



AI Analysis

What's New for Sellers With HubSpot

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Summary

The session explored various AI-powered tools and advancements in HubSpot designed to optimize sales processes, improve customer interactions, and enhance data utilization. The prospecting agent was discussed extensively, highlighting its ability to gather and analyze data from various sources such as CRMs and external signals to craft personalized outreach messages. The agent can adapt its communication based on customer interactions and is trained to follow specific sales processes, making it a powerful tool for driving better sales outcomes. Additionally, the customer agent was introduced as an AI concierge capable of handling inbound interactions across different channels, improving lead generation and qualification, and seamlessly integrating with CRMs to keep data updated and actionable.

Another significant focus was on tools for sales performance tracking and meeting preparation. The sales performance feature provides a unified command center for sales managers to monitor team metrics, identify trends, and receive proactive insights into pipeline health. This tool aims to reduce the operational burden of maintaining numerous dashboards and reports. The smarter sales meetings tool automates meeting preparation by consolidating all relevant information, such as previous interactions and customer pain points, into one view. It also includes an AI-powered note-taker for recording and summarizing meetings, ensuring that follow-up tasks are easily managed and sales reps can focus on selling rather than administrative tasks.

The final theme covered was the new CPQ (Configure, Price, Quote) system, which streamlines the quoting process by enabling dynamic approvals, engaging with buyers through AI-powered closing agents, and integrating payment capture to automate revenue processes. This system is designed to eliminate manual quoting inefficiencies and approval delays, providing a more seamless experience for both sellers and buyers. The session emphasized the importance of unstructured data in optimizing these tools and highlighted the integration capabilities with third-party systems like ChatGPT and Claude, which can provide advanced insights and research based on CRM data.



Takeaways

AI-Powered Prospecting Agent

The prospecting agent leverages CRM data and external signals to craft personalized outreach messages. It adapts communication based on customer interactions and follows specific sales processes, leading to improved sales outcomes. This tool is particularly effective in identifying and engaging with target accounts through timely and relevant messaging.

Enhanced Meeting Preparation and Follow-Up

The smarter sales meetings tool automates the preparation process by consolidating all relevant information into one view. It includes an AI-powered note-taker for recording and summarizing meetings, ensuring that follow-up tasks are easily managed. This helps sales reps focus more on selling and less on administrative duties.

Streamlined CPQ System

The new CPQ system in HubSpot streamlines the quoting process by enabling dynamic approvals and engaging with buyers through AI-powered closing agents. It also integrates payment capture to automate revenue processes, eliminating manual inefficiencies and approval delays. This system enhances the overall sales experience for both sellers and buyers.

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