SaaSSolutions

Platinum HubSpot
SOLUTIONS PARTNER PROGRAM

Unlock Your Sales Team's Potential with AI

A Sales Leader's Guide to Adopting HubSpot AI

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Elevate Your Sales Game with HubSpot AI

Today's buyers are harder to reach than ever before. Your team's performance is under constant scrutiny. Your time and budget are spread thin, and hitting your quotas seems increasingly difficult.

How will you empower your teams to meet (and, ideally, exceed) their sales targets?

With Hubspot AI

By embedding intuitive AI functionality into the HubSpot sales tools you and hundreds of thousands of companies already use, we've created a way for you to level up your existing sales strategies.

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What is HubSpot AI?

HubSpot AI is a toolkit of AI-powered capabilities embedded across the customer platform to help you work smarter. It includes features that leverage AI and your Smart CRM data to supercharge marketing, sales, and service efficiency while creating more personalized customer experiences at scale.

Sales Hub®

Marketing Hub®

Service Hub®

Content Hub™

Operations Hub®

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The Strategic CMO's Guide to Amplifying Revenue

Easy, fast, and unified

With help from HubSpot AI, your team will be able to spend less time on administrative tasks and more time doing what they do best: connecting, convincing, and closing.

HubSpot AI is easy to use

with no barriers to entry. This means that teams across your business can get started using it fast.

The best part?

HubSpot AI unifies your customer data, combined with knowledge from third-party sources, providing valuable insights and the smartest AI for your company. For sales teams, HubSpot AI enables you to automate tasks, uncover actionable insights, and personalize interactions that transform leads into loyal customers.

How HubSpot AI Helps Boost Your Team's Performance

Sales Hub's built-in AI tools streamline your path to deal closure, elevate your team's productivity, and refine your sales tactics.

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Boost Efficiency

76% **of HubSpot AI users say they have more time for sales activities**

HubSpot's AI-powered sales tools streamline your sales process to transform your leads from qualified to closed-won.

Increase Effectiveness

62% **of HubSpot AI users say they uncover new data insights**

HubSpot AI unlocks intelligent insights that take your information from accessible to actionable, creating more opportunities to turn leads into customers.

Scale Growth

81% **of HubSpot AI users say they cut down on administrative tasks**

HubSpot AI equips sales reps with AI tools that are embedded right where they need them on the customer platform.

*According to a survey of 3,100+ business professionals using HubSpot AI in early 2024

With forward-thinking security measures, compliance with applicable data protection laws and regulations, and comprehensive options for you to manage your data, HubSpot AI ensures your sensitive information is safe. HubSpot AI tools leverage both AI systems provided by our trusted AI service providers and our own HubSpot AI systems. When you use HubSpot AI to supercharge your work, our AI service providers won't train their models using your data.

HubSpot AI has been a game-changer for our Sandler marketing and sales teams, helping both groups create personalization at scale with outbound messaging, actionable insights, and increasing new prospect engagement with our brand by 25%.

Emily Reggia, Marketing Director, Enterprise at Sandler

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Fast-Track Your Sales with HubSpot AI: Key Use Cases

Whether you're most interested in lead scoring or CRM management, HubSpot AI has the functionality to help you win more.

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Boost Outreach with AI-Generated Sales Emails

Instantly draft cold outreach, introduction, and follow-up emails directly in Gmail, Outlook, and the HubSpot mobile app.

Here's how

Just input your talking points, insights, and preferred tone to generate personalized, engaging emails in moments, right where you work.

Generate content ✕

Email type *

Introduction email ▾

What are you selling? *

Ex: Sales software that increases rep productivity and drives revenue

Who are you selling to? *

Ex: Mary Doe, the Chief Sales Officer of Acme, Inc.

In a few words describe what you want to communicate in this email

Describe why your product is a great fit for the prospect and include any benefits. Mention any personal connections or points you want to make.

Select the tone of your email

☐ Professional ☐ Helpful ☐ Witty ☐ Formal ☐ Optimistic

Bottom-line benefit
Streamline email creation, saving time while boosting relevance and personalization for your audience.

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Optimize Sales Reporting

Create insightful reports swiftly by using natural language.

Here's how

Simply type what you want your report to be about—from deal win-loss rates to monthly team performance—and let HubSpot AI create it for you.
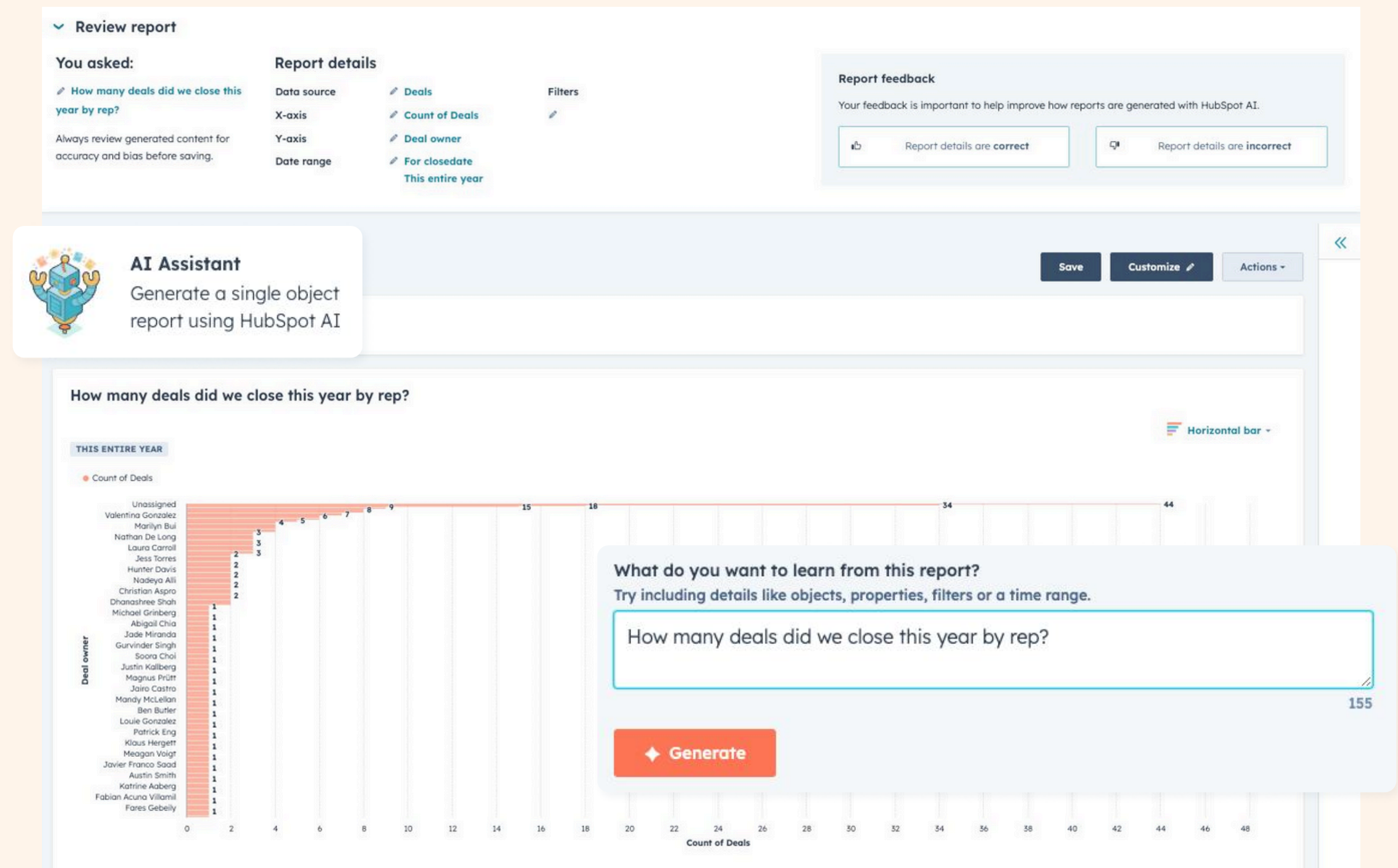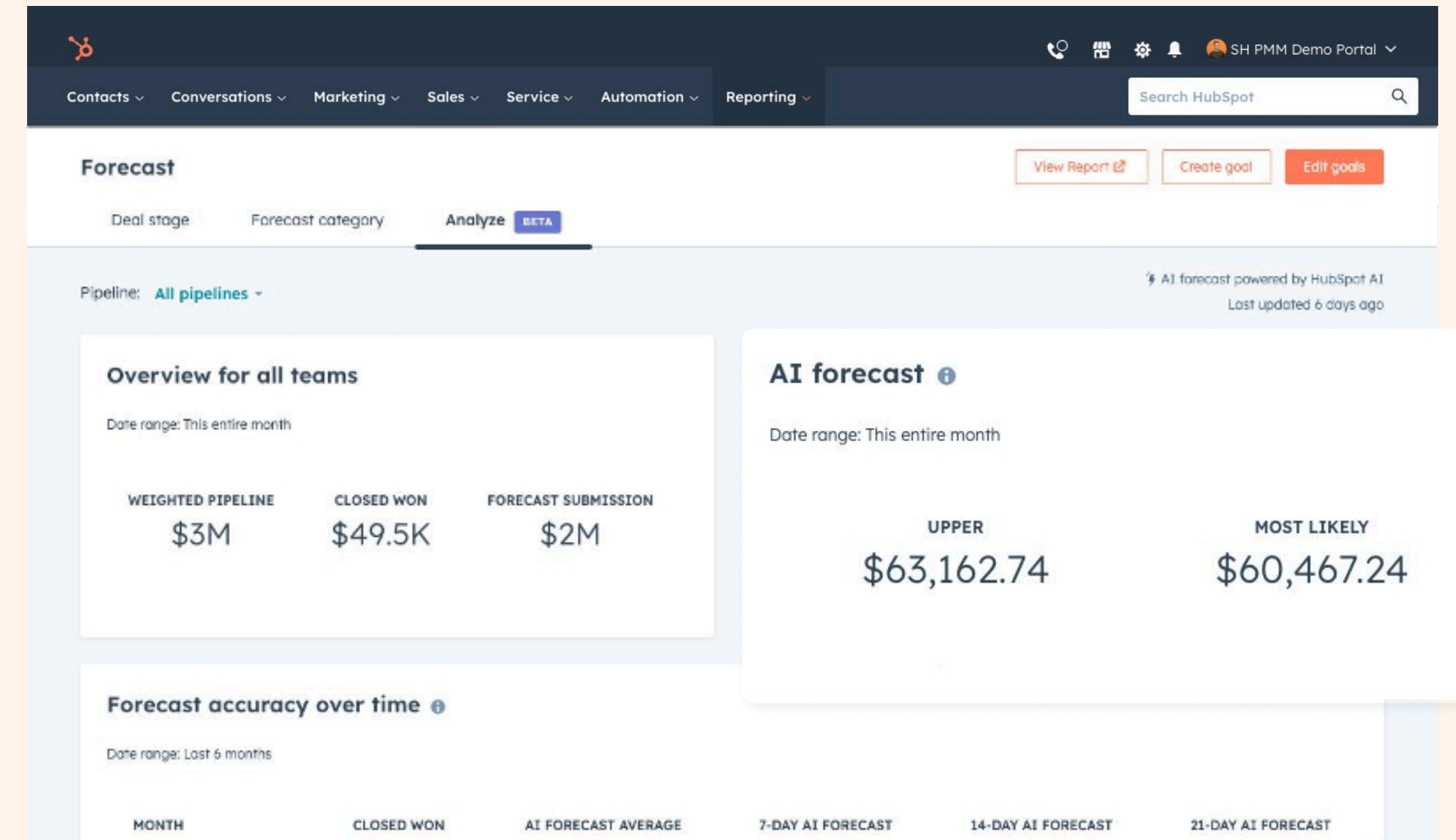

Bottom-line benefit
You'll save time and gain deeper insights into your sales performance — giving you what you need to make better decisions.

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Refine Forecasting Accuracy

Predict sales outcomes more accurately with AI-powered forecasting, based on your historical data.

Here's how

Use these insights in your planning and benefit from a smooth, integrated forecasting process.
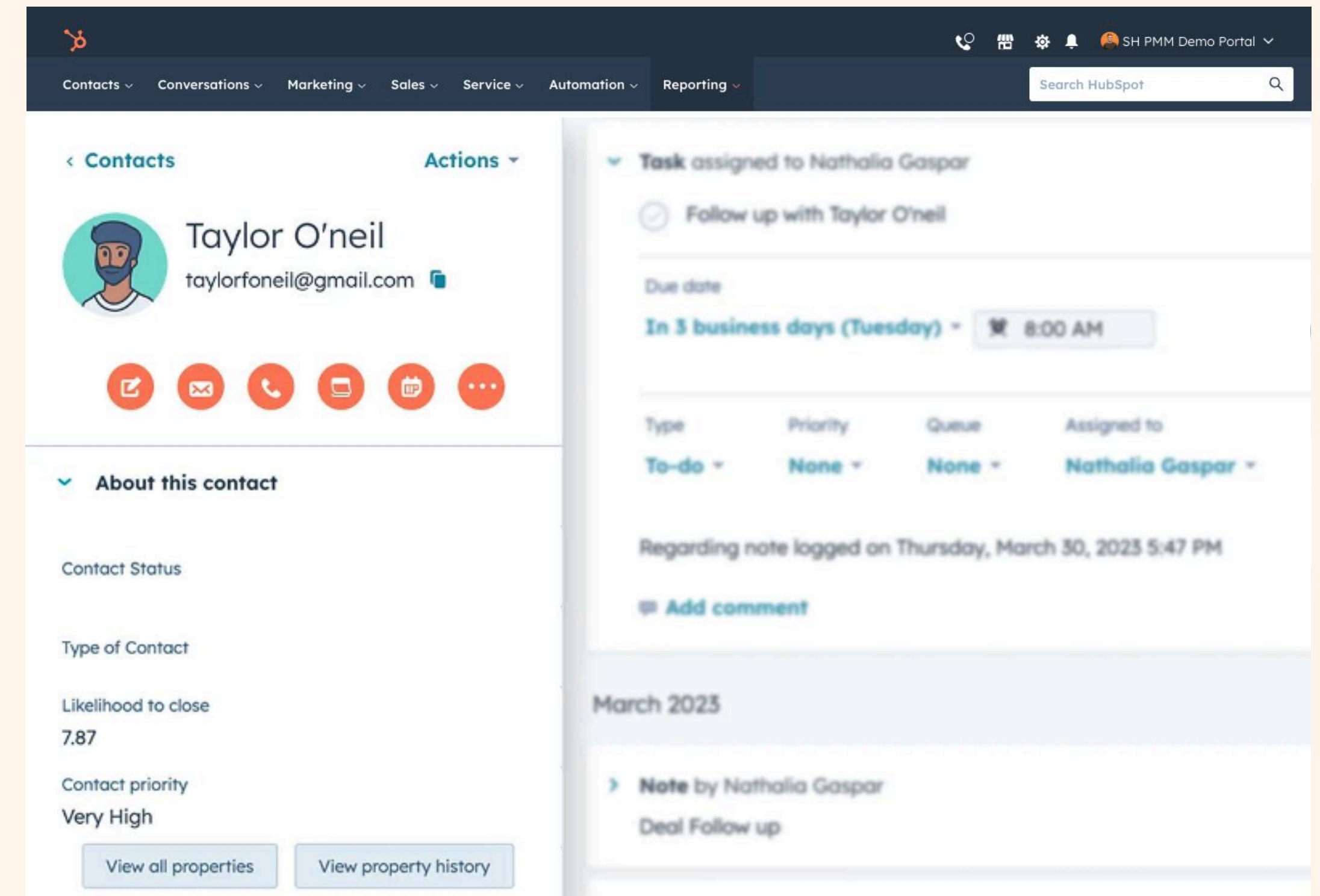

Bottom-line benefit
Reduced forecasting errors and a more streamlined process lead to more accurate sales predictions and better planning.

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Elevate Lead Management

Let AI help evaluate your leads based on comprehensive data so you can hone your focus and prioritize your follow-ups.

Here's how

HubSpot's AI analyzes leads and instantly updates scores for effective and easily visible prioritization.
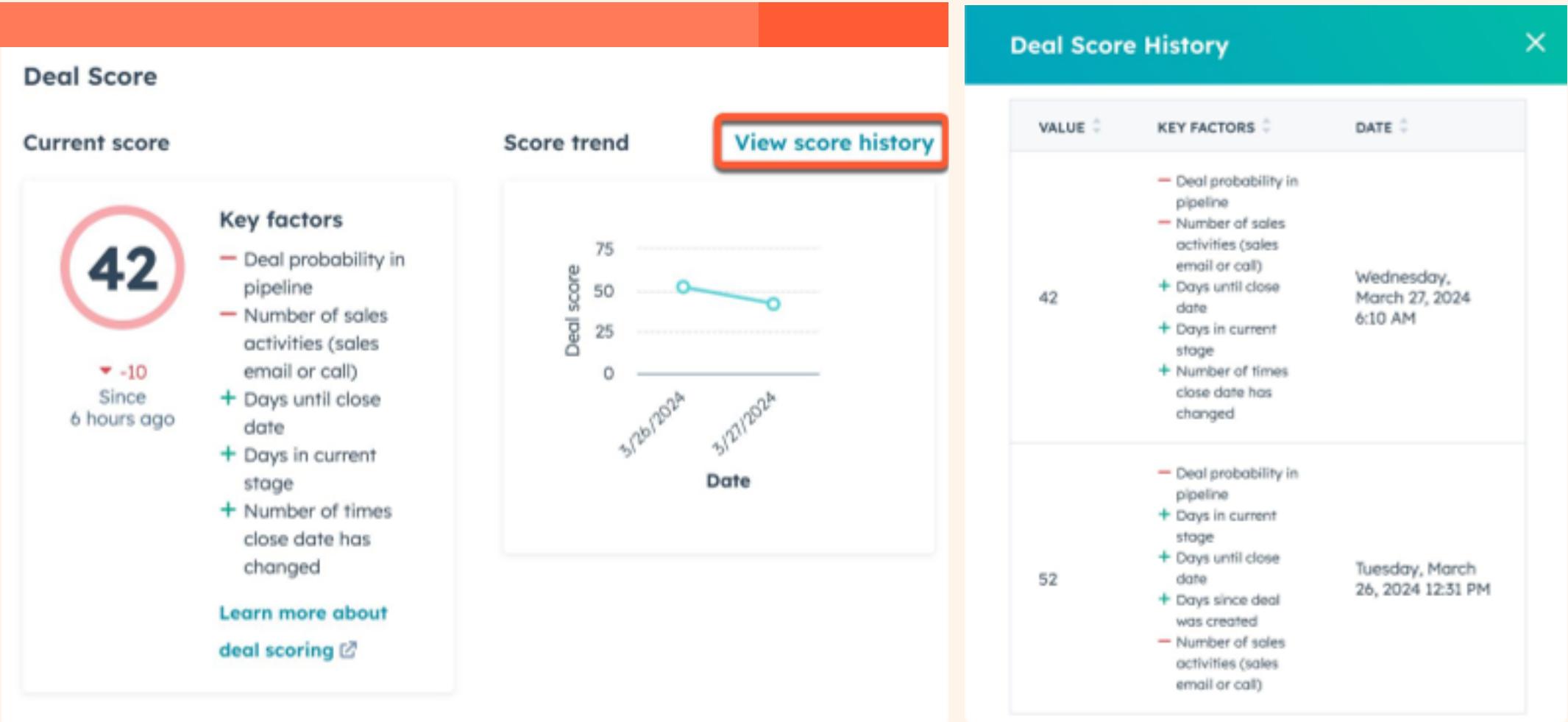

Bottom-line benefit
Boost sales efficiency and closing rates with HubSpot's data-driven lead prioritization, and enjoy enhanced decision-making and focus.

Optimize AE Prioritization

Enhance deal focus with Predictive Deal Scoring by automatically providing scores that gauge the likelihood of deal closures.

Here's how

Access deal scores to strategically align your efforts. The result? You can focus your efforts where they will have the most impact.
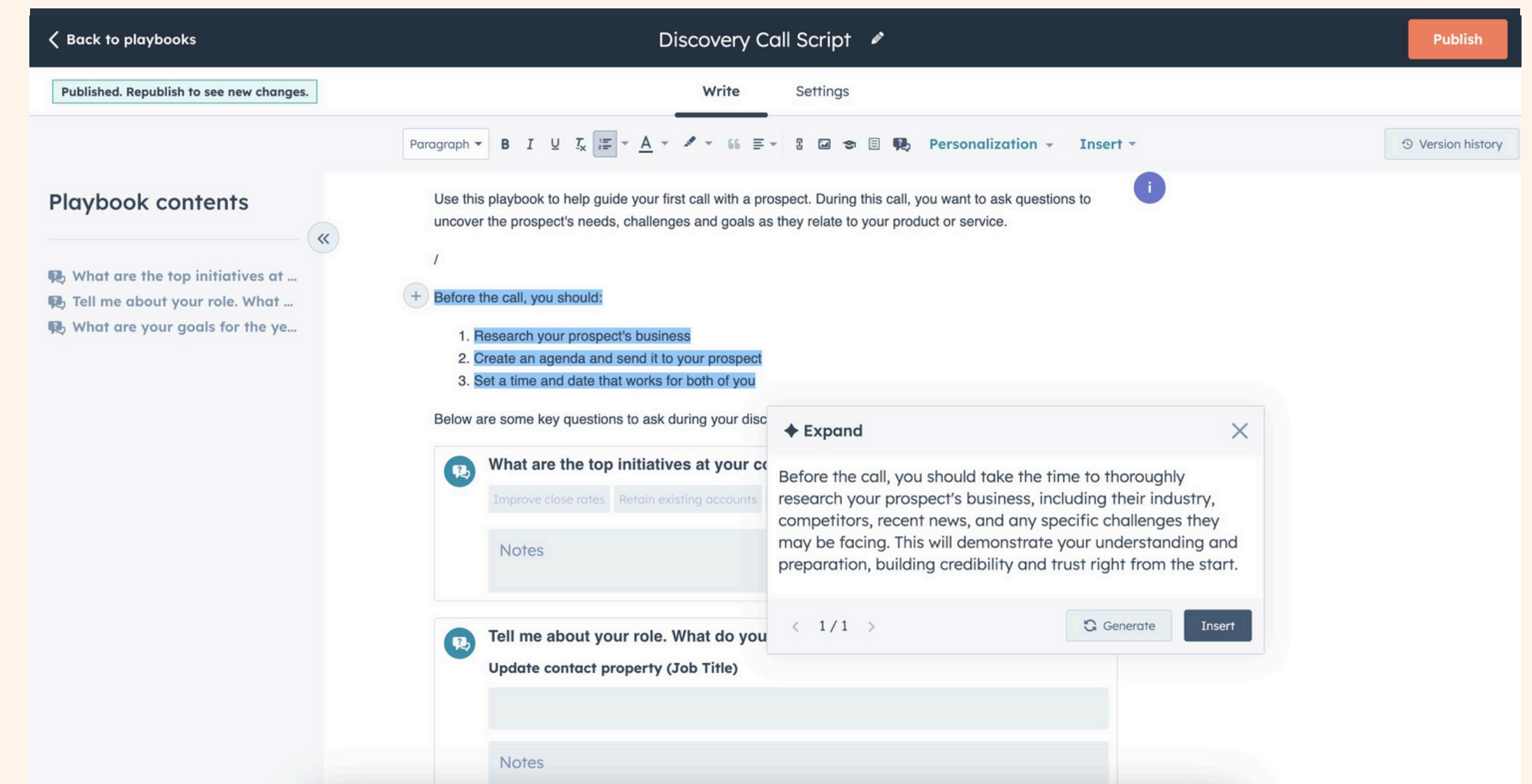

Bottom-line benefit
Sharpen your focus on high-priority deals, optimize outreach efforts, and improve your chances of closing the most valuable opportunities.

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Enhance Sales Playbooks

Streamline playbook and sales enablement content creation with HubSpot's AI content writer.

Here's how

Use AI-generated content to draft lead qualification scripts, product pitch guidelines, and closing technique outlines so your team can spend more time on ideation and final edits.

Bottom-line benefit
Developing the resources your sales team needs to succeed has never been easier.

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Reply Faster and Simplify Email Management

Gain instant, concise summaries of long email threads so you can respond to prospects promptly and effectively.

Here's how

These easy-read summaries can help you speed up client engagement without extra steps.

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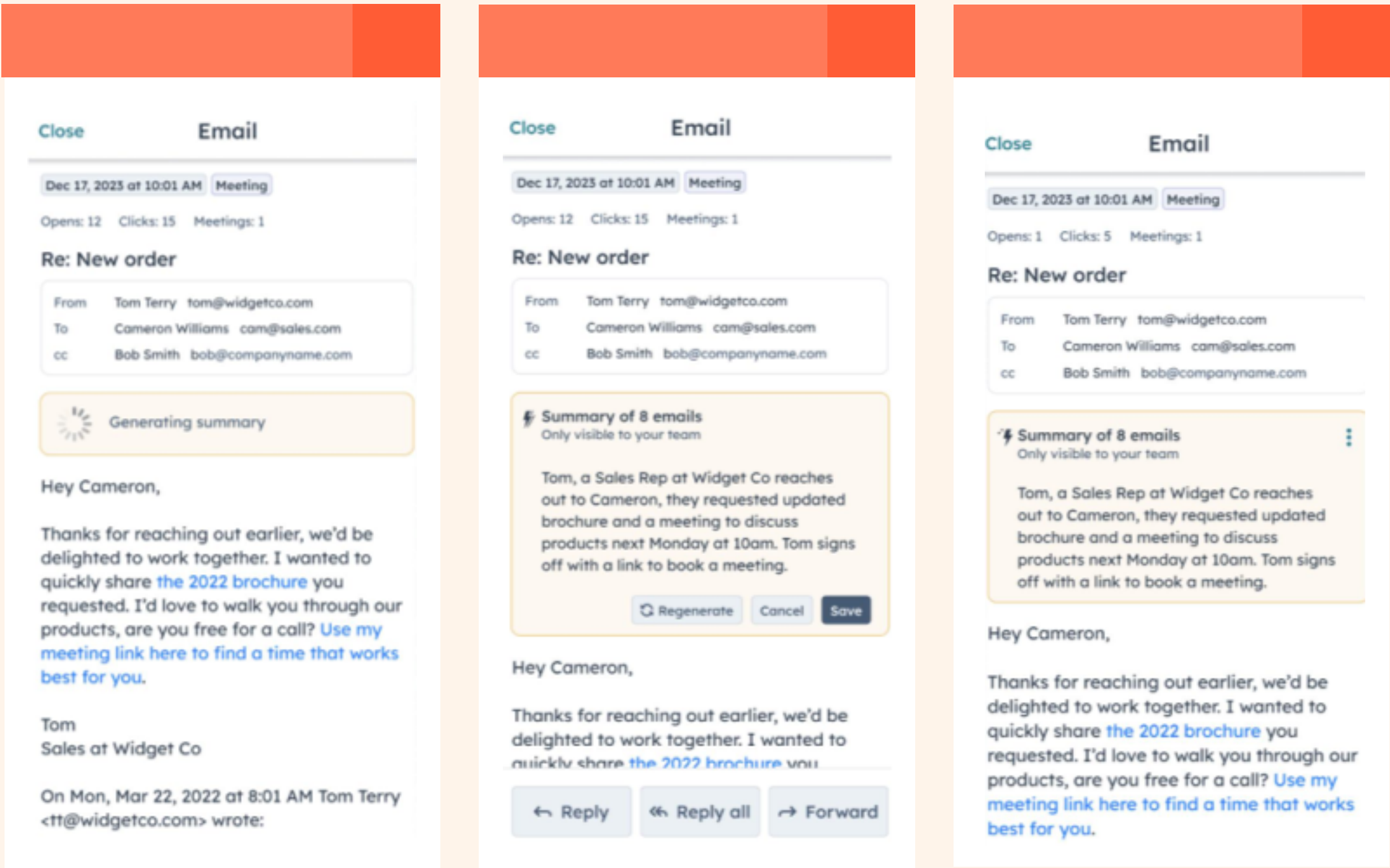
Bottom-line benefit
Save valuable time by quickly understanding email content. You'll also be able to send faster, more informed responses to prospects.

Get Post-Call Suggested Next Steps

Proactively take action to improve customer satisfaction with a generated list of post-call next steps.

Here's how

When you click to Generate a call summary, HubSpot AI will provide an overview of your call plus recommended actions.
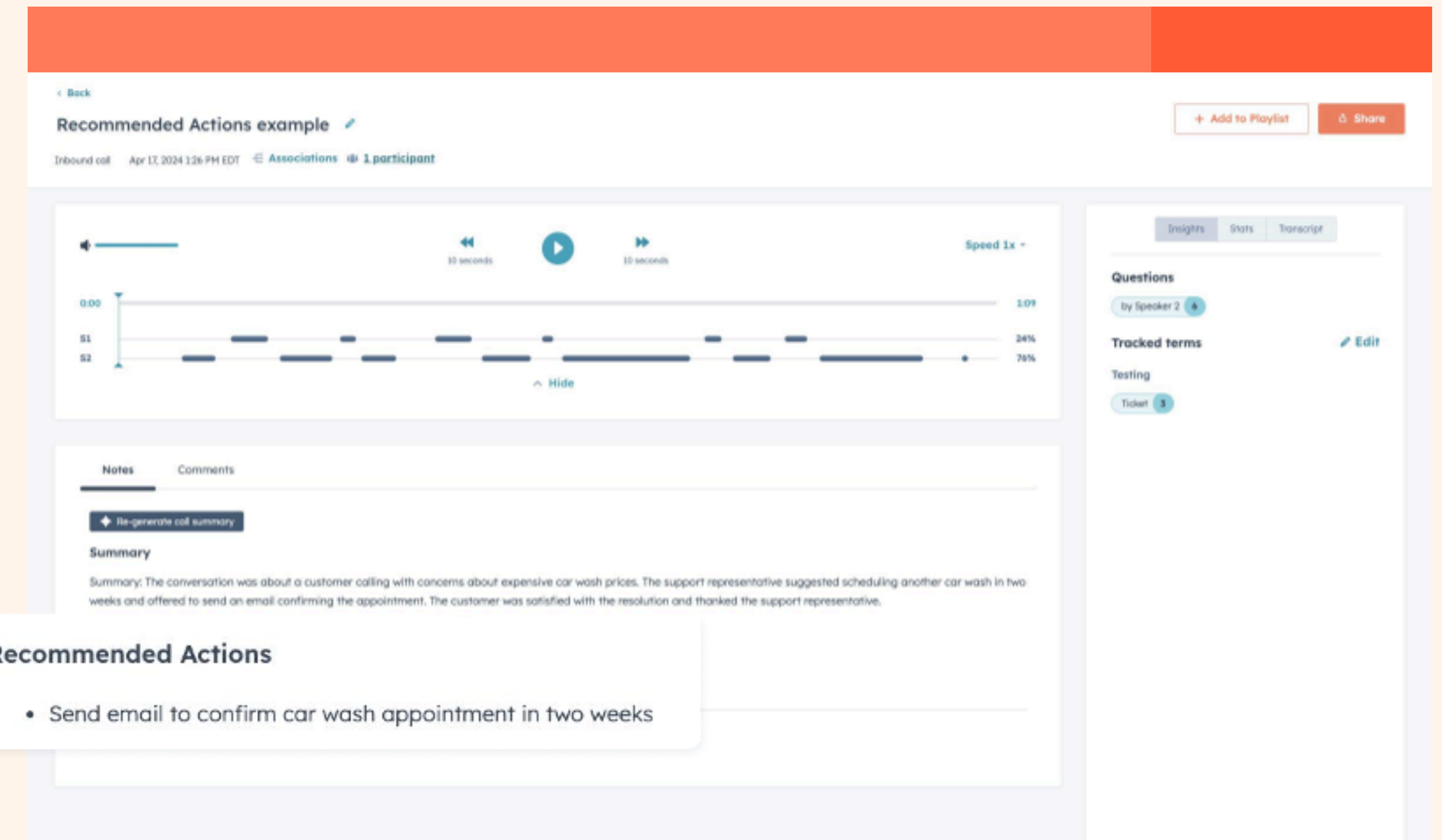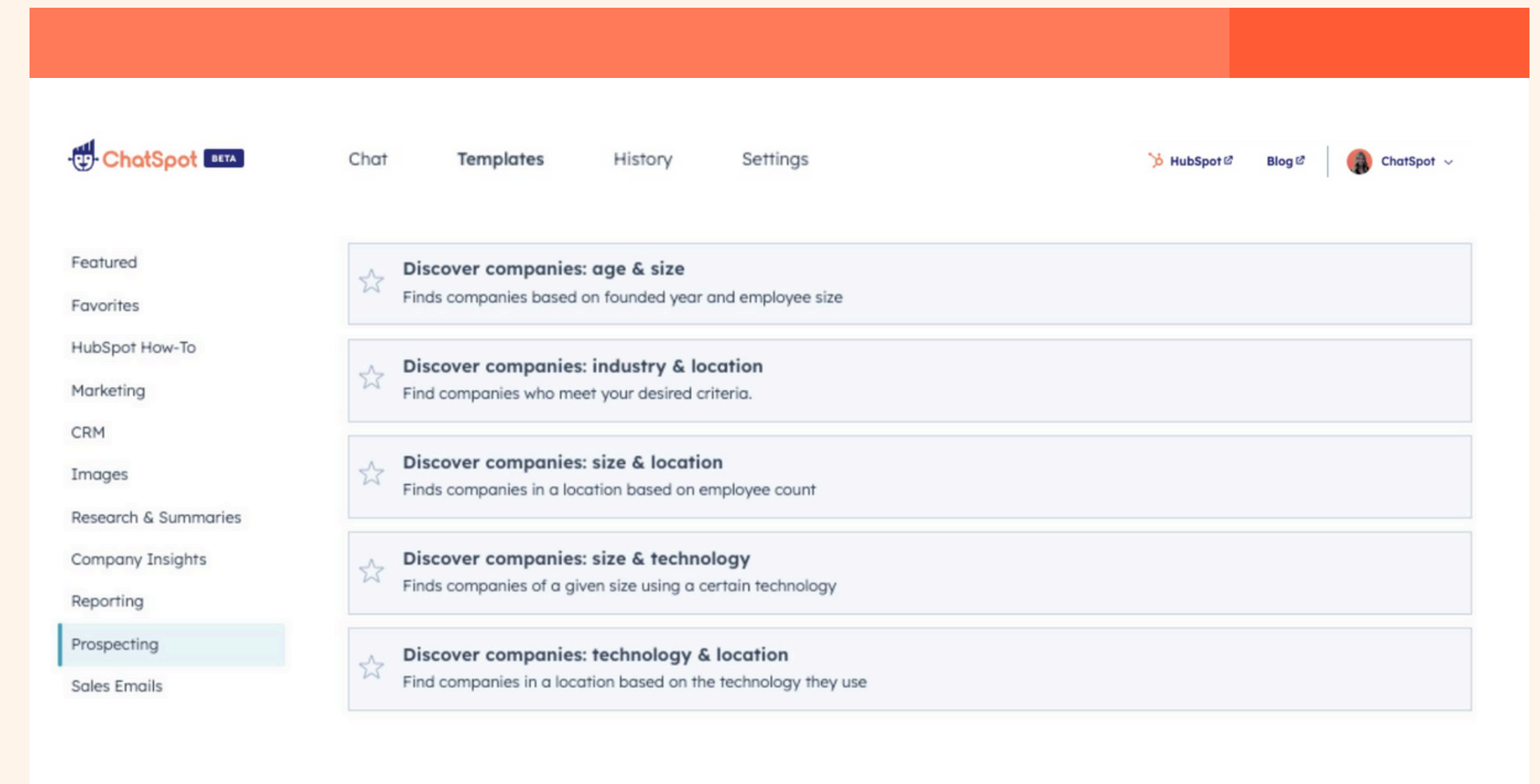

Bottom-line benefit

Save time by quickly analyzing calls and deciding on the next steps, allowing your team to act swiftly and efficiently.

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Prospect Smarter With ChatSpot

Use ChatSpot's company insights and prospecting templates to quickly identify companies ideal for outreach.

Here's how

With ChatSpot, you can find new potential customers and gain valuable insights, such as their latest news or what's in their tech stack. You can also use ChatSpot to create personalized and on-brand sales outreach emails, allowing you to connect with your prospects more effectively.

Bottom-line benefit

Save time when prospecting to free up more time for selling.

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Find Key Answers to Your Top HubSpot AI Questions

Successfully integrating HubSpot AI into your sales strategy enhances your team's effectiveness and gives you a cutting-edge approach to sales, fully backed by HubSpot's robust, easy-to- use platform. By understanding and leveraging the full suite of HubSpot AI features and functionalities, you can give your team more time to do what they do best: selling.

Top HubSpot AI Questions

How do I get my team started with HubSpot AI?

First, check with your HubSpot admin if your portal is enabled to use AI tools and features. The AI on/off toggle is located under Settings > AI Assistants. Then, look for the [diamond logo] to activate an AI Assistant. To get your team up to speed on how to use HubSpot, check out HubSpot's AI YouTube playlist or engage with other customers in HubSpot Community forums.

Where is HubSpot AI data stored and processed?

We prioritize your data's security by adhering to strict privacy standards. When using HubSpot's AI Assistants, your data is processed and stored securely in the United States, in compliance with OpenAI's API data usage policies. To give you even more peace of mind, our team has implemented controls to help safeguard the security, availability, and confidentiality of your data.

What are the data security and privacy implications of using HubSpot AI?

Security is our priority. That's why we entered agreements with all the third-party generative AI providers we use, like OpenAI, where they cannot train their models on the data our customers input. Nothing that goes through HubSpot will ever be used to train any of those models, whether that be a paragraph you want to edit or a prompt typed directly in our platform such as a phrase to generate a blog post. You can learn more about how our AI-powered features work from our model cards.

How can we ensure ongoing support as we integrate HubSpot AI into our sales operations?

HubSpot offers robust support and continuous learning opportunities along with its AI functionalities. We've found that this assists with the initial integration and helps sales professionals maximize the tool's benefits over time.

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Map Out Your HubSpot AI Sales Strategy

Here's your roadmap to transform your sales strategy into a more efficient AI-powered engine:

- Begin with a clear pilot plan.

- Select 1-2 lead use cases.

- Train your team.

- Track tangible benefits.

- Extend and optimize.

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Begin with a clear pilot plan.

Start by identifying a clear objective and, very specifically, how HubSpot AI fits into achieving this goal.

Example: "Improve the efficiency of prospecting by 30% by leveraging HubSpot AI to expedite the creation of personalized outreach emails. By automating the initial drafting process, we aim to increase the volume and personalization of our outreach efforts, enabling our sales team to engage more prospects in less time."

Select 1-2 lead use cases.

Identify and focus on a number of 1-2 key tasks where HubSpot AI can have the most immediate impact, such as email engagement or deal scoring, to start your pilot. Once you've seen good results with this pilot project, deploy your new AI-powered work routine in your larger organization.

Train your team.

Our AI tools are built to be intuitive, but your team will need time and educational resources to get the most out of them. Fortunately, we've got you covered. Here's a quick text guide to HubSpot AI and a helpful playlist of HubSpot AI video tutorials that you can share with your team. You can always post in our HubSpot Community forums with any questions you have (or helpful applications you find).

PRO TIP: Be realistic about what AI can achieve in the pilot phase. For example, you should make it clear to your team that while AI can initially enhance the speed of creating personalized sales emails, it won't replace the nuanced understanding a sales rep brings to client relationships.

Track tangible benefits.

Monitor measurable goals such as time efficiency, accuracy in forecasting, and improvements in sales engagement.

Example: Measure the decrease in time sales reps spend on data entry and the increase in meaningful customer interactions post-AI integration, using these improvements as benchmarks for AI's ROI in sales activities.

Extend and optimize.

Run your pilot project for 1-3 months. Measure the results and keep track of the lessons learned by your pilot team. Then, it's time to onboard your entire team onto HubSpot AI.

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The Future of Sales with HubSpot AI and SaaS Solutions

With every update and new feature, SaaS Solutions and HubSpot AI empowers your sales team with smarter tools, deeper insights, and more intuitive interfaces that anticipate your needs and elevate your strategies.

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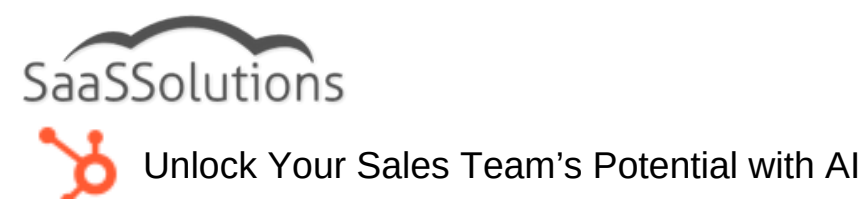
Our Services

Hubspot Integration and Optimization

- Salesforce Migration / Integration
- Custom Implementation
- CRM Configuration
- Data Migration & Management
- Automation Setup
- Customer Service Integration
- Third-Party Integrations
- Training and User Adoption
- Analytics and Reporting
- Continuous Optimization

Revenue Operations

- Sales & Marketing Alignment
- Process Optimization
- Revenue Forecasting & Modeling
- Data Integration & Management
- Customer Journey Mapping
- Compliance & Risk Management

Marketing Agency

- Fractional CMO
- Inbound Marketing
- Content Creation
- SEO - Search Engine Optimization
- Paid Advertising
- Website Design & Development
- Website Migration to Hubspot CMS

SaaS Solutions Cheat Sheet

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DocuSign
+ableau
zendesk zoominfo
DELL Boomi Adobe
formstack conga
DemandTools Cirrus Insight

CRM Services

- Consulting
- Development
- Implementation
- Integration
- Optimization

Rev Ops

- Strategy
- Process
- Forecasting
- Analytics
- Alignment

CRM Support

- Data Quality Management
- Admin On Demand
- Onsite & Online Training

Marketing

- Fractional CMO
- Inbound
- Content
- SEO
- Paid Advertising
- Websites

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