

AI Analysis

HubSpot Admin Pro Tips: Hidden Gems and Advanced Techniques

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Summary

In the session, Kyle Jepson explored advanced techniques and hidden gems for HubSpot admins, emphasizing data enrichment, CPQ features, and the evolution of CRM functionalities. He highlighted the integration of data enrichment across all paid subscriptions, eliminating credit consumption, which is a significant enhancement for data quality management. This shift allows admins to maintain healthier data without additional costs. He also discussed the flexible pricing options for HubSpot credits, allowing admins to set limits and manage overages effectively, thus ensuring better control over budget and resources.

Jepson introduced several advanced features in HubSpot, such as the projects tool within the CRM for project management, segments in Marketing Hub, and the integration of CPQ in Commerce Hub. The projects tool offers a comprehensive way to manage projects, including custom properties and workflows, enhancing organizational capabilities. The segments feature in Marketing Hub provides more flexible filtering options, improving list management and targeting. CPQ in Commerce Hub now includes tiered pricing and enhanced quote templates, streamlining the sales process and ensuring consistency in terms and conditions.

Lastly, Jepson showcased the capabilities of HubSpot's Data Hub, Breeze Studio, and smart properties. Data Hub's new Data Studio allows integration of external sources, significantly broadening the scope of data sets admins can work with. Breeze Studio introduces customizable agents and assistants, aiding in process automation and efficiency. Smart properties now include call transcript analysis, enabling deeper insights from unstructured data. The session concluded with an overview of buyer intent, research intent, and signals, which provide comprehensive tools for tracking and leveraging customer behavior and external events to drive strategic decisions.



Takeaways

Integrated Data Enrichment

HubSpot has enhanced data enrichment by including it in all paid subscriptions, eliminating credit consumption. This allows admins to enrich contacts and companies without additional costs, fostering better data quality management. It ensures that admins can maintain up-to-date, accurate records effortlessly, improving overall operational efficiency.

Advanced Project Management

The new projects tool within HubSpot CRM offers robust project management capabilities. Admins can create custom properties, workflows, and visualize projects using Gantt charts. This tool enables better association of projects with other CRM objects, enhancing organizational capabilities and streamlining project execution.

Enhanced CPQ Features

HubSpot's Commerce Hub now includes advanced CPQ features like tiered pricing and improved quote templates. These enhancements streamline the sales process, ensuring consistency in terms and conditions. Admins can set up standard enterprise packages, add attachments, and automate responses to buyer queries, significantly improving the quoting experience.

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