitor and receive daily notifications in case of sudden spikes or dips in enrollment numbers. HubSpot's AI model compares the daily enrollment with the past month's pattern to identify significant deviations.

USE CASE

Now, with anomaly detection, you can take the guesswork out of getting notified about changes that impact their business. HubSpot AI automatically detects when to proactively notify you of workflow enrollment changes that are worth your attention. You also have the choice to receive notifications based on a set range, ensuring you never miss out on important updates tailored to your preferences.

LAUNCH REGION: GLOBAL

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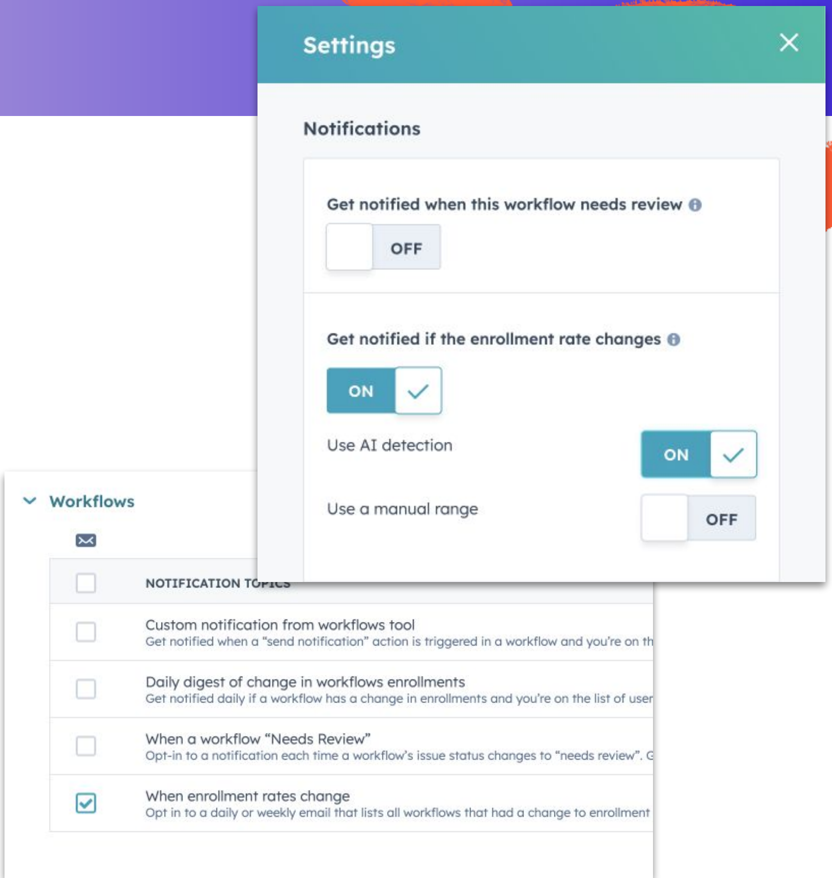
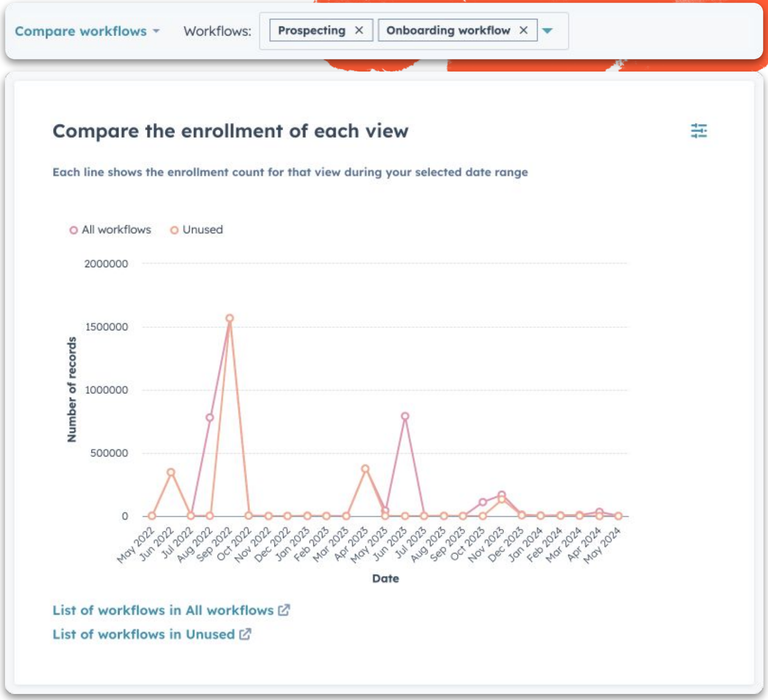


Operations Hub®

Automation Management

AUTOMATION ANALYTICS TAB

Automation Analytics: a way for you to quickly ascertain the extent of automation employed in HubSpot, identify potential areas for additional automation to streamline your operations, and understand the performance of existing automation processes.



USE CASE

These analytical tools will assist you in easily identifying:

- The extent to which automation is employed across your business and potential areas for further automation.
- Performance metrics of automations, including changes in enrollment rates, and comparing enrollment of specific workflows or groups of workflows.

LAUNCH REGION: GLOBAL

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Operations Hub®

Automation Management

WORKFLOWS HEALTH TAB

The Workflows Health Tab sits next to the Manage and Analyze tabs. It allows you to quickly discover potential health risks across all of your workflows.

USE CASE

- **Similar Workflows** — a list of workflows that may be redundant or in conflict with other workflows (Enterprise only)
- **Workflows with issues report** — a summary and graph of the number of workflows with any issues over time
- **Unused workflows report** — a summary and graph of the number of unused workflows over time

LAUNCH REGION: GLOBAL

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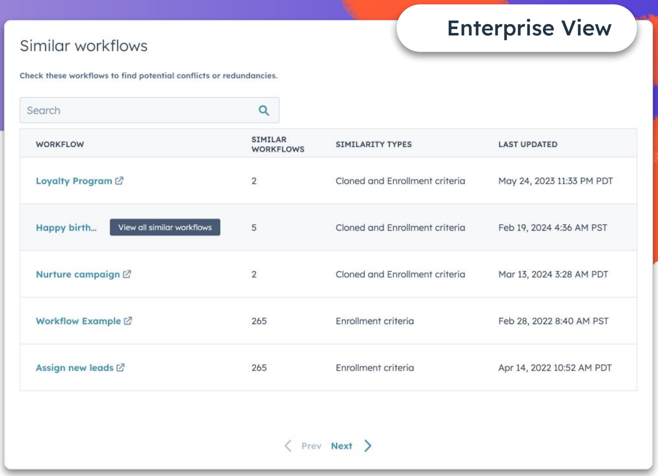

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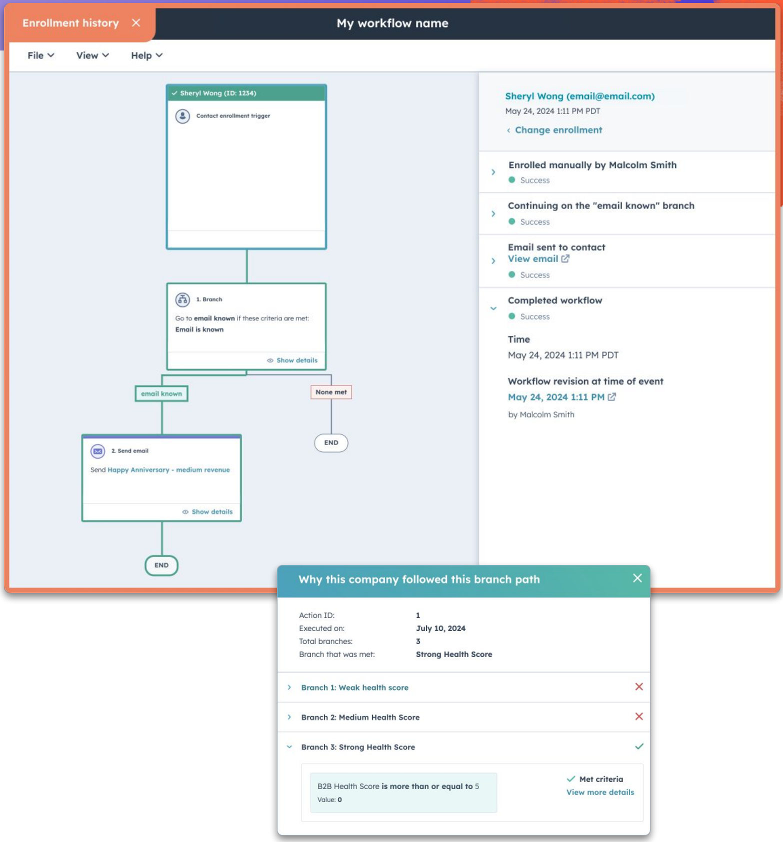
Operations Hub®

Automation Management

WORKFLOW ENROLLMENT HISTORY

An interactive visualization of what happened to each enrolled record, shown directly on the workflow editor. In this tool:

- The branches and paths each record followed are highlighted
- Any actions with errors are highlighted in red
- The full action logs for each enrollment are available
- Branch actions explain why each record followed that branch



USE CASE

Customers can now quickly and visually see what happened to any enrollment at every step in the workflow and why. They no longer need to piece together data from the action logs and the version history.

LAUNCH REGION: GLOBAL

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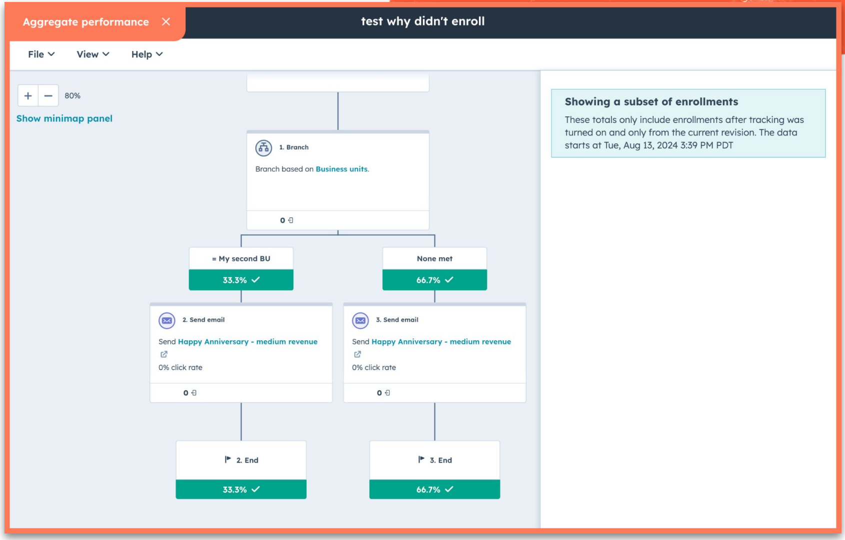
Operations Hub®

Automation Management

WORKFLOW METRICS

Customers can now see aggregate conversion and performance data visualized directly on the workflow editor. This data includes:

- The total enrollment count
- What percent of enrollments reached each end point
- What percent continued along each branch path
- For each action, the count of un-enrollments due to that action



USE CASE

Customers are now empowered with data to optimize their automation strategies and improve business outcomes using this new insight into the effectiveness and impact of every part of their workflows.

LAUNCH REGION: GLOBAL

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Commerce Hub™

Maryann Akinboyewa

Principal Product Marketing Manager

Commerce Hub™

BILLING FOR SUBSCRIPTIONS

Automate subscription management and recurring billing from the CRM. Commerce Hub customers can now leverage subscriptions to automatically create and send recurring invoices to buyers.

USE CASE

Manage recurring billing and customer renewals through Commerce Hub Subscriptions. You have had the ability to automatically collect recurring payments and can now use subscriptions to create and manage recurring billing.

LAUNCH REGION: GLOBAL

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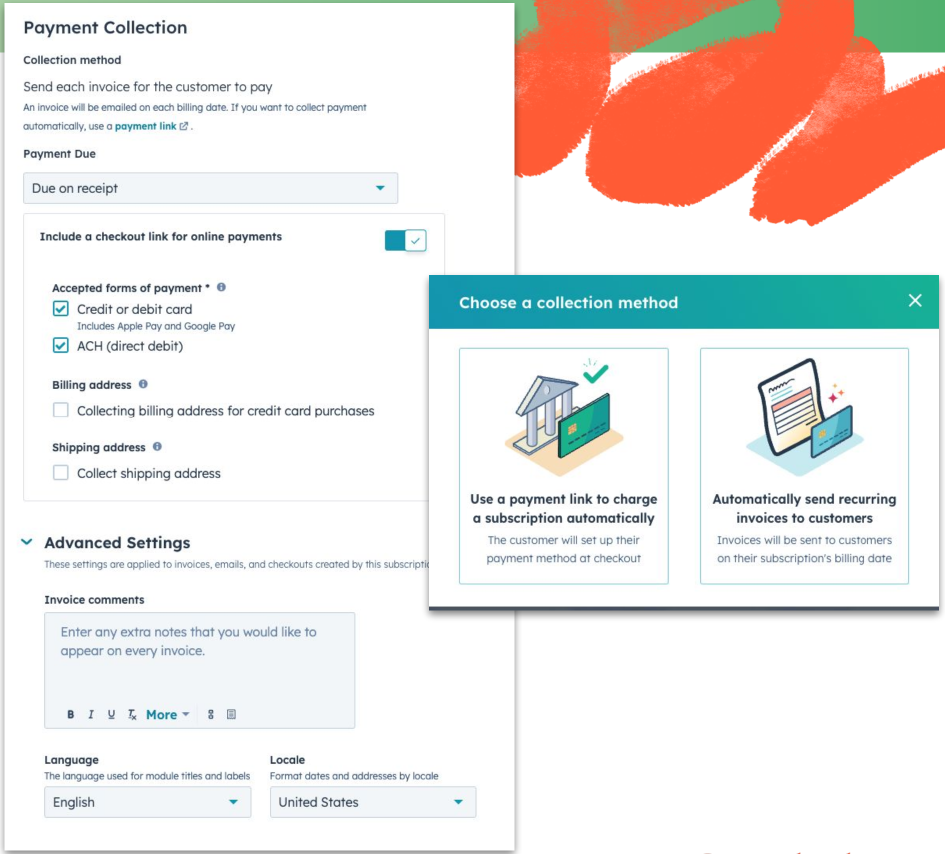


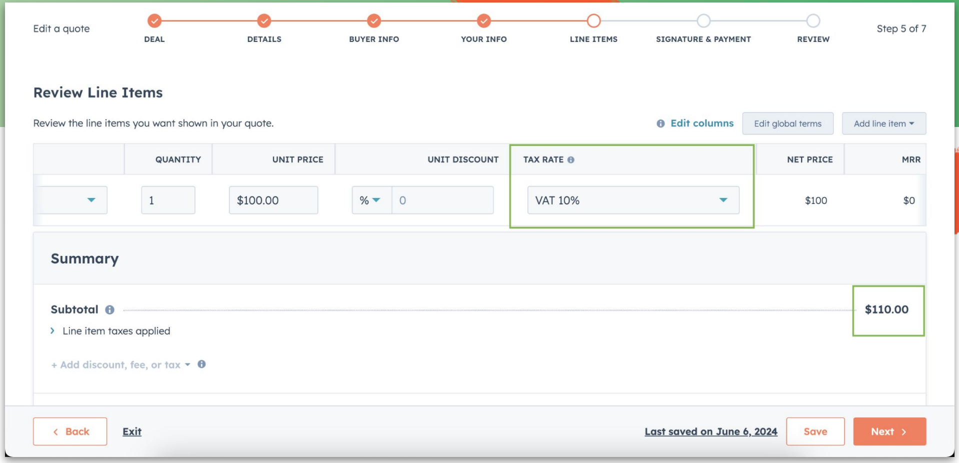
Commerce Hub™

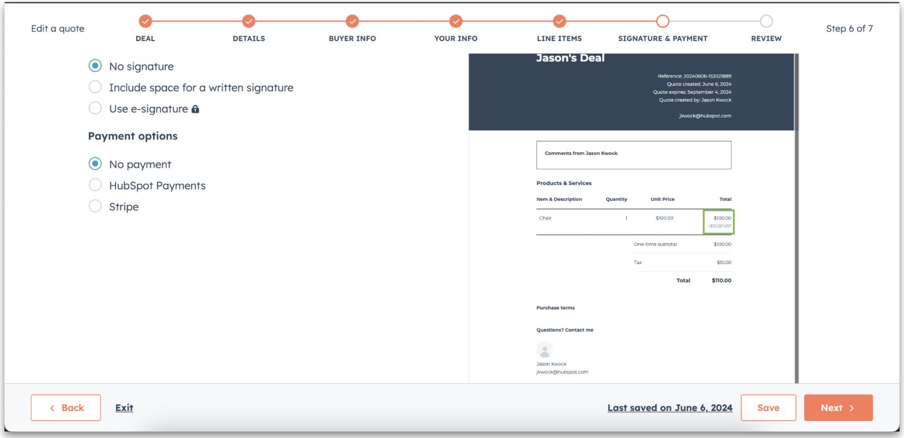
LINE-ITEM TAX

You can now create, organize, and apply tax rates on individual line items across all tools such as Quotes, Deals, Payment links, Invoices, and Subscriptions.

USE CASE

You may require tax to be a part of each product or service you offer. Tax can now be added during line item creation across all tools which allows you to associate tax to a specific line item.





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Commerce Hub™

TWO-WAY SYNC WITH QUICKBOOKS ONLINE

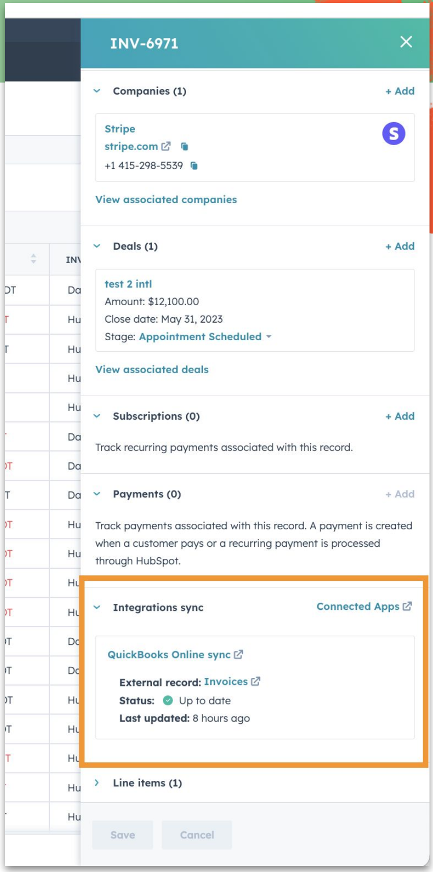
Two-way Invoice Sync for the Quickbooks Online integration is now live to all users! This feature allows users of the HubSpot <> Quickbooks Online (QBO) Integration to sync invoices from HubSpot → Quickbooks and Quickbooks → HubSpot. In addition to syncing invoices, payments applied to invoices will also be synced, whether the payments are created in HubSpot or in Quickbooks.

USE CASE

Two-way invoice sync to QBO is the #1 feature request among Commerce Hub users who are now able to create invoices and payments in HubSpot and have those automatically reflected in their accounting system.

LAUNCH REGION: U.S.

STARTER | PRO | ENTERPRISE | LIVE



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Smart CRM™

Jocelyn Horn

Principal Product Marketing Manager

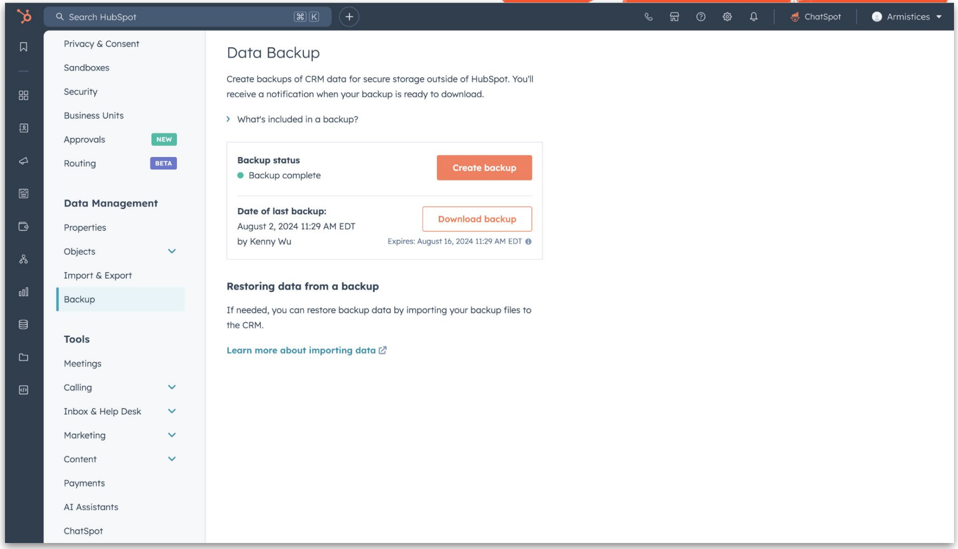
Spotlight FALL '24

Smart CRM™

Enterprise tiers can create a backup every 24 hours, while other tiers can create a weekly backup.

MANUAL CRM DATA BACKUP

CRM Data Backup introduces an important mechanism to protect your data. You now can take a manual export of all contacts, companies, deals, tickets, custom objects, products, calls, tasks, and conversations in a CSV zip file.



USE CASE

Even though we do allow you to export objects individually, there isn't an option to perform a full backup of your data. We often hear that integrations, workflows, and other automations can mistakenly alter your data. Now, you can safely take a backup prior to connecting an integration, starting a workflow, or importing a file, so that in the event of a mistake, you can restore the property values to its previous state.

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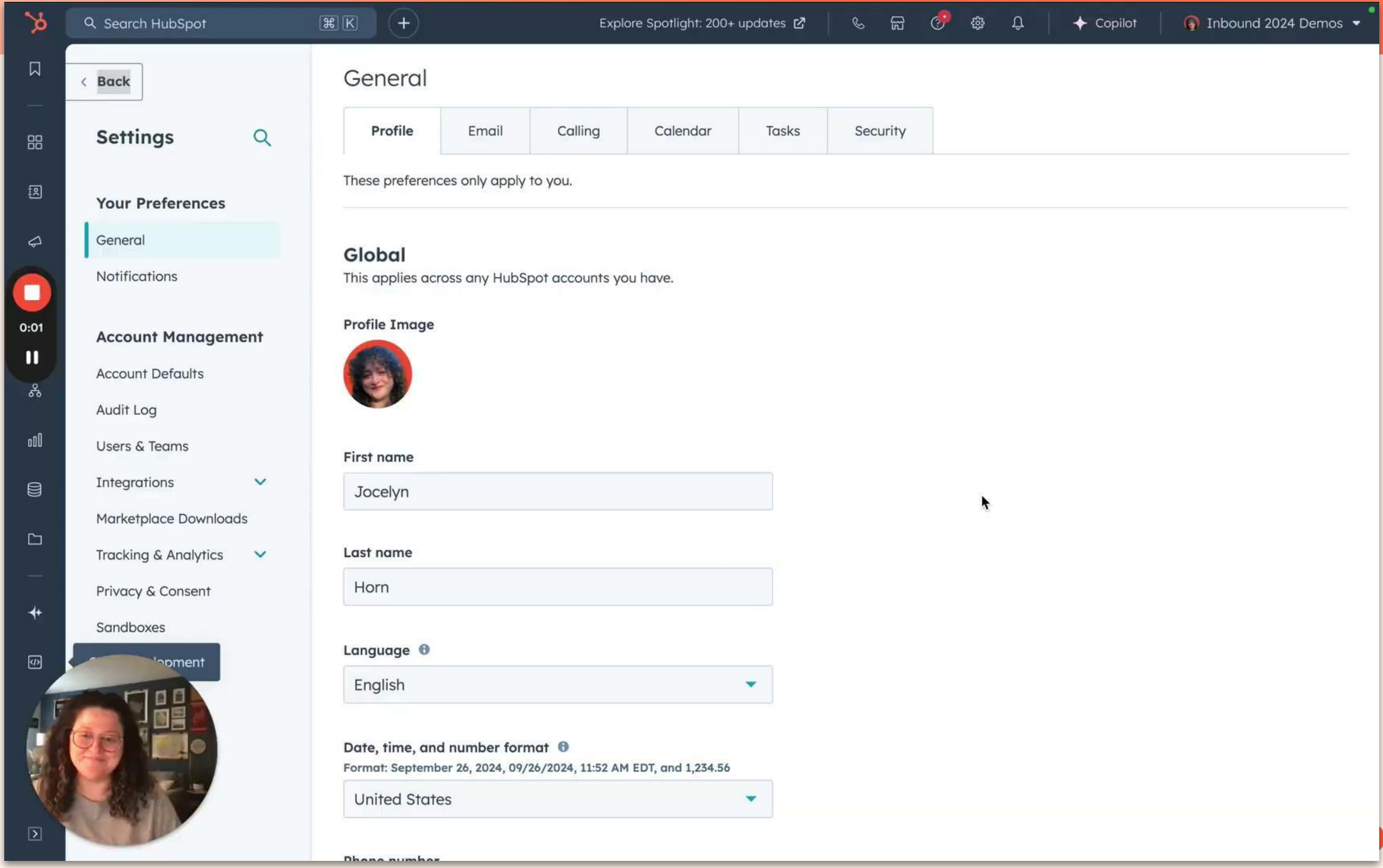
MANUAL CRM DATA BACKUP



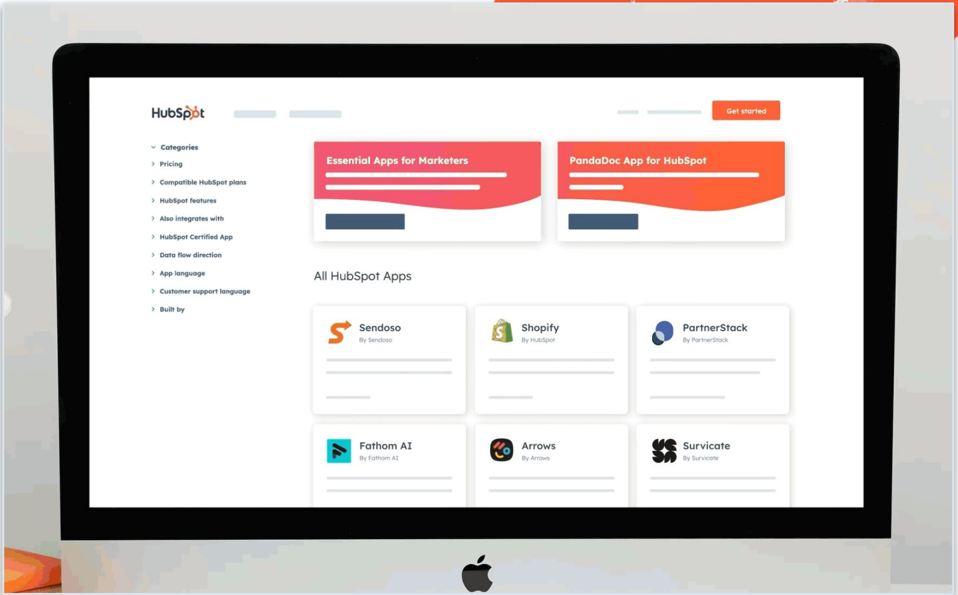
HubSpot App Marketplace

Kara Susvilla

Senior Co-Marketing Manager

APP CARDS POWERED BY UI EXTENSIONS

A custom way to display, sync, and action data between HubSpot and third-party tools, like PandaDoc, Sendoso, and Arrows. See all apps that surface actionable, centralized, and contextual insights right inside HubSpot.



USE CASE

- **Extend the power of HubSpot:** Save valuable time and resources with less context switching
- **Work your way:** Customize app cards to meet your unique business needs
- **Empower your team:** Drive personalization at scale with clear, contextual information

LAUNCH REGION: GLOBAL

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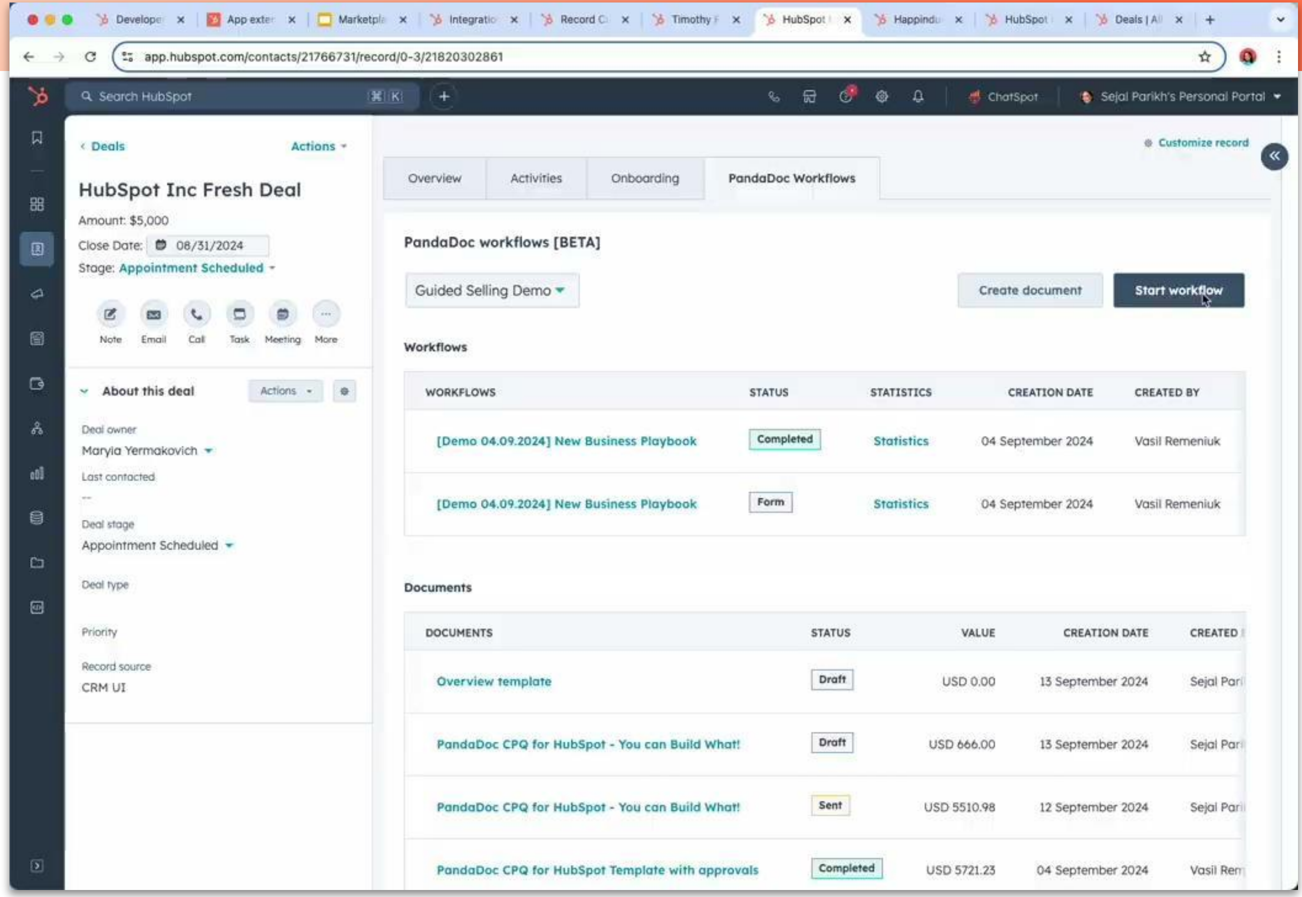
HubSpot App Marketplace



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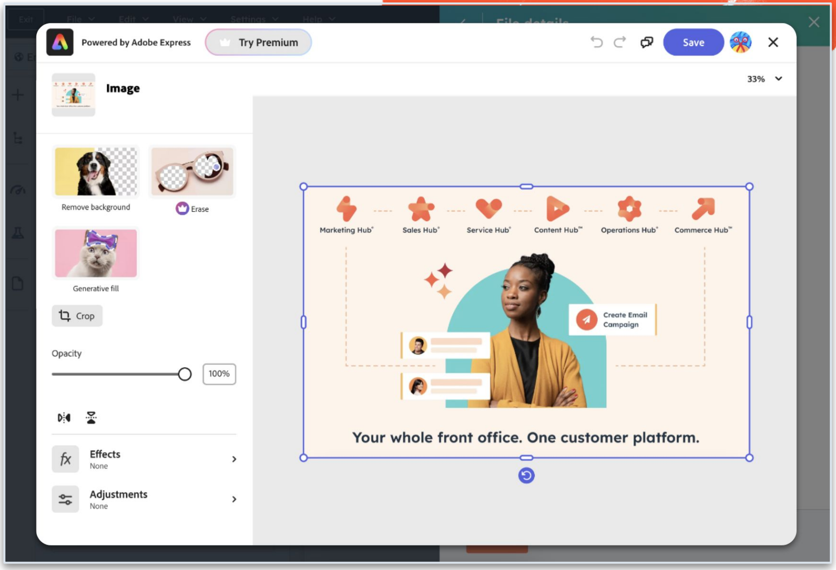
ESSENTIAL APPS FOR MARKETERS

Marketers will have everything they need by combining the power of Marketing Hub and Content Hub with these essential apps.



USE CASE

Popular apps and use cases include:

- **HeyGen**: Use this new app to create AI-generated videos from your blog posts in just a few clicks.
- **Amplitude:** Now updated so you can enrich your CRM data with product usage insights for personalized lead nurturing, pass qualified leads to Sales, and re-ignite at-risk customers.
- **Adobe Express:** Use this new AI content creation app to make stunning images and marketing assets directly in HubSpot.

LAUNCH REGION: GLOBAL

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HubSpot App Marketplace

95+ NEW and 35+ UPDATED APPS

In addition to the new and updated apps highlighted on the previous slides, dozens more apps were updated including:

- **Microsoft Teams**
- **CallRail**
- **Twilio Segment**

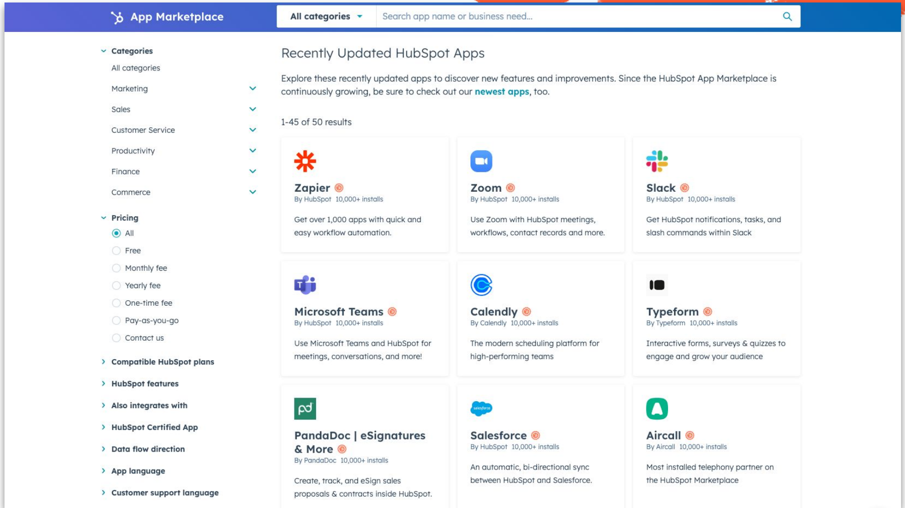
Browse more recently updated and new apps in the App Marketplace.

USE CASE

HubSpot's App Marketplace has 1,700+ apps, with new apps being added and improvements to existing apps being made every day to help you grow better with HubSpot.

LAUNCH REGION: GLOBAL

FREE | STARTER | PRO | ENTERPRISE | LIVE



Breeze™

Irina Nica

Senior Product Marketing Manager

Breeze

COPILOT

Breeze Copilot (formerly ChatSpot) is a powerful AI chat assistant that works with users to get things done in HubSpot. With Copilot, users can gain insights on prospects, generate content across all their marketing channels, prepare for upcoming customer meetings, and talk to the data in their CRM.

USE CASE

Copilot helps all users work more efficiently by giving them a smart assistant that knows about everything in their portal and can quickly accomplish basic tasks across HubSpot.

LAUNCH REGION: GLOBAL

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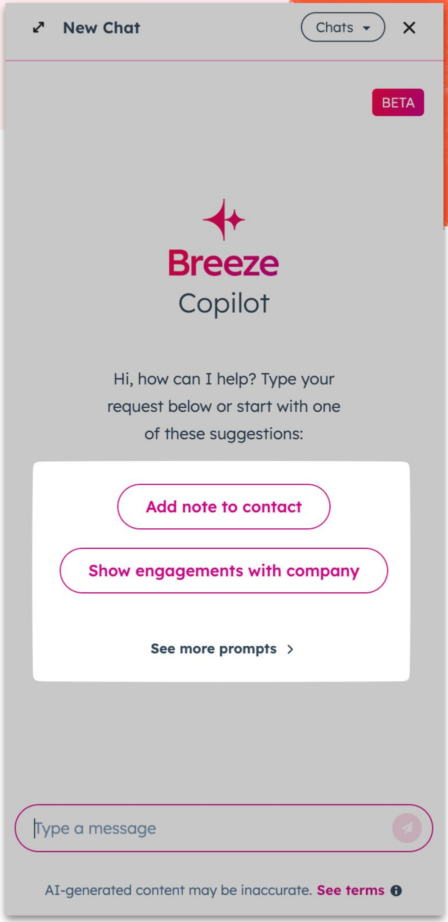


Lisa Edwards

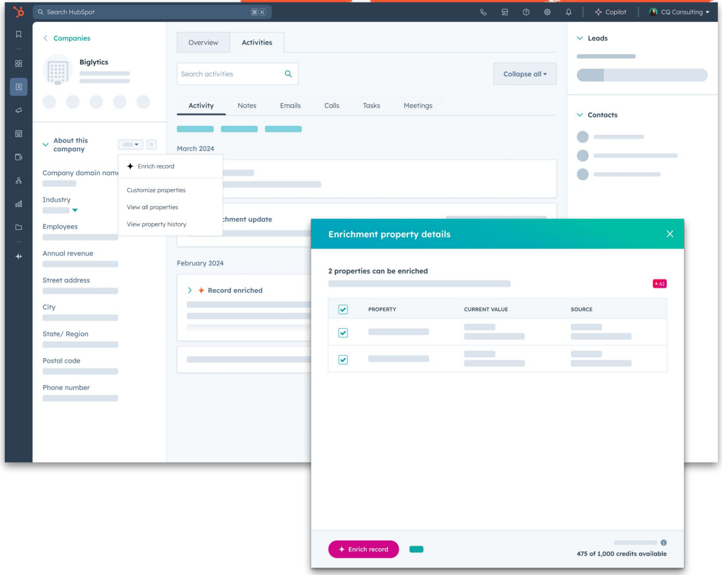
Principal Product Marketing Manager

Breeze™ Intelligence

DATA ENRICHMENT

Under settings there is a new, Enrichment section. This allows you to configure and control settings for both Contact and Company enrichment. Additionally you can see the available contact and company attributes on individual records as well as manage enrichment actions and credit spend within the Smart CRM.

- Enrich company and contact records automatically.
- Manually enrich or re-enrich a company or contact from an existing record.
- Bulk enrich company or contact records.



USE CASE

Enrich your contact and company records with precise, standardized data that your team needs to successfully go-to-market. With over 40+ firmographic, demographic, and technographic attributes across contacts and companies that are continually refreshed, the breadth and depth of the data offered through Breeze Intelligence has what you need to keep your CRM fresh.

LAUNCH REGION: GLOBAL

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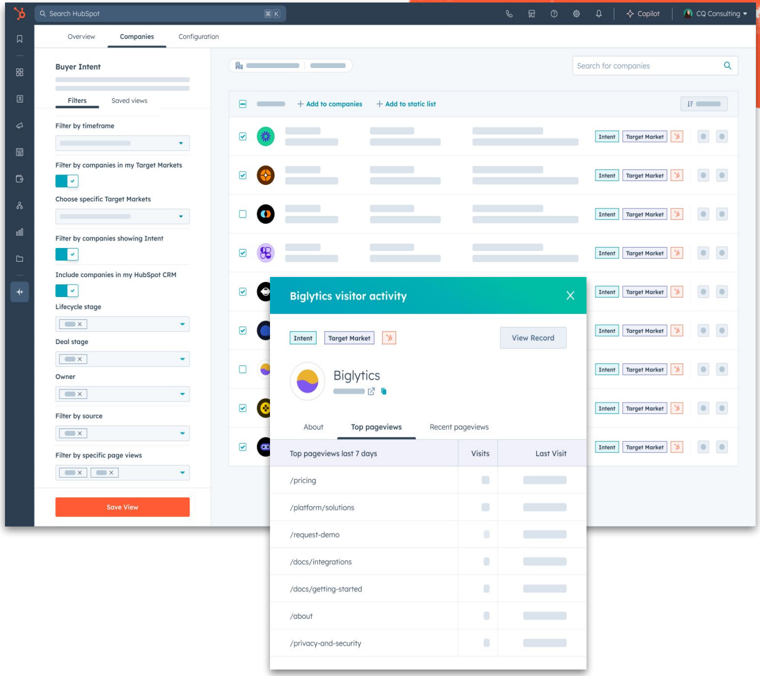
Breeze™ Intelligence

BUYER INTENT

Know what high-fit accounts are visiting and showing intent on your website.

USE CASE

Powered by reverse-IP and enrichment data sources and your own HubSpot Smart CRM data, buyer intent tells you which companies in your target market(s) are ready to buy—regardless if they're already in your CRM or not.



LAUNCH REGION: GLOBAL

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Breeze™
Intelligence

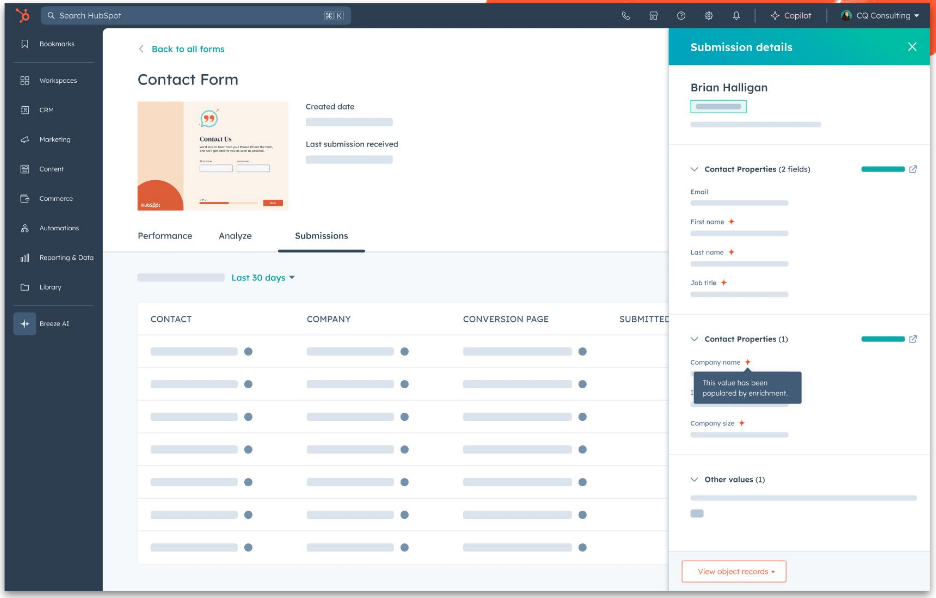
FORM SHORTENING

Capture more leads without sacrificing data.

USE CASE

Extra form fields mean fewer qualified leads. Get the best of both worlds by dynamically shortening your forms with HubSpot's global enrichment database while still collecting the data you need to understand, score, and route your leads with speed and precision.

Note: Form shortening is only available in the new forms editor. If you aren't using the new forms editor yet, simply opt-into the public beta in the "Product Updates" section of your HubSpot portal.



LAUNCH REGION: GLOBAL

FREE | STARTER | PRO | ENTERPRISE | PUBLIC BETA

Q3 2024 Product Recap

Check out all our Public Beta and Live updates from July!

[July At-A-Glance]

Check out all our Public Beta and Live updates from August!

[August At-A-Glance]

Coming Soon!

This deck will be available at the end of September on hubspot.com/new

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Spotlight FALL '24

THANK YOU