

INBOUND

HubSpot Admin Essentials:

Core Features Every Admin Should Master



Kyle Jepson

HubSpot Academy Evangelist

I help people fall in love with HubSpot by posting daily #HubSpotTipsAndTricks videos on LinkedIn, hosting weekly HubSpot Admin User Group webinars, and speaking at events (like INBOUND!)

I also love Billy Joel, Joan of Arc, and living in Boston with my beautiful family.

Core HubSpot Features

Hubs

Foundational tools for go-to-market teams

- CRM
- Marketing
- Sales
- Commerce
- Service
- Content
- Data

Platform (Pro)

Powerful automation for scaling businesses

- Workflows
- Scoring
- Reporting

Platform (Ent)

Advanced architecture for established processes

- Custom objects
- Account cleanup
- Sandboxes
- Sensitive Data



Essentials

Core HubSpot Features

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WHAT JUST HAPPENED?

?

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New Features

01 Operations Hub is now Data Hub!

Datasets are now part of Data Studio, which can combine data from multiple sources and use it for much more than reporting.

03 Commerce Hub CPQ!

Commerce Hub now includes tiered products and AI-powered quotes, tied to professional and enterprise Commerce Hub seats.

02 Breeze Studio!

We've got a whole marketplace of agents and assistants, and you can build custom assistants for your teams to use inside HubSpot.

04 Marketing Hub's Gone Wild!

Campaigns are now Marketing Studio. AI-powered email is super flexible and personalized. Better video tools, social features, etc!

New Pricing and Packaging

01 Data Enrichment and Data Quality

Enrichment is included in all paid plans and no longer consumes credits! Data Quality available to all Starter+ portals, not just Data Hub!

02 HubSpot Credits

You can now choose between auto-upgrades or pay-as-you-go! You can also set a monthly limit that can't be exceeded by users!

03 CPQ vs Legacy Quotes

The new CPQ lives in Commerce Hub. Sales Hub customers will keep access to legacy quotes for now, but the magic is in Commerce Hub.

04 Standalone CRM

You can get access to pro- and enterprise-level platform features (workflows, custom objects, etc.) without having to buy a hub!

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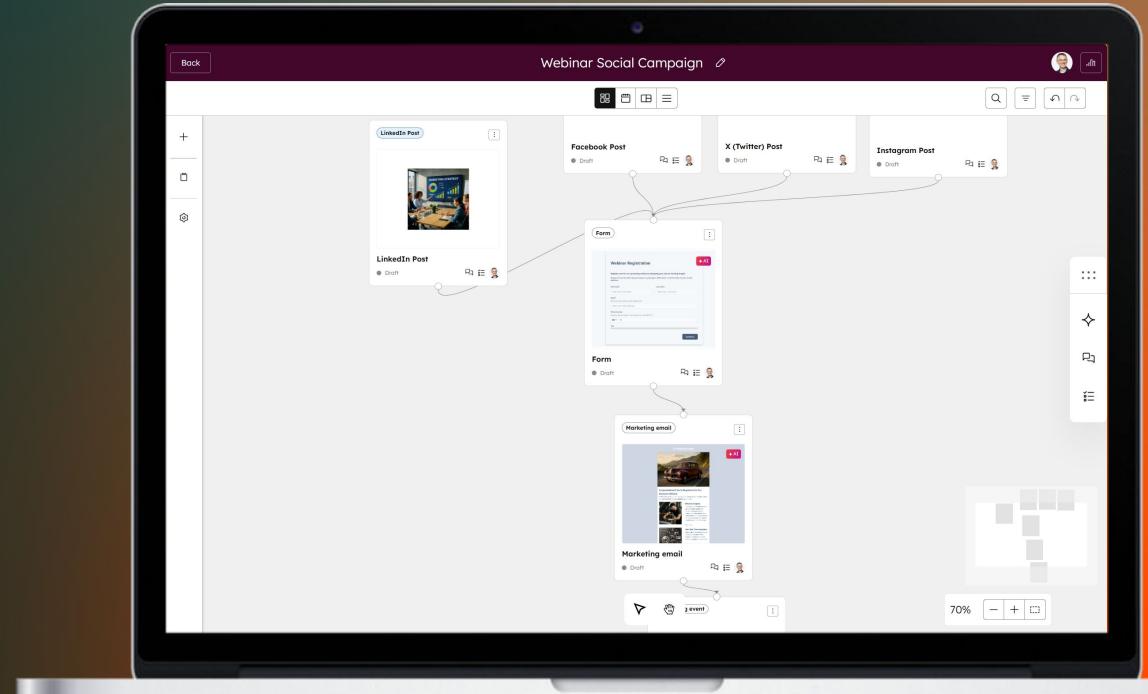
CRM

- Homepage
- Data Model Builder
- Index Pages
- Record Pages
- Enrichment

| Name | Contact Owner | Contact --> Company (Primary) |
|------------------------|------------------------------|-------------------------------|
| Katie Jepson | Kyle Jepson (kje...@...) | Marriott International, Inc. |
| Kyle Jepson | Kyle Jepson (kje...@...) | HubSpot |
| Fran Johnson | Kyle Jepson (kje...@...) | -- |
| Zach Reynolds | Andre Dominguez (the...@...) | Domino's Pizza LLC |
| hubspotthug@gmail.c... | Kyle Jepson (kje...@...) | -- |
| Joan of Arc | Kyle Jepson (kje...@...) | france.gov |
| Bob Jones | Kyle Jepson (kje...@...) | Disney |
| Brian Halligan | Kyle Jepson (kje...@...) | Amazon |
| Ashley Hovatter | Kyle Jepson (kje...@...) | FedEx |
| Hank Johnson | Andre Dominguez (the...@...) | The Boeing Company |
| Chuck Atoyot | Kyle Jepson (kje...@...) | Toyota Motor North America |
| Harper Williams | Kyle Jepson (kje...@...) | Takeout Town |
| Elizabeth Davis | Kyle Jepson (kje...@...) | Takeout Town |
| Alvin Tane | | |

Marketing

- Segments (formerly lists)
- Marketing Studio (formerly campaigns) Pro
- Journeys Ent
- Approvals Ent



Content

- AI images
- AI content
- Content
- A/B and
- Passwords
- Video
- Code
- Serverless

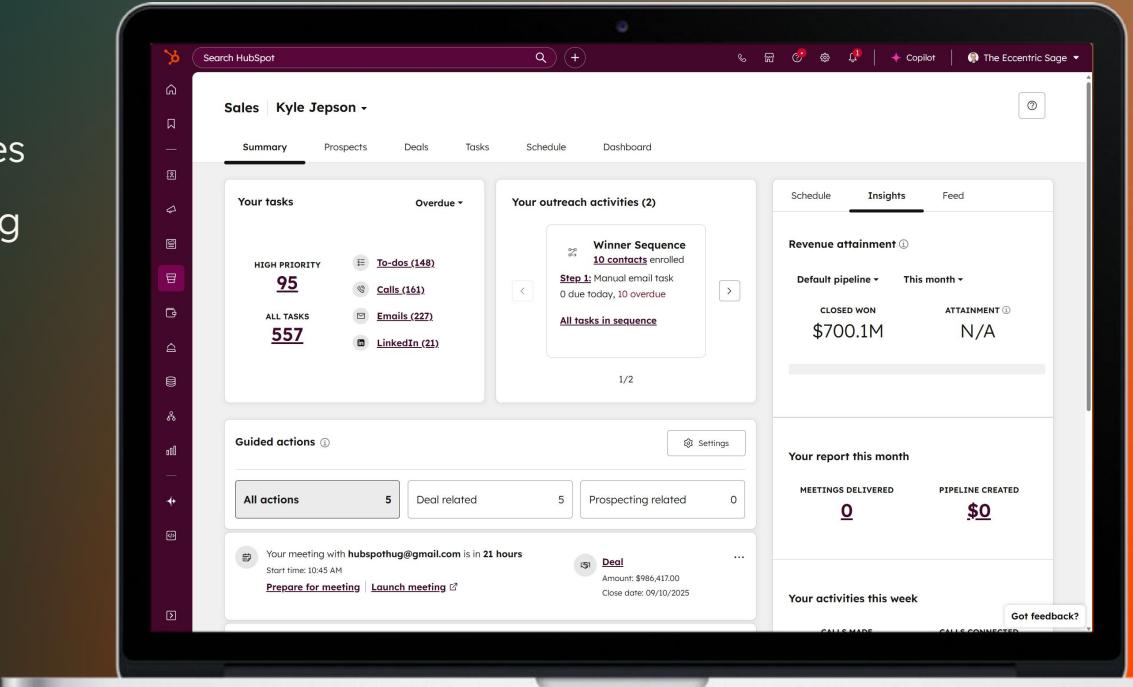
JUST GET HUBSPOT FOR MARKETERS

Kyle Jepson



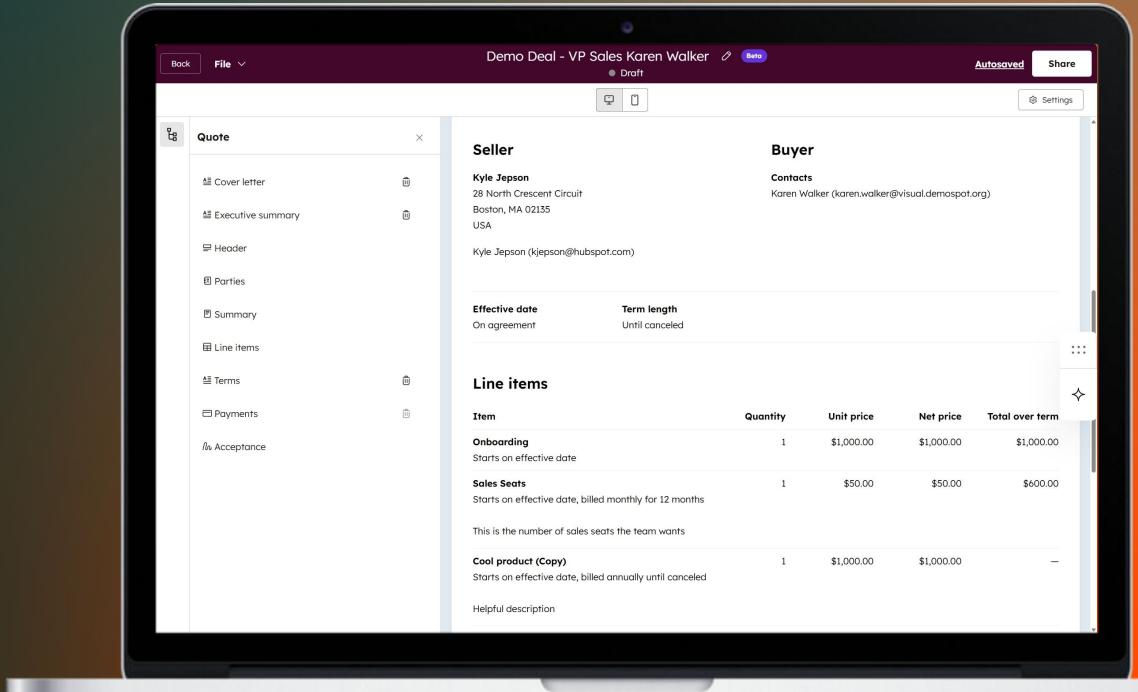
Sales

- Email scheduling and templates
- Meeting scheduling and routing
- Workspace Pro
- Sales Performance Pro
- Playbooks Pro
- Lead form routing Ent
- Deal approvals Ent



Commerce Hub

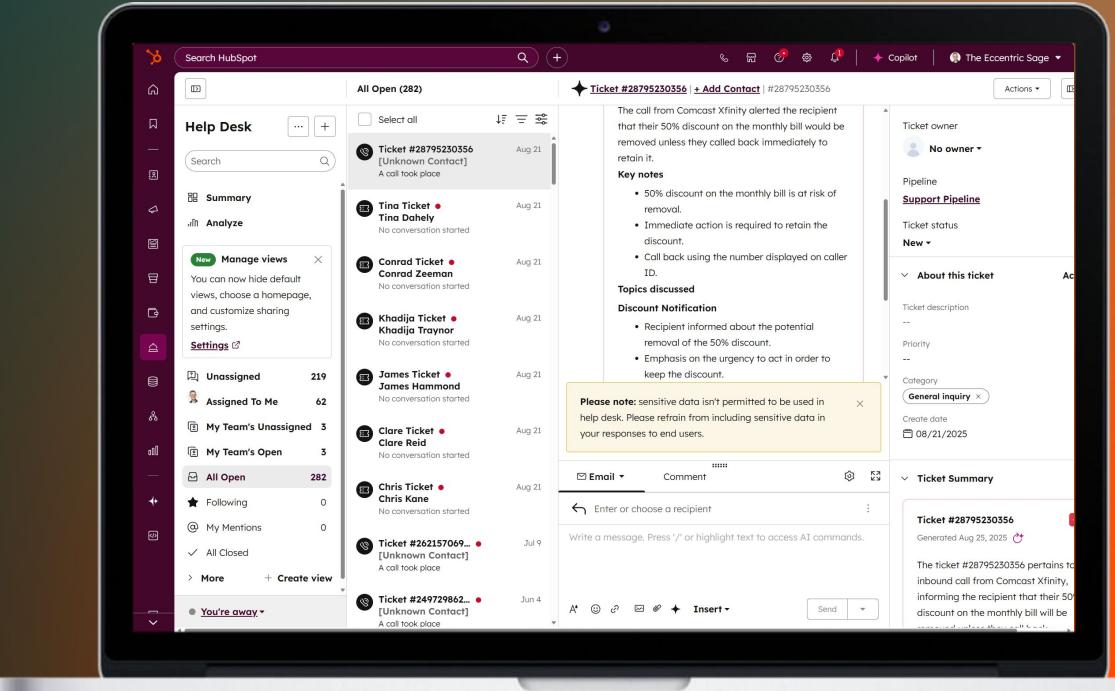
- Payments
- Products
- Tiered Pricing
- Templates Pro
- Quotes Pro
- Approvals* Pro
- E-signature Pro
- Advances approvals* Ent



*Approvers DON'T need a seat

Service

- Shared inbox
- Inbound/outbound calling
- Live chat
- SLAs
- Workspaces Pro
- IVR Ent
- Skills-based routing Ent
- Capacity limits Ent
- Spaces
- Agents (Customer, KB, Handoff)



Data

- Data Sync field mappings
- Data quality Pre
- Data Studio (Datasets++) Pro
- Snowflake, AWS S3, BigQuery Ent

Dataset preview Total data: 353 rows 0 filters

| First Name | Last Name | Email | Phone |
|------------|-------------|----------------------|----------------|
| Kyle | Jepson | kjepson@hubspot... | +18575407200 |
| John | TypO | john@microsoft.co... | +18885550000 |
| Zach | Reynolds | zreynolds@domain... | +18885552346 |
| Katie | Jepson | importanttest@m... | +19162120215 |
| Brian | Holligan | bhatest@hubspot.c... | 1-888-482-7768 |
| Russell | Nelson | tmitch@ids.org | 1230635981 |
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| David | Football | david@nfl.com | 4385749244 |
| Daniel | Wolchonok | dwochonok@hubs... | 549.732.8898 |
| Just | Testinit | garbaluza@hubsp... | 554.332.4435 |
| Kathleen | Kelly | NULL | 617-899-2064 |
| Berry | Smoothie | berries@smoothie... | 7481038490 |
| Lauren | Espresso | lauren@starbucks... | 7482947194 |
| Asifra | Noormohamed | anoormohamed@... | 857.209.9296 |
| Sal | Connroy | sconnroy@simmons... | 877.399.9397 |
| Gorbaluza | Mackymack | terosatu@flemall... | 883.225.6679 |
| Aadilyah | Anderson | aanderson@conve... | NULL |
| Abigail | Anderson | aanderson@quick... | NULL |
| Abigail | Taylor | ataylor@chickenc... | NULL |

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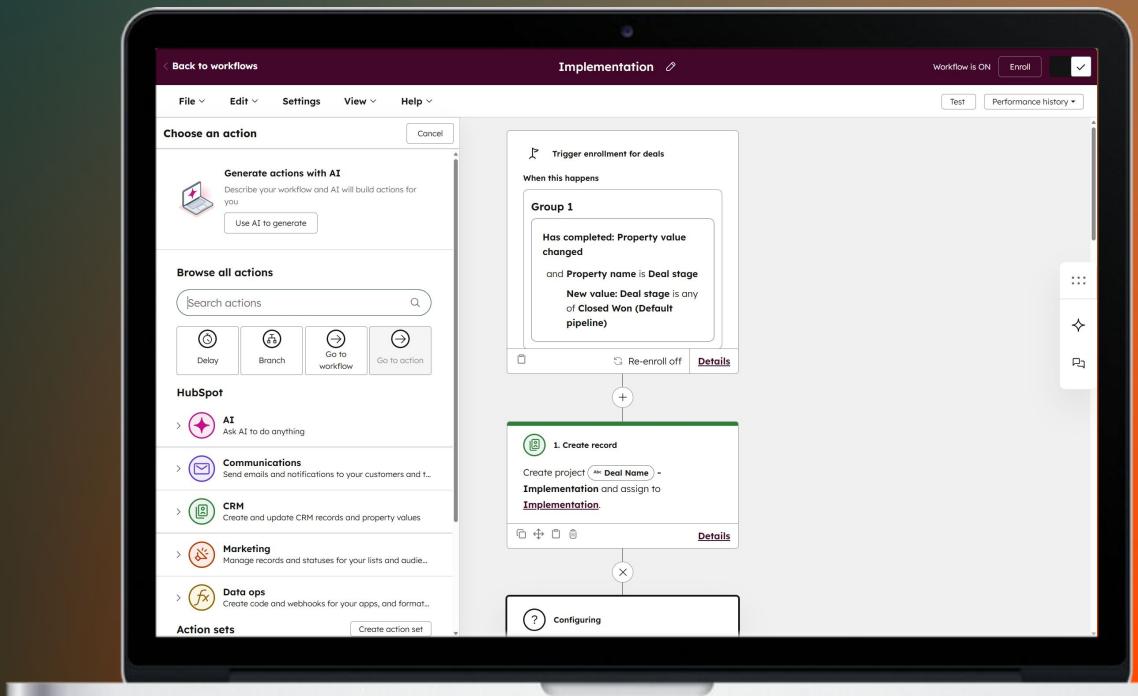
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Workflows

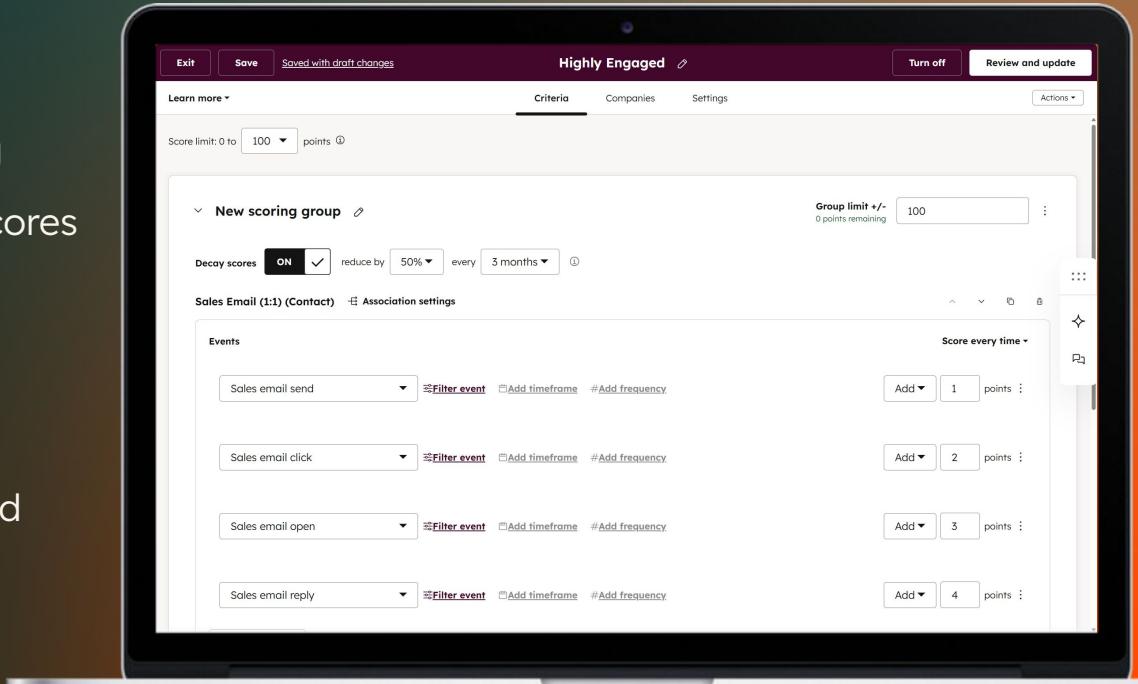
- Templates (use testimonials example)
- Required properties
- New creation flow
- Deeper data sources
- Metrics
- Troubleshooting
- Action sets



Scoring

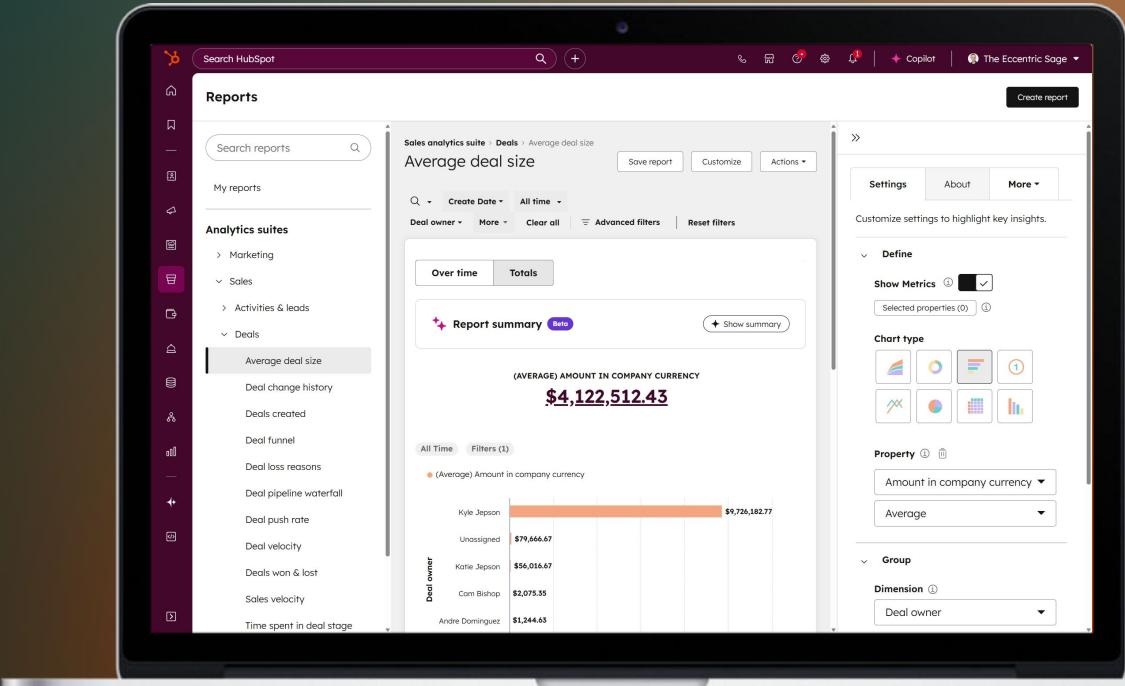
- Marketing Hub – Lead Scoring
- Sales Hub – Predictive Deal Scores
- Service Hub – Health Scores

- NEW: Manually score deals and companies in Sales Hub



Reporting

- Reports library
- Report viewer
- Analytics tools
- Custom report builder



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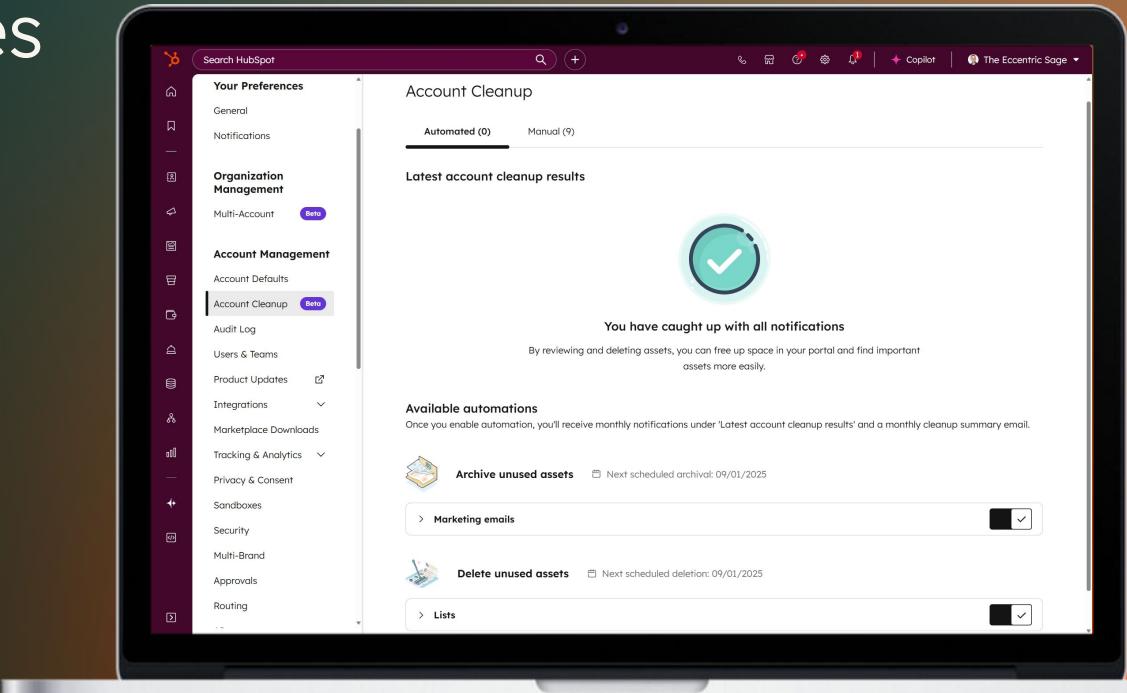
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Enterprise Features

- Account Cleanup
- Custom Objects
- Sandboxes
- Sensitive data



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