Practical AI in HubSpot

**AI is live in your HubSpot portal.
Is it part of your process yet?**

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Overview

Your team can see Breeze, Buyer Intent, Customer Agent and AI workflow actions.

They are still clicking through records, writing everything from scratch and guessing which accounts to focus on.

This service helps you turn the AI you already have into a few practical, low-risk workflows your team will actually use.

A simple five-step service to audit, configure and train your team on HubSpot AI features, so they support real work instead of adding more noise.

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Practical AI in HubSpot

✓ The goal of this service is simple.
Make the AI that is already in your HubSpot portal part of your actual process.

✓ We focus on:
- Where AI fits in your existing workflows, and where it does not
- Using Breeze, Buyer Intent, Customer Agent, smart properties and agents
- Supporting real marketing, sales and service work, not creating side projects

✓ What to expect: AI that supports real work
You work with a HubSpot team that will:
- Audit how AI is currently used in your portal
- Select a handful of processes where AI can safely take the busywork
- Configure the right features in your live portal
- Train your teams on when and how to use them
- Check in after three months to review impact and new releases

✓ The aim is not AI everywhere.
It is a few well-chosen places where AI makes each day easier.

Is This For You?

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This is a good fit for you if:

- ✓ Already have HubSpot Marketing, Sales or Service on paid tiers
- ✓ Can see AI features in the portal, but nobody really owns how they are used
- ✓ Want to improve a few specific processes rather than "do AI" in general
- ✓ Need clear guardrails and training so AI is trusted, not avoided
- ✓ Prefer a defined project with a beginning and end

This is NOT a good fit for you if:

- ✗ Only need one-off help with a single AI feature
- ✗ Do not yet have your core processes set up properly in HubSpot
- ✗ Already have an internal team actively managing AI configuration and credits
- ✗ Are looking for custom AI product development outside HubSpot

Outcomes

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Save time (do stuff quicker)

Minimise effort (do less stuff)

Automate stuff (do stuff at scale)

Team continuously trained

Training Scope

INCLUSIONS:

- ✓ Pre-discovery call to confirm fit and scope
- ✓ AI usage and process audit
- ✓ AI activation plan with prioritised use cases
- ✓ Configuration of agreed AI items, such as:
- ✓ Customer Agent
- ✓ Buyer Intent and Signals
- ✓ Breeze Assistant and agents
- ✓ Smart properties and enrichment
- ✓ AI workflow actions
- ✓ Role-based training sessions with recordings
- ✓ "AI in our HubSpot" dashboard in your portal
- ✓ Three-month check-in session with recommendations

EXCLUSIONS:

- ✗ Full HubSpot re-implementation or data migration
- ✗ Custom, non-marketplace integrations
- ✗ Large-scale change management programmes
- ✗ In-person workshops and travel, which can be added if required
- ✗ Ongoing AI content production beyond the agreed scope

Pricing

Prices are in AUD and exclusive of GST.
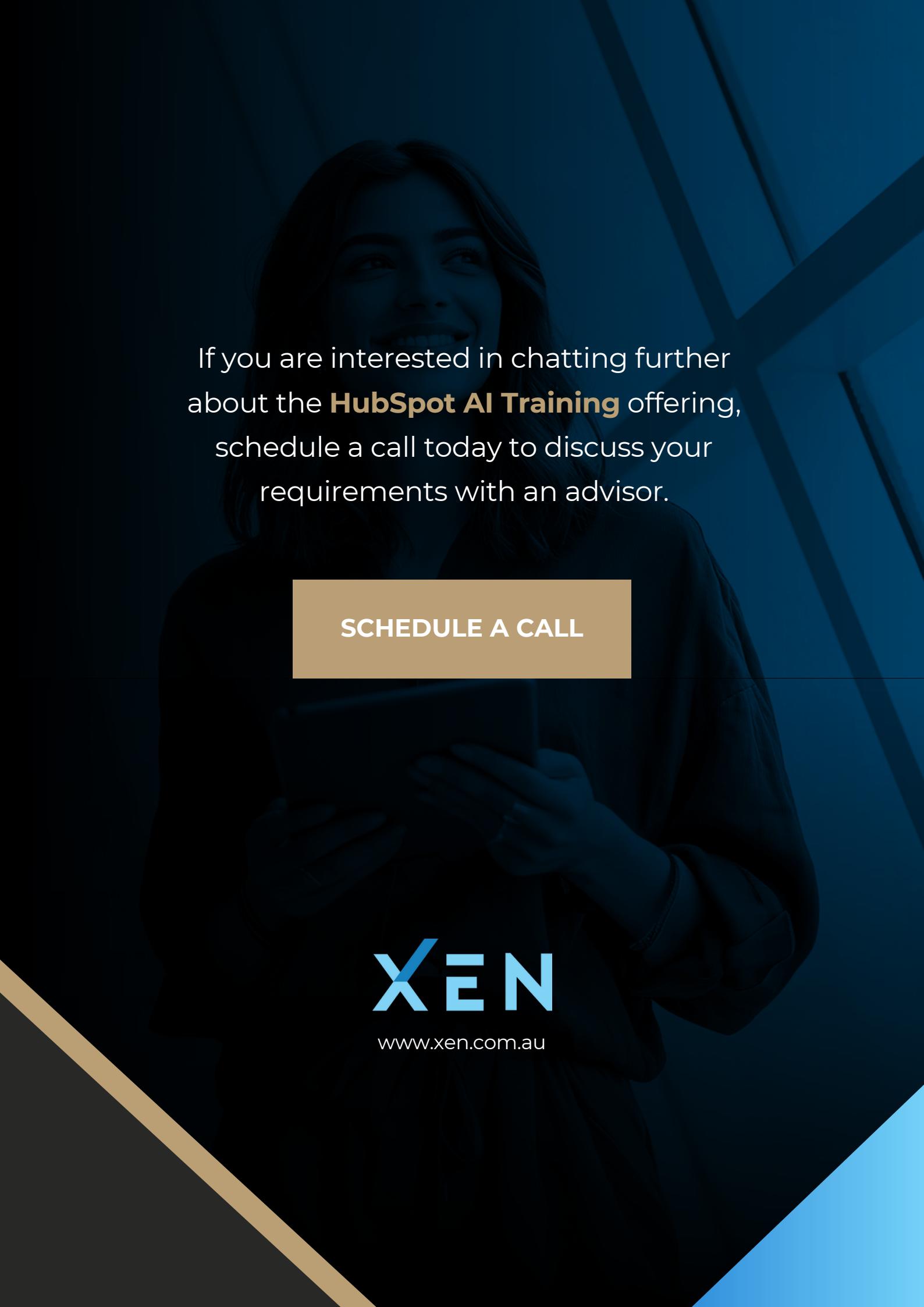Australian businesses will be charged an additional 10% GST.

$ 21,000

Includes an initial review, planning, implementation and training. Plus a 3-month check-in session.

Have questions about HubSpot AI Activation? Visit the **FAQs** to learn who it's for, what's included, and how it works.

If you are interested in chatting further about the **HubSpot AI Training** offering, schedule a call today to discuss your requirements with an advisor.

SCHEDULE A CALL

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www.xen.com.au