IN 25

AI Analysis

What's New for Service With HubSpot

Adriti Gulati
Principal Inbound Professor, HubSpot

Troy Fiawoo
Inbound Professor, HubSpot

Amber Bachlani
Product Manager, Knowledge Base, HubSpot

Bhargava Gade
Senior Product Manager, HubSpot

Bianca Recto
Product Design Lead, HubSpot

Abiola Owolewa
Senior Product Manager, HubSpot

Daniel Jacobson
Director of Product, Developer Product Group, HubSpot

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Summary

The session explored recent developments in HubSpot's customer service tools, focusing on CRM data, actions, knowledge base agents, and AI-driven insights. Bhargava Gade discussed new CRM data integration that allows customer agents to access and edit CRM properties, with stringent data protection measures like email verification. He also introduced the Actions feature, enabling customer agents to perform tasks in external systems using APIs, highlighting its importance in minimizing human intervention and enhancing efficiency. Amber Bachlani emphasized the Knowledge Base agent, which scans customer interactions to identify knowledge gaps and auto-generates articles to fill these gaps, streamlining content creation and maintenance processes.

Bhargava stressed the need for CRM integration to provide customer agents with context similar to human reps. He noted that while 50% of support queries are knowledge-based, the rest require human action, making the integration crucial for automating complex tasks. Amber highlighted that the Knowledge Base agent is in private beta and focused on making content creation more efficient by leveraging past customer interactions. Bianca Recto introduced AI features that streamline the post-sale customer journey and feedback analysis. She showcased a new AI-powered handoff process that consolidates customer data from sales to customer success teams and AI-generated feedback summaries that condense customer survey responses into actionable insights.

Abiola Owolewa demonstrated enhanced helpdesk reporting capabilities and SLA pausing. He highlighted the importance of AI in reducing the time required to gain actionable insights from data. The new summary tab in the helpdesk provides an overview of operational health, while the coaching tab helps managers identify areas for improvement in their team's adherence to SLA goals. Daniel Jacobson showcased HubSpot's GPT connectors for ChatGPT and Cloud, which enable detailed analysis of customer support data and generate comprehensive reports. These connectors integrate seamlessly with HubSpot, providing users with in-depth insights and recommendations based on historical data, thereby improving customer service and support operations.

Takeaways

CRM Data Integration and Actions

HubSpot's new CRM data integration allows customer agents to access and edit CRM properties, significantly reducing the need for human intervention. The Actions feature enables agents to perform tasks in external systems using APIs, which streamlines operations and enhances efficiency. These developments are crucial for automating complex support tasks.

Knowledge Base Agent

The Knowledge Base agent auto-generates articles based on customer interactions, filling knowledge gaps and easing the content creation process. This tool leverages past customer interactions to identify areas for improvement in the knowledge base, ensuring that support teams have up-to-date and comprehensive information to assist customers effectively.

AI-Powered Insights and Reporting

AI-driven features in HubSpot's helpdesk provide managers with a summary of operational health and detailed insights into SLA adherence and performance. The new summary and coaching tabs help identify areas for improvement and streamline decision-making. Additionally, GPT connectors for ChatGPT and Cloud offer detailed analysis and comprehensive reports based on historical customer support data.

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