HubSpot Workflow Automation With AI

Nicole Casares | Sep 2025

Nicole Casares

Inbound Professor

- **At Work**
  - Create educational content about HubSpot development, integrations, and customization
- **Outside Work**
  - Read, create art, and play D&D

A Little More About Me

I have three cats named Luna, Juno, and Zeus.

I used to compete as an amateur lightweight sumo wrestler.

I love lifting especially my friends.

Sandra Ramírez

Inbound Professor

- **At Work**
    - Create educational content about marketing, service, and sales
- **Outside Work**
  Lecturer and Portuguese student

Jess Hartnagle

Automation Product Manager

- **At Work**
  - Build automation software to help SMBs get more done and 10x their impact
- **Outside Work**
  Mom with kids in travel sports (I do a lot of carpool), reading, hiking, family walks

HubSpot Academy

Our vision is to power a global learning community through **content**, **experiences**, and **credentials**, so that we drive adoption, maximize career potential, and scale HubSpot capabilities upmarket.

Before We Get Started

- This session is meant to be **interactive**! We recommend following along and taking notes during demonstrations.
- We have two **session leaders**, a HubSpot product expert, and plenty of knowledgeable peers in the room today. We're all here to help!
- This session is **60 minutes** and there's a lot to cover. Add questions to the link and we'll get back to you within seven days.
- The more you **engage** with others and the content, the more you'll get out of the session!

Agenda

1. Customer Engagement Landscape
2. Intro to Breeze by HubSpot
3. Setting Up Breeze Actions
4. Create Workflows With Breeze Assistant
5. Use cases
6. Lab

Workflow Automation

Learning Objectives

01 You'll be able to set up various enrollment triggers, including standard events.

02 You'll be able to add the Breeze actions to a workflow and craft effective prompts to analyze and categorize data.

03 You'll be able to develop dynamic workflow logic based on AI-generated outputs.

The Customer Engagement Landscape

The Customer Engagement Landscape

What the Landscape Looks Like

81%

of customers prefer companies that offer a personalized experience.

- Forbes

70%

say a personalized experience in which the employee knows who they are and their history with the company is important.

- Forbes

90%

of consumers say immediate responses are critical in customer service.

- HubSpot

The Customer Engagement Landscape

Traditional Challenges

📅 **Outdated Data**

Campaigns planned weeks in advance using stale customer information

🔗 **Fragmented Execution**

Disconnected systems create inconsistent customer experiences

Rigid Buyer Journeys

One-size-fits-all approach ignores individual customer behavior

The Customer Engagement Landscape

Traditional Challenges

📅 **Outdated Data**
Campaigns planned weeks in advance using stale customer information

🔗 **Fragmented Execution**
Disconnected systems create inconsistent customer experiences

Rigid Buyer Journeys
One-size-fits-all approach ignores individual customer behavior

Customer Expectations

⚡ **Real-Time Responsiveness**
Immediate reactions to customer behavior and preferences

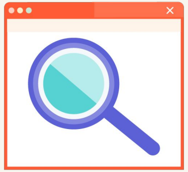
🎯 **Hyper-Personalization**
Content tailored to individual behavior and context

🔄 **Adaptive Journey**
Dynamic paths based on real customer actions

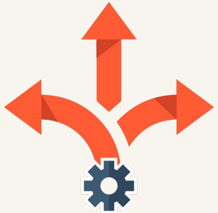
The Customer Engagement Landscape

Trigger Overview - The Building Blocks of AI-Enhanced Automation

Form Submissions



Page Views



Property Changes

List Membership

Email Engagement

Time-Based Events

Ice breaker [5 min]

- Name
- Based in
- What do you do?
- What do you wish was a olympic sport and would you win gold?

Part 1: Planning [5 min]

Activity 1: Current Challenge Assessment

Think about your current customer engagement challenges.

Complete these statements:

Our biggest challenge with lead follow-up is:

Our sales team spends too much time on:

Our customer success team struggles with:

Part 1: Planning [5 min]

Activity 2: Behavioral Trigger Identification

List 3-5 customer actions that currently require manual follow-up in your business:

Customer Action Example: Demo request	**Current Manual Process** Example: Sales representative researches company manually	**Desired Automated Response** AI research + personalized outreach

Intro to Breeze™

IN 25

What does Breeze do?

A suite of AI-powered tools designed to enhance HubSpot Smart CRM.

Your Intelligent Workflow Automation Partner

01 **Analyzes** customer data in real-time

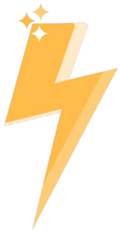
02 **Responds** to behavioral triggers instantly

03 **Personalizes** every customer interaction

04 **Adapts** workflows based on AI insights

Breeze™ AI-powered tools to create workflow

Breeze Assistant



Breeze Action

HubSpot customers drive business results with Breeze™.

AGICAP

Saved 750 hours per week and increased deal velocity by 20%

SANDLER®

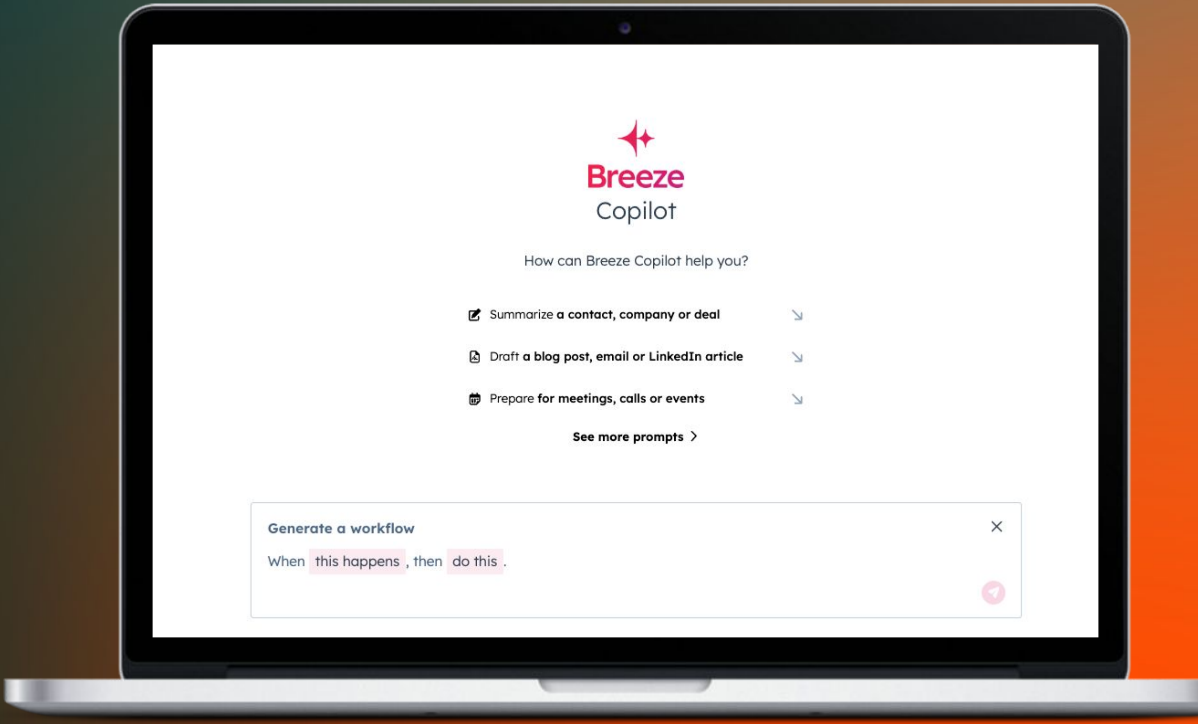
Drove 25% more engagement and 4x the sales leads by creating personalized experiences

KAPLAN® EARLY LEARNING COMPANY

Streamlined communications for customer service, reducing response times by 30%

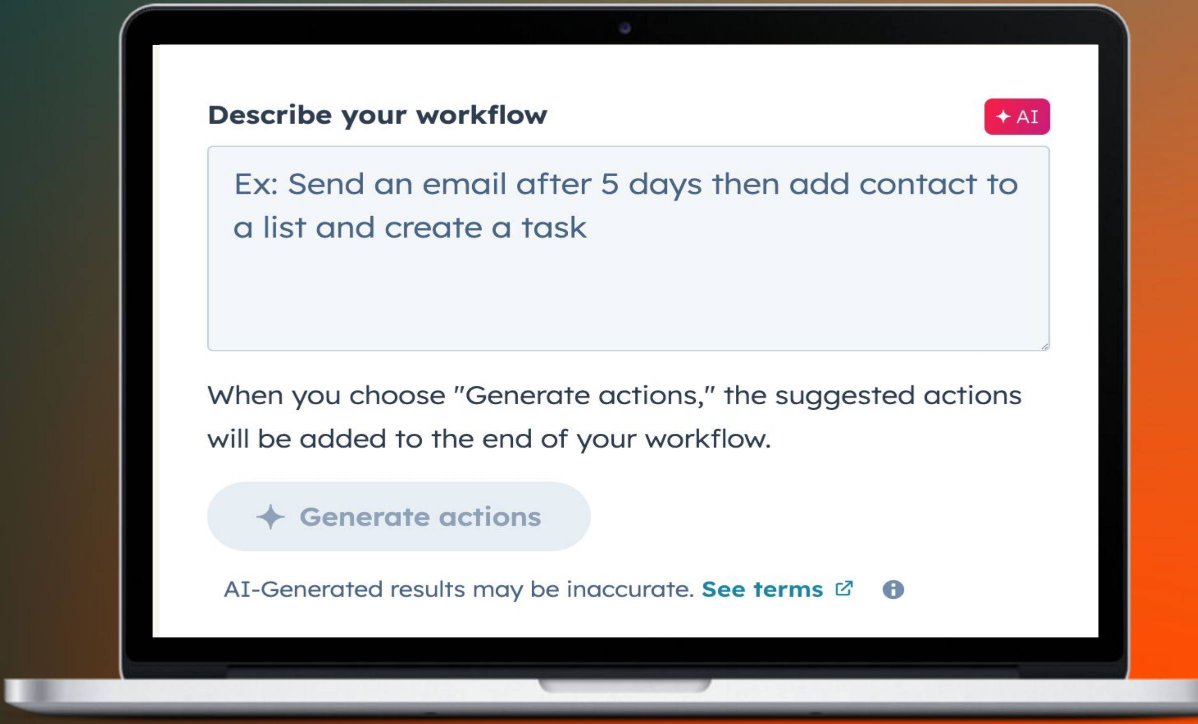
Breeze Assistant

A conversational AI tool that can be used like a virtual assistant to support your sales, marketing, and service goals.



Breeze Actions

Breeze Actions bring Data Agent's research and analysis capabilities directly into your HubSpot workflows, enabling your automation to make intelligent decisions based on real-time customer intelligence.



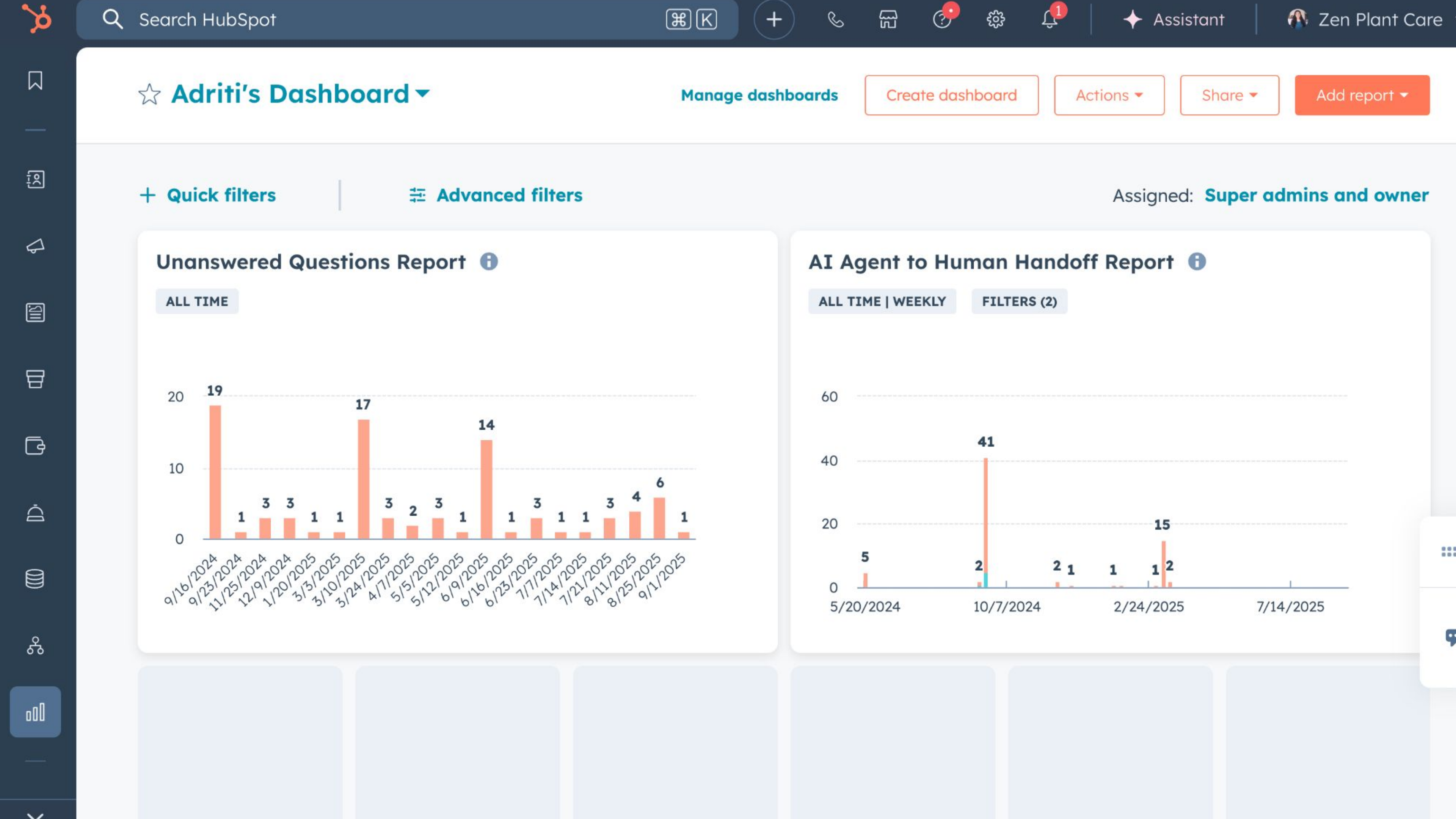
Part 2: Hands-On Lab Activities

Activity 1: Enable AI Settings and a Workflow

Step 1: Enabling AI Settings

In HubSpot, take the following steps.

1. In the top navigation bar, click the **settings icon.**
2. Under *Account management*, click **AI.**
3. Click the **Access** tab.
4. Toggle on **Give users access to generative AI tools and features.**
5. Toggle on **CRM Data.**
6. Click **Save.**


Search HubSpot
Assistant
Zen Plant Care
Adriti's Dashboard
Manage dashboards
Create dashboard
Actions
Share
Add report
Quick filters
Advanced filters
Assigned: Super admins and owner
Unanswered Questions Report
ALL TIME
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AI Agent to Human Handoff Report
ALL TIME | WEEKLY
FILTERS (2)
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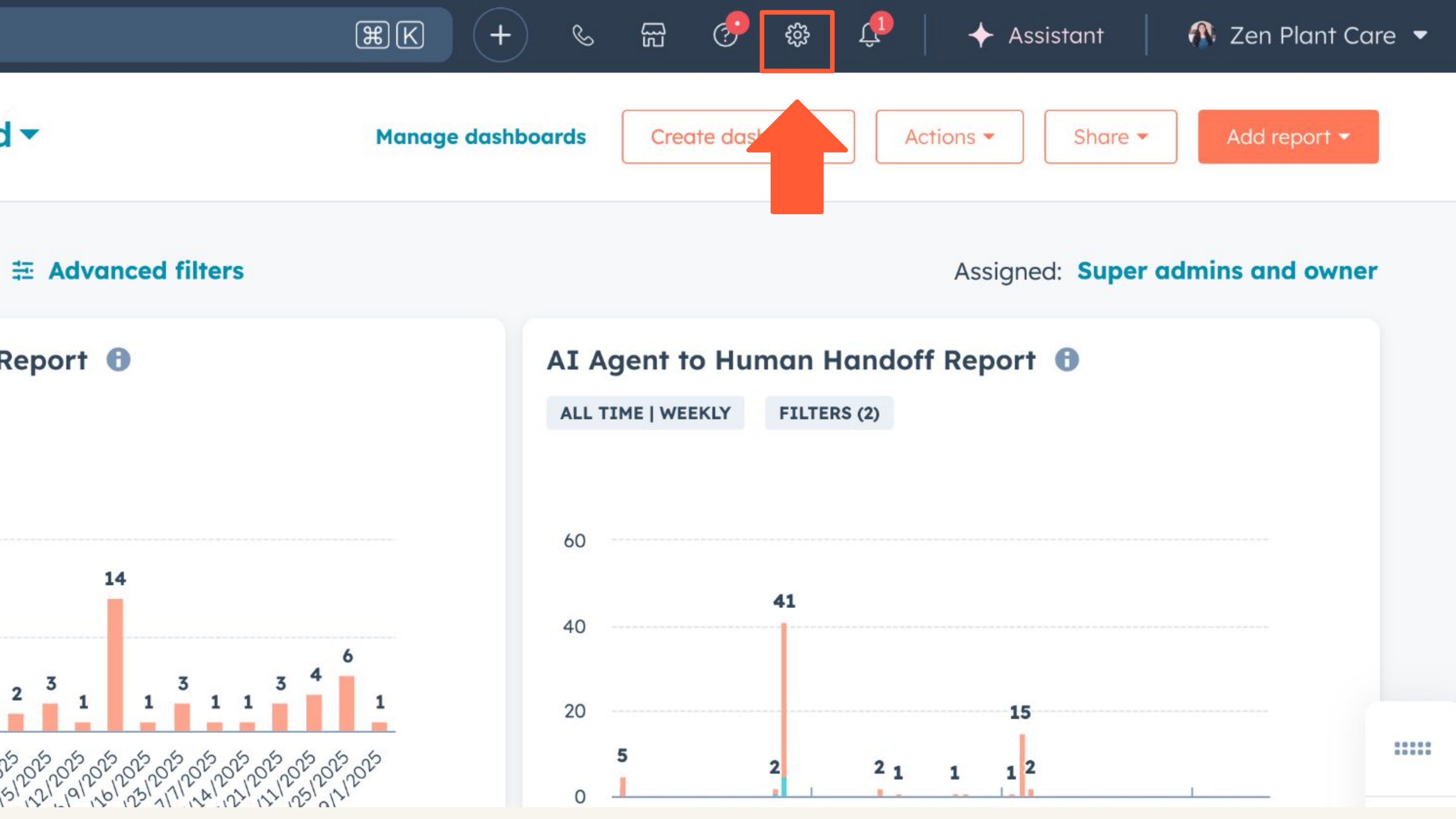
7/14/2025



Assistant
Zen Plant Care
Manage dashboards
Create das
Actions
Share
Add report
Advanced filters
Assigned: Super admins and owner
Report
AI Agent to Human Handoff Report
ALL TIME | WEEKLY
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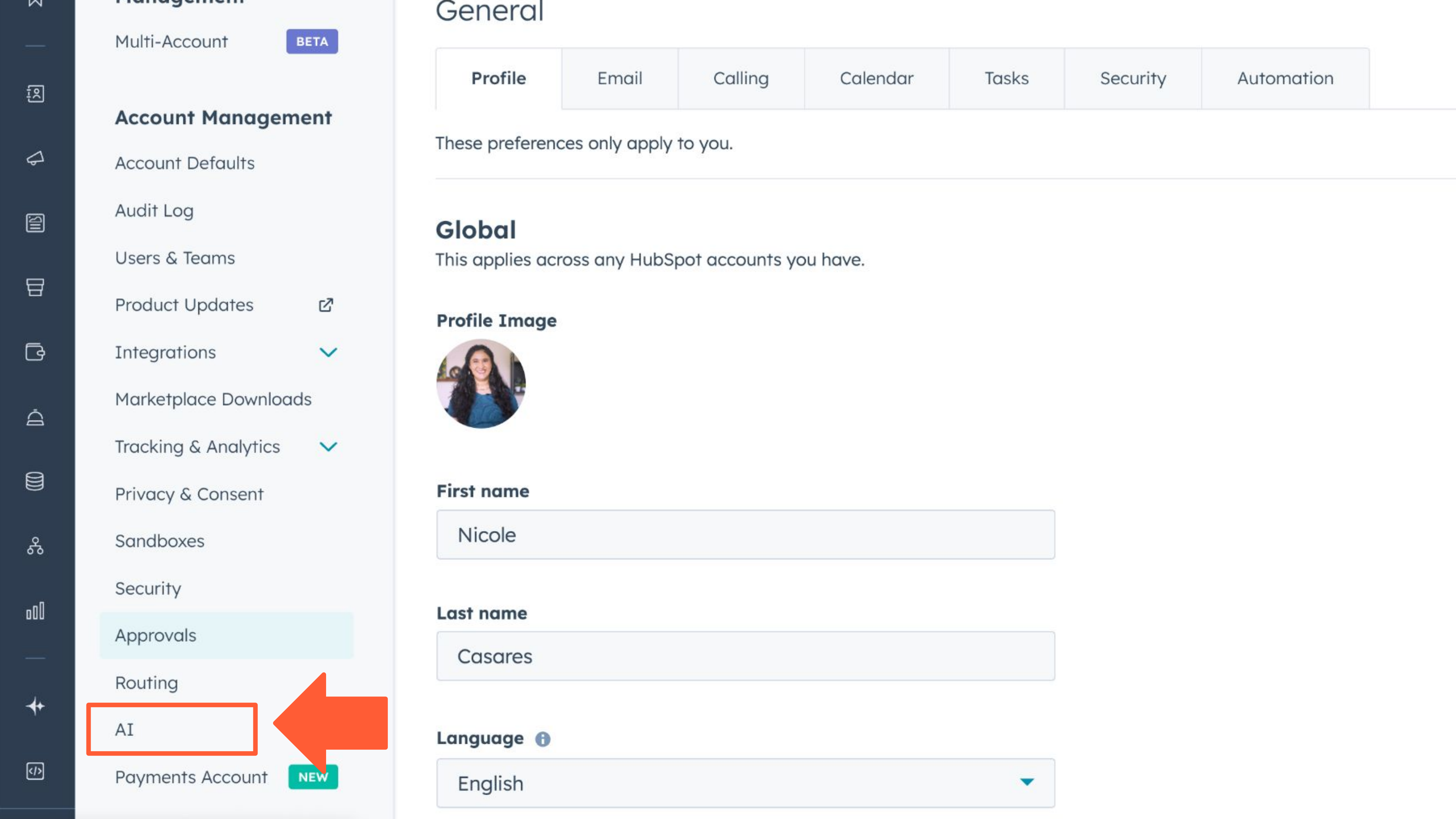
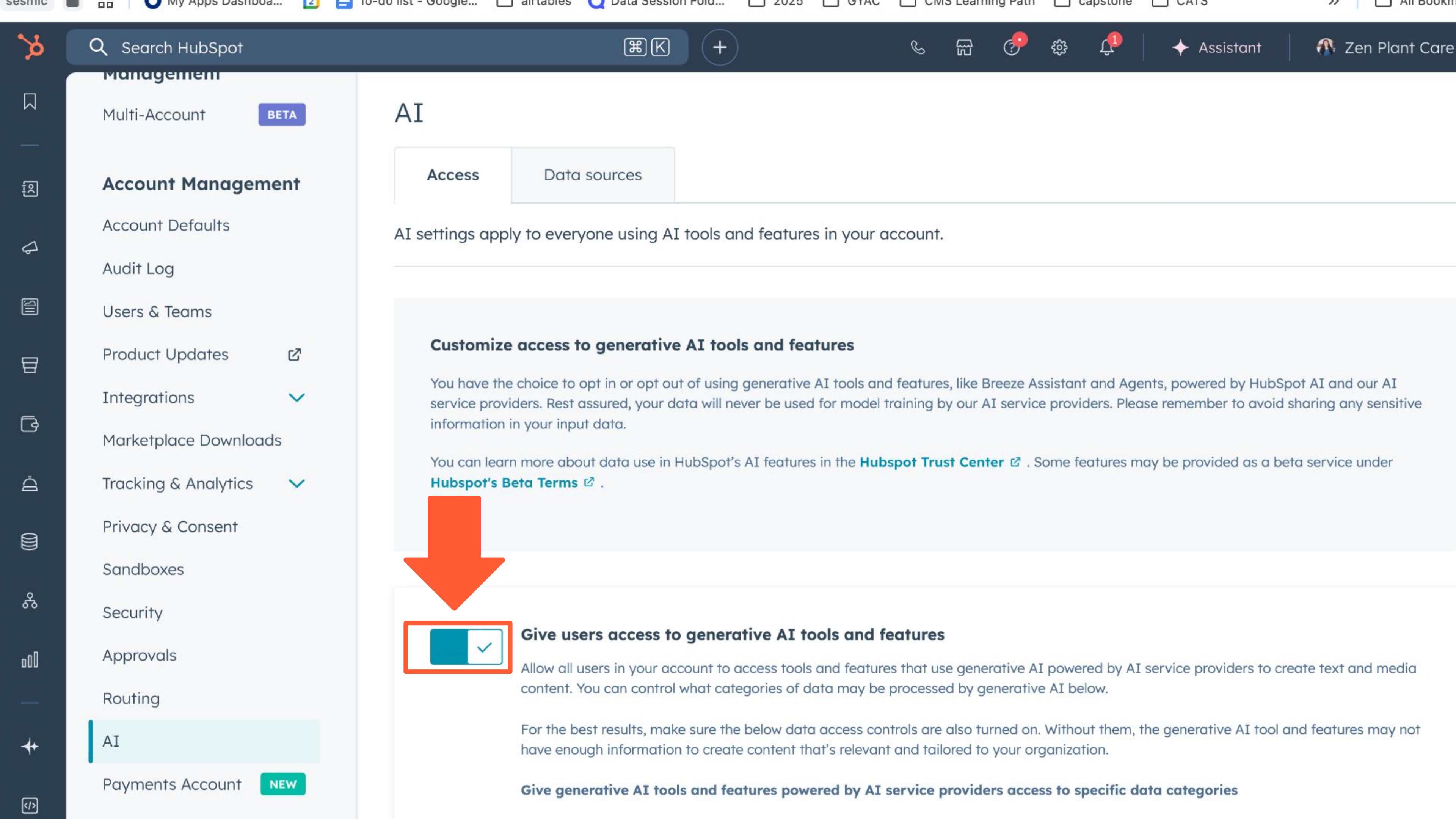


General
Multi-Account
BETA
Account Management
Account Defaults
Audit Log
Users & Teams
Product Updates
Integrations
Marketplace Downloads
Tracking & Analytics
Privacy & Consent
Sandboxes
Security
Approvals
Routing
AI
Payments Account
NEW
Profile
Email
Calling
Calendar
Tasks
Security
Automation
These preferences only apply to you.
Global
This applies across any HubSpot accounts you have.
Profile Image
First name
Nicole
Last name
Casares
Language
English


Search HubSpot
Assistant
Zen Plant Care
Management
Multi-Account
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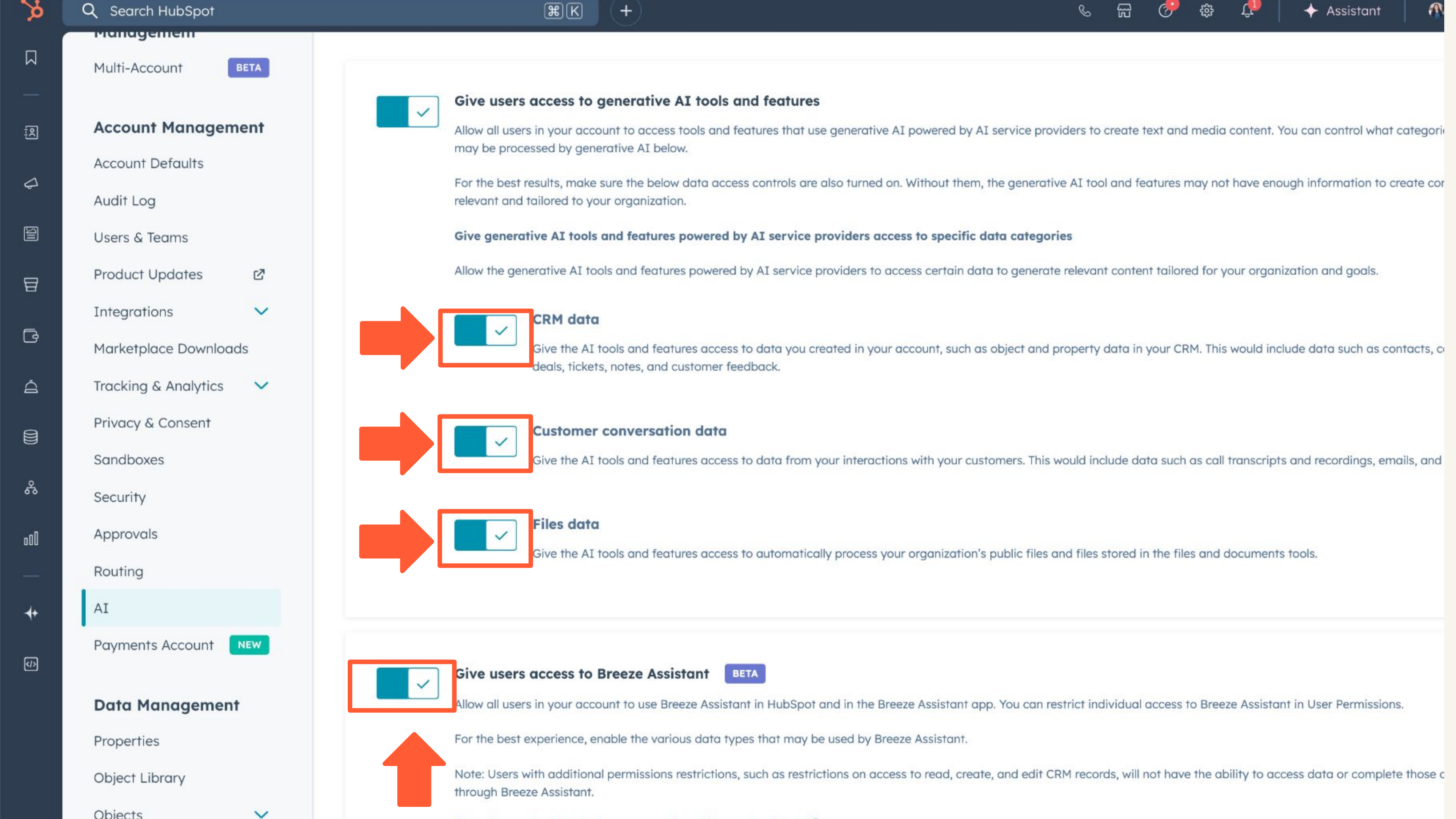
Marketplace Downloads
Tracking & Analytics
Privacy & Consent
Sandboxes
Security
Approvals
Routing
AI
Payments Account
NEW
AI
Access
Data sources
AI settings apply to everyone using AI tools and features in your account.
Customize access to generative AI tools and features
You have the choice to opt in or opt out of using generative AI tools and features, like Breeze Assistant and Agents, powered by HubSpot AI and our AI service providers. Rest assured, your data will never be used for model training by our AI service providers. Please remember to avoid sharing any sensitive information in your input data.
You can learn more about data use in HubSpot's AI features in the Hubspot Trust Center . Some features may be provided as a beta service under Hubspot's Beta Terms .
Give users access to generative AI tools and features
Allow all users in your account to access tools and features that use generative AI powered by AI service providers to create text and media content. You can control what categories of data may be processed by generative AI below.
For the best results, make sure the below data access controls are also turned on. Without them, the generative AI tool and features may not have enough information to create content that's relevant and tailored to your organization.
Give generative AI tools and features powered by AI service providers access to specific data categories


Search HubSpot
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Users & Teams
Product Updates
Integrations
Marketplace Downloads
Tracking & Analytics
Privacy & Consent
Sandboxes
Security
Approvals
Routing
AI
Payments Account
NEW
Data Management
Properties
Object Library
Objects
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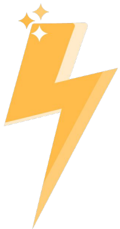
relevant and tailored to your organization.
Give generative AI tools and features powered by AI service providers access to specific data categories
Allow the generative AI tools and features powered by AI service providers to access certain data to generate relevant content tailored for your organization and goals.
CRM data
Give the AI tools and features access to data you created in your account, such as object and property data in your CRM. This would include data such as contacts, c
deals, tickets, notes, and customer feedback.
Customer conversation data
Give the AI tools and features access to data from your interactions with your customers. This would include data such as call transcripts and recordings, emails, and
Files data
Give the AI tools and features access to automatically process your organization's public files and files stored in the files and documents tools.
Give users access to Breeze Assistant
BETA
Allow all users in your account to use Breeze Assistant in HubSpot and in the Breeze Assistant app. You can restrict individual access to Breeze Assistant in User Permissions.
For the best experience, enable the various data types that may be used by Breeze Assistant.
Note: Users with additional permissions restrictions, such as restrictions on access to read, create, and edit CRM records, will not have the ability to access data or complete those a
through Breeze Assistant.

Setting Up Breeze Actions

IN 25

How Breeze™ Transforms Your Workflow

Breeze™



Customer Data In → **Breeze Analysis** → **Breeze Action**

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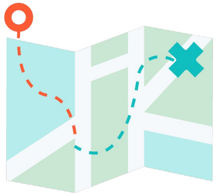
Setting Up Breeze Actions



Navigate to workflows.

Set enrollment trigger.

Add Breeze actions.

Write your prompt or configure premade actions.

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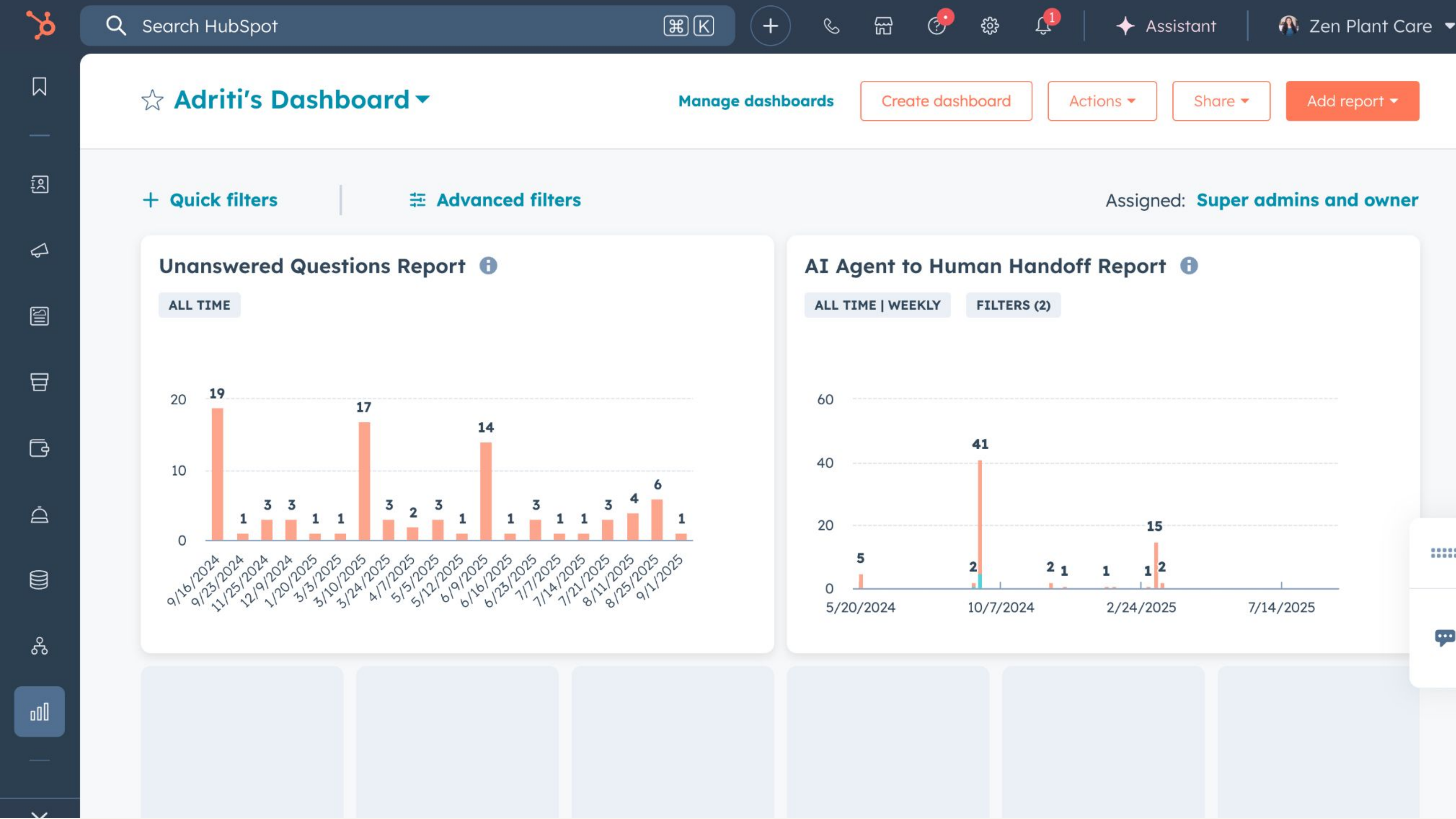
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ALL TIME | WEEKLY
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Quick filters
Advanced filters
Unanswered Questions Report
ALL TIME
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Date
AI Agent to Human Handoff Report
ALL TIME | WEEKLY
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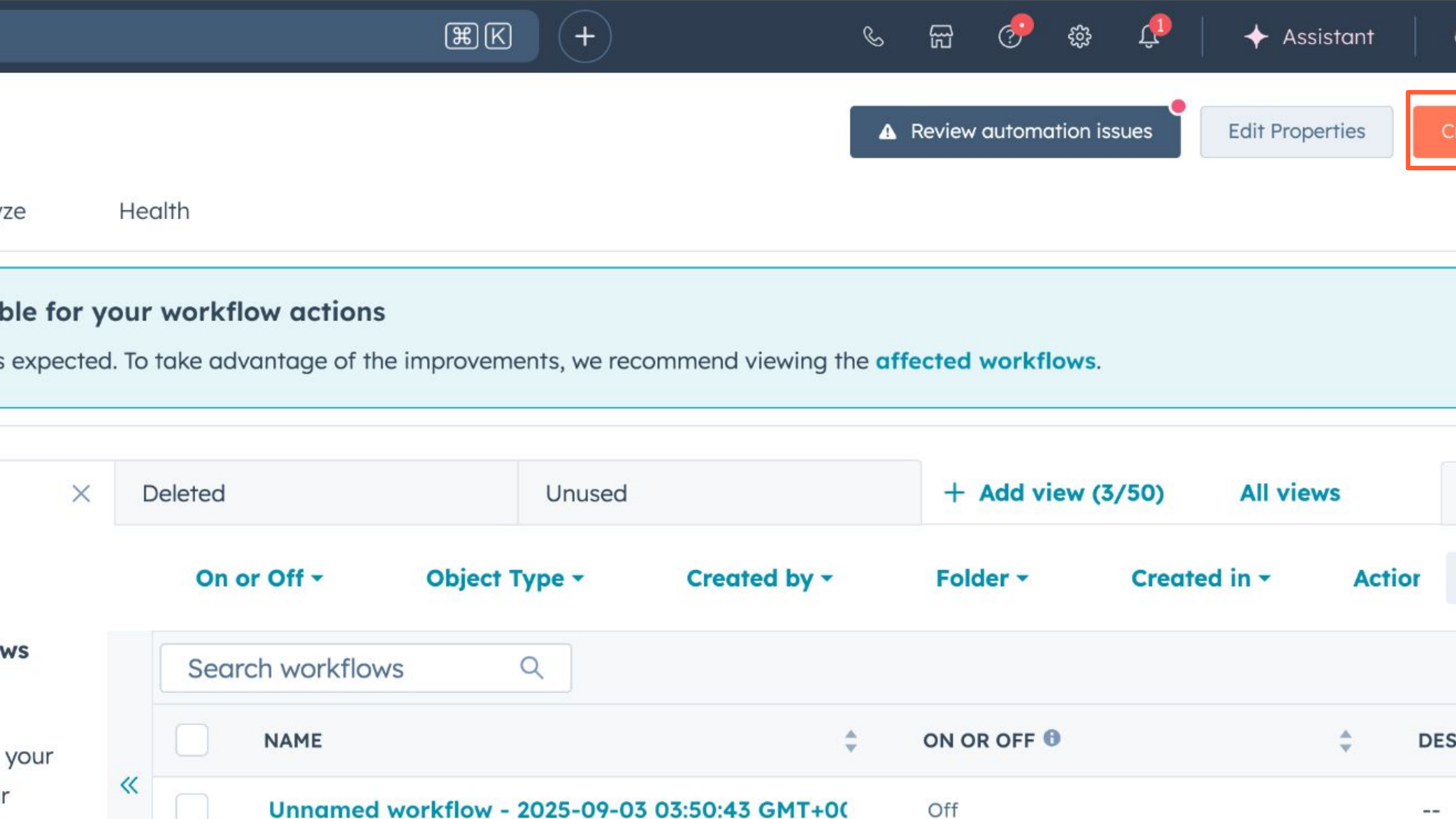
Automation
Overview
Workflows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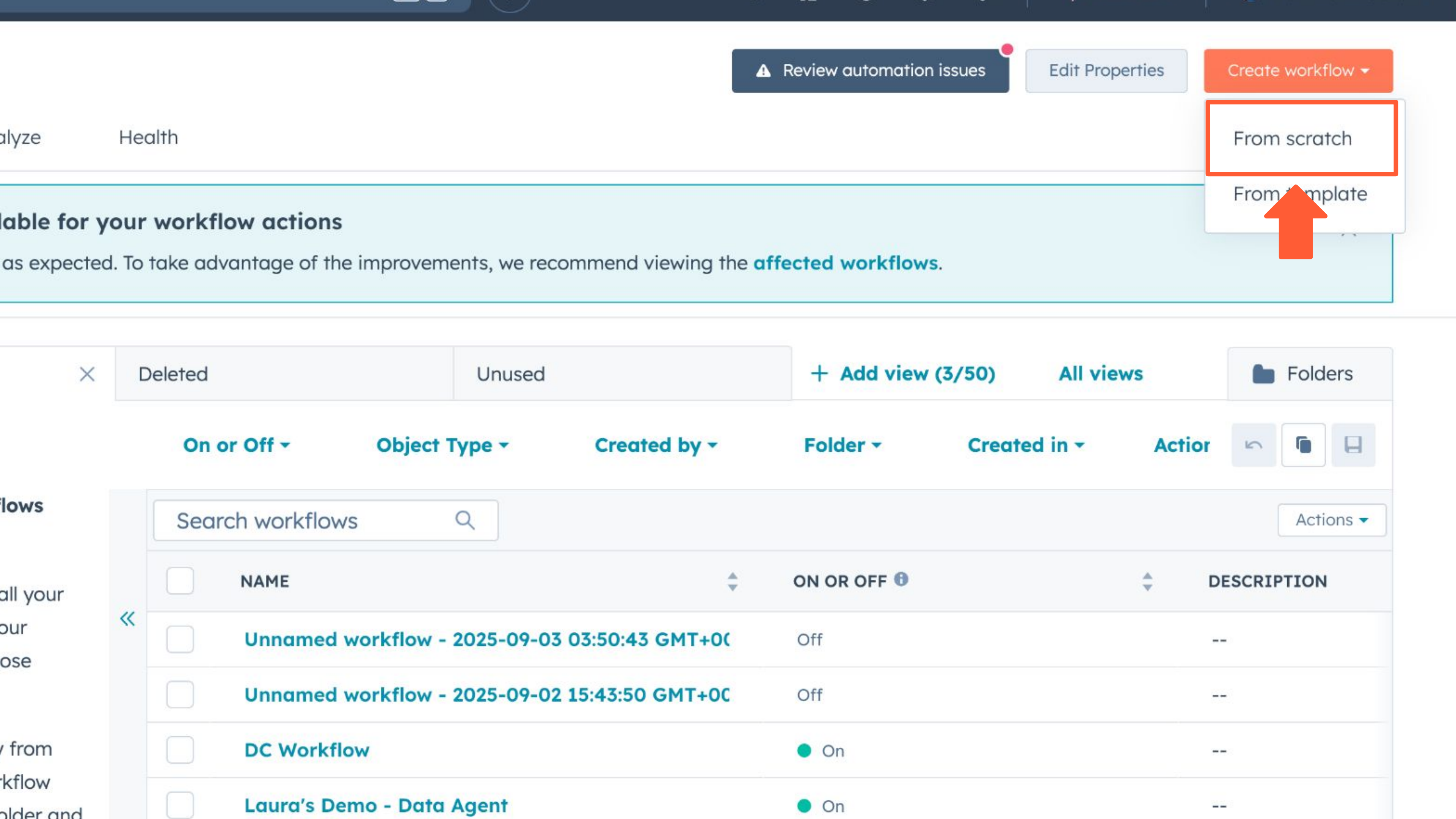
Review automation issues
Edit Properties
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DC Workflow
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Laura's Demo - Data Agent
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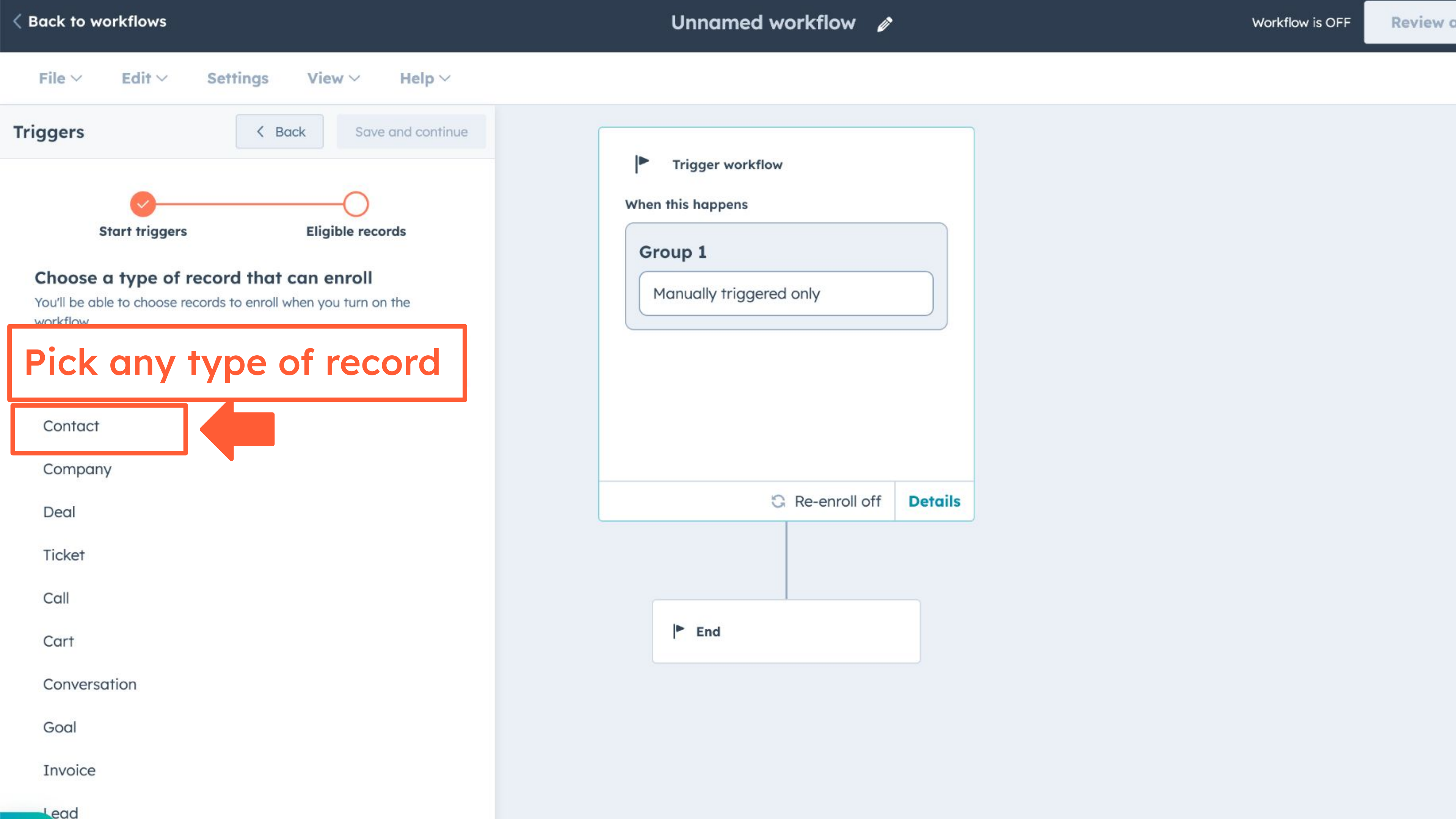
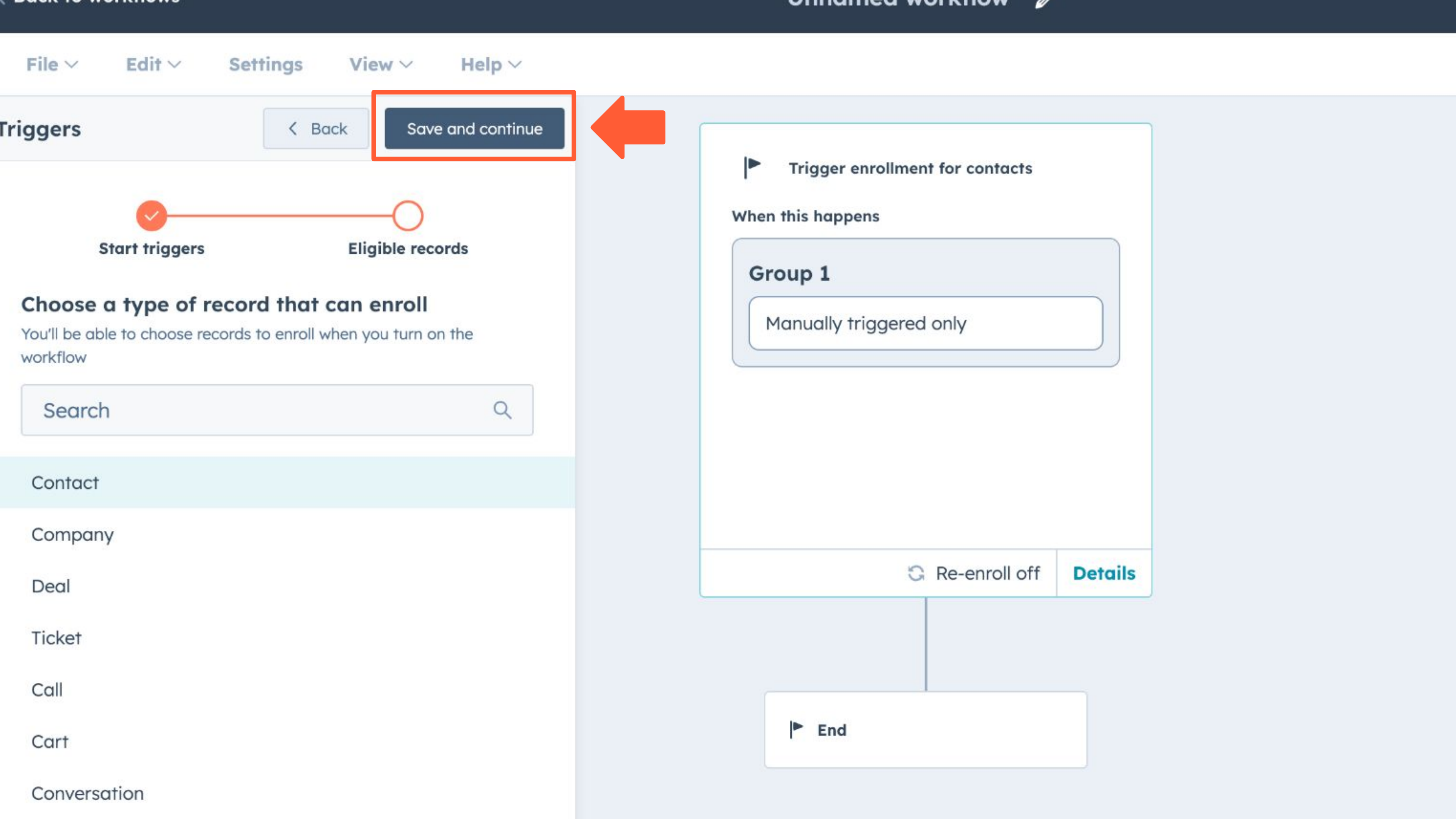


Back to workflows
Unnamed workflow
Workflow is OFF
Review a
File
Edit
Settings
View
Help
Triggers
Back
Save and continue
Start triggers
Eligible records
Choose a type of record that can enroll
You'll be able to choose records to enroll when you turn on the workflow
Pick any type of record
Contact
Company
Deal
Ticket
Call
Cart
Conversation
Goal
Invoice
Lead
Trigger workflow
When this happens
Group 1
Manually triggered only
Re-enroll off
Details
End


File
Edit
Settings
View
Help
Triggers
Back
Save and continue
Trigger enrollment for contacts
When this happens
Group 1
Manually triggered only
Re-enroll off
Details
End
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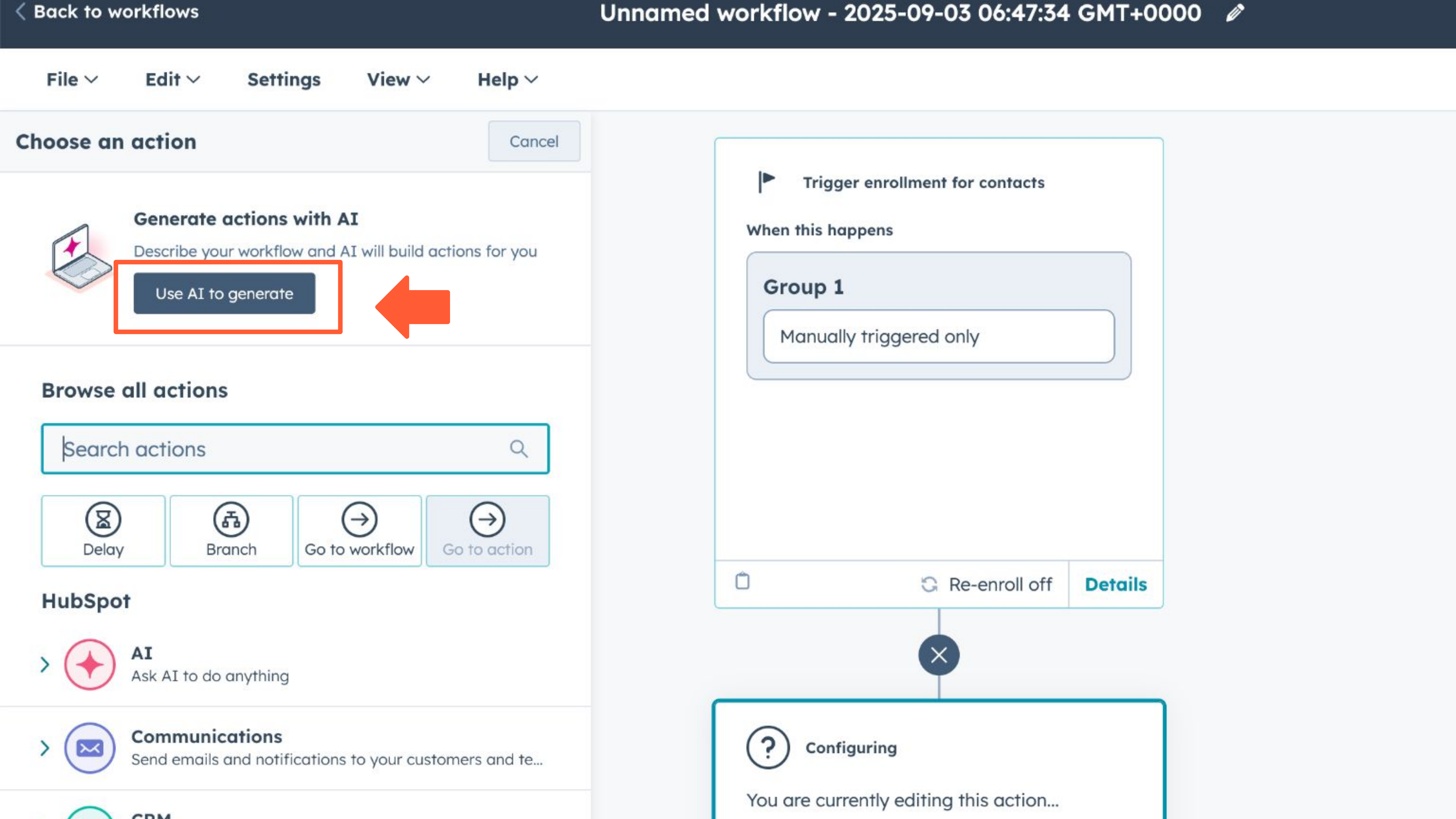
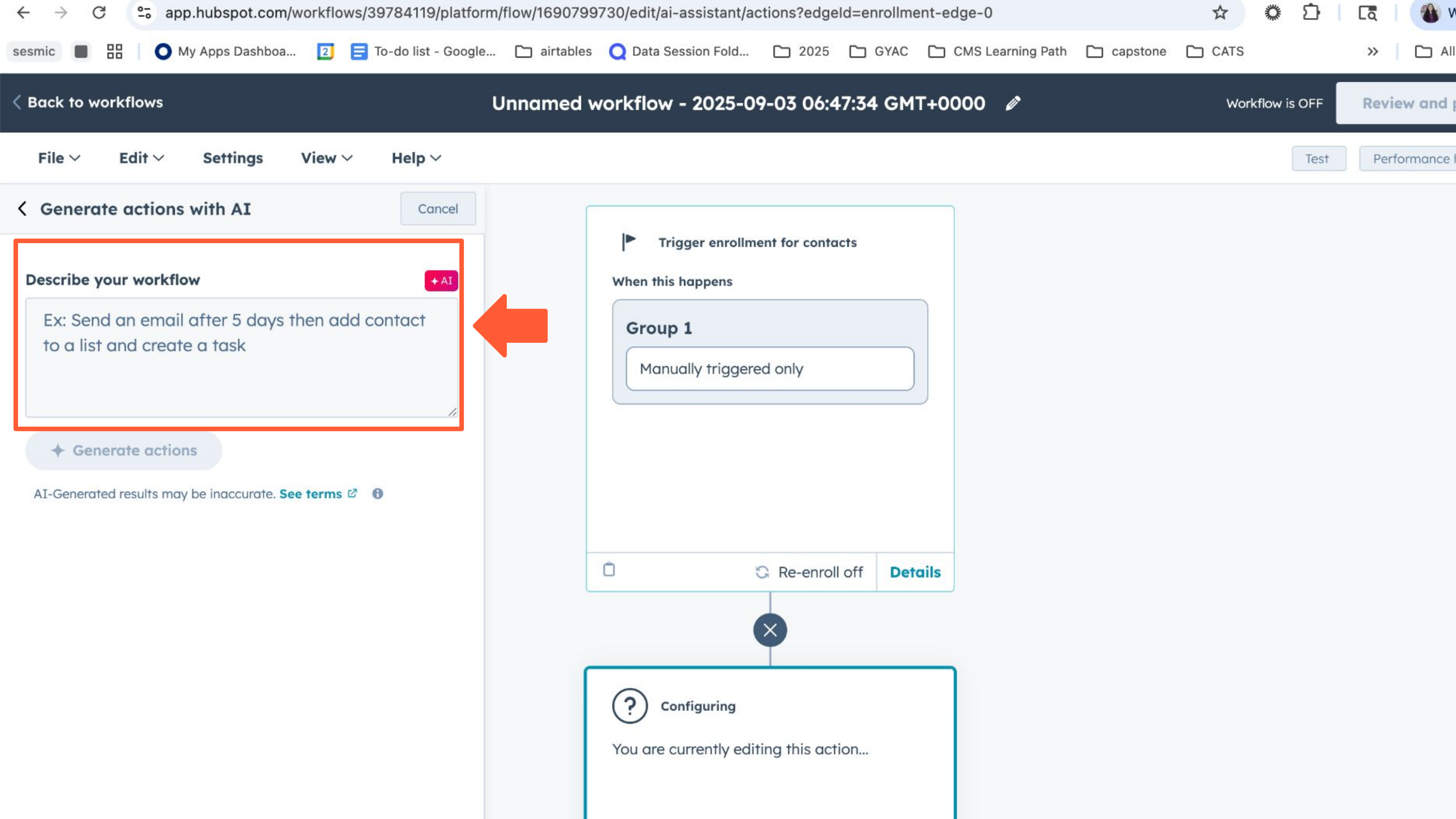

Back to workflows
Unnamed workflow - 2025-09-03 06:47:34 GMT+0000
File
Edit
Settings
View
Help
Choose an action
Cancel
Generate actions with AI
Describe your workflow and AI will build actions for you
Use AI to generate
Browse all actions
Search actions
Delay
Branch
Go to workflow
Go to action
HubSpot
AI
Ask AI to do anything
Communications
Send emails and notifications to your customers and te...
Trigger enrollment for contacts
When this happens
Group 1
Manually triggered only
Re-enroll off
Details
Configuring
You are currently editing this action...


app.hubspot.com/workflows/39784119/platform/flow/1690799730/edit/ai-assistant/actions?edgeId=enrollment-edge-0
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My Apps Dashboa...
To-do list - Google...
airtables
Data Session Fold...
2025
GYAC
CMS Learning Path
capstone
CATS
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Back to workflows
Unnamed workflow - 2025-09-03 06:47:34 GMT+0000
Workflow is OFF
Review and
File
Edit
Settings
View
Help
Test
Performance
Generate actions with AI
Cancel
Describe your workflow
AI
Ex: Send an email after 5 days then add contact to a list and create a task
Generate actions
AI-Generated results may be inaccurate. See terms
Trigger enrollment for contacts
When this happens
Group 1
Manually triggered only
Re-enroll off
Details
Configuring
You are currently editing this action...

Describe your workflow ✦ AI

When someone fills out a demo request or downloads content, research their company's current tech stack.

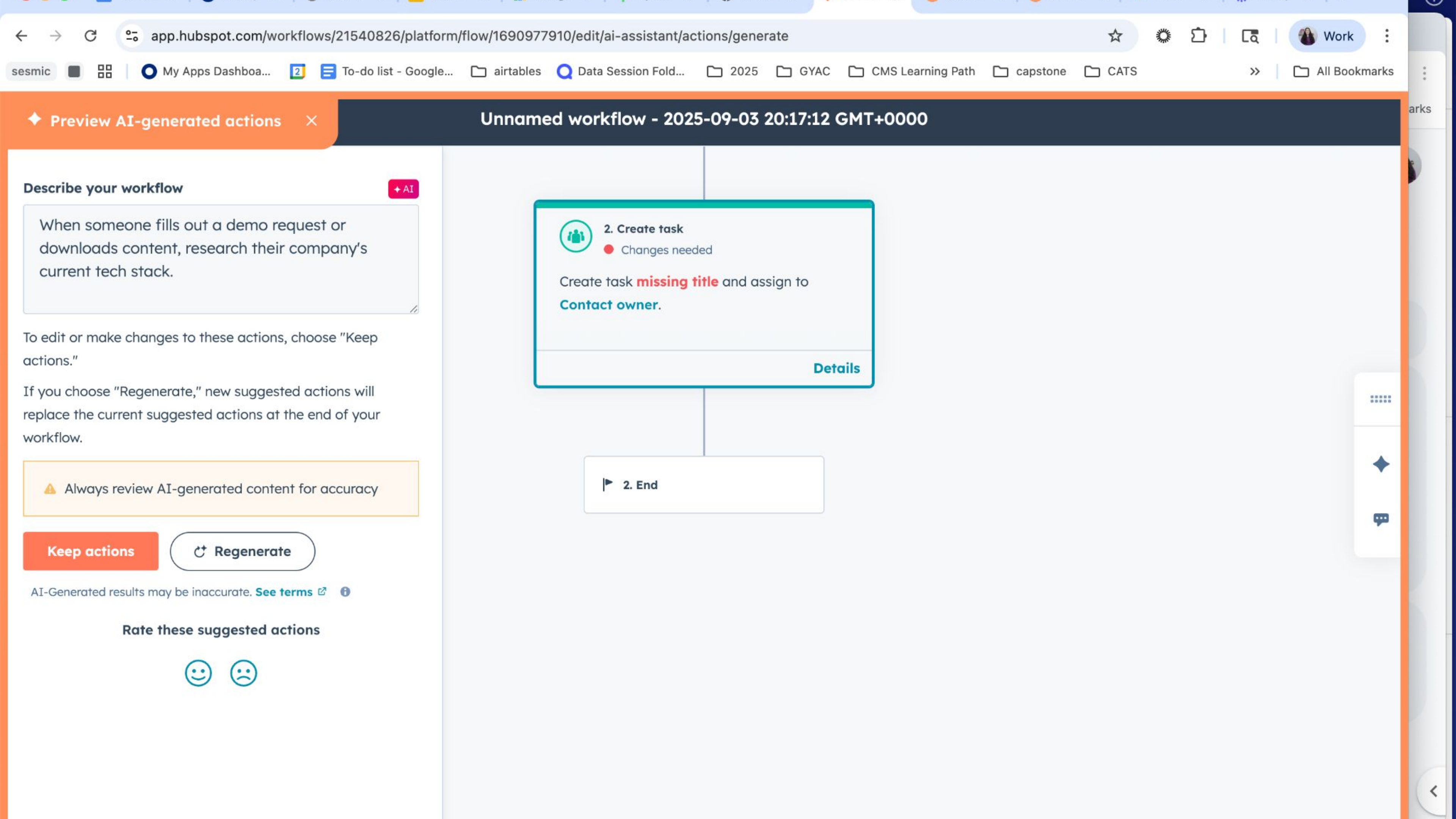
To edit or make changes to these actions, choose "Keep actions."

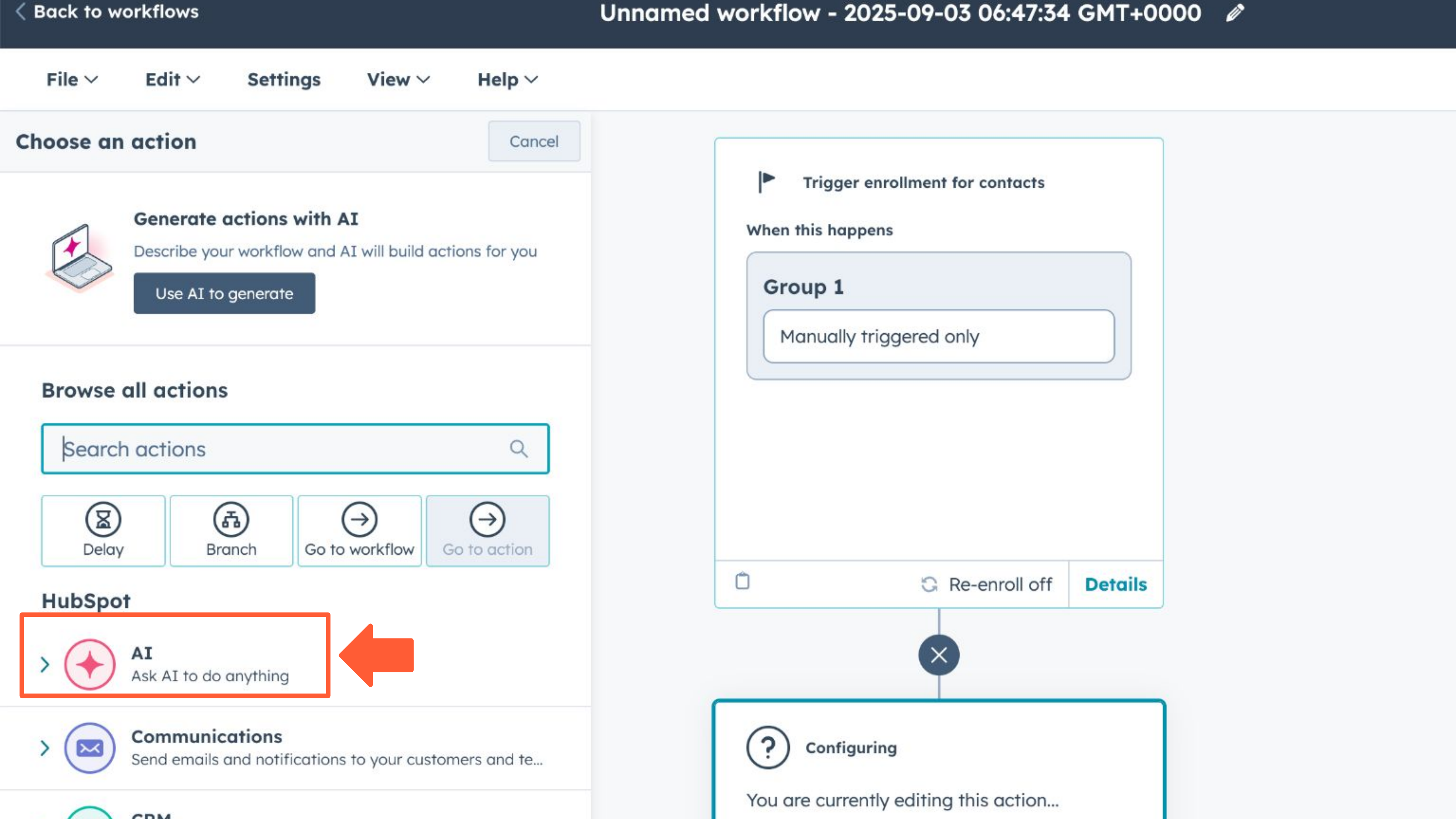
If you choose "Regenerate," new suggested actions will replace the current suggested actions at the end of your workflow.

> ⚠ Always review AI-generated content for accuracy

Keep actions | **Regenerate**

AI-Generated results may be inaccurate. **See terms**


app.hubspot.com/workflows/21540826/platform/flow/1690977910/edit/ai-assistant/actions/generate
Work
sesmic
My Apps Dashboa...
To-do list - Google...
airtables
Data Session Fold...
2025
GYAC
CMS Learning Path
capstone
CATS
All Bookmarks
Preview AI-generated actions
Unnamed workflow - 2025-09-03 20:17:12 GMT+0000
Describe your workflow
AI
When someone fills out a demo request or downloads content, research their company's current tech stack.
To edit or make changes to these actions, choose "Keep actions."
If you choose "Regenerate," new suggested actions will replace the current suggested actions at the end of your workflow.
Always review AI-generated content for accuracy
Keep actions
Regenerate
AI-Generated results may be inaccurate. See terms
Rate these suggested actions
2. Create task
Changes needed
Create task missing title and assign to Contact owner.
Details
2. End



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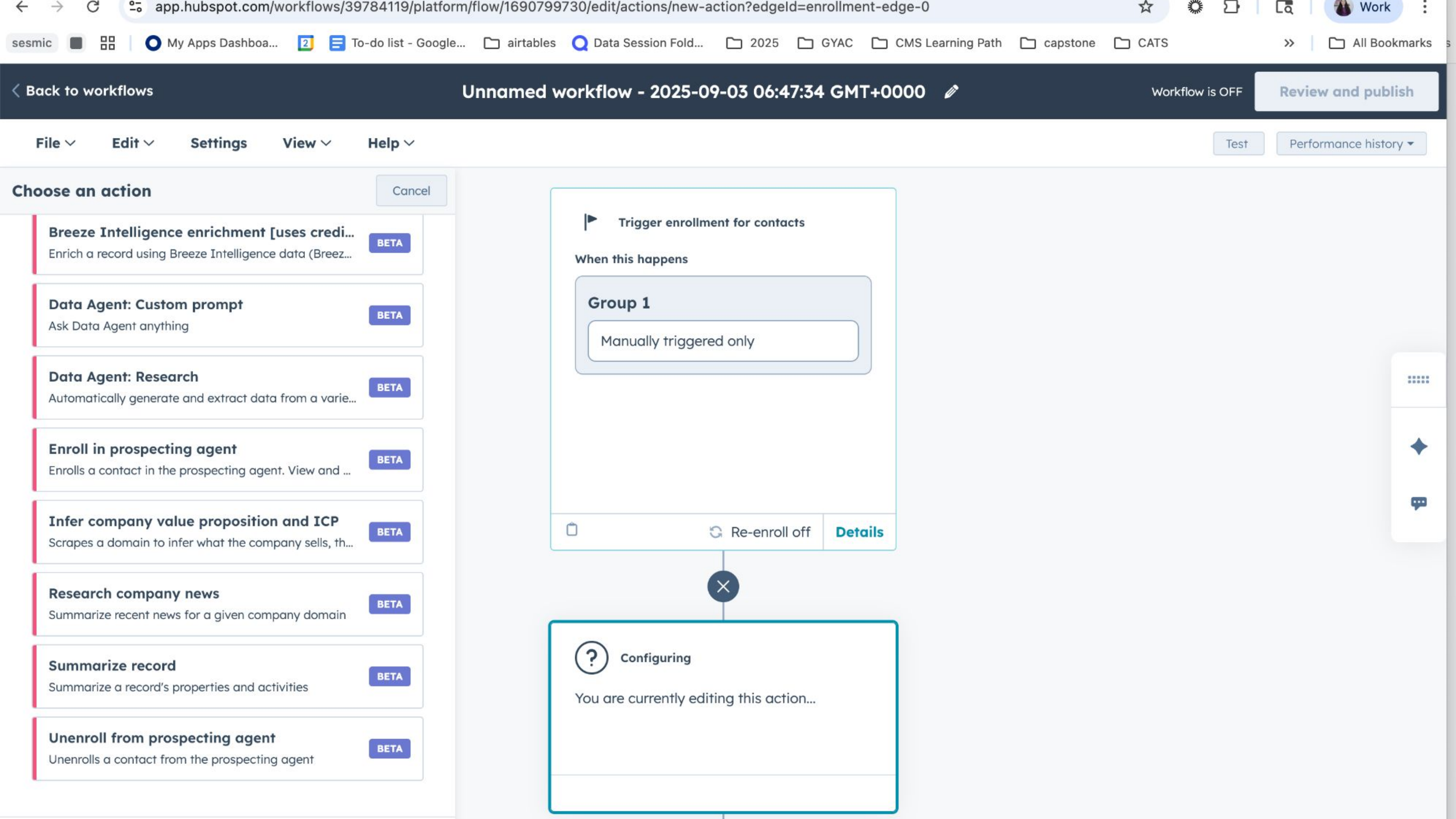

app.hubspot.com/workflows/39784119/platform/flow/1690799730/edit/actions/new-action?edgeId=enrollment-edge-0
Work
sesmic
My Apps Dashboa...
To-do list - Google...
airtables
Data Session Fold...
2025
GYAC
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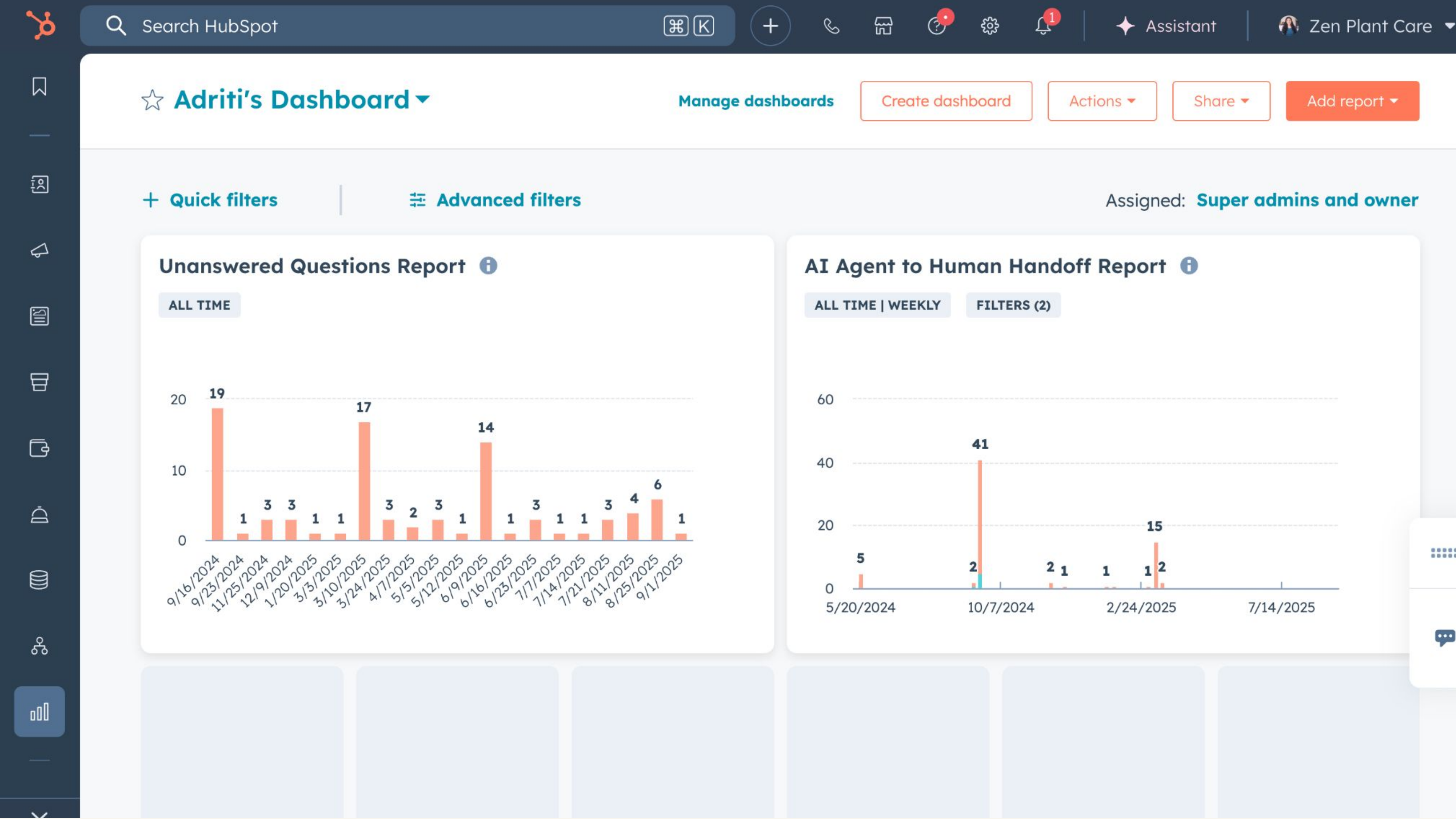
Back to workflows
Unnamed workflow - 2025-09-03 06:47:34 GMT+0000
Workflow is OFF
Review and publish
File
Edit
Settings
View
Help
Test
Performance history
Choose an action
Cancel
Breeze Intelligence enrichment [uses credi...
Enrich a record using Breeze Intelligence data (Breez...
BETA
Data Agent: Custom prompt
Ask Data Agent anything
BETA
Data Agent: Research
Automatically generate and extract data from a varie...
BETA
Enroll in prospecting agent
Enrolls a contact in the prospecting agent. View and ...
BETA
Infer company value proposition and ICP
Scrapes a domain to infer what the company sells, th...
BETA
Research company news
Summarize recent news for a given company domain
BETA
Summarize record
Summarize a record's properties and activities
BETA
Unenroll from prospecting agent
Unenrolls a contact from the prospecting agent
BETA
Trigger enrollment for contacts
When this happens
Group 1
Manually triggered only
Re-enroll off
Details
Configuring
You are currently editing this action...

Creating Workflows With Breeze Assistant

IN 25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Manage dashboards
Create dashboard
Actions
Share
Add report
Quick filters
Advanced filters
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Unanswered Questions Report
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AI Agent to Human Handoff Report
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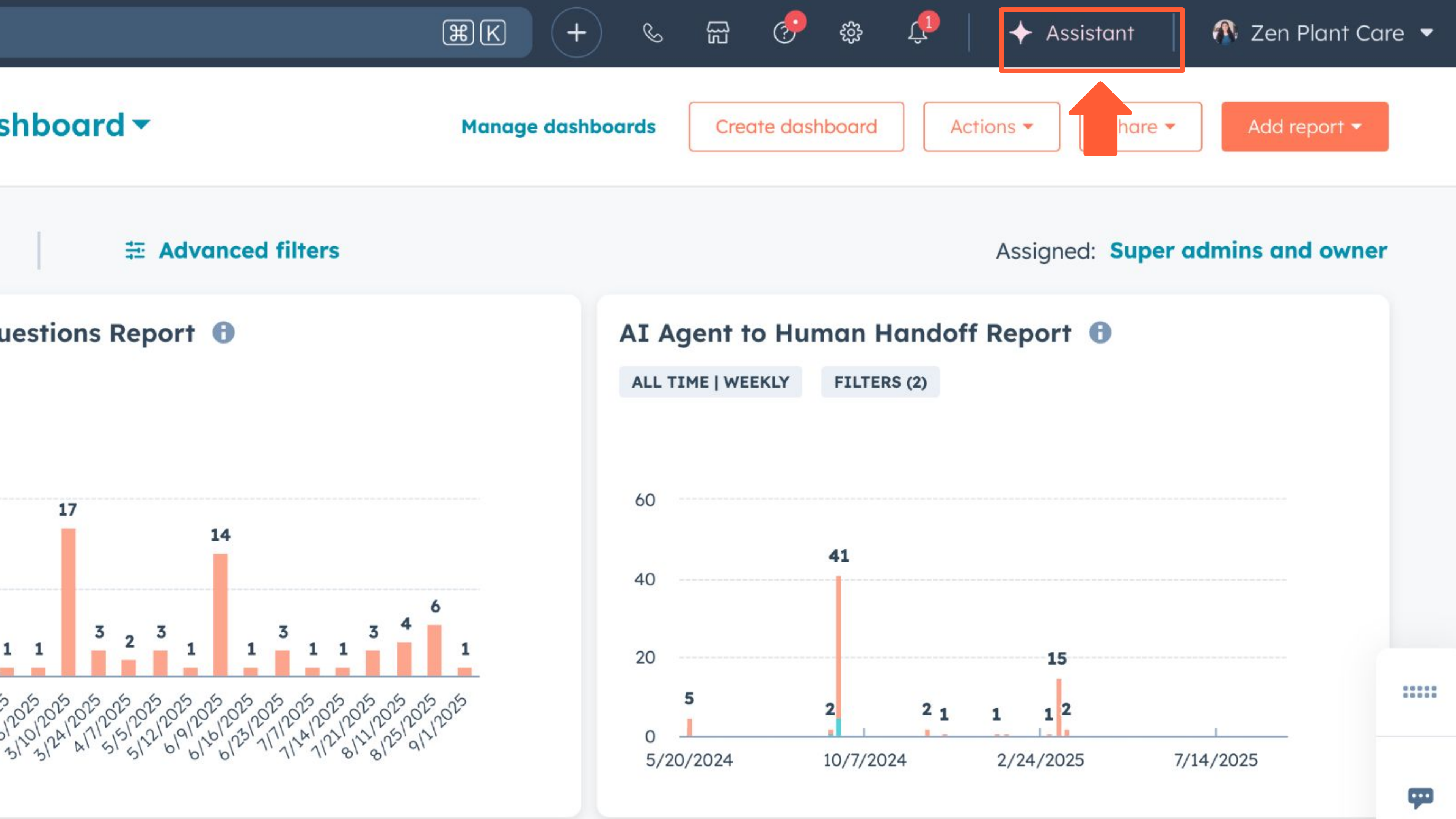

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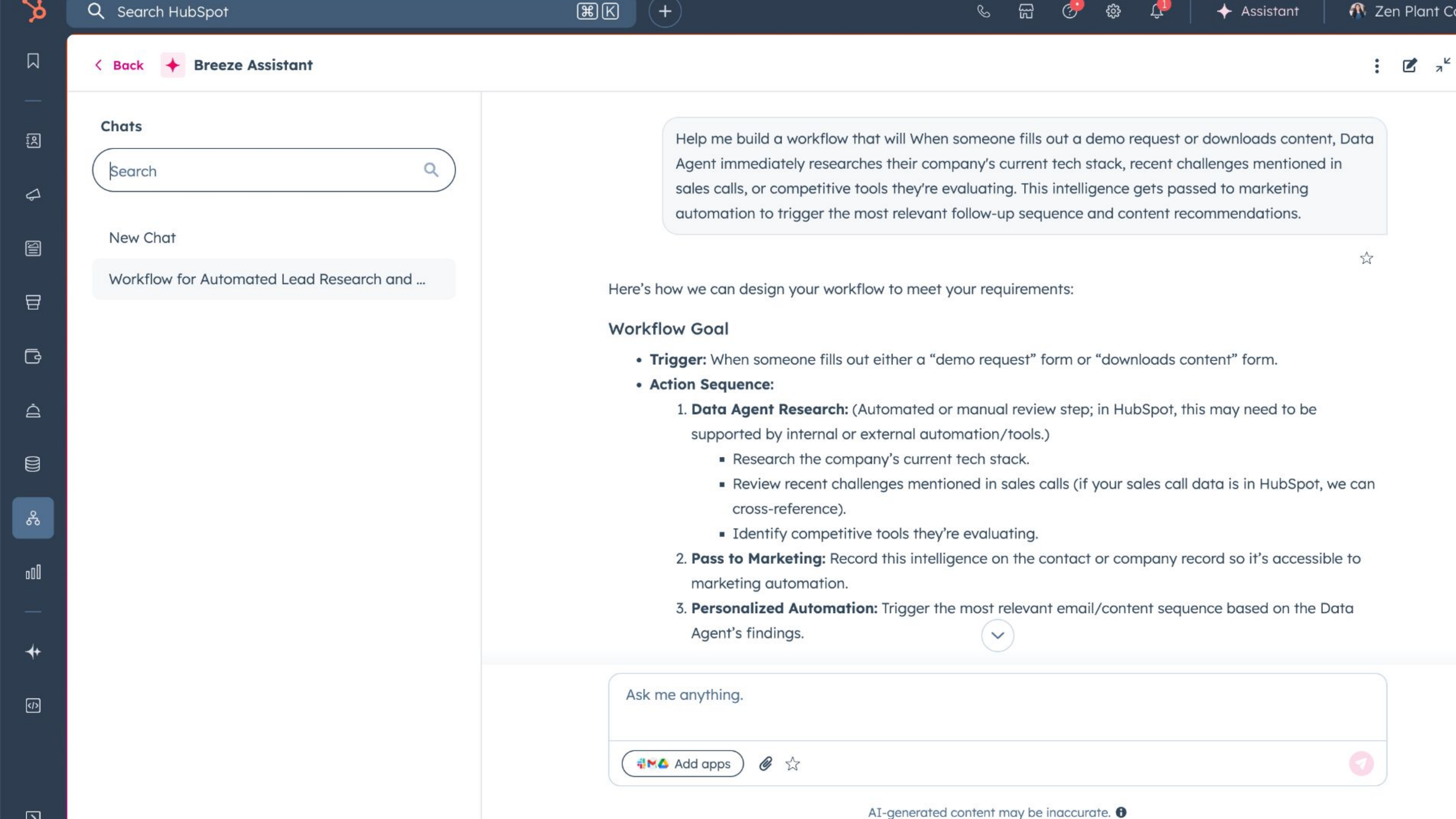
Breeze
Assistant

Ask me anything.

Add apps


Search HubSpot
Assistant
Zen Plant C
Back
Breeze Assistant
Chats
Search
New Chat
Workflow for Automated Lead Research and ...
Help me build a workflow that will When someone fills out a demo request or downloads content, Data Agent immediately researches their company's current tech stack, recent challenges mentioned in sales calls, or competitive tools they're evaluating. This intelligence gets passed to marketing automation to trigger the most relevant follow-up sequence and content recommendations.
Here's how we can design your workflow to meet your requirements:
Workflow Goal
Trigger: When someone fills out either a "demo request" form or "downloads content" form.
Action Sequence:
1. Data Agent Research: (Automated or manual review step; in HubSpot, this may need to be supported by internal or external automation/tools.)
Research the company's current tech stack.
Review recent challenges mentioned in sales calls (if your sales call data is in HubSpot, we can cross-reference).
Identify competitive tools they're evaluating.
2. Pass to Marketing: Record this intelligence on the contact or company record so it's accessible to marketing automation.
3. Personalized Automation: Trigger the most relevant email/content sequence based on the Data Agent's findings.
Ask me anything.
Add apps
AI-generated content may be inaccurate.

Part 2: Hands-On Lab Activities

Activity 1: Enable AI Settings and a Workflow

Step 2: Create AI-Assisted Workflow with Breeze actions (will use credits)

Or

Create AI-Assisted Workflow Breeze assistant (will not use credits)

Part 2: Hands-On Lab Activities

Activity 1: Enable AI Settings and a Workflow

Step 2: Create AI-Assisted Workflow with Breeze actions (will use credits)

1. In the left sidebar menu, click the **Automation**, then click **Workflows**.
2. Click **Create workflow**.
3. Click **From scratch**.
4. Click **Trigger Manual trigger**.
5. Select **Contact**.
6. Click **Save and continue**.
7. Click on the **Trigger enrollment** for contacts card.
8. Click **Generate action with AI**.
9. In the Group *1* field, include/insert a prompt or describe the condition that should start this workflow. We will create this in the next step.

Step 2: Create AI-Assisted Workflow Breeze assistant (will not use credits)

1. In the top navigation bar, click **Breeze Assistant.**
2. In the input field include/insert a prompt or describe the condition that should start this workflow. We will create this in the next step.

IN 25

Part 2: Hands-On Lab Activities

Activity 1: Enable AI Settings and a Workflow

AI Prompt for Trigger (customize based on your business): Best Practices for Query Structure:

- **Be Specific:** Instead of "follow up with leads," use "send personalized industry-specific content to qualified leads within 24 hours"
- **Include Context:** Mention your business type, typical customer journey, or specific goals
- **Sequence Actions:** List actions in logical order with timing considerations
- **Specify Recipients:** Clarify who should receive notifications or task assignments
- **Define Success:** Include what outcome you're trying to achieve

Part 2: Hands-On Lab Activities

Activity 1: Enable AI Settings and a Workflow

Step 2 Continued

Design Your Prompt?

Step 3: Document Your Results [5 min]

What trigger did AI suggest?

What would you modify?

Use Cases

Use Case:
Demo Request Form Follow-up

IN 25

Use Case: Form Follow-Ups

Challenges to Generic Follow-ups

01 Manual Research

Sales teams spend hours researching each lead's company, tech stack, and pain points.

02 Missed Opportunities

Critical insights about competitive evaluations and timing get overlooked.

03 Generic Content

One-size-fits-all follow-up emails fail to resonate with specific prospect needs.

04 Slow Response

There are delays in follow-up while teams gather context and craft responses.

The Solution Using AI

When someone fills out a demo request or downloads content, use **Breeze Agents** and **Breeze actions** inside workflows to research their company's current tech stack, recent challenges mentioned in sales calls,
and the tools they're evaluating.

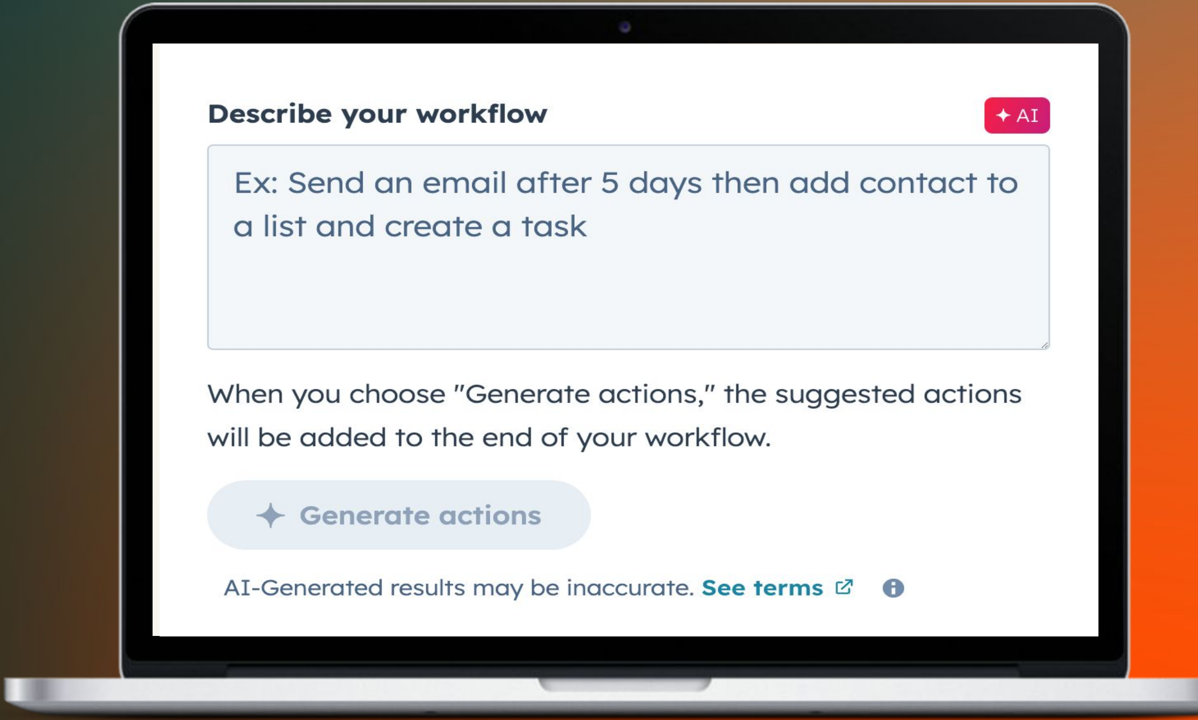
Form Follow-up

01 **Trigger**
A contact submits a demo request form.

02 **Breeze Action**
AI analyzes company data, industry, and CRM history.

03 **Smart Branching**
A route to appropriate follow-up sequence is established.

03 **Personalized Outreach**
Relevant content and messaging is delivered.



Use Case: Form Follow-Ups

Smart Follow-up Sequence

High Fit + Immediate

- Immediate sales notification
- Same-day personalized outreach
- Industry-specific demo invite

Medium Fit Exploring

- Educational email sequence
- Case study for similar companies
- Follow-up in one week

Low Fit Future

- Long-term nurture sequence
- Industry insights newsletter
- Quarterly check-in

Use Case: Personalized Prospect Outreach

Use Case: Prospect Outreach

Challenges to Prospect Outreach

01 Manual Research

Sales teams spend hours researching each prospect's company, tech stack, and pain points.

02 Generic Templates

Templated outreach feels like a mass email and gets deleted immediately.

03 Missed Context

Critical insights buried in CRM notes, emails, and recent company announcements.

04 Poor Response Rates

There can be low response rates because prospects don't see relevance to their specific situation and current challenges.

The Solution Using AI

Instead of sales manually researching every prospect, they can use **Breeze Agents** and **Breeze actions** to research their prospects' company announcements, industry challenges, executive content, CRM history and more.

Breeze tools synthesize all this data into personalized talking points.

Use Case: Customer Success Renewal Prep

IN 25

Use Case: Customer Success Renewal Prep

Challenges to Customer Success Renewal Prep

01 Data Scattered Everywhere

Data in multiple systems. CS teams can't see the full picture before renewal calls.

02 Generic Conversations

"How's everything going?" leads to surface-level discussions instead of strategic conversations about growth and value realization.

03 Missed Expansion Revenue

Upsell opportunities get overlooked because teams don't connect usage patterns with business growth signals and hiring trends.

04 Time-Crunch Preparation

Renewal prep happens out when it's too late to address issues or identify expansion opportunities that should have been nurtured months earlier.

IN 25

The Solution Using AI

When customer accounts are approaching renewal, use **Breeze Agents** and **Breeze actions** inside workflows to analyze product usage patterns, support ticket history, team expansion indicators, and recent business developments.

It helps customer success teams prepare strategic renewal conversations and find upsell opportunities based on customer behavior and growth signals.

INBOUND

Resources

- Workbook
- Slides
- Q&A community Post

bitly

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Please rate my session.

We hope you enjoyed today's session.
Please head to the INBOUND mobile app to provide your feedback.
Thank you!