

**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

## Hubs

Foundation  
go-to-market

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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!

### **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.

### **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!

### **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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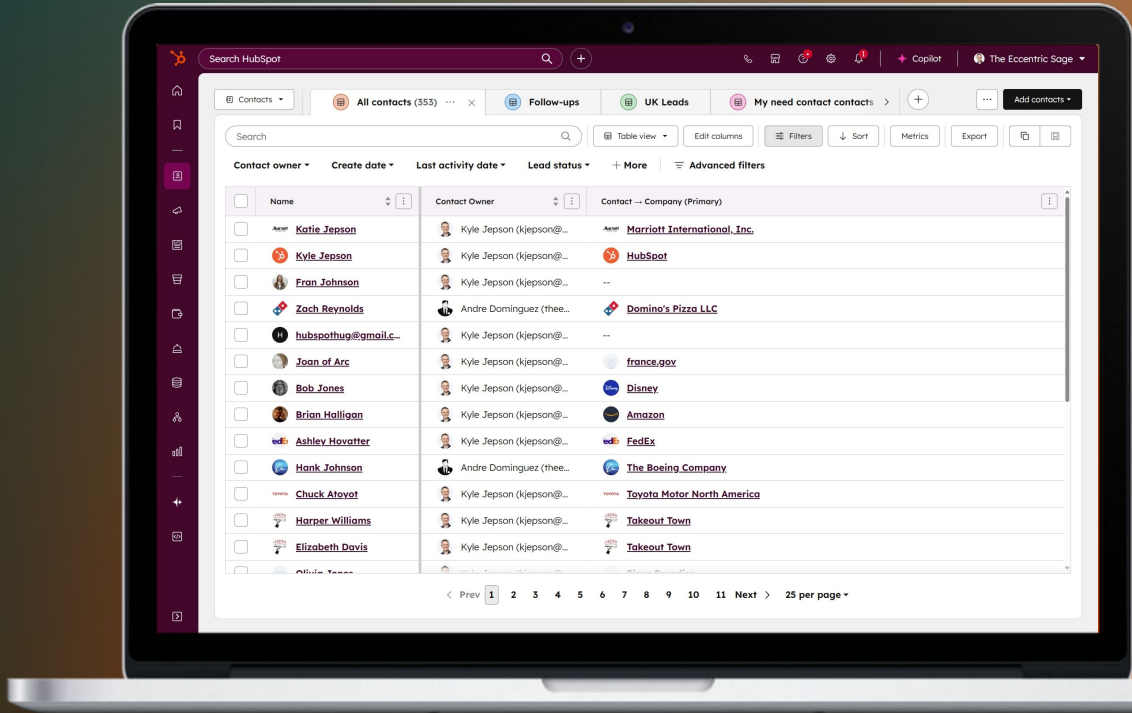
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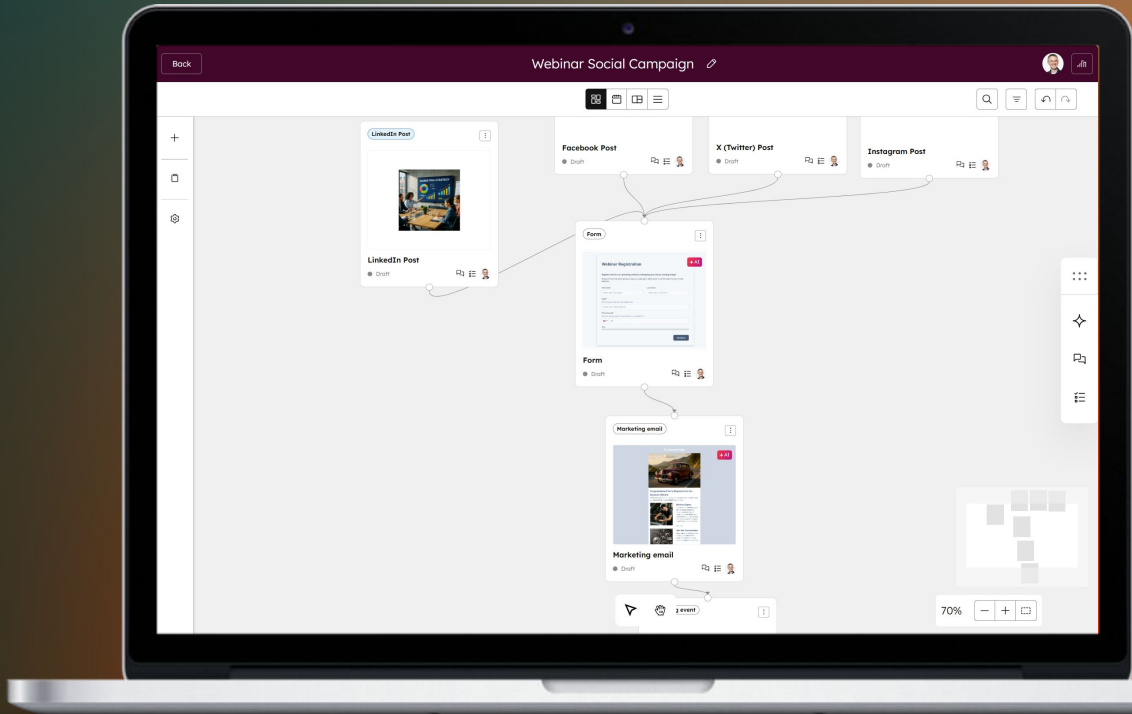
# CRM

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



# Marketing

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

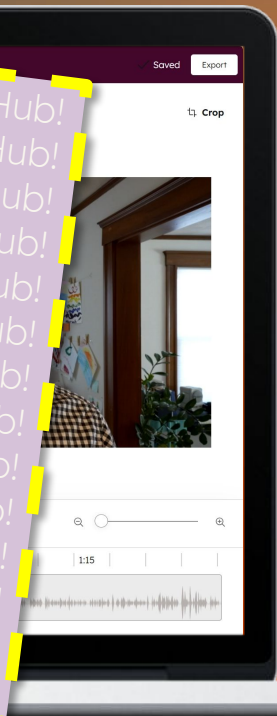


# Content

- AI image
- AI content
- Content
- A/B and
- Password
- Video
- Code
- Services

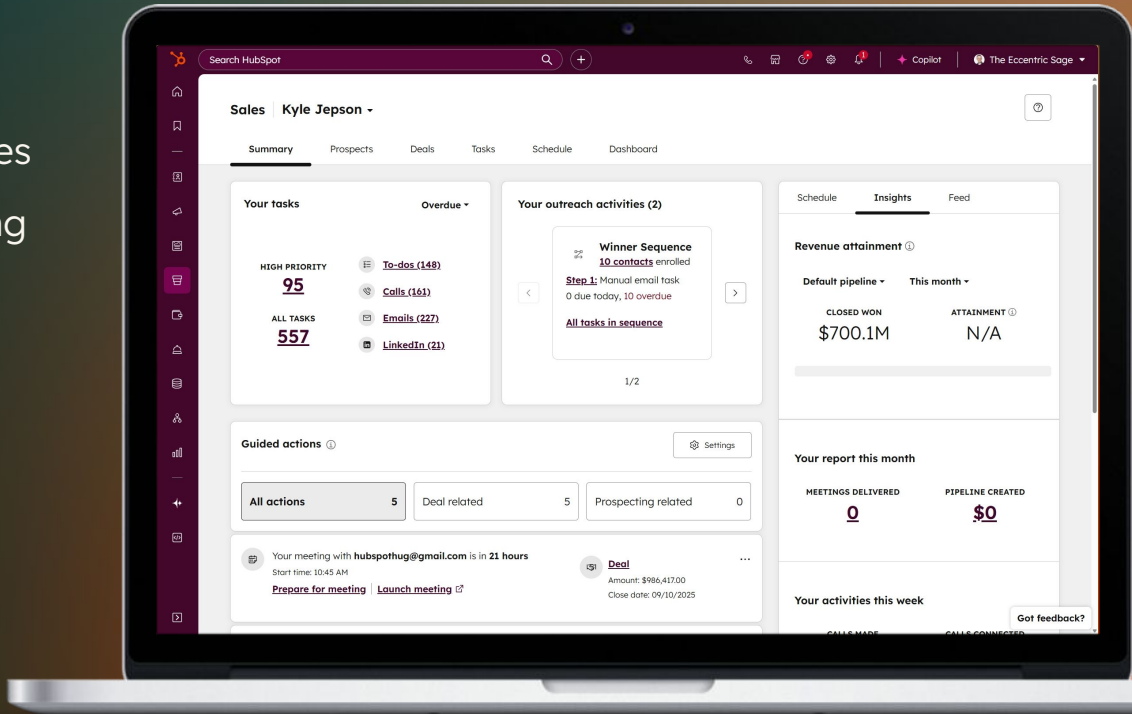
**JUST GET  
HUBSPOT FOR MARKETERS**

Kyle Jepson



# Sales

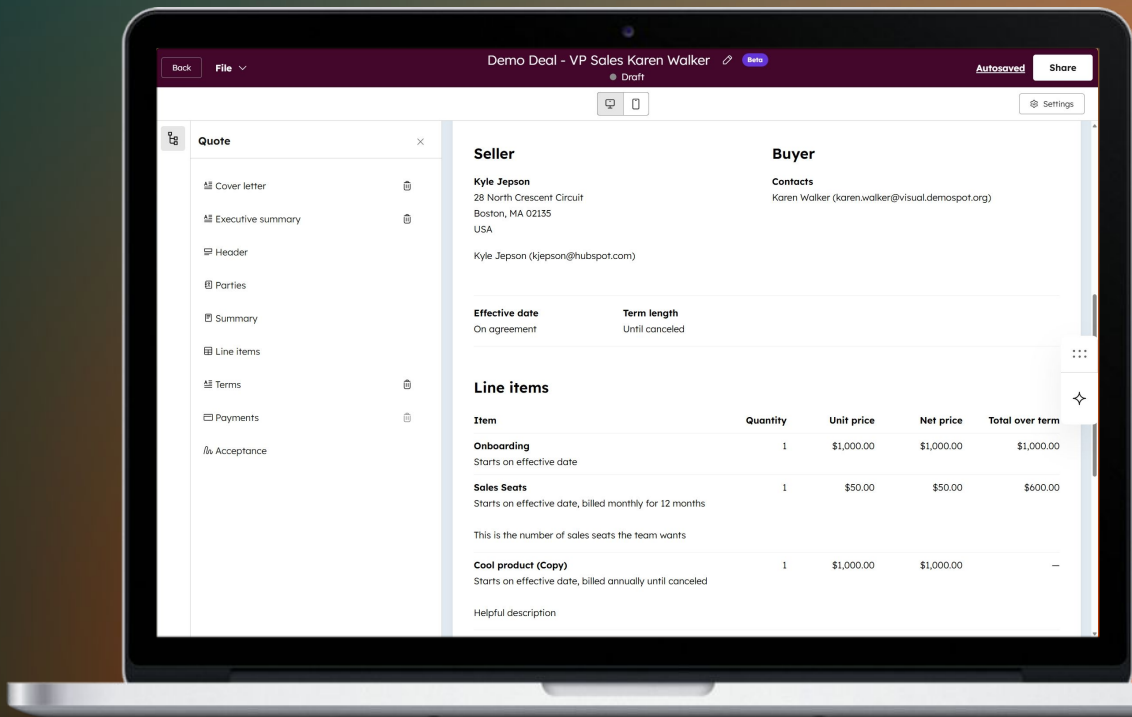
- Email scheduling and templates
- Meeting scheduling and routing
- Workspace **Pro**
- Sales Performance **Pro**
- Playbooks **Pro**
- Lead form routing **Ent**
- Deal approvals **Ent**



# Commerce Hub

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

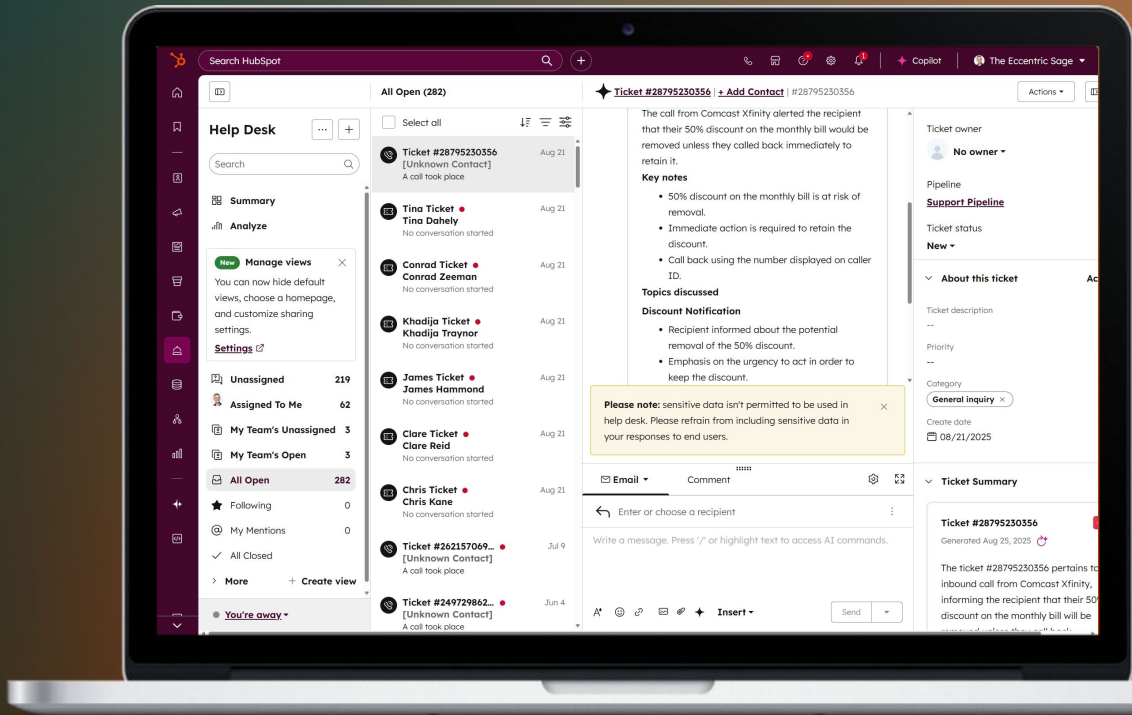
\*Approvers DON'T need a seat



# Service

- Shared inbox
- Inbound/outbound calling
- Live chat
- SLAs **Pro**
- Workspaces **Pro**
- IVR **Ent**
- Skills-based routing **Ent**
- Capacity limits **Ent**

- Spaces
- Agents (Customer, KB, Handoff)



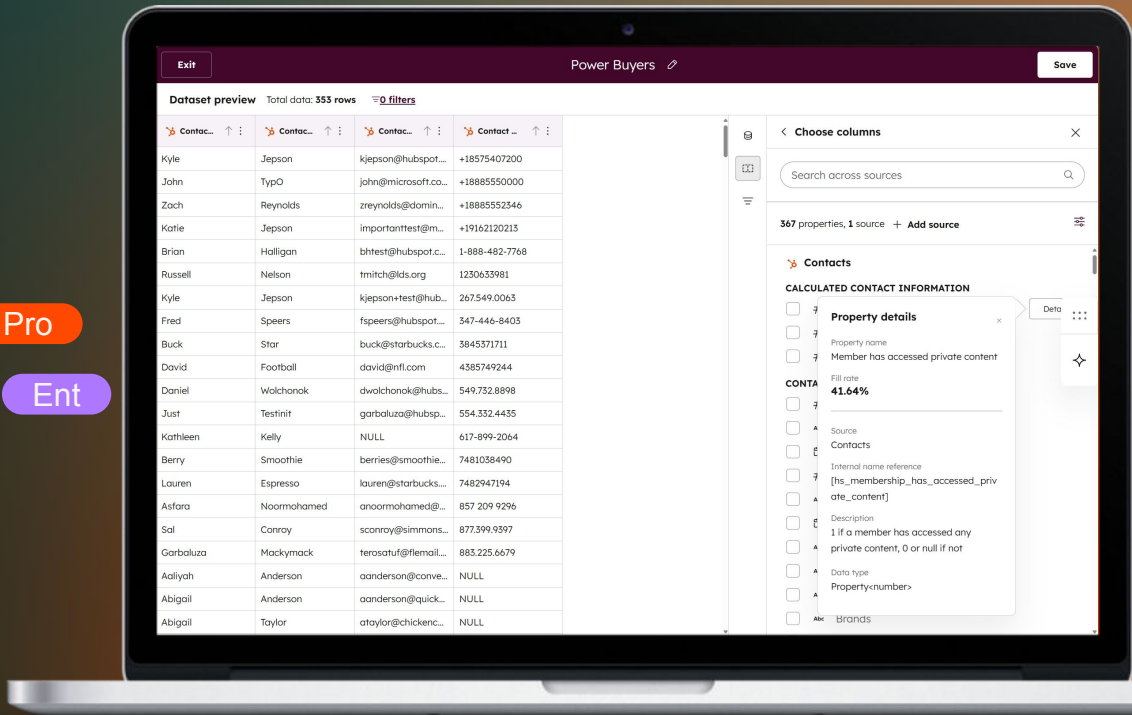
# Data

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

Pre

Pro

Ent



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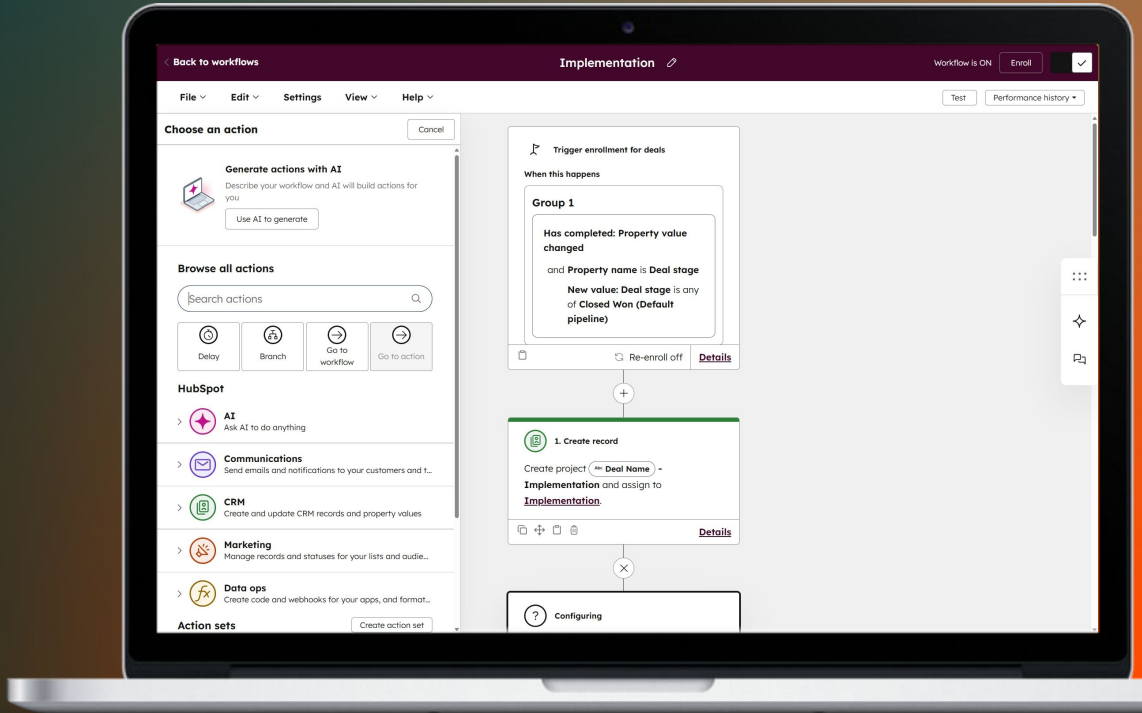
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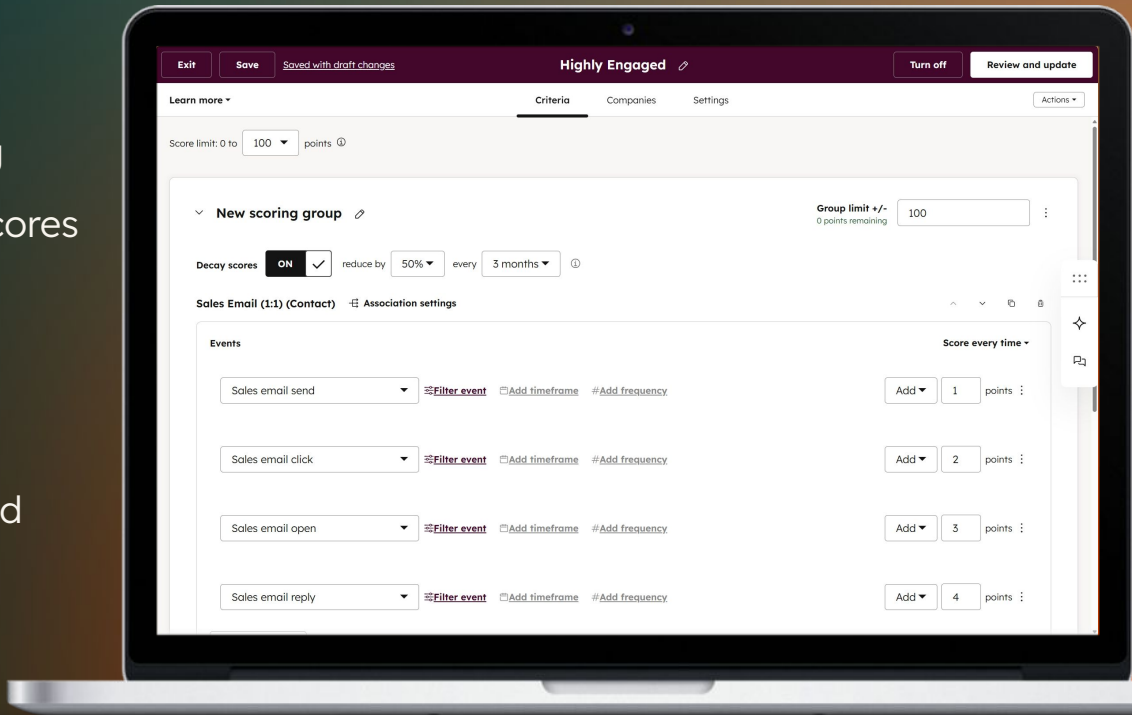
# Workflows

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



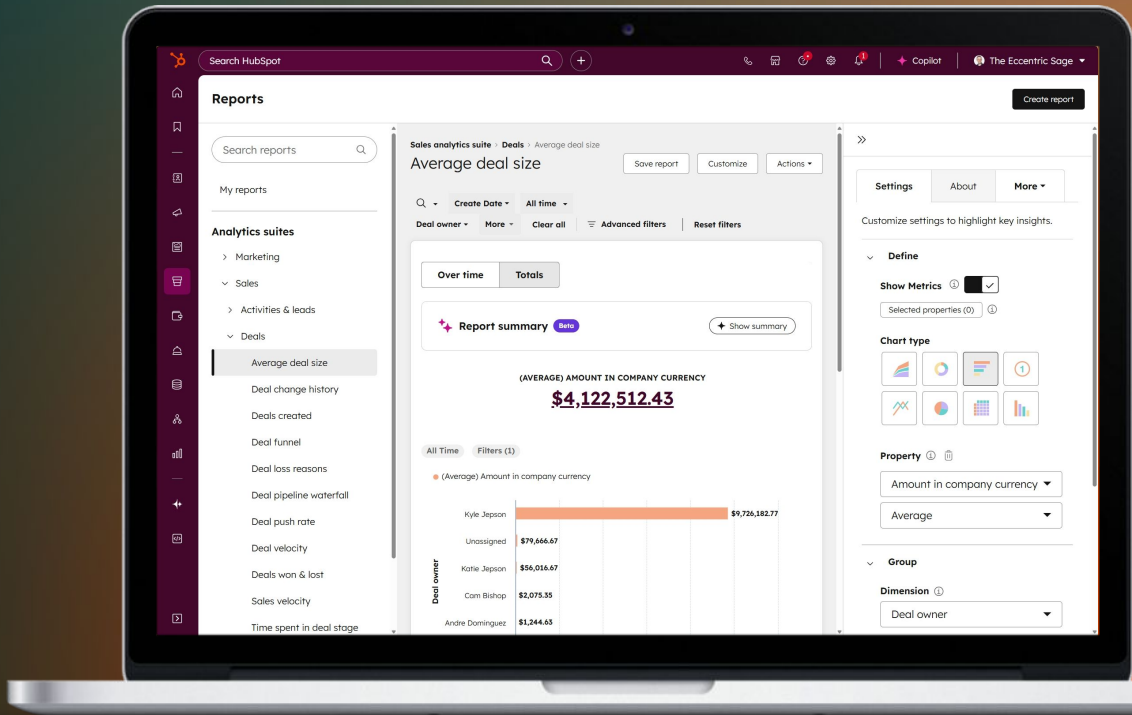
# Scoring

- 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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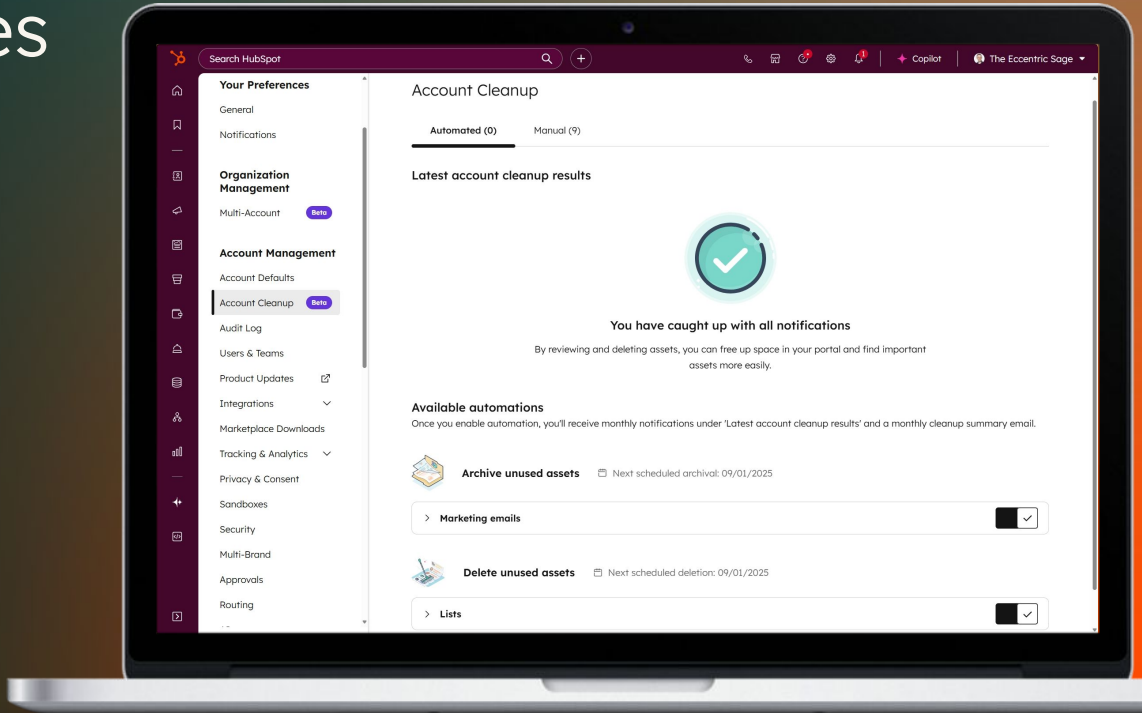
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# Enterprise Features

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- Custom Objects
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