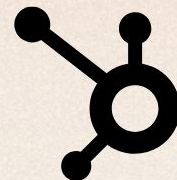


Welcome!

Workspaces for Sales and Customer Success

Tuesday, May 20 — 10 AM EDT | 4 PM CEST

25 SPRING 2025 SP



Some light housekeeping...

Your audio and video will be **disabled** throughout

Use the Q&A section — not the chat — for questions, to ensure we see them

Slides & recording will be shared — just give us 24 hours to get everything processed.



If you're having trouble hearing or seeing us...

- Refresh your browser
- Try a different browser
- Ask for assistance in the Q&A tab

SPRING 2025 SPRING 2025 SPRING 2025



Workspaces for Sales & Customer Success

Jan Bogaert

Senior Product Marketer,
Sales Hub

Caitlyn Cimikoski

Principal Product Marketer,
Service Hub

Jeff Kushmerek

CEO & Founder
Infinite Renewals



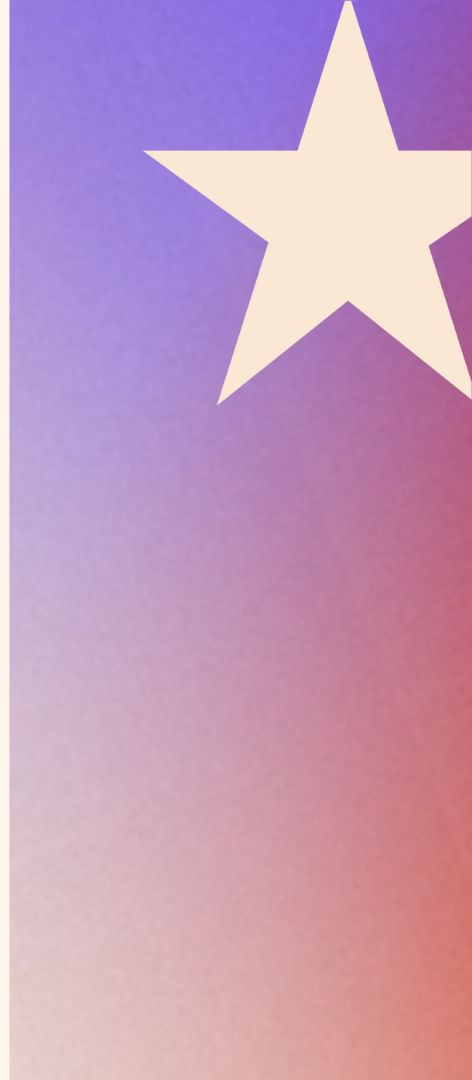
2025 SPRING

Today's Agenda

- 02 MIN** Welcome & Intros
- 15 MIN** Explore the Sales Workspace
- 15 MIN** Explore the Customer Success Workspace
- 15 MIN** Partner Spotlight: Infinite Renewals
- 10 MIN** Live Q&A

01

Explore the Sales Workspace



What is the sales workspace?



"I tell all our clients, **'The sales workspace is where your day starts'**. Simply using its meeting prep and follow-up capabilities transforms average sellers into standout performers."



Anders Björklund,
Founder & CEO at
Zooma Agency

"The sales workspace is our one-stop shop. As a PLG company, **our sellers rely on it every day** to identify high-quality inbound leads, prioritize follow-ups, and track deal progression"



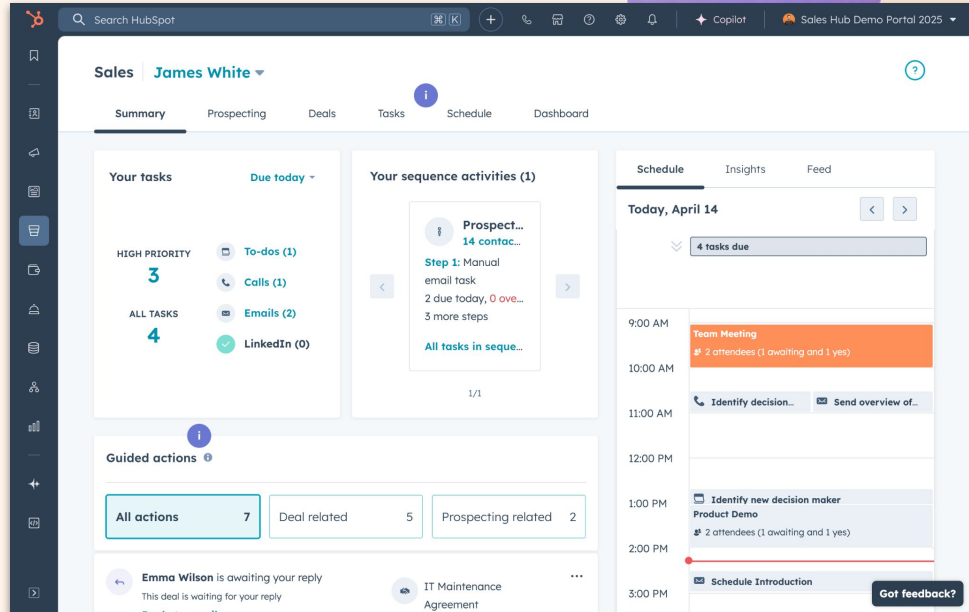
Bill Mooney,
Sales Director at
Time Doctor

Huge updates to the Sales Workspace

- Enhanced guided actions
- New daily digest
- Added Tasks tabs
- Added Dashboard tabs
- Added target accounts
- New HubSpot Notetaker (Beta)
- And more...

 Professional+

Requires Sales Seat



Search HubSpot

Sales | James White

Summary | Prospecting | Deals | Tasks | Schedule | Dashboard

Your tasks Due today

HIGH PRIORITY **3**

- To-dos (1)
- Calls (1)

ALL TASKS **4**

- Emails (2)
- LinkedIn (0)

Your sequence activities (1)

Prospect... 14 contact...

Step 1: Manual email task

2 due today, 0 over... 3 more steps

All tasks in sequence...

1/1

Guided actions

All actions 7 | Deal related 5 | Prospecting related 2

Emma Wilson is awaiting your reply
This deal is waiting for your reply

IT Maintenance Agreement

Schedule | Insights | Feed

Today, April 14

4 tasks due

9:00 AM **Team Meeting**
2 attendees (1 awaiting and 1 yes)

10:00 AM Identify decision... | Send overview of...

11:00 AM

12:00 PM

1:00 PM Identify new decision maker
Product Demo
2 attendees (1 awaiting and 1 yes)

2:00 PM

3:00 PM Schedule Introduction

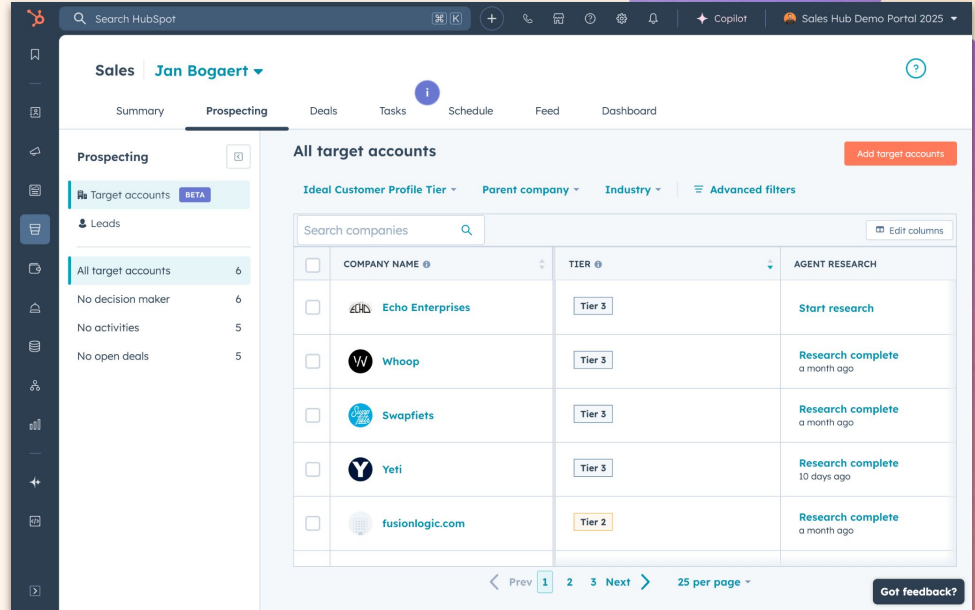
Go feedback?

Target accounts in the workspace

The sales workspace now supports account-based selling. By adding target accounts into the fold, sellers can easily keep track and engage with all of their ideal customers from the Prospecting tab.

 Professional+

Requires Sales Seat



The screenshot displays the HubSpot Sales workspace interface. The top navigation bar includes the search bar, user profile (Jan Bogaert), and various utility icons. The main content area is divided into two sections: 'Prospecting' on the left and 'All target accounts' on the right. The 'Prospecting' section shows a sidebar with 'Target accounts' (6), 'Leads', and 'All target accounts' (6). The 'All target accounts' section features a table with columns for 'COMPANY NAME', 'TIER', and 'AGENT RESEARCH'. The table lists five companies: Echo Enterprises (Tier 3), Whoop (Tier 3), Swapfiets (Tier 3), Yeti (Tier 3), and fusionlogic.com (Tier 2). Each row includes a checkbox, a 'Start research' button, and a status indicator (e.g., 'Research complete a month ago').

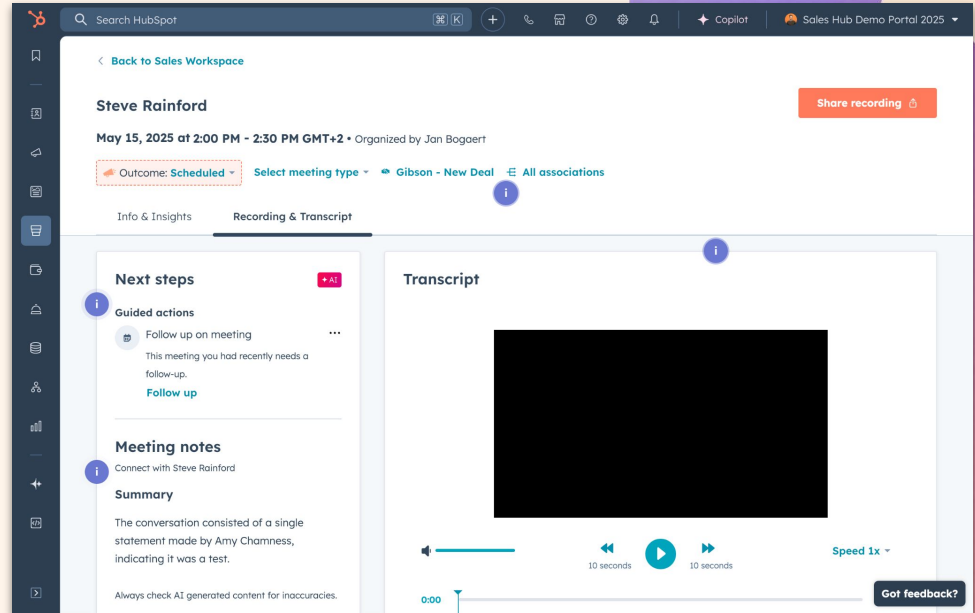
COMPANY NAME	TIER	AGENT RESEARCH
<input type="checkbox"/> Echo Enterprises	Tier 3	Start research
<input type="checkbox"/> Whoop	Tier 3	Research complete a month ago
<input type="checkbox"/> Swapfiets	Tier 3	Research complete a month ago
<input type="checkbox"/> Yeti	Tier 3	Research complete 10 days ago
<input type="checkbox"/> fusionlogic.com	Tier 2	Research complete a month ago

Enhanced AI Meeting Assistant

Sales reps can use meeting assistant on the Schedule tab to prepare for meetings and to follow up after meetings. Meeting assistant provides detailed information about your meeting attendees, suggests activities for you before and after meetings, and provides AI-generated summaries.

 Professional+

Requires Sales Seat



The screenshot displays the Salesforce HubSpot interface for a meeting recording. The top navigation bar includes the HubSpot logo, a search bar, and various utility icons. The main content area is titled "Steve Rainford" and shows the meeting details: "May 15, 2025 at 2:00 PM - 2:30 PM GMT+2 • Organized by Jan Bogaert". A "Share recording" button is visible in the top right. Below the meeting details, there are tabs for "Info & Insights" and "Recording & Transcript". The "Recording & Transcript" tab is active, showing a "Next steps" section with a "Guided actions" card that suggests following up on the meeting. The "Meeting notes" section provides a summary of the conversation. The transcript area on the right shows a video player with a play button and a "Speed 1x" dropdown menu. A "Got feedback?" button is located at the bottom right of the transcript area.

03

Explore the Customer Success Workspace



Customer Success Workspace

Drive proactive customer value and empower reps to manage their entire book of business in one place, with the new customer success workspace.

Professional+

Requires Service Seat

The screenshot displays the Customer Success Workspace interface. The main view is a 'Portfolio' of companies, with a table listing their health status and scores. A detailed view for 'Torp Co' is open on the right, showing its health score of 83 and key factors.

COMPANY NAME	HEALTH STATUS	HEALTH SCORE
<input type="checkbox"/> Torp Co	HEALTHY	83
<input type="checkbox"/> [Company]	NEUTRAL	65
<input type="checkbox"/> [Company]	AT-RISK	32
<input type="checkbox"/> [Company]	AT-RISK	55
<input type="checkbox"/> [Company]	NEUTRAL	71

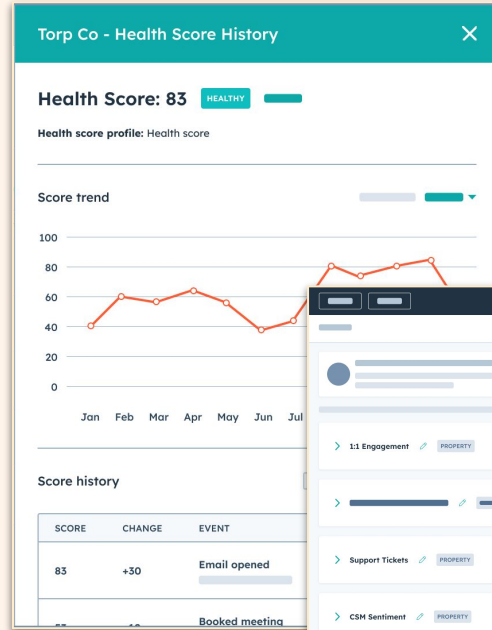
Torp Co Health score: **83** (HEALTHY)

Key factors: [Bar chart]

Last 7 days: [Trend line]

Health Scores

Identify customer churn risk with health scores, prioritize outreach, and address customer needs proactively.



Companies Calculations Settings

Group score limit +/- 20 (0 points remaining)

Group score limit +/- 20 (0 points remaining)

Group score limit +/- 20 (0 points remaining)

 Professional+

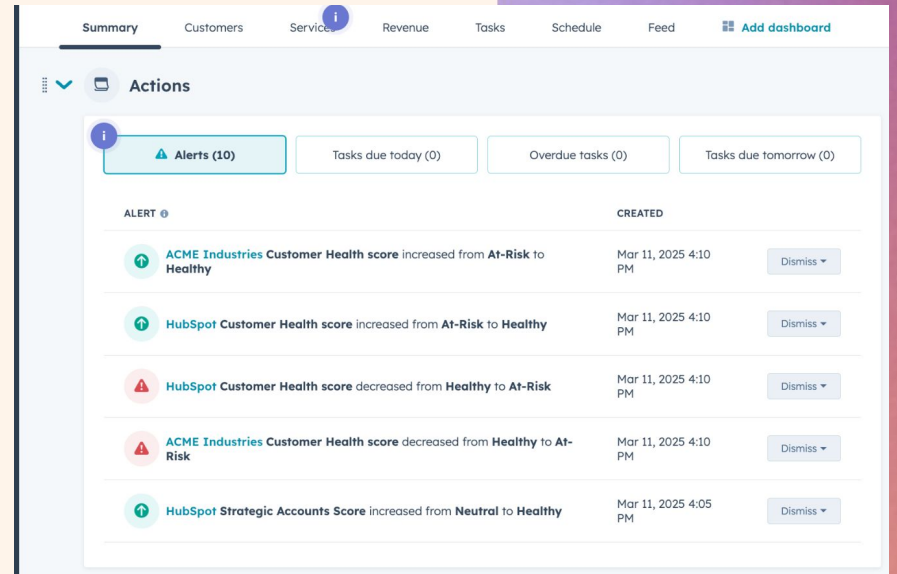
Requires Service Seat

Health Score Alerts






Receive alerts when health scores change status, ensuring your team has real-time information to make decisions. Create a score based on a company, contact, or custom object.

 Professional+

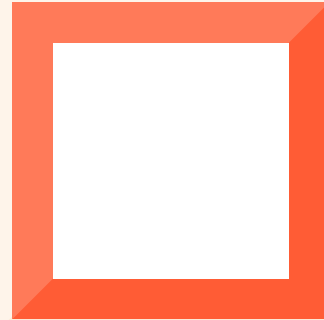
Requires Service Seat



The screenshot displays a CRM dashboard with a navigation bar at the top containing 'Summary', 'Customers', 'Service' (with an information icon), 'Revenue', 'Tasks', 'Schedule', 'Feed', and 'Add dashboard'. Below the navigation bar is an 'Actions' section with a sub-header 'Alerts (10)' and three summary cards: 'Tasks due today (0)', 'Overdue tasks (0)', and 'Tasks due tomorrow (0)'. The main content area is titled 'ALERT' and lists five alerts with columns for 'ALERT' and 'CREATED'. Each alert includes a status icon, a description of the health score change, the creation time, and a 'Dismiss' button.

ALERT	CREATED
 ACME Industries Customer Health score increased from At-Risk to Healthy	Mar 11, 2025 4:10 PM Dismiss
 HubSpot Customer Health score increased from At-Risk to Healthy	Mar 11, 2025 4:10 PM Dismiss
 HubSpot Customer Health score decreased from Healthy to At-Risk	Mar 11, 2025 4:10 PM Dismiss
 ACME Industries Customer Health score decreased from Healthy to At-Risk	Mar 11, 2025 4:10 PM Dismiss
 HubSpot Strategic Accounts Score increased from Neutral to Healthy	Mar 11, 2025 4:05 PM Dismiss

Are you interested in
arranging a demo of
our tools for your
specific use case?



04

Partner Spotlight: Infinite Renewals





Connect on LinkedIn



Infinite Renewals



Jeff

Jeff Kushmerek
CEO & Founder
Infinite Renewals



05

Live Q&A with Caitlyn and Jan





Thank you!