HubSpot

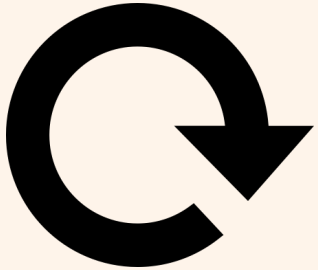
Q2 Product Roundup Webinar

June 29, 11:00 AM EST

HubSpot

Hello!

Please hit record!



If you're having any trouble with hearing or viewing this webinar, please:

1. Refresh your browser
2. Try a different browser
3. Ask for assistance in the Q&A tab

Q&A

Marc Hans

Senior Professor

Agenda

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Service Hub	31
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Commerce & Payments	49
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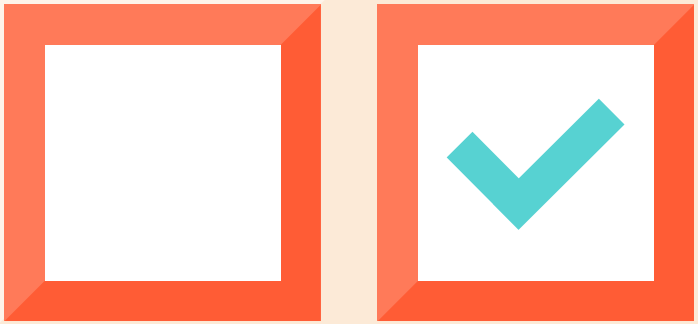
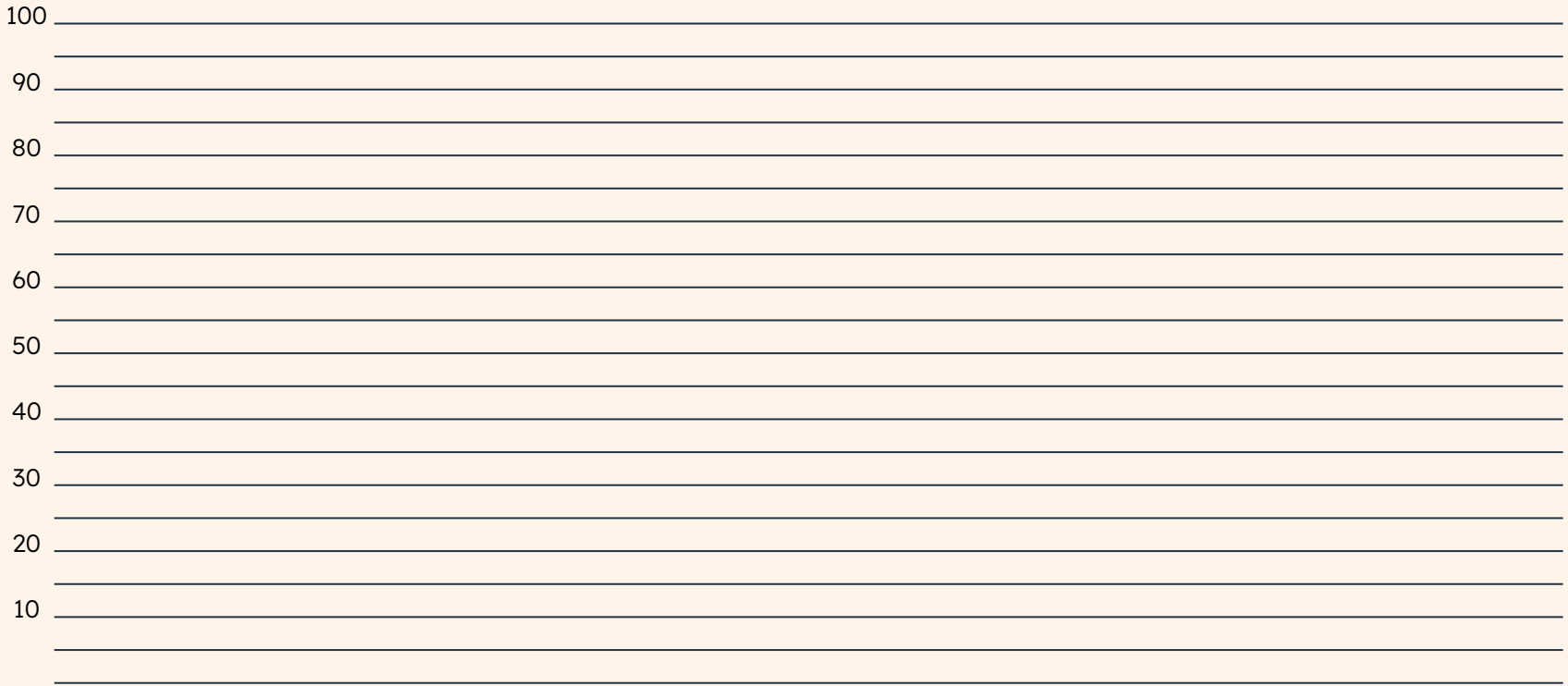
App Marketplace & Integrations	60

Poll Time!



Updates By Hub



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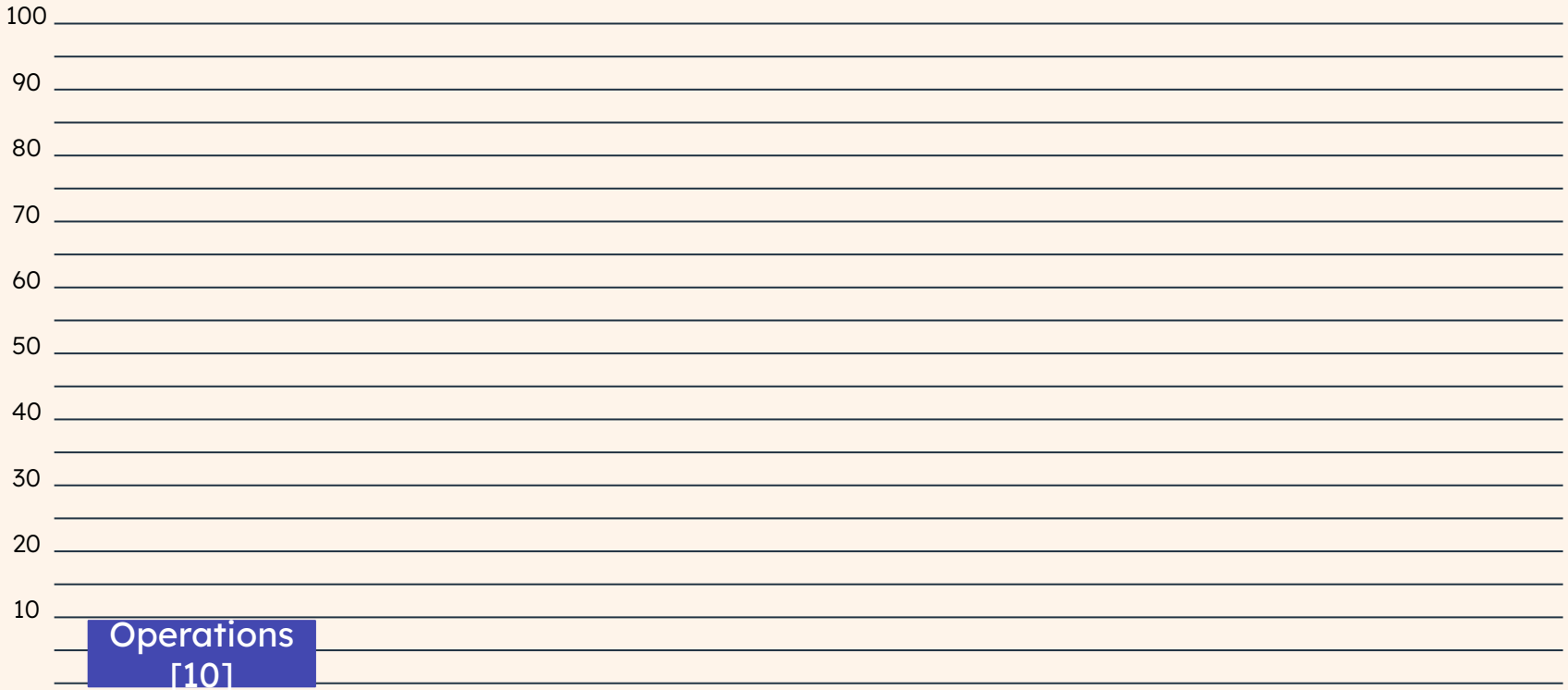

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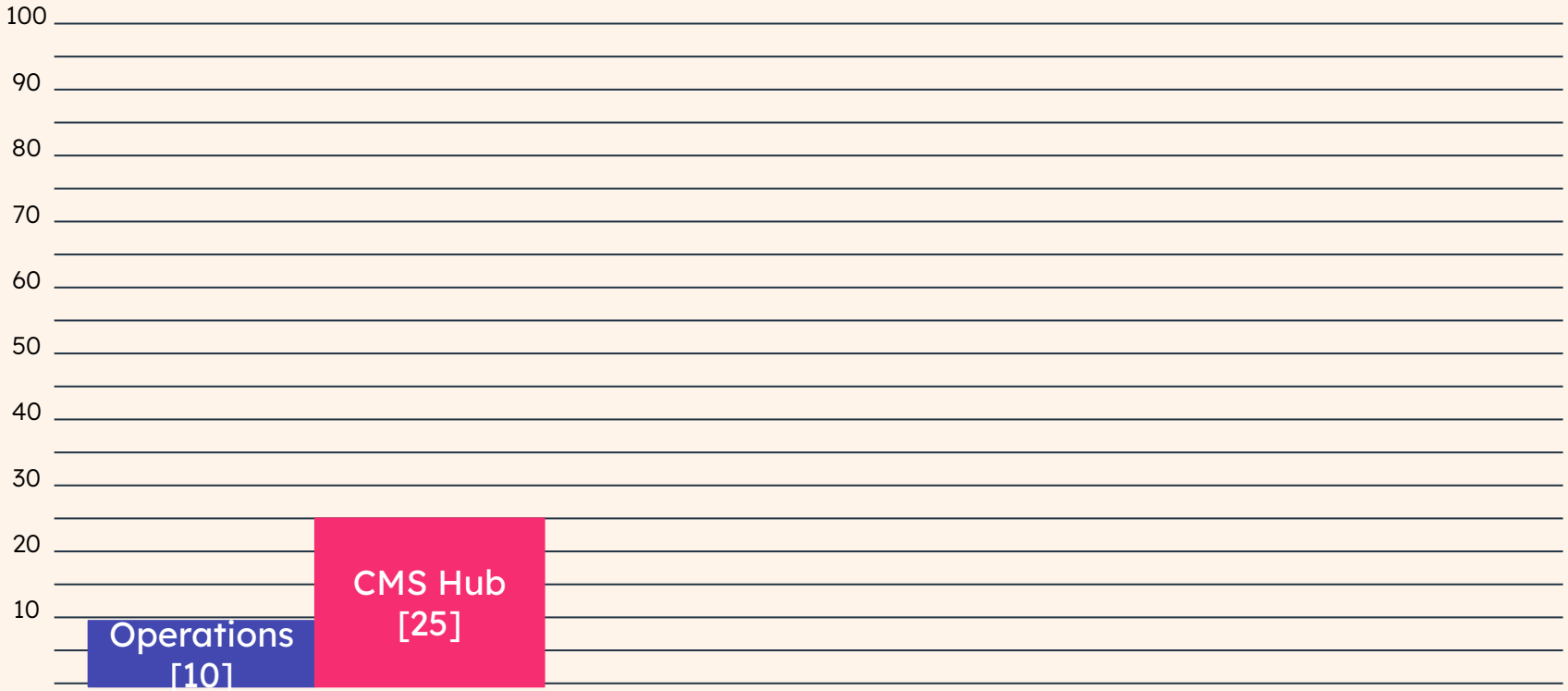

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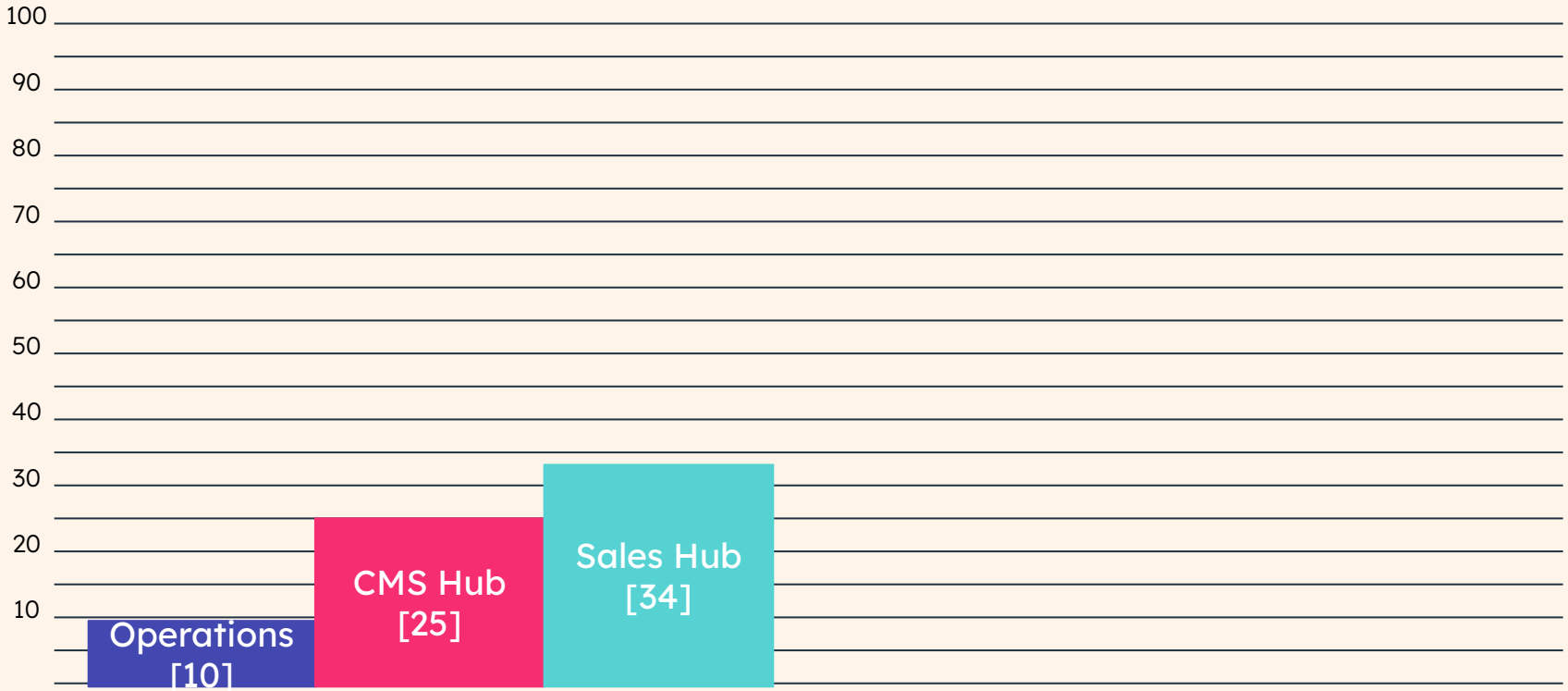

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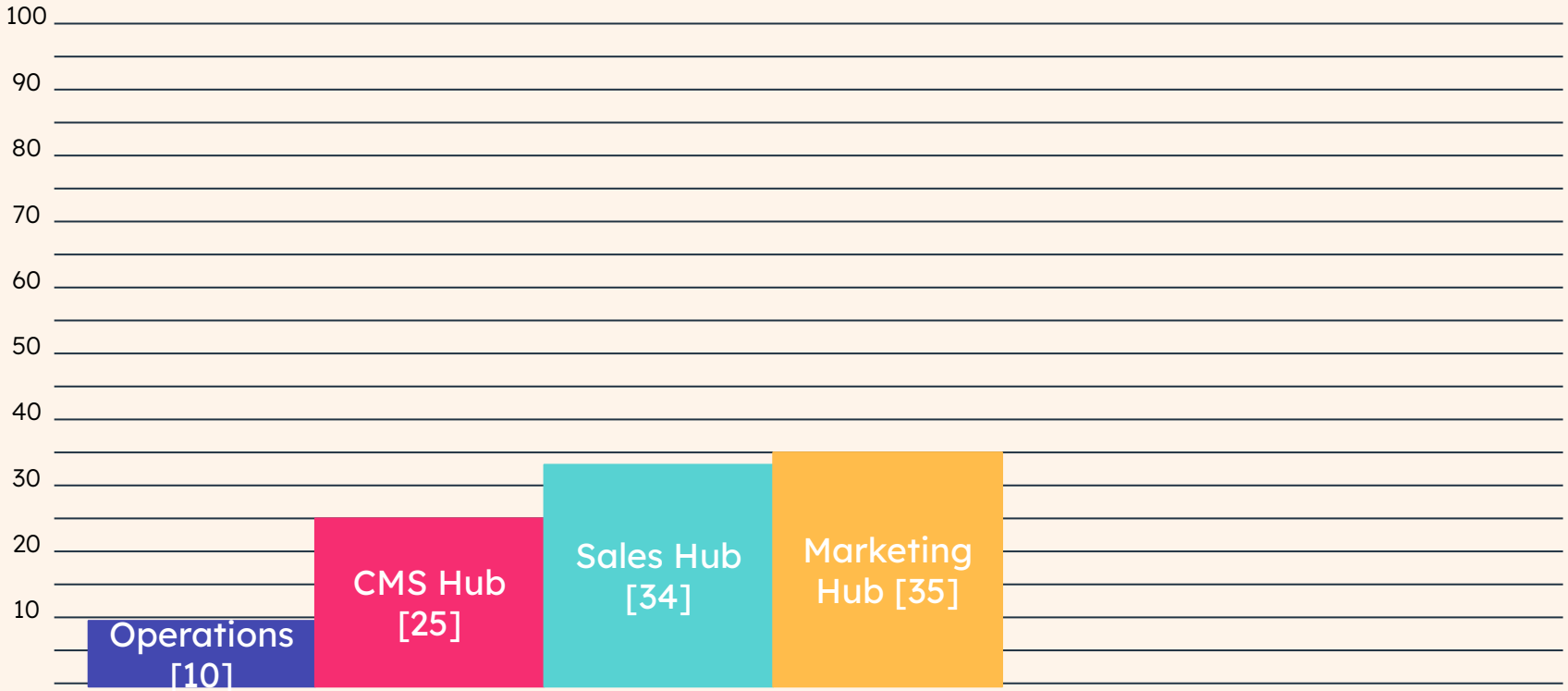
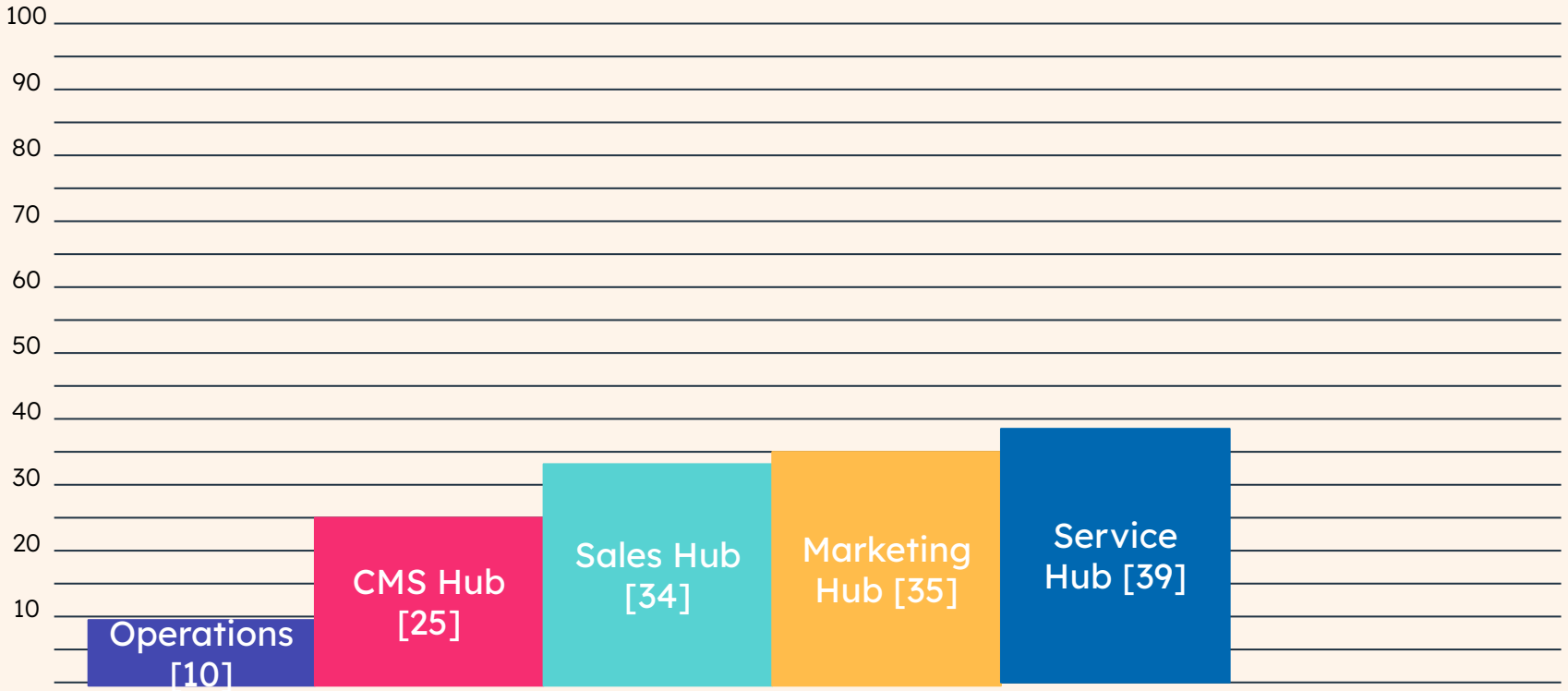
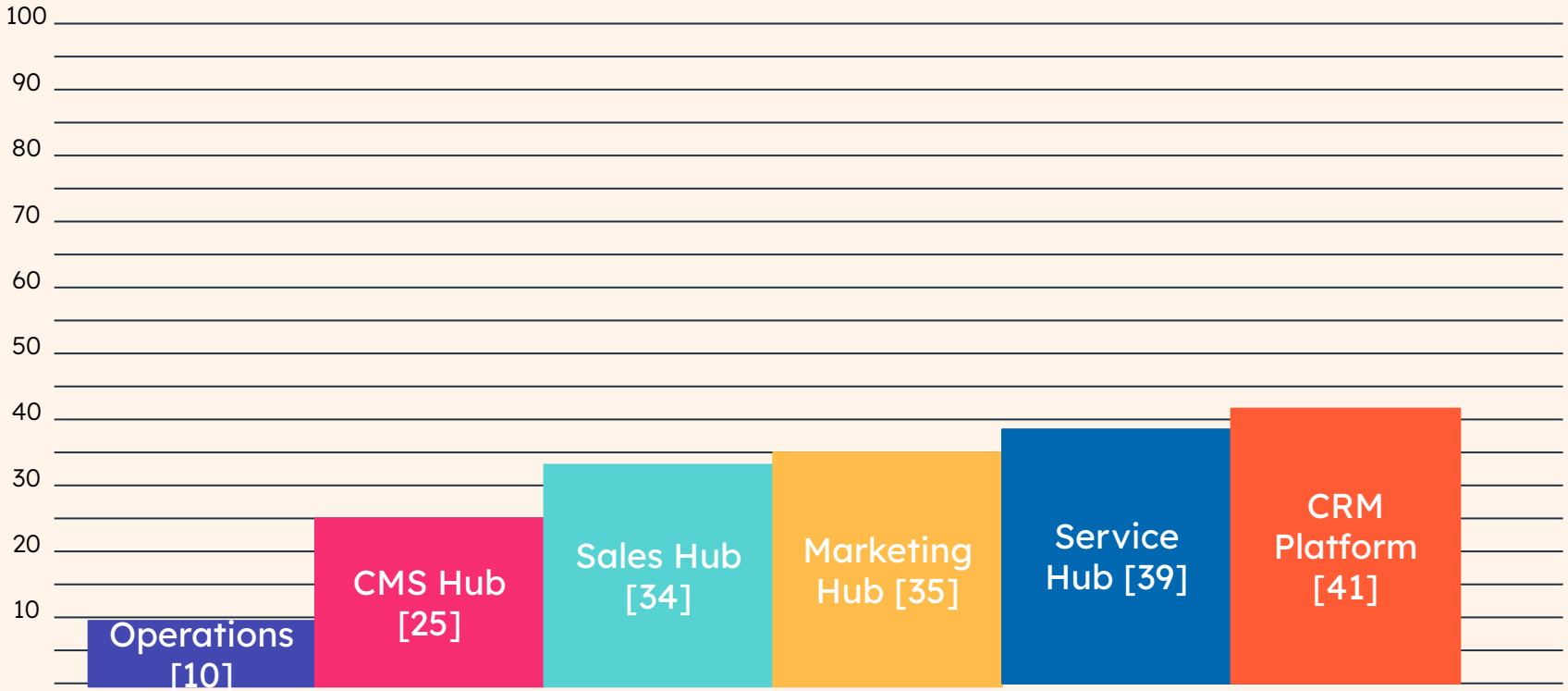


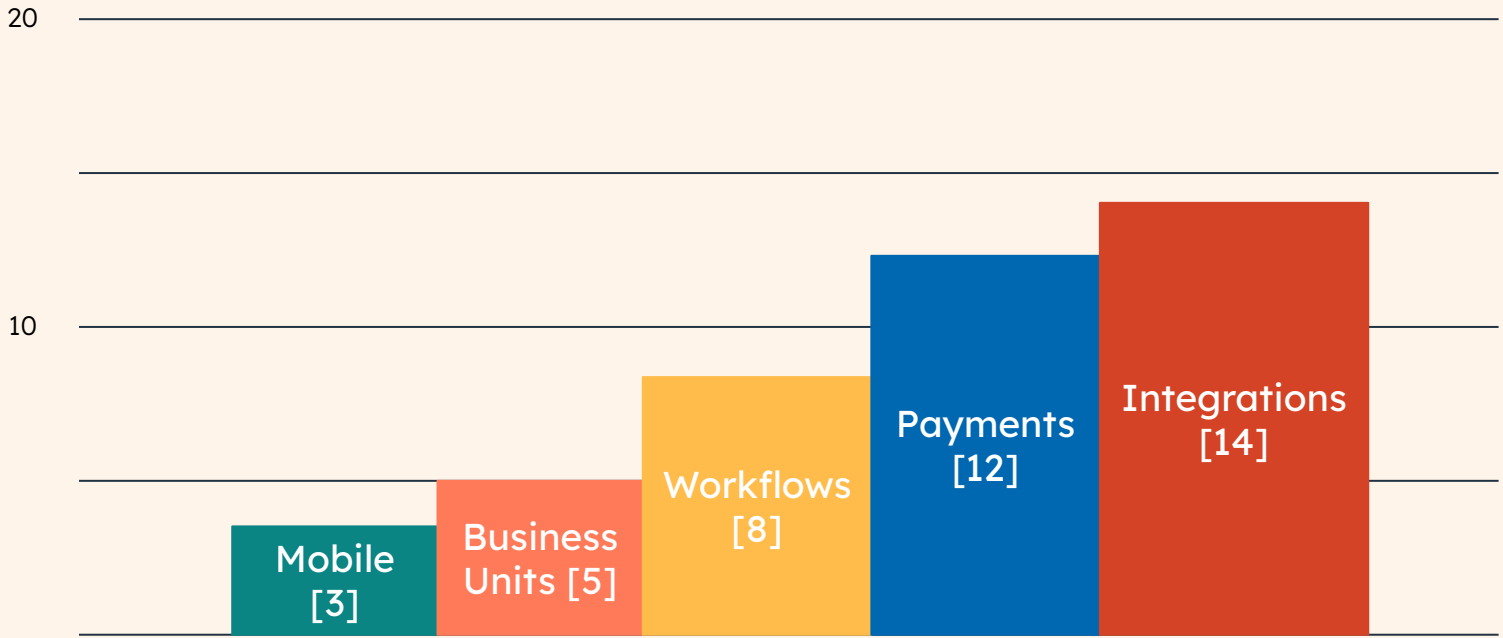
Updates By Hub



Updates By Hub

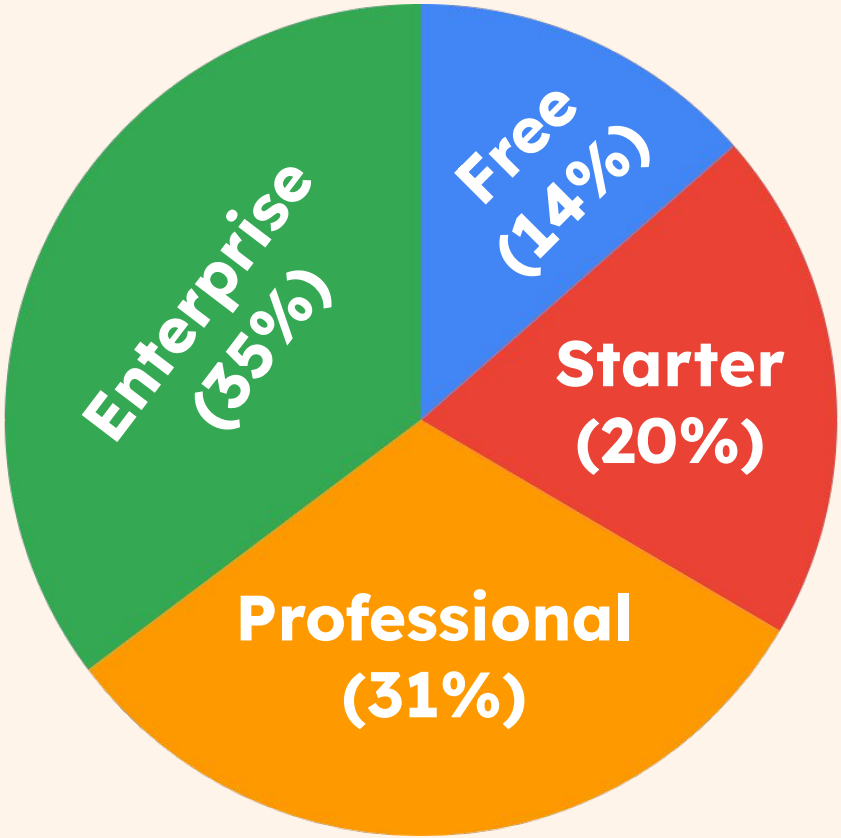


Other Updates



Guess which tier got the must updates?

Updates By Tier



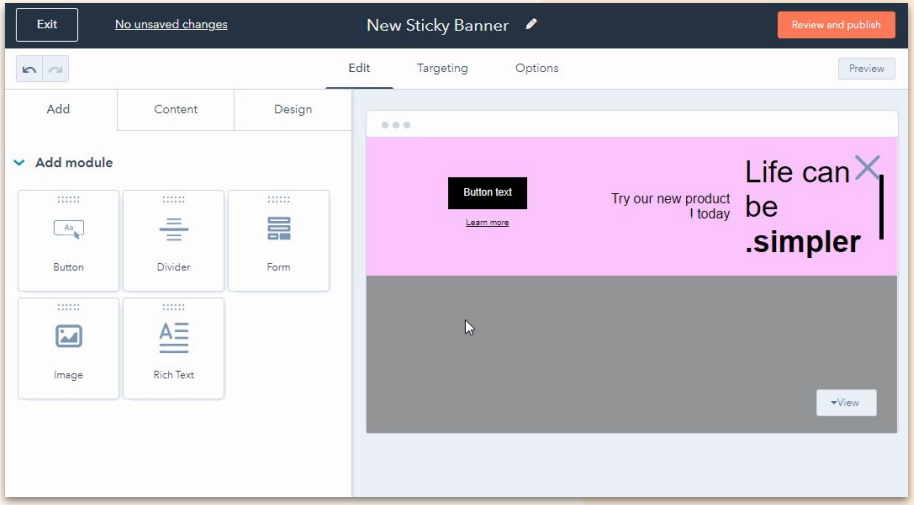
Marketing Hub™

Maranda Thompson

Senior Product Marketing Manager

New Re-Imagined CTAs Tool

Create different types of CTAs for all your needs: pop-ups, slide-ins, embeddable buttons or banners, without the help of a developer or a designer. These CTAs work both on HubSpot and external CMS pages.



Use Case

The new re-imagined CTAs tool helps you create beautiful, engaging pop-ups and banners for your website, unlocking your website as a channel for your marketing campaigns.

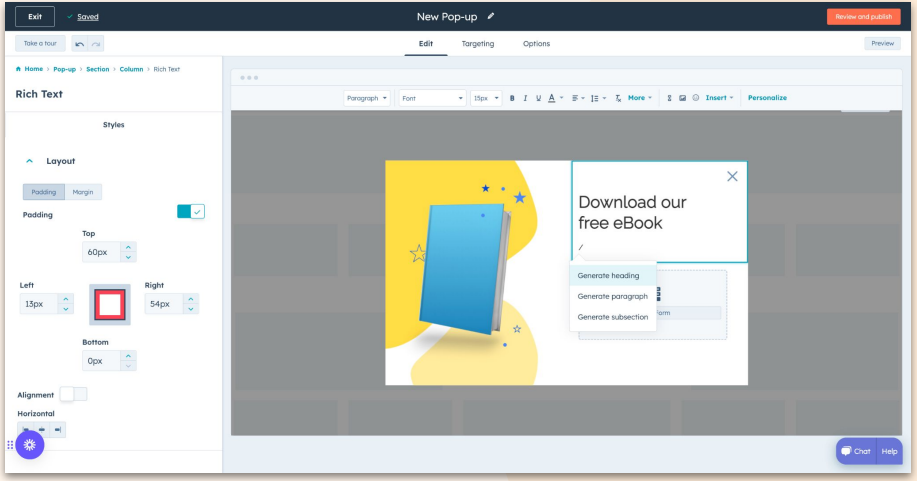
Free | Starter | Pro | Ent | Live

Launch region: Global

Marketing Hub™ + CMS Hub®

Content Assistant: Slash and Highlight Commands in CTAs

You can now use HubSpot's AI Content Assistant to generate CTA copy from scratch using simple prompts or rewrite existing content by opting to rewrite, shorten, expand, or change the tone of the text you selected.



Use Case

Help content creators create their CTAs content quickly and efficiently.

Free | Starter | Pro | Ent | Public Beta

Launch region: Global

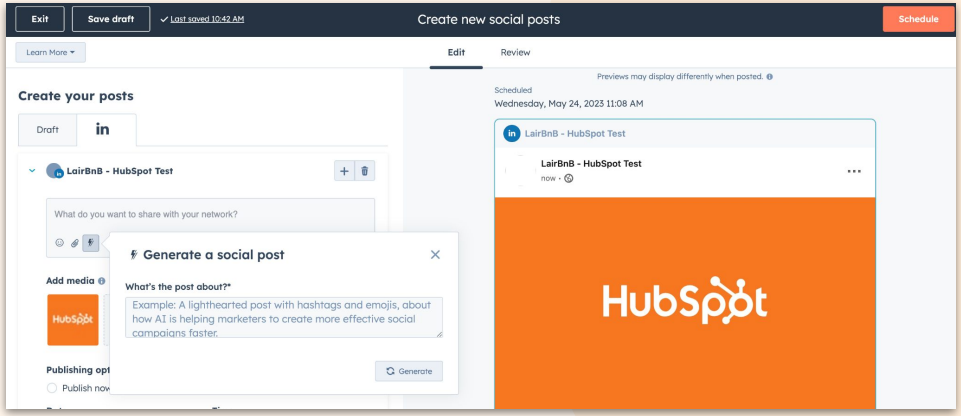
HubSpot

Irina Nica

Product Marketing Manager

Content Assistant: Generate Social Posts

Using content assistant will enable you to write social posts more quickly and with ease. Content assistant automated the tedious parts of writing, leaving you with more time to shape your own thoughts, opinions, and creativity into your content.



Use Case

Help marketers generate social posts based on simple prompts.

Free | Starter | Pro | Ent | Live

Launch region: Global

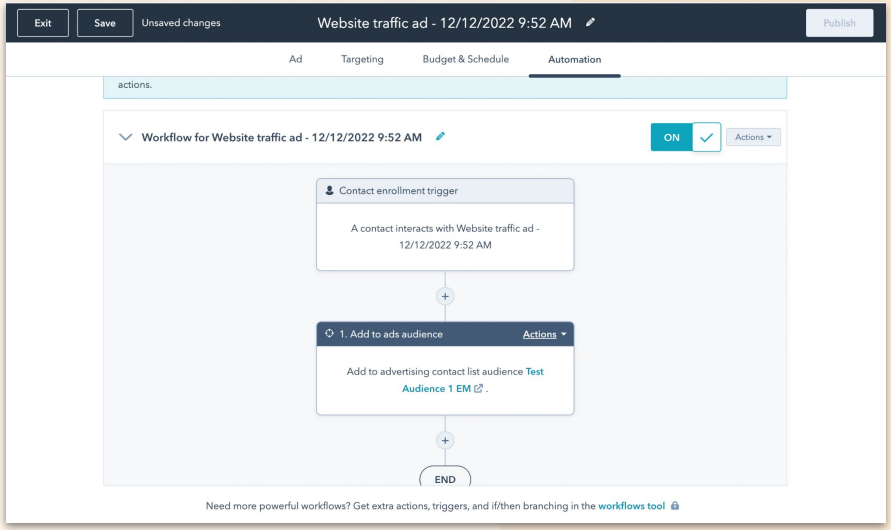
Marketing Hub™

Automation in Starter for Ads

Marketing Hub Starter customers can now create simple workflows in ad campaign creation and management. This now unlocks the ability for our Starter customers to create simple yet powerful automation tasks such as sending a follow up email after getting an ad interaction from within Ad Campaign Creation and Management.

Use Case

Create workflows from contacts gathered from ad campaigns.



Free | **Starter** | Pro | Ent | **Live**

Launch region: Global

Sales Hub™

Mary Kate Nolan

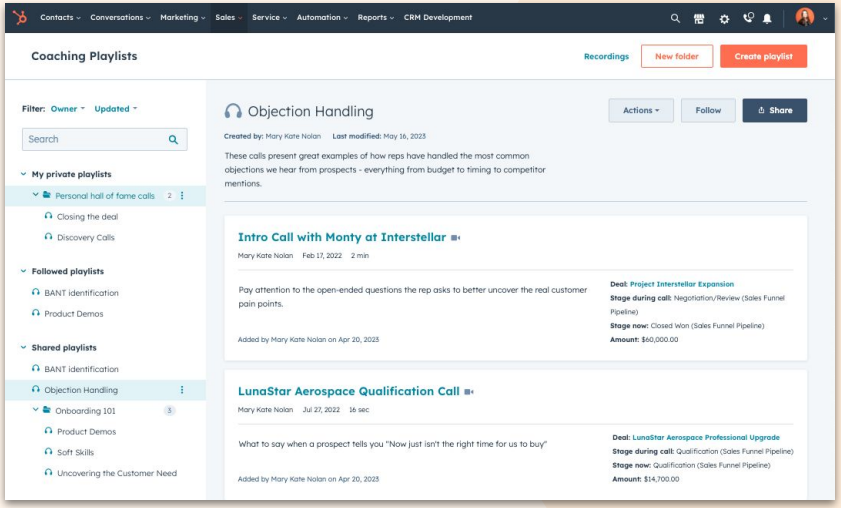
Product Manager

Coaching Playlists

Enable users to save call recordings to playlists, making it easy to onboard and upskill reps at scale.

Case Study

Now with playlists, exemplary hall-of-fame calls from seasoned reps can be easily added to a coaching playlist and shared out with specific reps or the whole team to help them improve their soft skills and adopt successful selling tactics. Coaching Playlists make onboarding and coaching reps easier, faster, and more scalable.



Free Starter Pro Ent Live

Launch region: Global

Sales Hub™

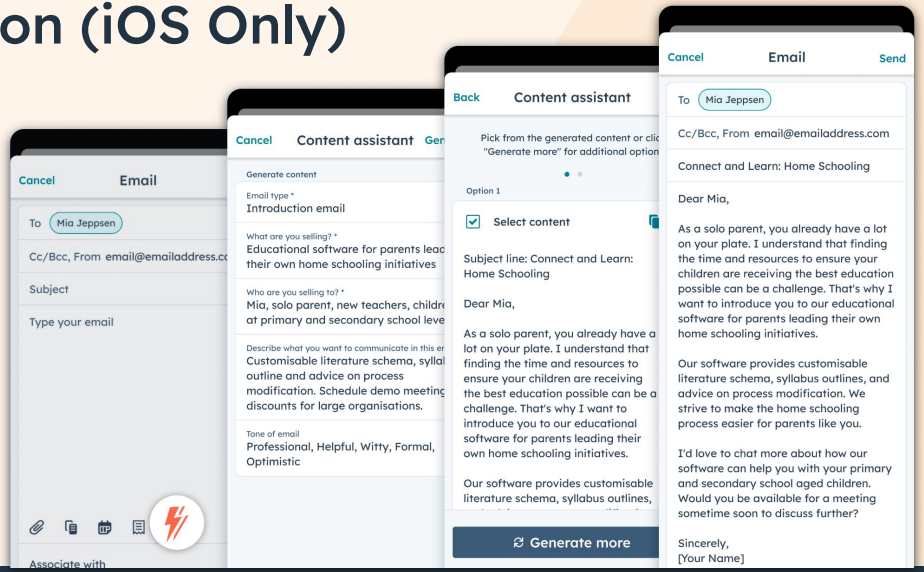
Mobile AI Sales Email Generation (iOS Only)

AI has now arrived to the HubSpot mobile app and it's here to change the way our customers are going to work on mobile!

iPhone users can now boost their communications efficiency when prospecting or selling on-the-go by leveraging AI to help them compose emails easier and faster.

Use Case

Mobile sales reps can compose new emails using AI Content Assistant when on-the-go on the HubSpot iOS app.



Free | Starter | Pro | Ent | Live

Launch region: Global

HubSpot

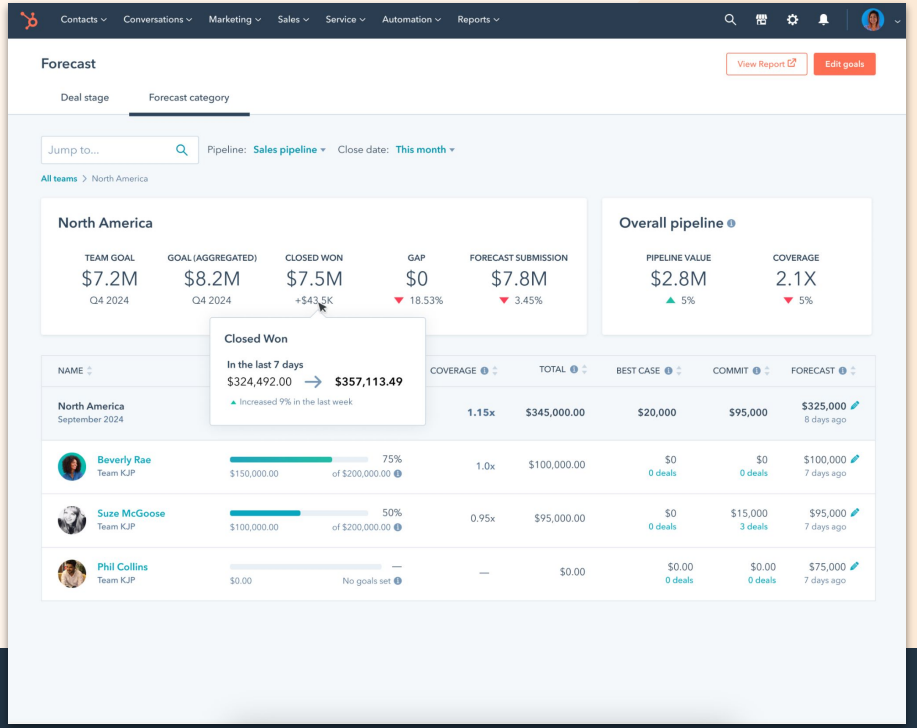
Sales Hub™ + Service Hub™

Forecast Data Insights

See how your revenue trends against your monthly, quarterly, or yearly sales targets. The forecast app will depict deeper insights that make it easier to monitor how the forecast and pipeline are trending over time.

Use Case

With the new insights data, obtain greater forecast insights, including gap to goal.



Free | Starter | Pro | Ent | Live

Launch region: Global

HubSpot

Service Hub™

Danny Vendrell

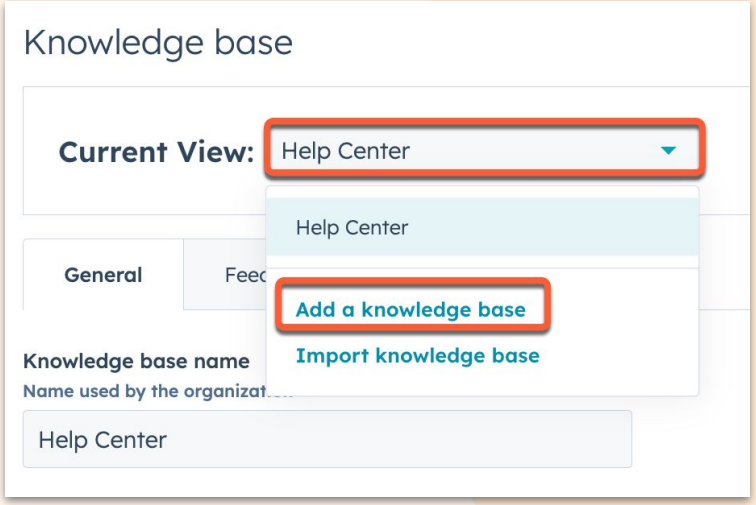
Senior Product Marketing Manager

Create Multiple Knowledge Bases

In the past, it was only possible to have one knowledge base within a HubSpot account. It is now possible for Service Hub Enterprise accounts to host multiple knowledge bases with distinct branding and content, all within one HubSpot account.

Use Case

With Service Hub Enterprise, accounts can now create up to 5 knowledge bases, making their articles more targeted to their specific customer segments and needs.



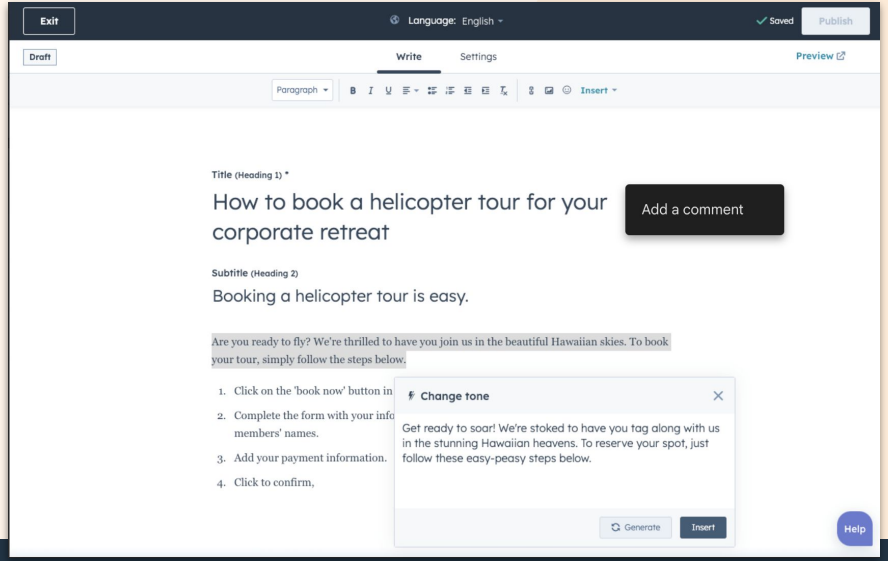
Free | Starter | Pro | **Ent** | **Live**

Launch region: Global

Service Hub™

Content Assistant: Highlight Commands in Knowledge Base

Content creators can now generate blog post outlines, paragraphs, ideas, or conclusions within the blog editor, along with editing existing text to rewrite, shorten, expand, or change the tone of the text they select.



Use Case

Help content creators edit their knowledge base content quickly and efficiently.

Free | Starter | Pro | Ent | Public Beta

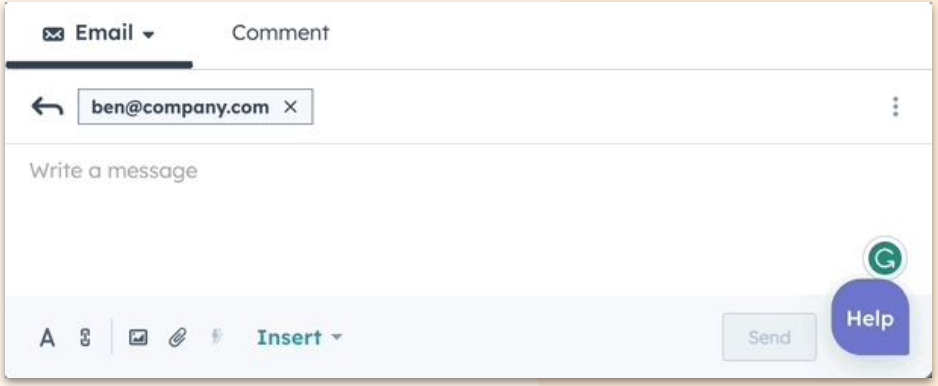
Launch region: Global

HubSpot

Service Hub™

Content Assistant in Conversations Inbox

With content assistant, you can do everything from generating responses to customer inquiries to editing existing or generated text by opting to rewrite, shorten, expand, or change the tone of the text they select.



Use Case

This tool will help agents generate responses quickly via any channel in the Inbox, automating the most tedious parts of answering incoming inquiries and giving users time back in their day to focus on delivering a high-quality and personalized customer experience.

Free | Starter | Pro | Ent | Public Beta

Launch region: Global

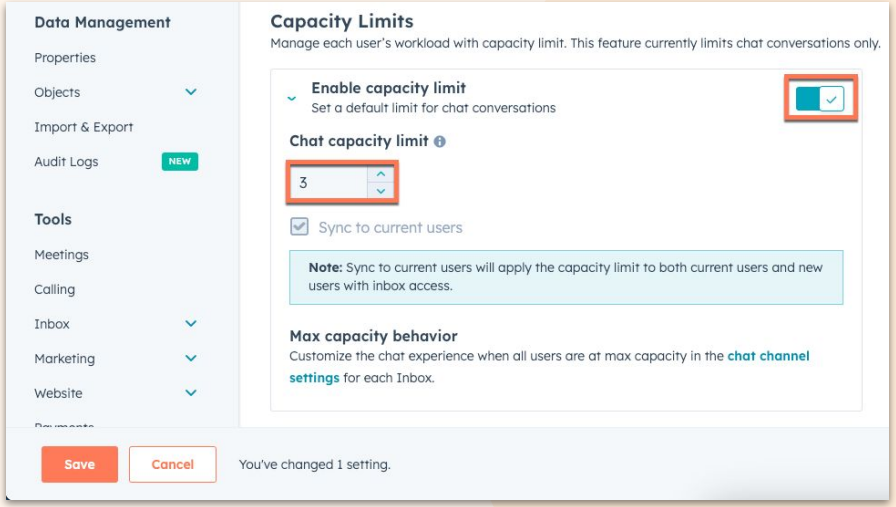
Service Hub™

Global Capacity Limits for Live Chat Agents

Admins can set capacity limits for all of their live agents, ensuring that agents are not automatically assigned chats when they are over their capacity limit.

Use Case

Agents can focus on a small number of chats, increasing time to first response and customer sentiment, and reducing overall conversation length from an overwhelmed agent.



Free Starter Pro Ent Live

Launch region: Global

HubSpot

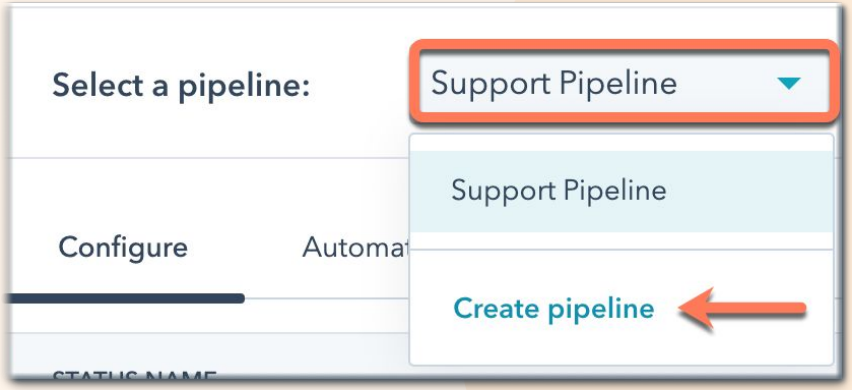
Service Hub™

Ticket Pipeline Limit Increase

We have increased the pipeline limit for Tickets on Service Hub Enterprise from 50 to 100. This change also brings parity to the limit for deal pipelines on Sales Hub Enterprise.

Use Case

Ticket pipeline limit increase on Service Hub Enterprise.



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Launch region: Global

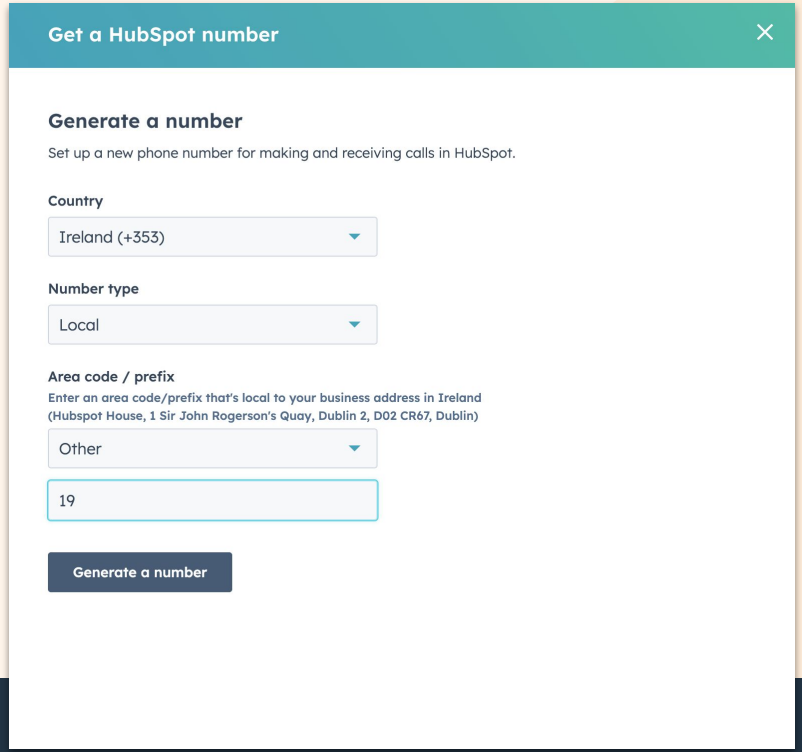
Sales Hub™ + Service Hub™

Ireland Local Numbers

We're expanding country support for HubSpot provided numbers. Local numbers in Ireland are now available with more countries to follow. HubSpot provided numbers can be used for inbound and outbound calling. Admins are able to acquire numbers and assign them to any user with a paid Sales, or Service Hub seat.

Use Case

Expand HubSpot local numbers to Ireland



Free | Starter | Pro | Ent | Live

Launch region: Global

HubSpot

CMS Hub®

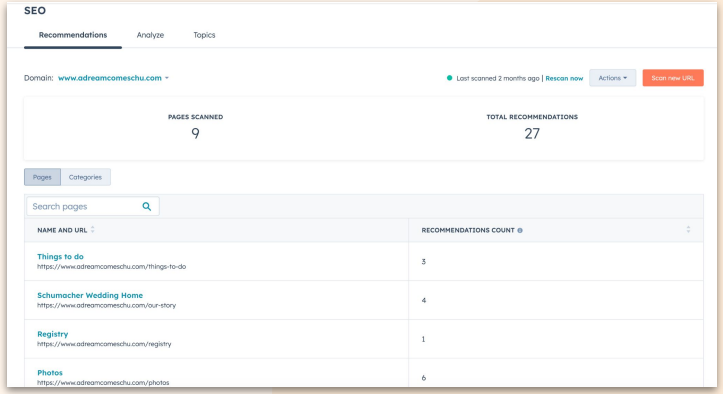
Amanda Schumacher

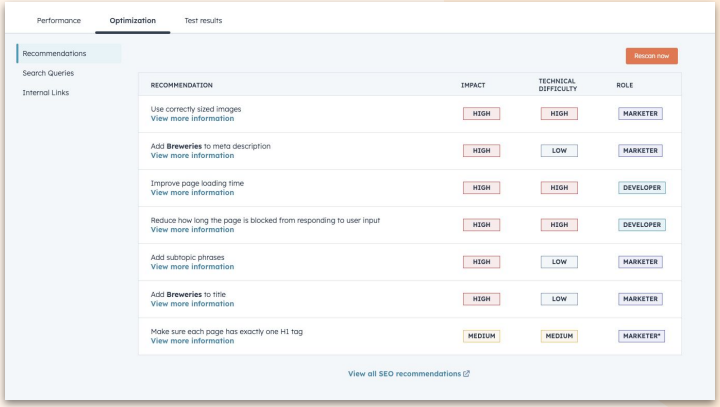
Product Manager

SEO Recommendations by Page

We've added a brand new view to the SEO tool that allows you to see a list of all your website pages and the number of SEO recommendations per page.

To help you optimize your website pages, we added over 20 new unique page performance, mobile, and SEO recommendations to your Recommendations in Content details.





Case Study

Help marketers locate any SEO issues on their individual pages after they are published.

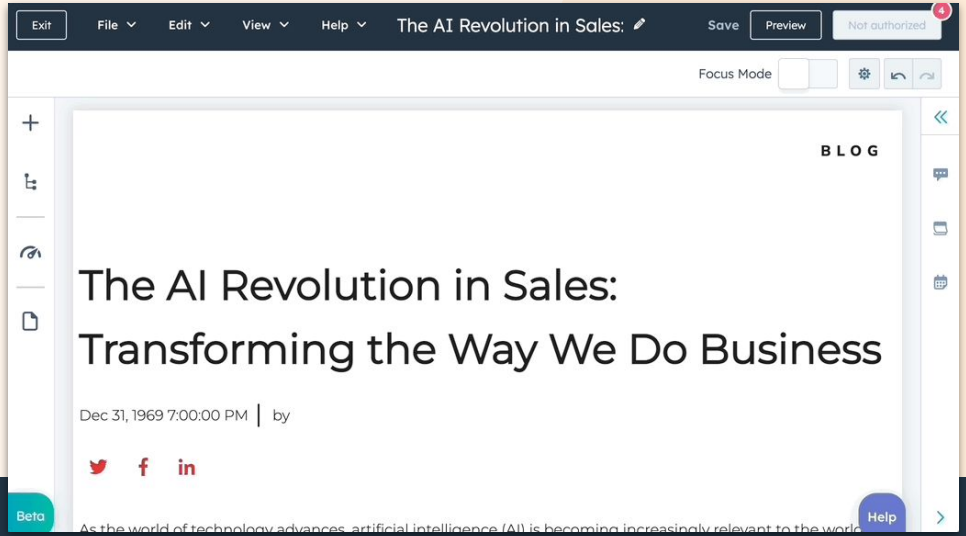
Free | Starter | Pro | Ent | Public Beta

Launch region: Global

CMS Hub®

Content Assistant: Page Title and Meta Description Generation

We added new content assistant functionality to the settings field in website pages, landing pages, and blog to allow you to click on a button and generate SEO-friendly titles or meta descriptions. The feature analyzes your page's content and uses AI to generate compelling titles and meta descriptions that accurately represent the page's content.



Use Case

Help marketers save time by generating relevant and catchy titles with one click for website pages, landing pages and blog.

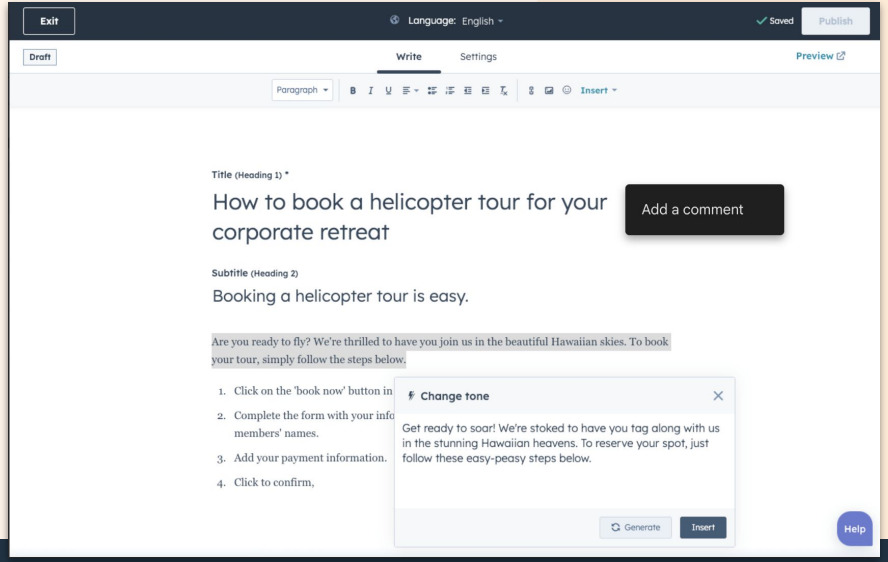
Free | Starter | Pro | Ent | Public Beta

Launch region: Global

Marketing Hub™ + CMS Hub®

Content Assistant: Highlight Commands in Website Pages, Landing Pages, Email and Blog

Content creators can now generate blog outlines, paragraphs, ideas, or conclusions within the blog editor, along with editing existing text to rewrite, shorten, expand, or change the tone of the text they select.



Use Case

Help content creators build and edit their marketing content quickly and efficiently.

Free | Starter | Pro | Ent | Public Beta

Launch region: Global

Operations Hub™

HubSpot

Pat Merlino

Senior Software Engineer II

Operations Hub™

Data Panel with Associated Record Data in Workflows

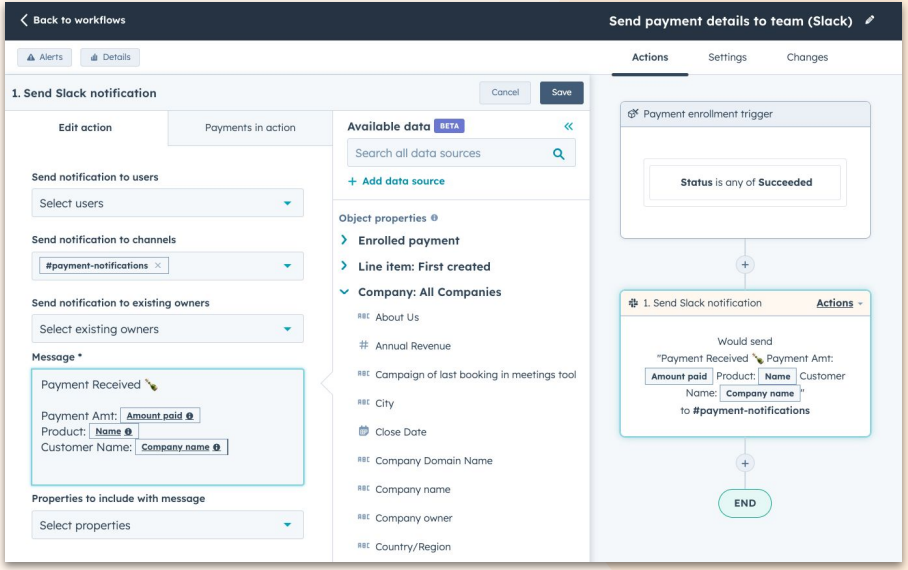
With the new Data Panel in workflows, you have access to more of your CRM data, which ensures your team can work quickly and effectively to provide a delightful customer experience.

Use Case

- Power a new customer kick-off process by sending payment alerts to Slack, that include the customer's name, payment status and subscription details
- Set your customer success managers to have effective calls by sending them robust pre-meeting notifications that include key details about the point of contact's recent activity, their most recently opened support cricket, and the latest feedback score

Free | Starter | Pro | Ent | Public Beta

Launch region: Global



**available to all Workflow customers with Pro+ plans*

HubSpot

Operations Hub™

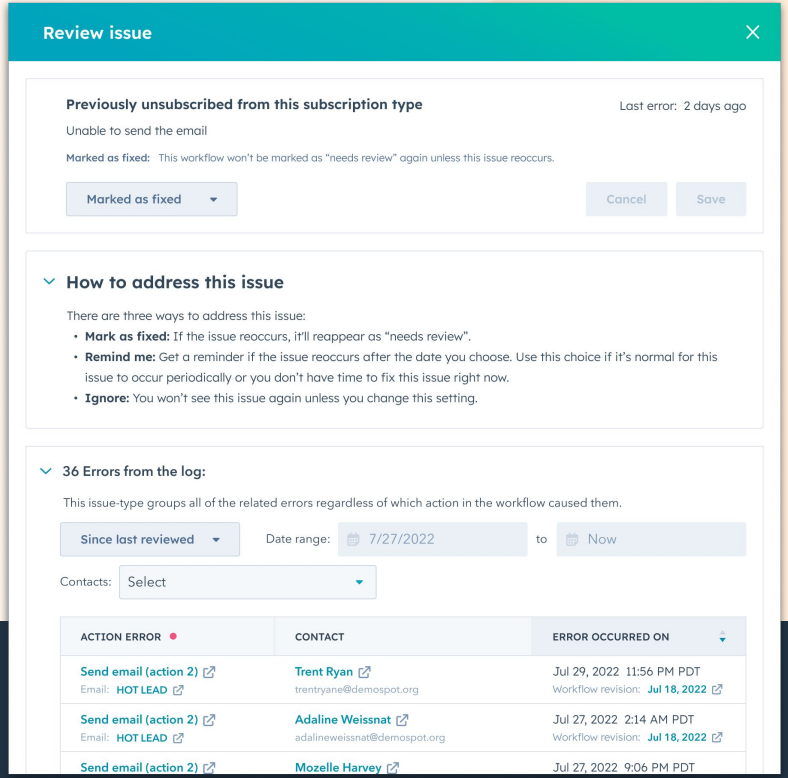
Improved Workflows Issue Details Panel with Reminders

All workflow customers can now quickly see the impact of issues within each workflow's Issue Details panel. This new panel includes the actions and contact records connected to each separate issue.

Enterprise customers can take workflow monitoring a step further by customizing reminders about the workflow issues they want to monitor.

Use Case

Users can set preferences for when they want to review workflows different issues.



Free | Starter | Pro | Ent | Live

Launch region: Global

HubSpot

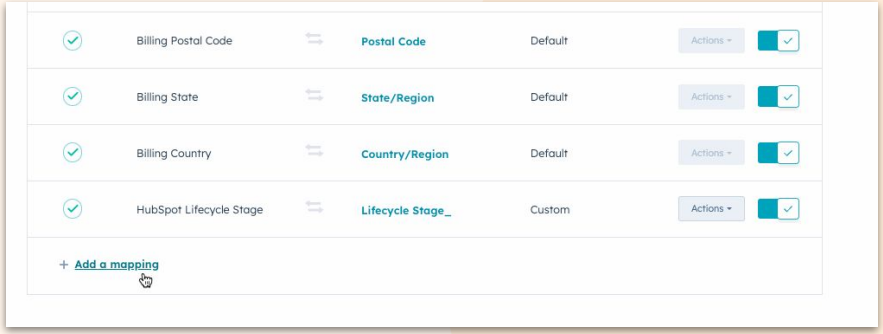
Operations Hub™

Automatic Two-Way Picklist Syncing

Field mappings of custom dropdown & multi-select fields will become mappable in a two-way sync configuration.

Use Case

Increased support to map custom fields directly with one another, and/or get rid of cumbersome workarounds that had users syncing dropdowns one-way into text properties.



Free | Starter | Pro | Ent | Live

Launch region: Global

HubSpot

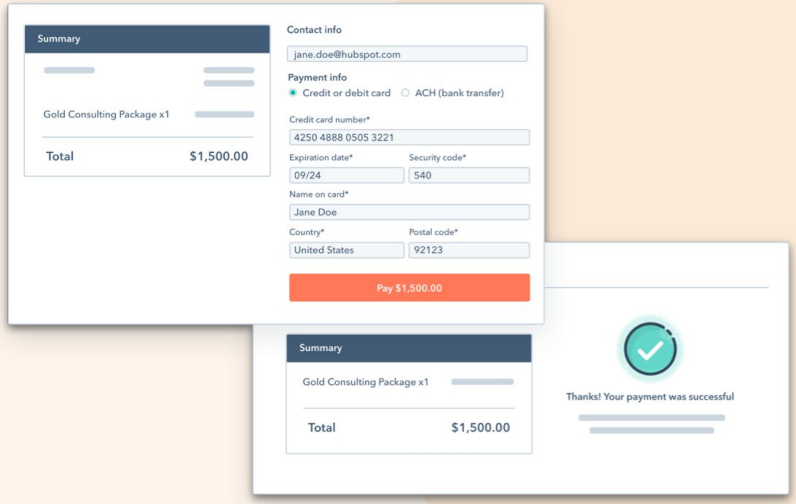
Commerce

Shilpa Khetan

Senior Product Manager

Subscription Management

- **Edit your subscriptions:** Upgrade or downgrade subscriptions, change quantities and more. No more canceling subscriptions to change them.
- **Change next payment date of subscriptions:** Modify the next recurring payment date for subscriptions
- **Subscription Index Page:** Customers who sell subscriptions (or collect recurring payments) with HubSpot Payments now have a new home for all their subscriptions.
- **Gross Revenue Reporting Dashboard:** This dashboard aims to empower customers with a detailed view on revenue collected with HubSpot Payments, top and bottom product performers, and top sales performers.
- **Automate Processes with Commerce Objects:** Use Subscriptions, Payments & [in beta] Invoices objects to automate processes and reach out to customers timely



Use Case

Achieve greater billing flexibility and customizable options to accommodate your customers' subscription needs and preferences.

Free | Starter | Pro | Ent | Live

Launch region: U.S. Only

***HubSpot payments is available to U.S.-based customers using a Starter, Professional, or Enterprise edition of any hub.*

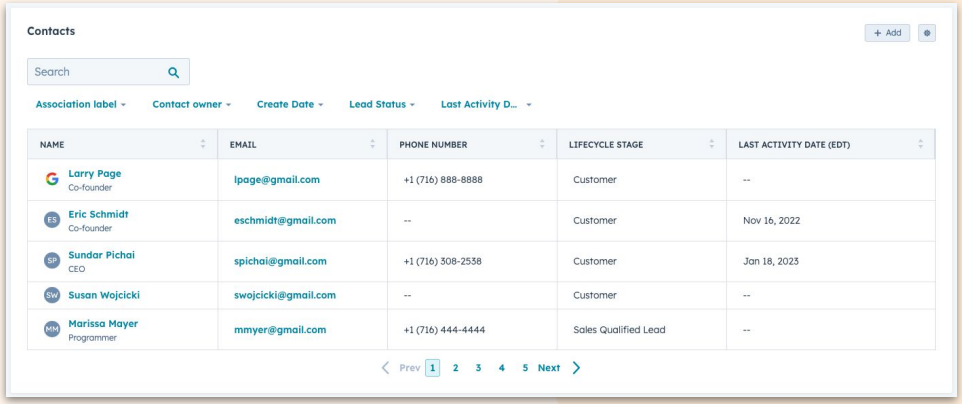
CRM Platform

Amy Chamness

Product Marketing Manager

Record Association Tables: Search, Quick Filters, and Pagination

Record association table improvements include new search, quick filter, and pagination features. You can now find the information you're looking for more quickly.



Use Case

Reps can now find the associated information they're looking for more quickly on the record.

Free | Starter | Pro | Ent | Live

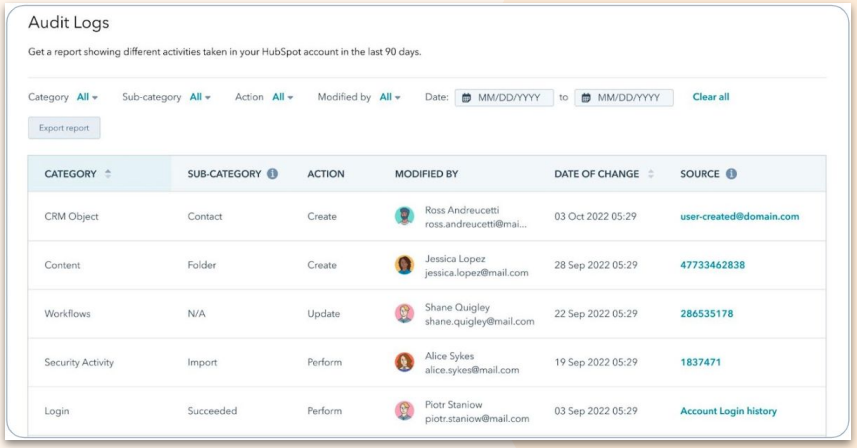
Launch region: Global

Centralized Audit Log of User Actions

A new centralized tool for super admins to view and filter for various user actions that have taken place across their HubSpot account.

Use Case

Super admins can now quickly and easily troubleshoot issues by finding out for themselves which user took a specific action and when through flexible filters and comprehensive data. There is also an export report option if required for further analysis or to provide details to external third-parties.



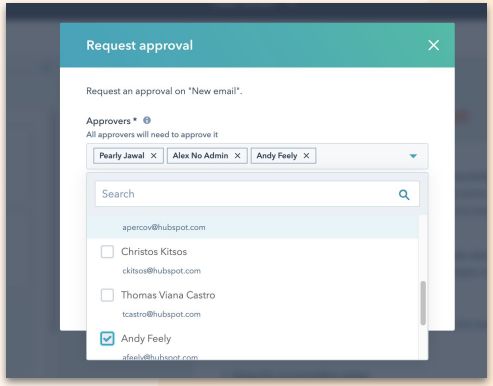
Free | Starter | Pro | **Ent** | **Live**

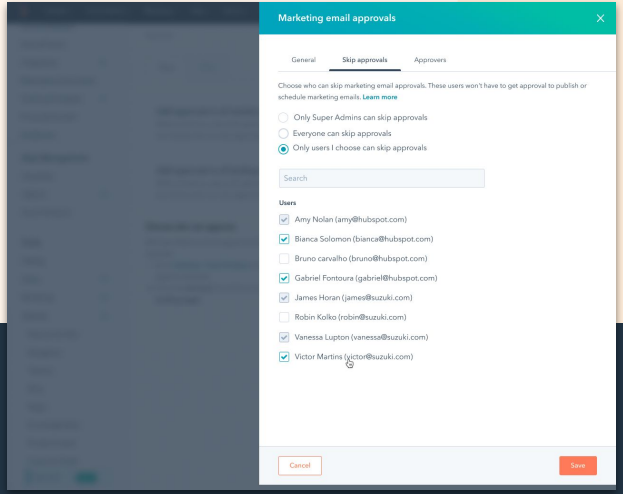
Launch region: Global

CRM Platform

Approvals for Email

- **Approvals for Sending Marketing Emails:** Marketers who are creating an email in the editor will be able to request approval all in one place before sending the email.
- **Decide Who Can Skip Marketing Email Approvals:** Admins can now decide who can publish or schedule marketing emails without requesting an approval first.





Use Case

Marketing email approvals enforces a more efficient process that allows different levels of access to marketing emails, different stakeholders to work on content without accidentally sending it out and ensuring brand guidelines are followed.

Free | Starter | Pro | Ent | Live

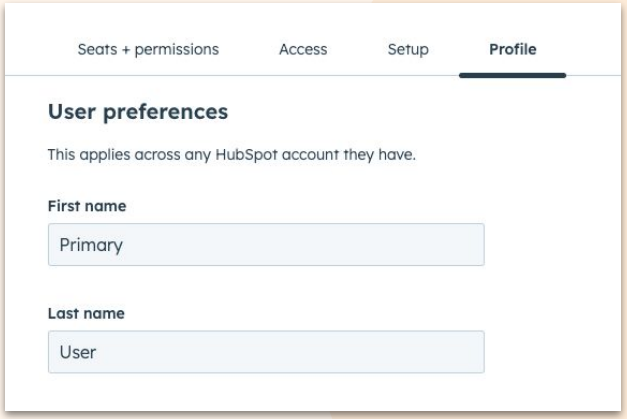
Launch region: Global

HubSpot

CRM Platform

Edit User First and Last Name

We're introducing a brand new, full-width User record to give admins a bigger picture of their users in HubSpot. With this new feature, among other things, we'll be enabling admins to edit a user's first and last name for the first time.



Use Case

We know that admins need to be able to verify setup and troubleshoot their growing number of users when needed. Giving admins visibility in a centralized space is necessary for them to efficiently set up and manage their users. With this new update, we can further enable admins to take action on behalf of their users.

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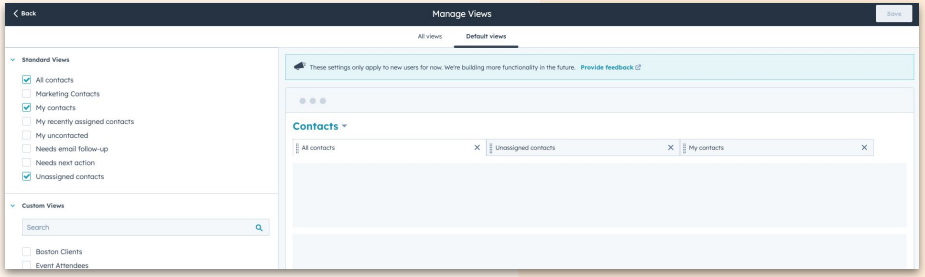
Launch region: Global

CRM Platform

Admin Set ‘Default Views for Index Pages’

Admins can now set the views that new users will see by default when they first come to the index pages.



Use Case

Admins now have the ability to control which index page views a new user sees. You can set the views that shows by default for new users in a few clicks, saving time so you can focus on what matters.

Free Starter Pro Ent Live

Launch region: Global

HubSpot

CRM Platform

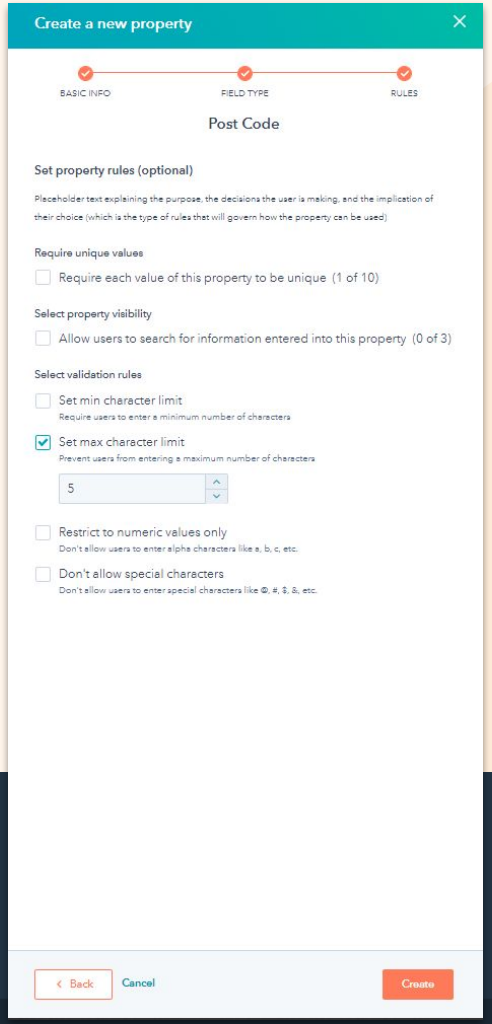
Additional Property Validation Settings Available

With our property validations tool, you can define granular rules for property values, giving you more control over the data that enters your CRM.

You can set validation rules for custom text, number, and date picker properties. When set, these rules act as guardrails for properties, preventing users from deviating from your requirements when entering data (e.g., only numeric values can be entered and no special characters).

Use Case

Give admins more control of their data by now allowing them to enforce the entry of clean, reliable, and accurate data into their system.



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Launch region: Global

HubSpot

App Marketplace & Integrations

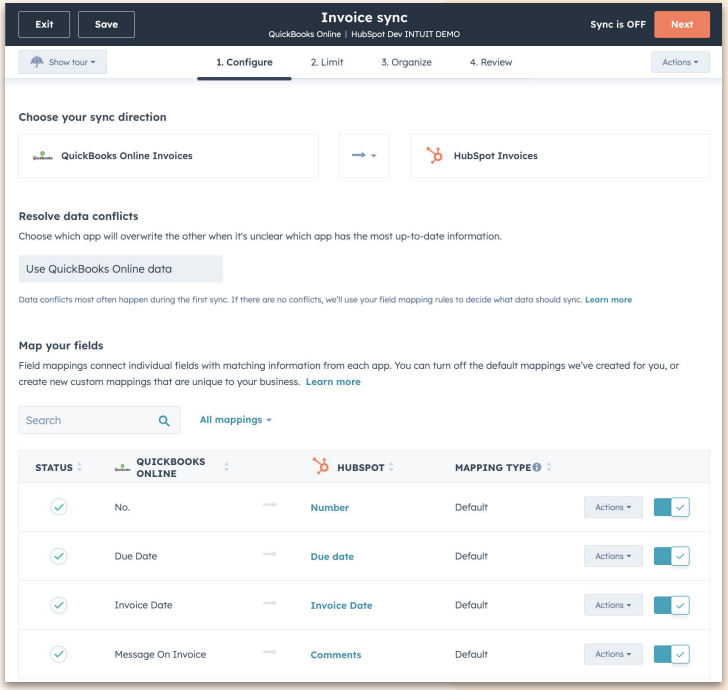
Byung Chung

Senior Product Manager

New QuickBooks Online Integration Powered by Data Sync

Powered by data sync, the two-way syncing engine behind Operations Hub, this integration offers:

- Two-way contact sync
- Two-way product sync
- The ability to sync QuickBooks invoices to HubSpot
- Advanced sync settings
- Sync insights including: in sync, failing, and excluded



Use Case

With this new integration, your accounting team can improve back-office processes and more easily close your books. Get insight into syncing errors and utilize sync settings, to ensure syncing is working as you'd like.

Free | Starter | Pro | Ent | Live

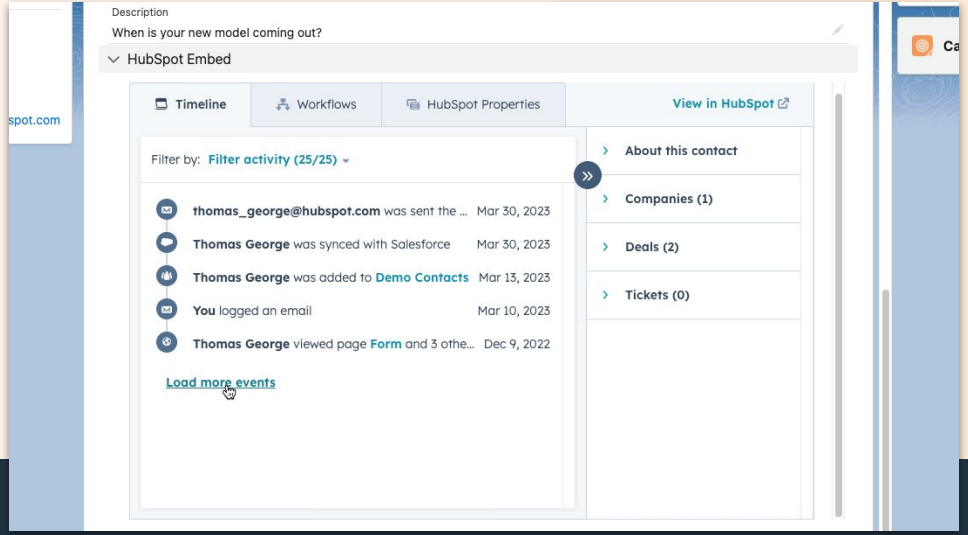
Launch region: Global

New HubSpot Embed for Salesforce

HubSpot's Salesforce integration now has a new HubSpot embed available to provide users with a more comprehensive view of their data within Salesforce. With the new embed, users can access all timeline insights, contact and company insights, property history, and more. This feature can now be added to various types of Salesforce records, including leads, contacts, accounts, and opportunities, in addition to existing automation and target accounts capabilities.

Use Case

Sales teams can access all the power and insights of HubSpot's records timeline, association, and the ability to trigger automation, all from within Salesforce.



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Launch region: Global

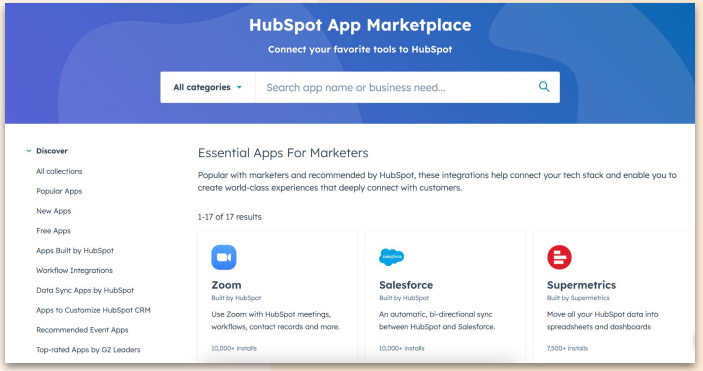
App Marketplace

The Essential Apps for Marketing Hub

Check out HubSpot's curated collection of integrations that are popular with Marketing Hub customers and recommended by HubSpot!

Examples:

- Amplitude: Track in-product events with Amplitude and add them to contact profiles in HubSpot, developing a better understanding of how customers use their products.
- NetSuite: Sync data between NetSuite and HubSpot to cut out manual data entry, allowing marketing teams to build a fuller picture of prospects, leads, and customers.
- Salesforce: Sync Salesforce with Marketing Hub to get a full view of marketing and sales activity across your company



Use Case

From driving high-quality leads to measuring impact, marketers will have everything they need by combining the power of Marketing Hub with essential integrations.

Free | Starter | Pro | Ent | Live

Launch region: Global

April Product Recap

2023

1. Personalization Token in Sequences Tasks
2. Deal and Ticket Property Insights in the Data Quality Command Center
3. New Filters for Date Properties on Object Index Pages
4. Meetings Data Now Available in Customer Journey Analytics
5. Advanced Playbook Recommendations
6. Default Settings for Payment Links
9. Random Split Lists
10. Set Task Due Date to Count Business Days in Workflows
11. One Way Salesforce Cases Sync for the Salesforce Integration
12. Repeat a Past Import
13. Multiple Knowledge Bases
14. Centralized Audit Log of User Actions
15. Colored Ticket Tags
16. Form Dashboard Saved Views
17. Moving Help to the Nav
17. Improved Payouts Experience for HubSpot Payments
18. Improvements to the “Get Help” Functionality on Mobile
19. Survey Enhancements; New Viewing and Exporting Features

May Product Recap

2023

1. WhatsApp Module
2. New QuickBooks Online Integration Powered by Data Sync
3. New Service Playbook Templates
4. “Rating” Type Questions in Custom Surveys Now Support Calculating Average
5. Email Log & Track Default Settings for Admin
6. Sort HubDB Data by Columns
7. Custom Code HubSpot Client Version Update
8. Clone Static Lists
9. Restore Static Lists
10. Review and Ignore Workflows At-Risk on the At-Risk Workflow Tab
11. Invoice User Permissions
12. Session Timeout for User Inactivity
13. View Users Without 2FA in Security Center
14. Data Model Overview Design Improvements
17. Form Dashboard on the Framework
18. Add Teams to Presets
19. Improved Comment Notification Emails
20. Restore Deleted Products
21. Saved Views in Tasks

June Product Recap

2023

1. Colored Object Tag Enhancements
2. Security Score Notifications
3. Simplified Global Search with Quicker Actions
4. Formatting Options for Calculated Properties
5. Workflows Custom Views and Subfolders
6. Refreshed User Creation Flow
7. Login to HubSpot with Microsoft
8. Goals Overview Tab
9. Integration Sync Card for NetSuite
10. Integration Sync Card for Dynamics 365
11. Goals App is now in the Global Nav
12. AI Content Assistant
13. Updated User Interface for CMS Content Editors
14. Spam Submissions Tool for Forms
15. Activities in the Data Model Overview
16. CRM Activity Cards in Preview Sidebar
17. Subscriptions Index Page
18. Marketing Email Analytics now in Custom Report Builder
19. Checkout Page Included in Google Analytics
20. New Settings Page for Salesforce Integration
21. JavaScript Building Blocks

Read our blog!

Learn more

Great minds think alike

Have an idea that you think will improve the HubSpot product? We think so, too.

151	211	113	1128
Ideas in review	Ideas in planning	Ideas in beta	Ideas delivered

out of 29 features presented are from the Ideas Forum!

Submit your ideas!

Q&A

HubSpot

Thank You!