



HubSpot Updates That Matter

Findings & Recommendations

September 2026

Prepared for:

HubShots



Session Goals

01 Save Time

Quickly identify and understand the most impactful HubSpot updates

02 Minimise Effort

Filter out irrelevant updates and focus only on what matters to your portal

Session Overview

Business check in

Useful new HubSpot features

Updates session will be recorded

XEN team available via email
(team@xen.com.au) for any questions

Business Check-In

01 Challenges

What key problems/focus areas do you have in HubSpot?

02 Opportunities

What opportunities are you keen to build on in the coming months?

What's Covered

01 Business check-in

02 Updates

General CRM
Sales Hub
Service Hub
Marketing and Content Hub
Breeze AI
Dashboards & Reports

03 Questions

04 Next Steps

General CRM



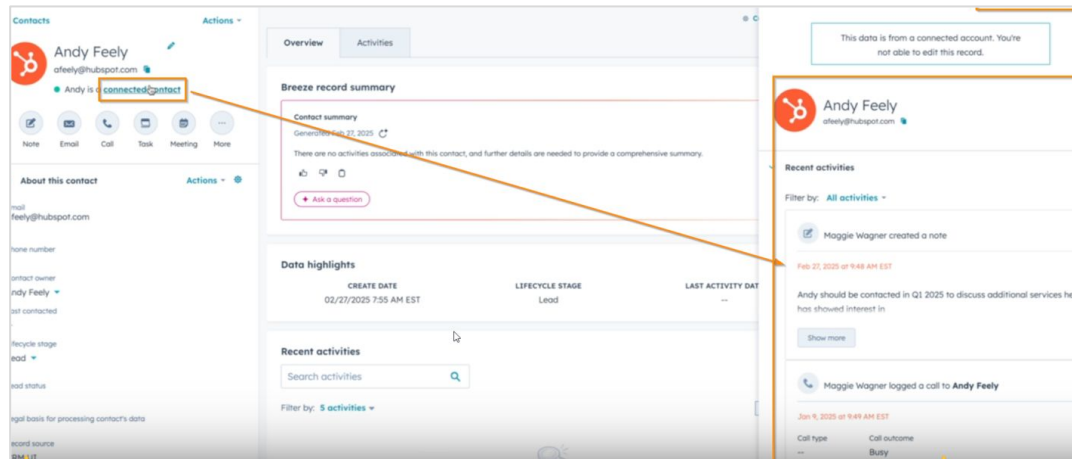
Multi-Account Management

(HubShots Lesson)

What is it

- Allows up to 5 HubSpot portals to be separate from each other while still enabling them to see each other's records and respective activities.
- Additionally, users can copy some assets between these portals.

● HIGH IMPACT



Automated Inactive User Deactivation

(HubShots Lesson)

What is it

- By default, HubSpot requires users to log in at least once every 90 days to prevent their account from being deactivated.
- This can be turned HubSpot wide or per user.

HIGH IMPACT

Integrations

Marketplace Downloads

Tracking & Analytics

Privacy & Consent

Sandboxes

Security

Brand Identity

Approvals

Routing

Partners

AI

Demographic Analysis

Security

Login

Permissions

Monitor and manage user permissions to reduce risk. Review key permission settings like Super Admin access, 2FA enrollment, inactive users, and partner access to help keep your account secure.

inactive users will be deactivated on 29 August 2025

NEW

Keeping inactive users to a minimum ensures that your account is only accessed by current users.

Manage

users are not enrolled in two-factor authentication (2FA)

Keeping the number of unenrolled users under 4 helps reduce unauthorized access to your account.

Manage

XEN | HUBSPOT UPDATES THAT MATTER

8

Health Score Builder

(HubShots Lesson)

What is it

- Assigns points to customer properties and activities, consolidating them into a single, automated score on a record.
- Use to evaluate account health and identify potential churn risks.

MEDIUM IMPACT

All companies

My companies

VIP companies

Company owner

Create date

Last activity date

Lead status

+ More

Advance

Search name, phone, or d

	ACCOUNT NAME		CUSTOMER SUCCESS HE...		CUSTOMER SUCCESS HE...
	 ABC Company		44		AT-RISK
	 XYZ Corp		47		AT-RISK
	 DEF Industries		29		AT-RISK
	 GHI Systems		44		AT-RISK
	 JKL Solutions		36		AT-RISK
	 MNO Group		67		NEUTRAL
	 PQR Holdings		51		NEUTRAL
	 STU Ventures		53		NEUTRAL
	VWX Partners		59		NEUTRAL

Property Control in Record Merges

(HubShots Lesson)

What is it

- Have full control to select which property values are kept on the final record.

● HIGH IMPACT

The screenshot shows the 'Merge duplicate records' interface in HubSpot. It features a teal header with the title 'Merge duplicate records' and a close button. Below the header, the text 'Customize your record merge' is displayed. To the right of this text is a link 'Set properties to review' with a gear icon. An orange callout box with the text 'customise the properties to review here' points to this link. The main area is divided into three sections: 'Select a record to merge into Roselen Fernandez', 'Customize properties', and 'View merged record preview'. The 'Select a record to merge into Roselen Fernandez' section shows two records: 'Roselen Fernandez' (created 22/07/2020 10:59 AM GMT+8) and 'roselen@sc...' (created 20/04/2021 8:20 AM GMT+8). The 'Customize properties' section has a list of properties with radio buttons to select which to keep. The 'Email' property is selected. An orange callout box with the text 'For instance, I can choose the email from the non-primary record as the value to retain afte merge' points to the 'Email' radio button. The 'View merged record preview' section shows the final merged record for 'Roselen Fernandez' with the selected properties. An orange box highlights the 'Email' field in this preview. A vertical scrollbar is visible on the right side of the preview area.

Merge duplicate records

Customize your record merge

Set properties to review

customise the properties to review here

Select a record to merge into Roselen Fernandez

Roselen Fernandez
roselen@sc...
Create date
22/07/2020 10:59 AM GMT+8

roselen@sc...
roselen@sc...
Create date
20/04/2021 8:20 AM GMT+8

View merged record preview

Roselen Fernandez
roselen@sc...
Create date
22/07/2020 10:59 AM GMT+8

Customize properties

Email
roselen@sc...

First Name
Roselen

Last Activity Date
22/05/2025 5:42 PM GMT+8

Last Name
Fernandez

Phone Number
123456789

For instance, I can choose the email from the non-primary record as the value to retain afte merge

Properties

Email
roselen@sc...

First Name
Roselen

Last Activity Date
22/05/2025 5:42 PM GMT+8

Last Name
Fernandez

Phone Number
123456789

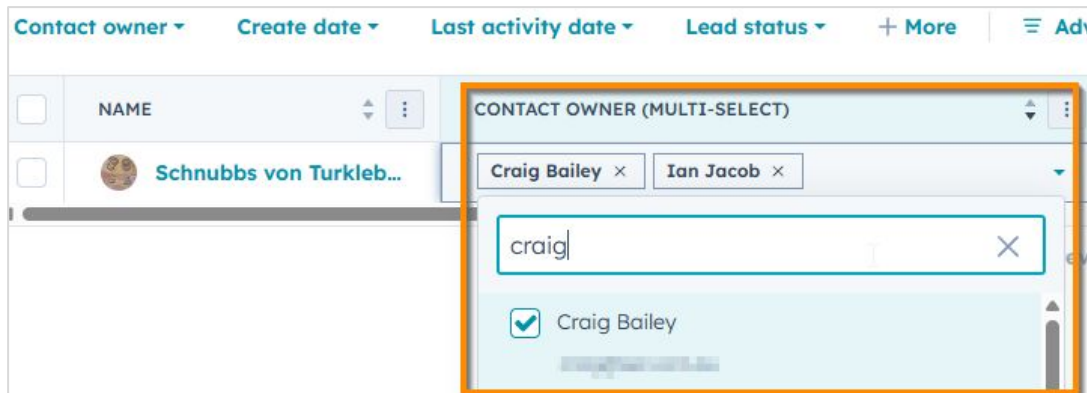
Multi-Select User Property

(HubShots Lesson)

What is it

- Assign multiple owners to a record using a single property.
- Perfect for businesses with multiple brands in one HubSpot portal where contacts engage with different brands.

● HIGH IMPACT



Custom Events: Track Property Changes

(HubShots Lesson)

What is it

- Track historical changes to property values with Custom Events.
- For example, track email address changes and see when and who updated it.

● MEDIUM IMPACT

Send HubSpot internal data

NO-CODE

 **Track object changes**
Capture when an object property values change and create reports around that event.

Overview Property info Analyze

Date range: This month Frequency: Day

CONTACT	COMPLETION DATE	PREVIOUS VALUE	VALUE	UPDATED BY USER ID
Roselen Fernandez	28 Jul 2025 3:38 PM	roselen.fernandez@xen.com.au	roselen.fernandez@xen.com.au	Roselen Fernandez

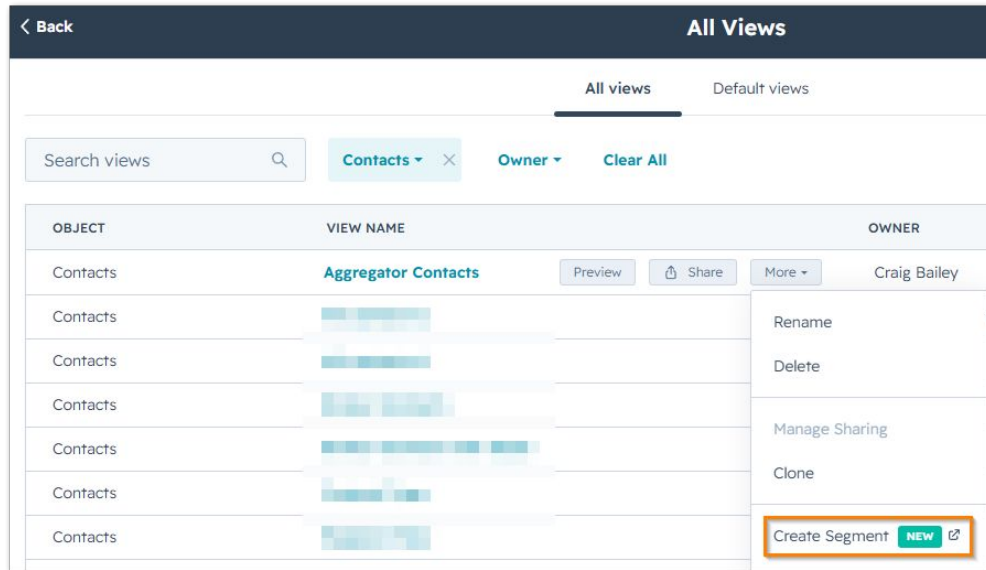
Convert Views to Segment

(HubShots Lesson)

What is it

- Easily turn your saved views into segments with just one click.

● LOW IMPACT



Rename HubSpot Defined Objects

[\(HubShots Lesson\)](#)

What is it

- Rename the different objects in HubSpot (Deals, Contacts, Companies, Tickets) ([link](#))
- For example, change 'Contact' to ['Pet Owner'] or ['Client']

● LOW IMPACT

Object name (Singular)

[Reset to Default](#)

Object name (Plural)

Client



Contacts

Relevant property labels will be adjusted to match the new object name (opt out is available). [i](#)

OBJECT TYPE	CURRENT PROPERTY		REPLACEMENT PROPERTY
Client	Contact unworked	→	Client unworked
Client	Contact owner	→	Client owner

Contact Email Logging Rules

(HubShots Lesson)

What is it

- HubSpot currently only logs emails that are direct replies to emails you have already logged
- This new option will log all emails from existing contacts to users directly into the CRM

● LOW IMPACT

Email Log & Track | Email Frequency Controls | Associations

These settings are for everyone logging data in your account's CRM. To connect your email, go to [Settings > Integrations > Email](#).

Email Log and Track Settings

Configure how emails are recorded in HubSpot

- ☒ **Allow all users to log email attachments**
When this setting is off it will prevent all incoming attachments from being logged in the CRM, conversations inbox, and sidebar. [Learn more](#)
- ☐ **Apply Default Log setting for all users - Sales Extension Only**
Turn this setting on to select a default log setting for all HubSpot Sales Extension users in the portal. This will override the individual's default log setting.
- ☐ **Apply Default Association for all users - Sales Extension Only**
Turn this setting on to set default associations for all HubSpot Sales Extension users in the portal. This will override the individual's default association setting.
- ☒ **Allow all users to track emails and see recipients open and click on their emails**
When this setting is off it will prevent all users from tracking emails sent from the CRM, conversations inbox, email extensions, and sequences. [Learn more](#)
- ☐ **Apply Default Track setting for all users - Sales Extension Only**
Turn this setting on to select default track setting for all HubSpot Sales Extension users in the portal. This will override the individual's default track setting.

Contact email logging rules

Configure which incoming contact emails are logged to the CRM. This setting only applies to new emails.

- ☐ **Log replies only**
Only logs emails from contacts that are part of an existing thread already logged to the CRM by a user. [Learn more](#)
- ☒ **Log all emails** NEW
Logs all emails between known contacts in the CRM and users with connected emails. [Learn more](#)

Build a New Sandbox and Deploy to Production

(HubShots Lesson)

What is it

- The new HubSpot Standard Sandbox allows you to safely build and test supported assets, then deploy them directly to production.

● MEDIUM IMPACT

The screenshot displays the 'Sandboxes' section of the HubSpot interface, marked with a 'BETA' badge. It features two tabs: 'Sandboxes' (active) and 'Activity Log'. Below the tabs is a table with columns 'SANDBOX' and 'TYPE'. The table lists two sandboxes: 'Sandbox 1' (ID: 22641093, Type: Legacy stand) and 'Sandbox 2 (Sep 2025)' (ID: 50492593, Type: Standard san). An 'Actions' dropdown menu is open for 'Sandbox 2', showing three options: 'Set up a deploy' (highlighted with an orange box and a cursor), 'Set up a sync to sandbox', and 'Delete'.

SANDBOX	TYPE
Sandbox 1 🔗 22641093	Legacy stand
Sandbox 2 (Sep 2025) 🔗 50492593	Standard san

Actions ▾

- Set up a deploy
- Set up a sync to sandbox
- Delete

Manage Associations in Bulk

(HubShots Lesson)

What is it

- Bulk update and review associations

● HIGH IMPACT

4 contacts selected ✦ Enrich records ✦ Fill smart properties → Assign 📄 Share ✎ Edit 🗑 Delete ⚙ Review Associations						
☐	Name	Email	Number Of Associated D...			
☒	KK					
☒	XEN					
☒	BC					
☒	DS					
☐	JG					

Adding Subtasks to a Parent Task

(HubShots Lesson)

What is it

- Add multiple subtasks to a parent task manually or through a Workflow.

● HIGH IMPACT

The screenshot displays the HubSpot CRM interface. On the left, the 'Create task' form is open, showing fields for 'Add to shared task queue' (set to 'XEN B2B'), 'Priority' (set to 'Medium'), 'Assign Task to' (set to 'An existing owner of the contact'), and 'Which contact owner' (set to 'Contact owner'). Below these fields is a 'Subtasks' section with three listed tasks: 'Check if new email exists', 'Add new email as additional email address, set as main/default email', and 'Update label of associated company (former vs primary company)'. A '+ New subtask' button is at the bottom of this list. On the right, a workflow diagram is visible, showing a sequence of steps: '1. Update association labels' (with a description 'To update existing association labels') and '2. Create task' (with a description 'Create task Update new company details for:'). The '2. Create task' step includes a form with fields for 'First Name (Enrolled contact)' and 'Last Name (Enrolled contact)'. The workflow ends with a '2. End' step.

Restore CRM Changes

(HubShots Lesson)

What is it

- Quickly undo changes and restore previous versions of their CRM data from the past 14 days directly within the platform.

Find or Ask

< Back

Search Settings

Translations

Data Capture

Data Enrichment

Markets

Import & Export

Backup & Restore

Tools

Recording & Transcription

Meetings

Backup & Restore

Backup

Restore

Prepare a restore

Choose your type of restore to bring values back to a state and we'll prepare a preview of the changes.

Restore CRM changes

Restore actions that happened in your account (created, updated, deleted).

Restore History

Restore type All Status All Date All Requested

Restore ID	Restore Type	Status
------------	--------------	--------

Restore CRM changes

Preparing a restore can take some time. We'll notify you when your preview is ready. You'll have 24 hours to review and restore.

Tell us what you need to restore (within the last 14 days). We'll run the search and prepare a preview of the changes.

Source *

Select a source

CRM Changes

Import

Integration

Workflow

XEN | HUBSPOT UPDATES THAT MATTER

19

Import Historical Email from Gmail

(HubShots Lesson)

What is it

- This allows Sales Hub Pro+ users to bring existing contacts and past email threads from their Gmail inbox directly into the HubSpot CRM.

● HIGH IMPACT

Dashboard

Search Settings

Our Preferences

- General
- Notifications

Organization Management

- Multi-Account
- Reset Copying

Account Management

- Account Defaults
- Account & Billing
- Account Cleanup
- Audit Log
- Users & Teams

General

Profile | **Email** | Calling | Calendar | Tasks | Security | Automation

These preferences only apply to you. For account level email management, go to [email logging settings](#).

Email

Connect your personal email accounts to HubSpot to log, track, send, and receive emails in the HubSpot CRM. To manage and import emails, go to [inbox settings](#).

Email	Status	Inbox automation
  Inbox type: G Suite	Actions ▾ ● Enabled	☒

[Connect personal email](#)

Configure

- [Add email alias](#)
An email alias allows emails sent outside of HubSpot to be associated with your user.
- [Manage email signatures](#)
Your signature will be used in one-on-one emails through the HubSpot CRM and as a personalization token for marketing emails.

Import historical email data **Beta**

Update Exclusions in Segments

(HubShots Lesson)

What is it

- These three most commonly used exclusion criteria are now readily available in exclusion settings of a segment.

HIGH IMPACT

Team owner [Learn more](#)

All teams

and + Add filter group

Exclude contacts ☒

Members of a segment
You can exclude up to 10 segments 0/10
Choose segment(s)

Individual contacts
You can exclude selected contacts
Choose contact(s)

Additional exclusion rules New

Exclude non-marketing contacts
Contacts not marked as marketing contacts will be excluded from this segment. ☒

Exclude email domains
Exclude widely used email domains or your company's domain to filter out coworkers.
Examples: gmail.com, yahoo.com, yourcompany.com
gmail.com x hotmail.com x

Exclude unsubscribers
Contacts who have unsubscribed from communications will be excluded. ☒

Sales Hub



Block Free Email Domains from Booking a Meeting

(HubShots Lesson)

What is it

- A one-click option to block free email domains from scheduling a meeting with you using HubSpot Meetings

HIGH IMPACT

The screenshot shows the HubSpot interface with the following navigation path highlighted by numbered callouts:

- Sales** (in the left sidebar)
- Meetings Scheduler** (in the Sales Workspace sub-menu)
- Form** (in the top tabs of the Meetings Scheduler)
- Block free email domains** (in the right-hand form configuration area)

The 'Form' configuration area includes the following fields and options:

- First Name (Required)
- Last Name (Required)
- Email (Required)
- Phone number (Required)
- What is the call about? (Required)
- + Contact property
- + Custom question
- CAPTCHA (spam prevention) (Toggle switch)
- Block free email domains** (Toggle switch, checked)
- Block free email domains from booking meetings. [See list](#)
- + Block specific domains

Schedule Automatic Exchange Rate Updates

(HubShots Lesson)

What is it

- Set exchange rates to update automatically every month, quarter, or year keeping your exchange rates accurate and current.
- Exchange rate applies to open deals and other HubSpot records that use exchange rates. Deals you've already closed will keep the exchange rate from their close date.

HIGH IMPACT

The screenshot shows the HubSpot interface with the following elements highlighted by numbered callouts:

- 1:** The settings gear icon in the top navigation bar.
- 2:** The 'Account Defaults' link in the left sidebar under 'Account Management'.
- 3:** The 'Currency' tab in the 'Account Defaults' section.
- 4:** The toggle switch for 'Schedule automatic exchange rate updates'.
- 5:** The 'Add Currency' button in the 'All Currencies' section.

Account Defaults

General | Branding | User Defaults | Notification Profiles | **Currency** | More

These defaults will be used for deals and properties.

Schedule automatic exchange rate updates. [Learn more](#) **NEW**

Frequency: Monthly | Update status: Next update on 01/07/2025

[View history](#)

All Currencies [Exchange rate log](#) **Add Currency**

Open records (including deals) use these exchange rates. Closed records use the exchange rate at the time of closing. [Learn more](#)

NAME	EXCHANGE RATE	FORMAT	LAST UPDATED
Australian Dollar (A...	Company Currency	\$123,456.78	14/07/2023 CRM UI

Sales Workspace Overview

(HubShots Lesson)

Check if Deals and Prospects tabs available

What is it

- Central place in HubSpot where you and your team can manage sales and prospecting related activities
- Check out tasks, calendar schedule and plan for the day

MEDIUM IMPACT

The screenshot displays the HubSpot Sales Workspace Overview dashboard. At the top, there are tabs for Summary, Prospects, Deals, Tasks, Schedule, and Dashboard. The 'Summary' tab is active.

Your tasks

- HIGH PRIORITY**: 0
- ALL TASKS**: 1
- To-do's (1)**: 1
- Calls (0)**: 0
- Emails (0)**: 0
- LinkedIn (0)**: 0

Your outreach activities (1)

- Prospecting agent**: 1 email to review, [Review emails](#)

Guided actions

- All actions**: 2
- Deal related**: 0
- Prospecting related**: 2

Today, 9 October

- 8:00 AM
- 9:00 AM
- 10:00 AM
- 11:00 AM
- 12:00 PM
- 1:00 PM
- 2:00 PM
- 3:00 PM
- 4:00 PM
- 5:00 PM
- 6:00 PM

Activities:

- 2 | SOS
- HubShots Framework
- 2 | Lunch
- Performance review prep
- 2 | Prep for training

Guided actions details:

- Your meeting with **Roselen Test** is in a day. Start time: 9:30 AM. [Prepare for meeting](#)
- Calls need an outcome. 10 calls occurred in the last 7 days but still need an outcome. [Log outcomes](#)

Sales Workspace: Guided Actions & Deal Risks

(HubShots Lesson)

What is it

- To understand a deal's score and get a guidance on what to do next, simply hover over the score. You'll see explanations, like "no activity scheduled," and other actionable recommendations.

● LOW IMPACT

The screenshot displays the Sales Hub interface with the following sections:

- Guided Actions**: A section with a hamburger menu icon and a card titled "Update next steps" which states "Email to your contact was more than a day ago but still needs an update." and includes a link "Update next steps".
- Deal Insights**: A section with an information icon, stating "Generated a few seconds ago" and a "+ AI" button. It contains a "Recent activity" card showing "Latest 5 activities 19 Sep 2025 - 22 Sep 2025" and "5 emails", with a "Show more" link.
- Deal Score**: A section featuring a large score of 33 in a red circle, a "+ AI" button, and a list of "Key factors":
 - Progression**:
 - Deal probability is 10% (red minus icon)
 - Less than 1 day in current stage (green plus icon)
 - 60 days until close date (red minus icon)
 - Engagement**:
 - 12 sales activities (green plus icon)
 - Contacted 7 times (red minus icon)A link "Learn more about deal scoring" with an external link icon is also present.
- About this deal**: A section at the bottom right with an "Actions" dropdown menu.

Lead Scoring

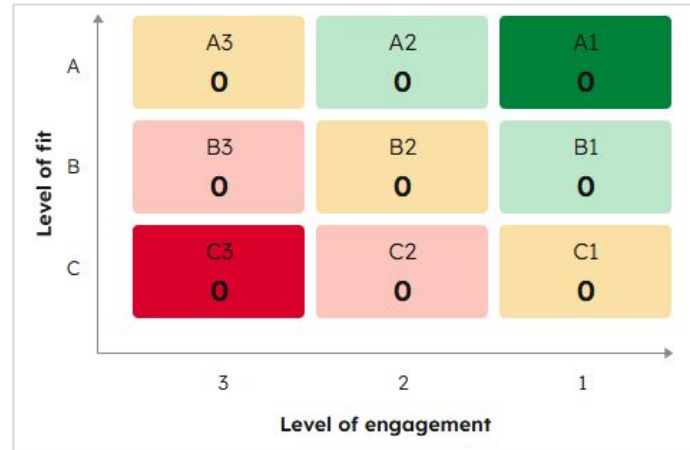
(HubShots Lesson)

What is it

- Score companies or deals based on several criteria like property values and engagements
- A good way to prioritise/identify qualified leads/deals

● HIGH IMPACT

Deal Name	Deal Score ...	Deal Score Engagem...	Deal Score Fit Early Sta...	Deal Score Early Stage
Example Company, Boston Ave...	15	0	15	C5
Example Company, Boston Ave...	5	0	5	C5
Example Company, Boston Ave...	5	0	5	C5



Quotes: Verification for E-Signatures

(HubShots Lesson)

What is it

- When turned on, signers will be required to verify their identity via email

MEDIUM IMPACT

Quotes

[Setup](#)[E-signature](#)[Approvals](#)[More ▾](#)

[View quotes in the data model](#)

E-signature usage this month

E-signature usage

Usage resets at the start of each month.

An e-signature counts toward the total usage for a calendar month as soon as a quote is published. Expired, deleted, archived, or recalled quotes with the e-signature option turned on will be included in the total count.

[Learn more.](#)

E-signature settings

Identity verification

When turned on, signers will be required to verify their identity via email before signing the document.

[Learn more.](#)

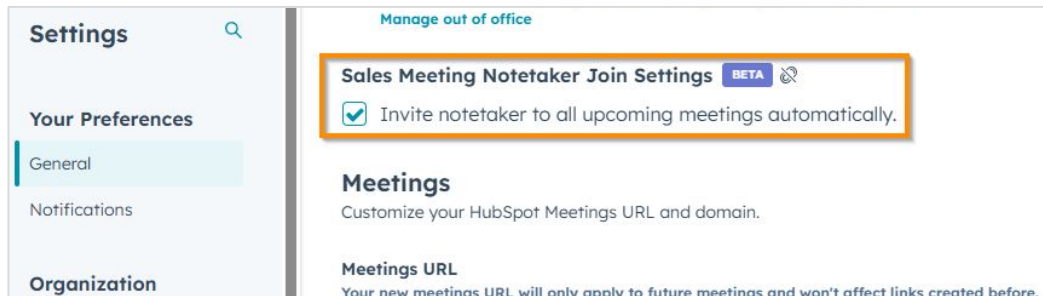
[ON](#) ☒

Call and Meeting Notetaker (Beta)

What is it

- **Calling Notetaker (Beta)**
 - HubSpot calling now supports live call transcription & AI powered note taking.
- **Sales Meeting Notetaker**
 - Meetings are automatically recorded, transcribed, and stored in HubSpot.

● HIGH IMPACT



Product Builder

(HubShots Lesson)

What is it

- New Product Builder with Product Status

● LOW IMPACT

The screenshot displays the 'Edit product' interface in HubSpot's Product Builder. The interface is divided into several sections:

- Product information:** Contains a 'Name' field with a value of '1 | Website Design |', an 'SKU' field with a value of 'Website Strategy', and a 'Product description' field with the text 'Strategic sessions to plan and guide the implementation of your HubSpot website.' There is also a 'See more' link and a thumbnail image of a 'create Website Strategy Workshop'.
- Tax category:** A dropdown menu with the value 'Select a Tax Category'.
- Product type:** A dropdown menu with the value 'Service'.
- Billing details:** Contains a 'Billing frequency' dropdown menu with the value 'One-time'.

The interface includes a top bar with 'Edit product' and 'Update product' buttons, and a bottom bar with 'this form' and 'Active: 1'.

Forecast Submissions Cadence & Reminders

(HubShots Lesson)

What is it

- Set a regular schedule for forecast submissions and send automated reminders to your team to ensure they are always submitted on time.

● LOW IMPACT

Name	Goal Attainment	Weighted Pipeline	Forecast Submission
XEN B2B October 2025 total	203%		—
Roselen Fernandez			—
Pooja Shah			—
Kezia Imposo			—
Keren Tornea			—
Erika Diduro			—
Dona Piquero			—
Craig Bailey			—

Set forecast schedule for Sales Forecast

Set up a forecast submission schedule for Sales Forecast. [Learn more](#)

Please note: your local time zone is GMT+8, but this form uses your company's time zone, AEDT.

☒ Set a forecast submission schedule
Schedule when forecast submissions are due for selected teams and, optionally, send reminders.

Submission schedule start date * **Due time (AEDT) ***

13/10/2025 8:00 AM

Repeats *

Biweekly on Monday

Forecast submissions are due **biweekly on Monday at 8:00 AM AEDT** starting on **October 13th**.

Assigned to *
The forecast submission schedule applies to all users in the selected team(s). Reminders will only be sent to users who have permission to edit forecasts.

XEN

Reminder *
Users will receive an email and/or pop-up notification with a direct link to submit their forecast, based on their individual notification settings.

1 day before due time

[Cancel](#) [Save](#)

Account Cleanup

(HubShots Lesson)

What is it

- [Enterprise only]
- Find opportunities to clean up and declutter your HubSpot portal with the Account Cleanup feature.

● HIGH IMPACT

Marketing emails

Marketing emails are never deleted, and just organized for easier cleanup. Marketing emails meeting the rule will appear in the [archived view](#) in Marketing Emails:
→ Last edited over 6 months ago and status is draft

Blog Posts

Blog posts are never deleted, and just organized for easier cleanup. Blog posts meeting the rule will appear in your [archived view](#) in Blog Posts:
→ Last edited over 6 months ago and status is draft

Landing pages

Landing pages are never deleted, and just organized for easier cleanup. Landing pages meeting the rule will appear in your [archived view](#) in Landing Pages:
→ Last edited over 6 months ago and status is draft

Website Pages

Intent Signals

(HubShots Lesson)

What is it

- HubSpot's intelligent buying signals are also now available on the Prospects tab of the Sales Workspace and in Company Views

HIGH IMPACT

The screenshot displays the HubSpot Sales Hub interface. The top navigation bar includes 'Summary', 'Prospects' (highlighted), 'Deals', 'Tasks', 'Schedule', and 'Dashboard'. The 'Prospects' tab shows a list of companies, with 'Aircall' highlighted. The 'Aircall' company profile is shown on the right, including details like 'Tier: Select a tier', 'Company owner: Roselen Fernandez', and 'Lifecycle stage: Lead'. The 'Top signals' section for Aircall lists several research activities, each with a 'Preview' button.

Below the company profile, the 'Companies' section is visible, showing a list of companies with columns for 'Account Name', 'Company owner', and 'Recent Intent Signals'. The 'Recent Intent Signals' column for Aircall lists several signals, each with a 'Preview' button.

Account Name	Company owner	Recent Intent Signals
Craig Bailey (craig@xen...)	Craig Bailey (craig@xen...)	Regulatory approval
HubSpot	Craig Bailey (craig@xen...)	Job st..., Job e..., Rese..., Product int..., Email b..., Industry rec..., Leadership ...
Keren Tornea (keren@x...)	Keren Tornea (keren@x...)	Job started, Job ended
Roselen Fernandez (ros...)	Roselen Fernandez (ros...)	Job started, Job ended
Keren Tornea (keren@x...)	Keren Tornea (keren@x...)	Job started, Job ended, Visitor intent
Kezia Improso (kezia@x...)	Kezia Improso (kezia@x...)	Email bounce
Dona Piquero (dona@x...)	Dona Piquero (dona@x...)	Visitor intent
Dona Piquero (dona@x...)	Dona Piquero (dona@x...)	Visitor intent

Service Hub



Help Desk Overview

What is it

- Inbox and ticket pipeline combined
- Centralised workspace designed for support teams to manage and process tickets
- Not included in your current subscription

Benefits

- Consolidates all omnichannel communication (email, chat, social)
- Integrates AI-powered tools (eg Knowledge Sources Sidebar)
- Features the familiar Board View like ticket pipeline



Auto Create Ticket When Replying to an Email

(HubShots Lesson)

What is it

- If you send a message from an email that is a Help Desk channel within HubSpot, a support ticket will be created automatically.

● MEDIUM IMPACT

The screenshot displays the HubSpot email composer interface. At the top, there's a navigation bar with 'Email' selected. Below it, tabs for 'Templates', 'Sequences', 'Documents', 'Meetings', and 'Quotes' are visible. The email header shows 'To: Schnubbs von Turkleberry', 'From: Roselen Fernandez from XEN (@xen.com.au)', and 'Subject: Hey Schnubbs'. A confirmation message in a light blue box states: 'You have selected a help desk email address. When you send a message using a help desk email address, a ticket will be generated automatically.' The email body starts with 'Hi Schnubbs,' followed by 'Follow up on our previous discussion...'. At the bottom, the 'Default send button' is highlighted, which is a red button labeled 'Send and create ticket'. To the right of this button, there's a checkbox for 'Create a To-do task to follow up' with a dropdown set to 'In 3 business days (Thursday)'.

Help Desk: Setting Default Reply Email Address

(HubShots Lesson)

(Enterprise feature)

MEDIUM IMPACT

Object Library

- Objects
- Translations
- Data Enrichment
- Markets
- Import & Export
- Backup & Restore
- Tools
- Meetings
- Calling
- Sales Workspace
- Inbox & Help Desk
- Inboxes
- Help Desk
- Availability Management
- Allow & Deny List
- Customer Success
- Marketing
- SMS
- Content
- Payments

Channels > team@xen.com.au

support/team email
Help Desk channel

Configuration Automation

Send from

From name

Agent and company name

Agent name from XEN

Team signature

+ Add team signature

Choose original sender of email forwards

When an email is forwarded into help desk, choose the original sender as the associated contact. Replies and ticket creation will default to the original sender. Turn this setting off to default to the forwarder instead of the original sender.

Default reply email

When you turn this setting on, all replies in help desk will be sent from team@xen.com.au. You can apply this to all teams or specific teams.

Enable this email as the default reply email address

Select Team(s)

XEN

Help Desk: Open Tickets Capacity Limit Per User

(HubShots Lesson)

What is it

- Set the maximum number of open tickets per user
- Useful for HubSpot portals that regularly handle a high volume of live chat conversations.
 - For example, if all users are at a capacity, new chat conversations will show your 'Team is at max capacity' messaging

LOW IMPACT

The screenshot displays the HubSpot Help Desk interface. On the left sidebar, the 'Routing' menu item is highlighted. The main content area shows the 'Capacity limits' tab, which is also highlighted. Below the tab, there is a section titled 'Ticket capacity limits' with a description: 'Manage the maximum number of open tickets in help desk for each user. Automatic assignments will temporarily pause for users who are at full capacity. Only users with Service Seats can use the capacity limits. [Manage seats](#)'. A filter dropdown is set to 'All users'. Below this is a table with two columns: 'NAME' and 'CAPACITY LIMIT'. The table lists two users: 'Craig Bailey' and 'Dona Piquero'. The 'CAPACITY LIMIT' column for 'Dona Piquero' shows a value of 4. A '+ Add limit' button is visible next to the capacity limit input field. The current ticket count for 'Dona Piquero' is 0.

NAME	CAPACITY LIMIT
Craig Bailey	
Dona Piquero	4

Help Desk: Set Default View

(HubShots Lesson)

What is it

- Create a custom View that you'd like to set as default View for all Help Desk users

● LOW IMPACT

The screenshot shows the 'Views' management interface in HubSpot. At the top is a search bar labeled 'Search by view name'. Below it is a table with columns: 'VIEW NAME', 'SHARED WITH', and 'TYPE'. The table lists four views: 'All Open' (Default type), 'My Urgent Tickets' (Custom type), 'XEN | Closed Tickets | Support Pipeline' (Custom type), and 'XEN | Open Tickets | Support Pipeline' (Custom type). For the 'My Urgent Tickets' view, a three-dot menu is open, showing options: 'Edit', 'Set as homepage', and 'Delete'. The 'Set as homepage' option is highlighted with an orange box. A tooltip points to this option, stating: 'This will set this view as the default page users land on when they navigate to help desk.'

VIEW NAME	SHARED WITH	TYPE
All Open	Everyone	Default
My Urgent Tickets		Custom
XEN Closed Tickets Support Pipeline		Custom
XEN Open Tickets Support Pipeline		Custom

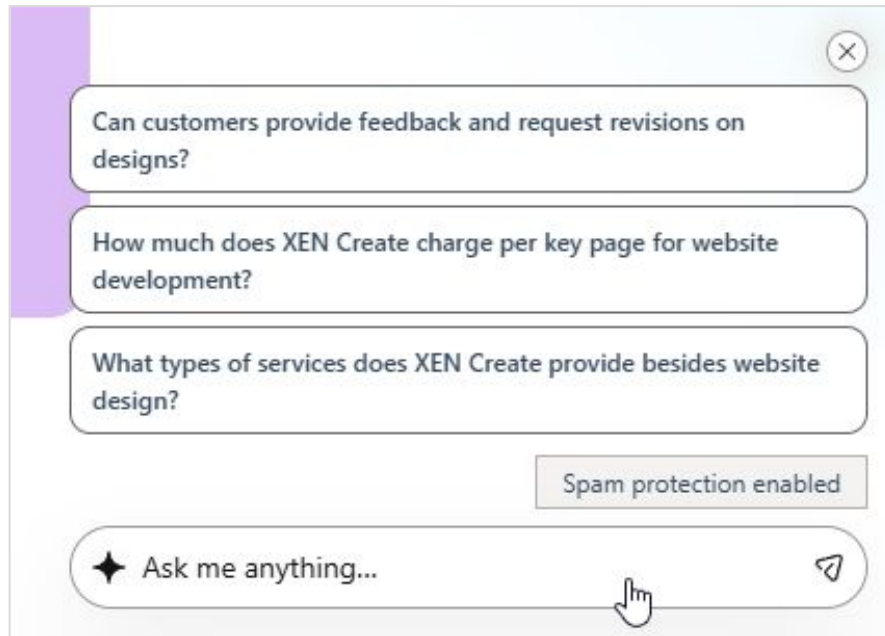
Customer Agent Suggested Prompts

(HubShots Lesson)

What is it

- Customer Agent now serves page-specific prompt suggestions, automatically displaying relevant questions only when it has the verified knowledge to answer them

MEDIUM IMPACT



A screenshot of the Customer Agent interface. At the top right is a close button (X). Below it are three rounded rectangular boxes containing suggested prompts: "Can customers provide feedback and request revisions on designs?", "How much does XEN Create charge per key page for website development?", and "What types of services does XEN Create provide besides website design?". To the right of these prompts is a button labeled "Spam protection enabled". At the bottom is a text input field with a star icon on the left and a send icon on the right, containing the placeholder text "Ask me anything...". A hand cursor is pointing at the input field.

Knowledge Base Agent

(HubShots Lesson)

What is it

- Automatically analyses customer support tickets to identify information gaps and generate new draft articles for your knowledge base

● HIGH IMPACT

Knowledge base

Knowledge base: XEN Knowledge Base | URL: <https://www.xenkb.com>

Manage

Analyze

Knowledge base agent + AI

Transform support conversations into powerful self-service content with Breeze knowledge base agent

- **Breeze knowledge base agent writes articles for you:** AI will scan knowledge gaps and analyze ticket data to create article drafts.
- **Publish in minutes, not hours:** Simply review, adjust, and publish articles — no more juggling multiple tools or endless writing cycles.
- **Create a powerful feedback loop:** Utilize your team's knowledge to keep your content up to date and continually improve your self-service capabilities.

Create Knowledge Base Agent

Learn more

Marketing and Content Hub



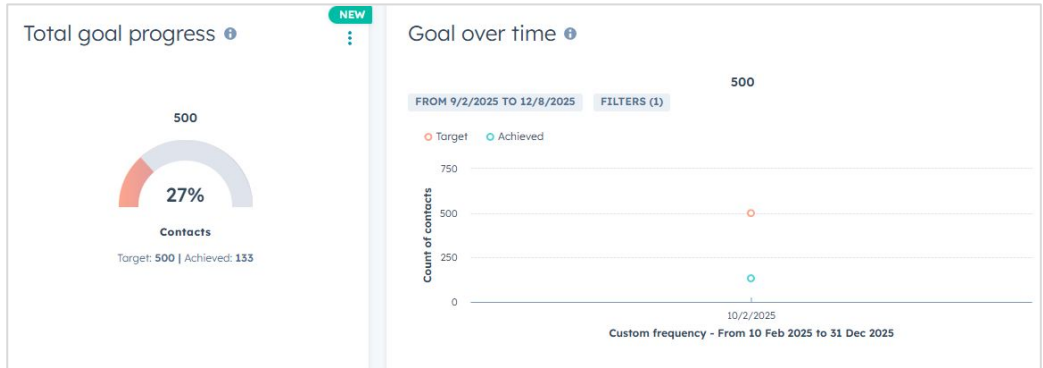
Campaigns: Report on Goal

(HubShots Lesson)

What is it

- The goal field in HubSpot campaigns is no longer a simple text field; it now allows you to track and report on campaign progress directly.

MEDIUM IMPACT



Form: Use Hidden Fields in Conditional Logic

(HubShots Lesson)

What is it

- This update allows you to use hidden fields, to trigger conditional logic within forms and to power custom redirects after submission.

MEDIUM IMPACT

Choose between displaying a thank you message or redirecting people to another option.

- ☐ Thank you message
- ☐ HubSpot page or External URL
- ☐ Scheduling page
- ☒ Conditionally redirect to a scheduling page, HubSpot page or external URL

Set up conditions for redirecting visitors to a scheduling page ⓘ

If

Brand

is any of

XEN Create

Redirect To

Scheduling page

Redirect to a single meeting scheduling page

60 min, 30 min, and 15 min mee...

+ Add condition

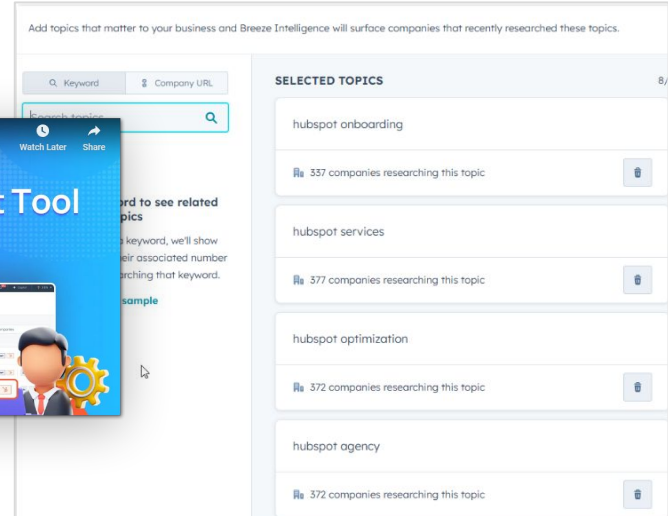
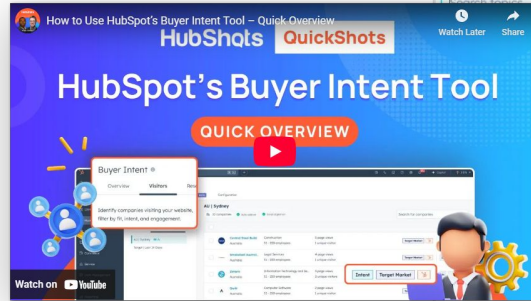
Buyer Intent: Research Intent

(HubShots Lesson)

What is it

- Identify companies showing buyer intent, based on their search topics, even if they aren't existing HubSpot records.
- New Signals

HIGH IMPACT



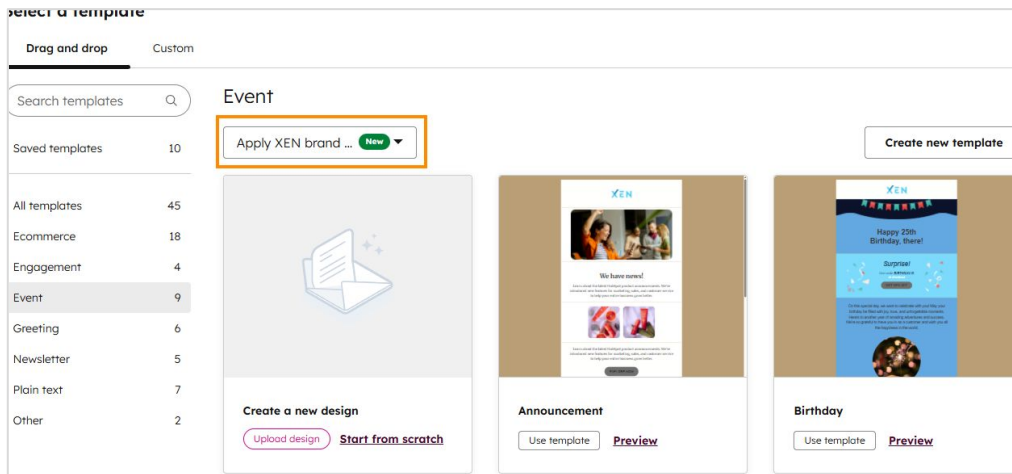
Branded Email Templates

(HubShots Lesson)

What is it

- Use HubSpot default email templates and automatically apply your company's branding to it.

● LOW IMPACT



Throttle Marketing Email

(HubShots Lesson)

What is it

- Throttle marketing email send, especially if you're sending to a large number of contacts. This will help with your email deliverability.

● HIGH IMPACT

Schedule

When will you send the email?

- ☐ Send now
- ☐ Schedule for later
- ☒ Optimize send time for each contact **Beta**

Each contact receives the email at a time when they're most likely to engage

Send time optimization

We'll send to each contact at a unique time optimized for engagement based on the time window you choose below. [Learn more.](#)

Find optimal time within

120 hours of sending

4 —————

or [use a custom time frame](#)

Summary

Message will be sent to **each recipient** at an optimized time for engagement within **120 hours** of sending the email.

Send Time Optimization uses previous open and click data from each contact to find an optimal time to send.

Longer time windows are likely to have more engagement data available, which should mean a more accurate send time per contact.

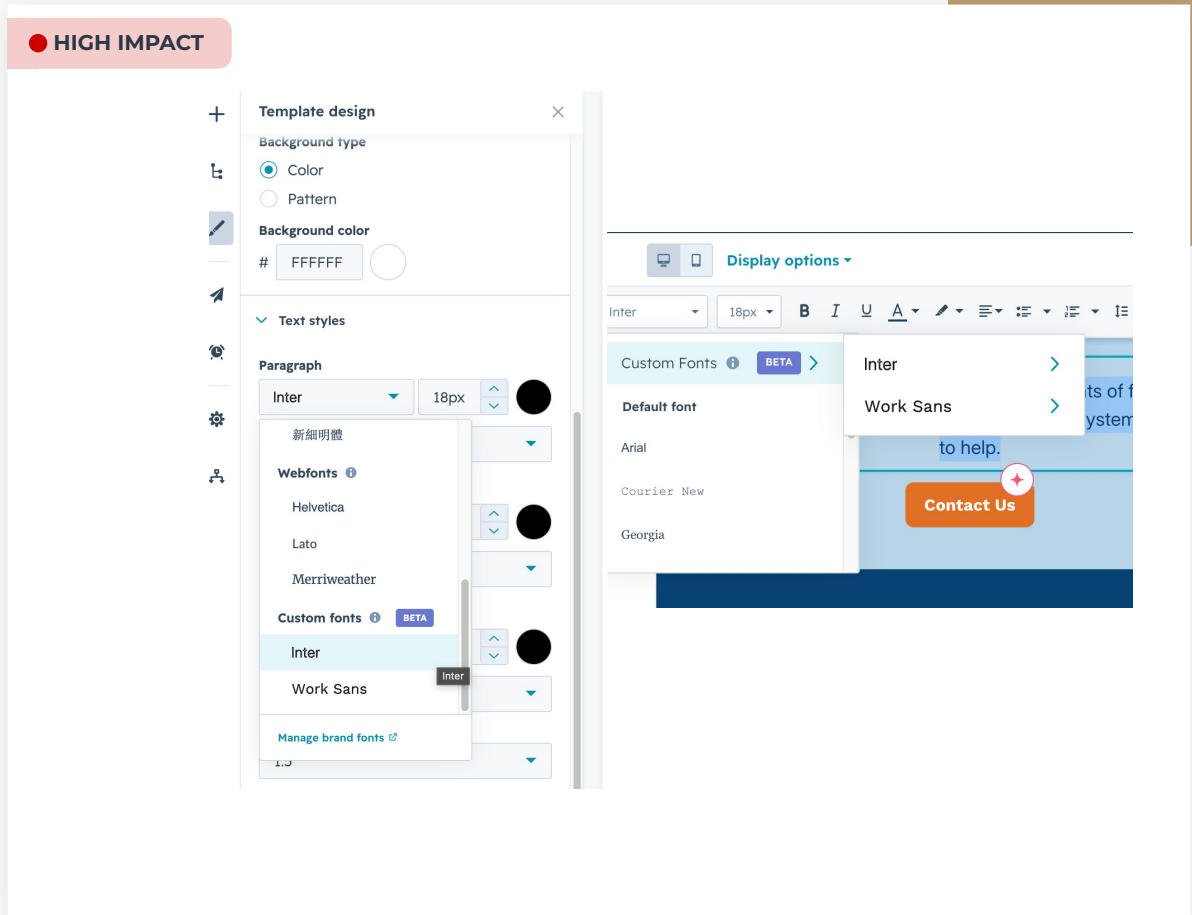
If there's not enough data, we'll send at the start of the chosen window.

Custom fonts in marketing emails

(HubSpot KB)

What is it

- Use custom fonts in marketing emails to match your brand



Auto Capture Website Events

(HubSpot KB)

What is it

- Track clicked element or visited URL on your page without code

MEDIUM IMPACT

The screenshot shows the 'Custom events' configuration window in HubSpot. At the top, it says 'Custom events' and '3 of 500 events created'. Below this is the 'Clicked element details' section, which instructs the user to use the 'click selector' or manually type the CSS, ID, or jQuery selector. A text input field contains 'div#hs_cos_wrapper_widget_17803717163t' and a magnifying glass icon. Below this is the 'I'd like to track this on:' section with three radio button options: 'All websites with the tracking script' (with a note 'Tracking on 15 domains or more'), 'This domain' (with a note 'Tracking all of https://accord.asn.au'), and 'This page' (which is selected, with a note 'Tracking only https://accord.asn.au/accord-training-regulatory-bites'). At the bottom is the 'Tracking name' section with a text input field containing 'Download the slides'. The window has a 'Close visual' button at the top right and 'Cancel' and 'Next >' buttons at the bottom.

Close visual

Custom events 3 of 500 events created

Clicked element details

Use the **click selector** or manually type the CSS, ID or jQuery selector

Selector *

The selector will be automatically highlighted for you

div#hs_cos_wrapper_widget_17803717163t

I'd like to track this on:

☐ All websites with the tracking script
Tracking on 15 domains or more

☐ This domain
Tracking all of https://accord.asn.au

☒ This page
Tracking only https://accord.asn.au/accord-training-regulatory-bites

Tracking name *

Download the slides

Cancel Next >

Breeze AI

(HubSpot AI)



HubSpot Credits Overview

(HubShots Lesson)

What is it

- HubSpot Credits by Hub
 - Starter = 500 credits / month
 - Professional = 3,000 credits / month
 - Enterprise = 5,000 credits / month
- You can buy additional HubSpot Credits as add ons
- Credits per usage:
 - 1 record enrichment = 0 credits
 - 1 Customer Agent conversation = 50 credits



Record Enrichment

(HubShots Lesson)

What is it

- HubSpot AI could populate some properties like name, country and employment role for contacts or company name and industry for companies.

● HIGH IMPACT

NAME	HAS BEEN ENRICHED	EMPLOYMENT ROLE	EMPLOYMENT SENIORITY	EMPLOYMENT SUB ROLE
 [Redacted]	Yes	Marketing	Senior	Marketing Specialist
 [Redacted]	Yes	Communications	Senior	Writer
 [Redacted]	Yes	Operations	Executive	Chief Executive Officer
 [Redacted]	Yes	Sales	Employee	Salesperson
 [Redacted]	Yes	Information Technology	Employee	Data IT
 [Redacted]	Yes	Entrepreneurship	Owner	Founder
 [Redacted]	Yes	Marketing	Manager	Marketing Specialist
 [Redacted]	Yes	Sales	VP	Sales Operations
 [Redacted]	Yes	Business Development	VP	Director of Development
 [Redacted]	Yes	Information Technology	Manager	Information Technology Spe...

Breeze AI

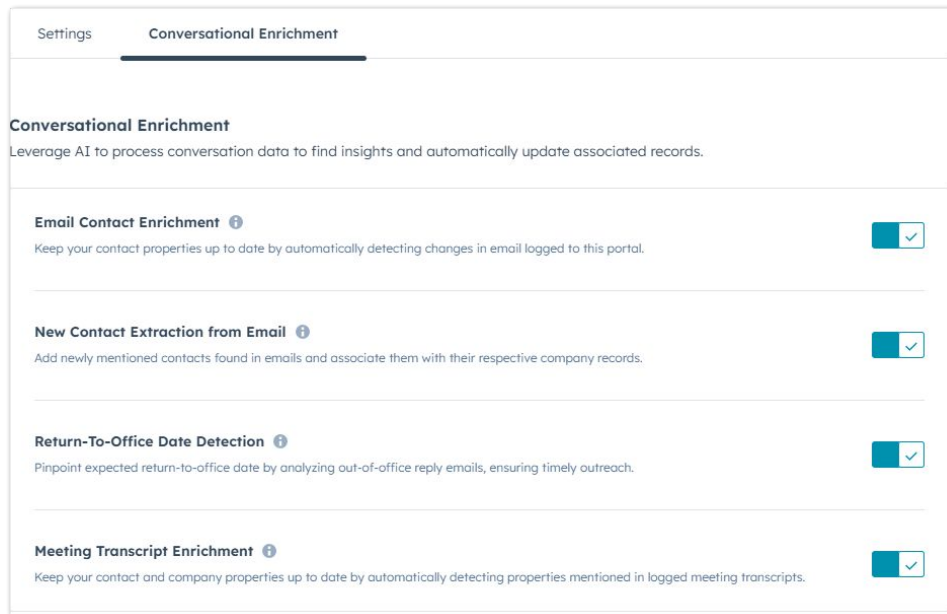
HubSpot Credits: More Control of Enrichment

(HubShots Lesson)

What is it

- More enrichment options (link)

MEDIUM IMPACT



The screenshot shows the 'Conversational Enrichment' settings page in HubSpot. The page has a 'Settings' tab and a 'Conversational Enrichment' sub-tab. Below the sub-tab, there is a section titled 'Conversational Enrichment' with a description: 'Leverage AI to process conversation data to find insights and automatically update associated records.' Below this, there are four toggle switches, all of which are turned on (indicated by a blue bar and a checkmark icon). Each toggle has a title, a description, and an information icon (i).

Feature	Description	Status
Email Contact Enrichment	Keep your contact properties up to date by automatically detecting changes in email logged to this portal.	On
New Contact Extraction from Email	Add newly mentioned contacts found in emails and associate them with their respective company records.	On
Return-To-Office Date Detection	Pinpoint expected return-to-office date by analyzing out-of-office reply emails, ensuring timely outreach.	On
Meeting Transcript Enrichment	Keep your contact and company properties up to date by automatically detecting properties mentioned in logged meeting transcripts.	On

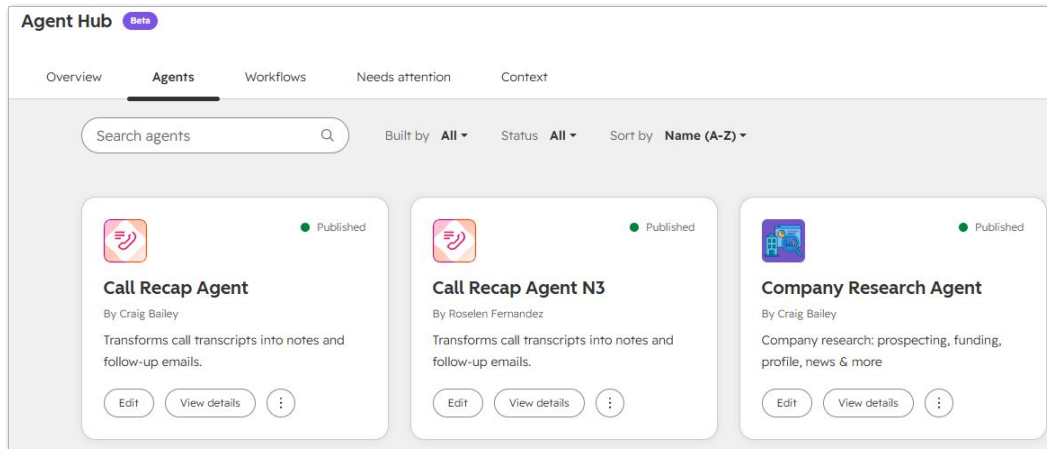
HubSpot Agents Overview

(HubShots Lesson)

What is it

- Breeze Agent is a type of AI that is designed to operate with a high degree of autonomy within HubSpot
- The main purpose of Breeze Agents is to handle busy work and repetitive tasks
- Pre-built agents are available on the HubSpot Marketplace

● HIGH IMPACT

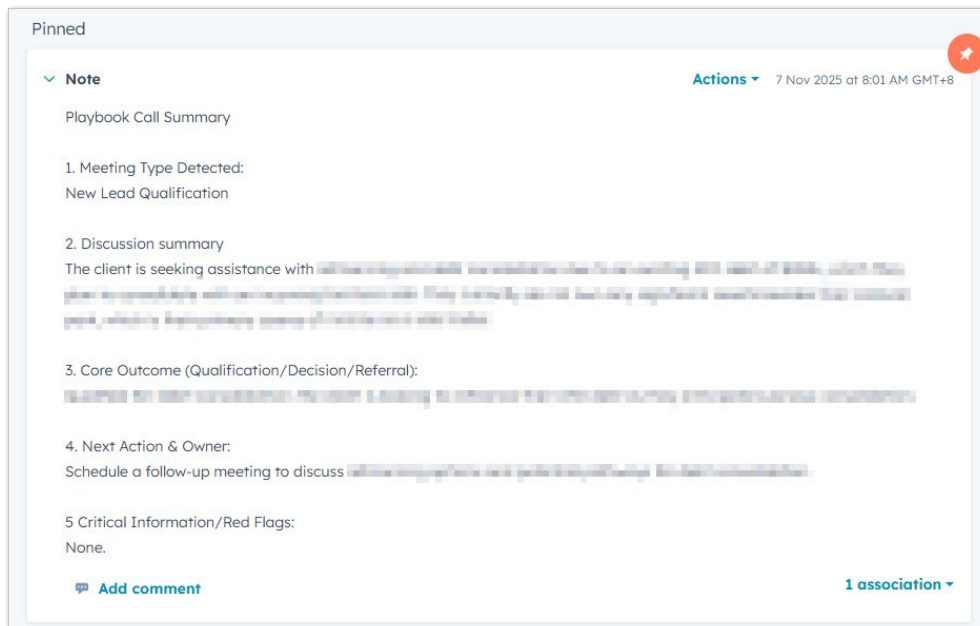


Data Agent: Custom Prompt in Workflow

What is it

- Add a custom prompt in Workflow like summarising a Playbook and adding that as a note against the contact/deal

MEDIUM IMPACT

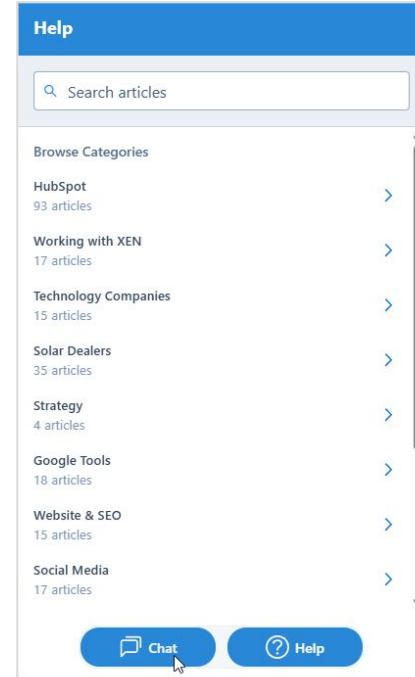
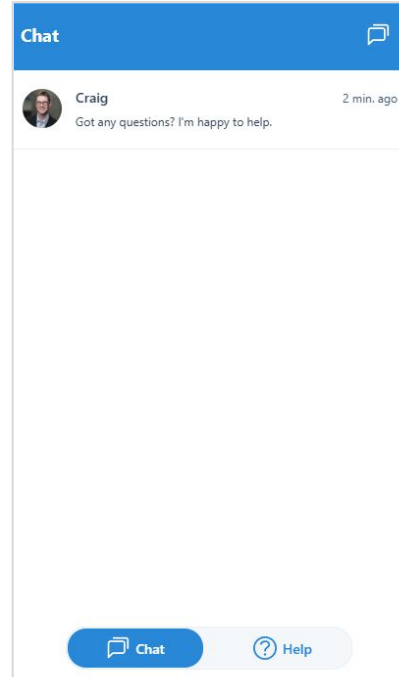


Customer Agent

What is it

- AI support that can answer enquiries (chats, emails, phone calls, forms, etc.) 24/7 by pulling information from your content or provided knowledge source

● HIGH IMPACT



Who Customer Agent Responds to on Email

(HubShots Lesson)

What is it

- Define which contacts your Customer Agent responds with on email by selecting from existing HubSpot segments.

● HIGH IMPACT

Deploy a channel

Channel

XEN

✓ Choose when Customer Agent should respond (optional)

Working hours ⓘ

☒ All hours

The agent responds to new conversations at any time

☐ During specific hours

The agent responds only within the hours you set

☐ Only outside specific hours

The agent responds only outside the hours you set

Targets to include ⓘ New

When no targets are selected, the agent responds to everyone.

Select contact lists

Targets to exclude ⓘ New

04: Customers x

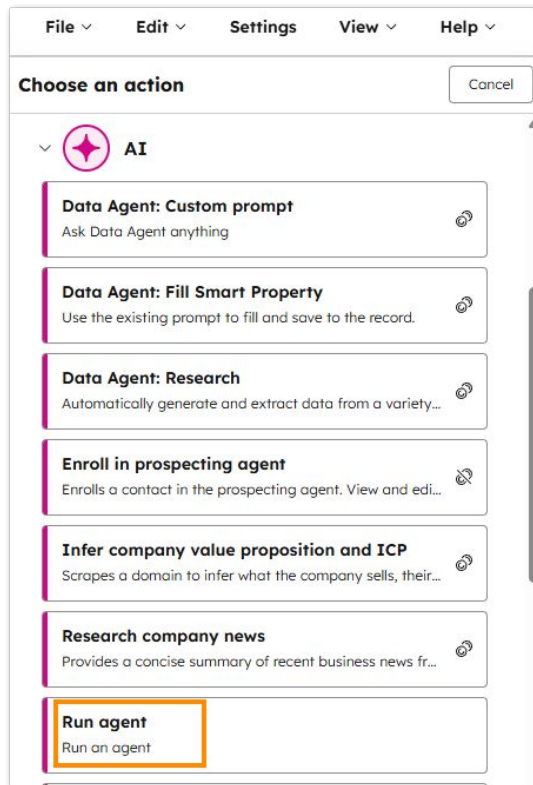
Run Agent Workflows Action

(HubShots Lesson)

What is it

- Trigger a Breeze Agent using Workflows

● HIGH IMPACT

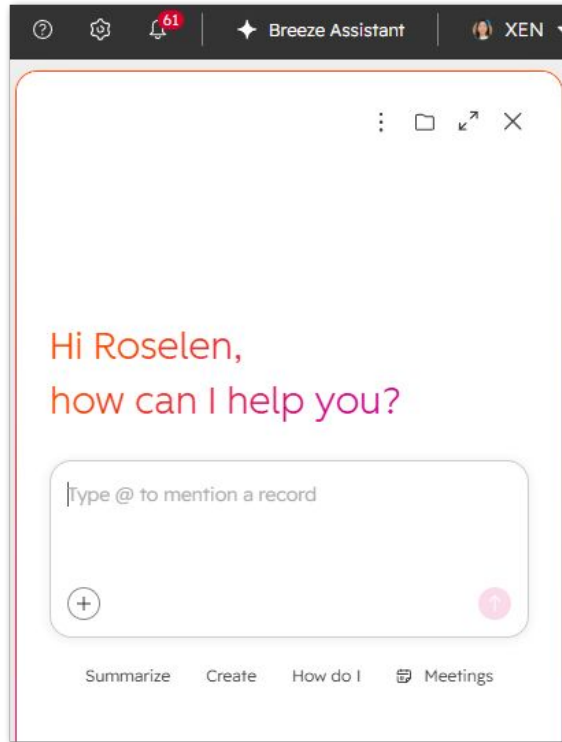


Breeze Assistant

What is it

- 'ChatGPT' experience in HubSpot
- Answers can be based on the info within your portal or on the web research
- Can also perform actions like creating records

● HIGH IMPACT



Map Enriched Data to Custom Property

(HubShots Lesson)

What is it

- Choose which properties your enriched data will be written to:

MEDIUM IMPACT

The screenshot shows the HubSpot Mapping interface. On the left is a sidebar with navigation options: Partners, AI, Payments Account, Data Management (with sub-items Properties, Objects, Translations, Data Enrichment, Markets, Import & Export, Backup & Restore), Tools (with sub-items Meetings, Calling, Sales Workspace, Sales Performance, Inbox & Help Desk), and a 'Beta' badge. The main content area has tabs for Settings, Conversational Enrichment, and Mapping. The Mapping tab is active, showing a title 'Mapping' and a subtitle 'Configure how enrichment properties map to your HubSpot properties.' Below this is a search bar and two tabs: '13 standard properties' and '0 custom properties'. A table lists the mappings:

Enrichment Property		HubSpot Property	Overwrite Rule	
State/Region Code	→	State/Region Code	Fill empty values only	🔄
Country/Region Code	→	Country/Region Code	Fill empty values only	🔄
LinkedIn URL	→	LinkedIn URL	Fill empty values only	🔄
State/Region	→	State/Region	Fill empty values only	🔄
Country	→	Country	Fill empty values only	🔄
Job Title	→	Job Title	Fill empty values only	🔄

Dashboards and Reports

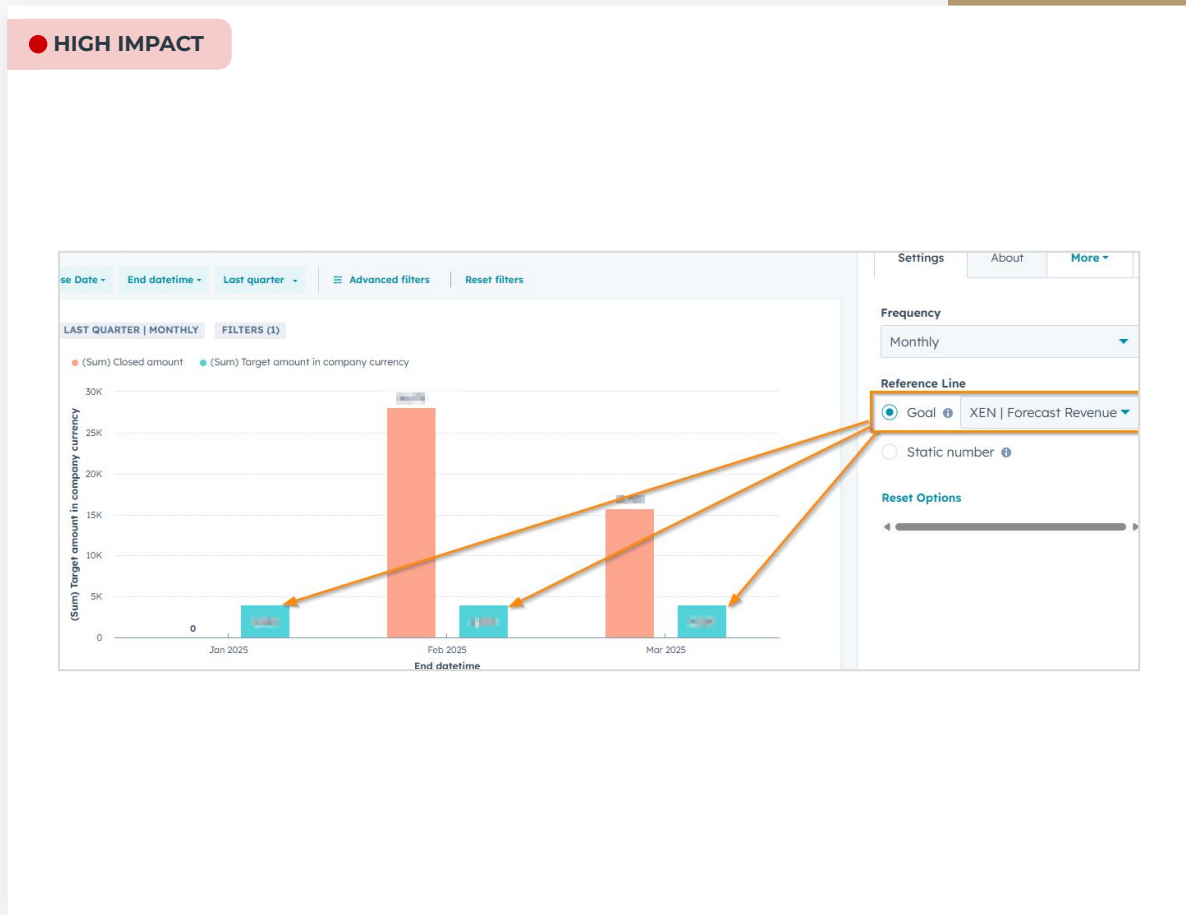


Goal as a Reference Line in Reports

(HubShots Lesson)

What is it

- Use a Goal you created as a reference line in single-object reports.
- For example: compare your closed deal amount against your revenue goal.



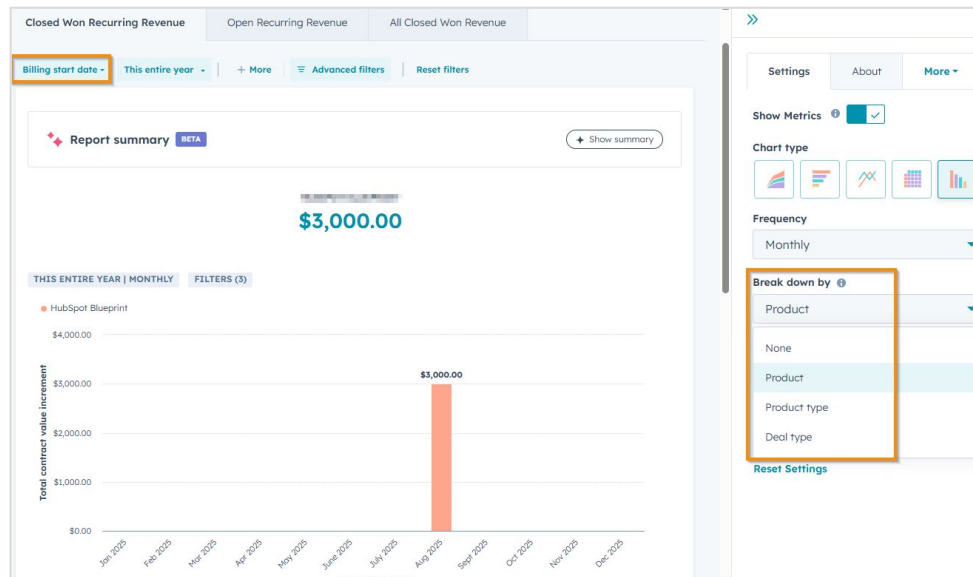
Line Item Revenue Reports

(HubShots Lesson)

What is it

- Get more accurate insights by reporting on closed or forecasted revenue using the billing start and end dates for each line item

● HIGH IMPACT



Organise Reports with Tags

(HubShots Lesson)

What is it

- Custom tags provide the practical benefit of structuring and organising reports

● LOW IMPACT

The screenshot shows the HubSpot Reports interface. At the top, there's a green badge that says 'LOW IMPACT'. Below it, the report interface has a header with filters: 'Dashboard', 'Owner', 'Last updated', 'Tags' (highlighted with an orange box), and 'Clear filters'. The 'Tags' dropdown menu is open, showing three options: 'XEN B2B | Revenue' (checked), 'XEN Create', and 'XEN Create | Revenue' (checked). Below the menu is a 'Manage tags' link. The report table below has columns: 'Name', 'Owner', 'Assigned', and 'Tags' (highlighted with an orange box). The 'Tags' column contains three tags: 'XEN Create | ...', 'XEN B2B | Rev...', and 'XEN B2B | Rev...'. The report rows show various reports like 'XEN | Deals | Time in Co', 'Deals Against Goals', and 'XEN | Deals by Closed by Month by Brand'.

Name	Owner	Assigned	Tags
XEN Deals Time in Co	Craig Bailey	Everyone	XEN Create ...
Deals Against Goals	Roselen Fernandez	Everyone	XEN B2B Rev...
XEN Deals by Closed by Month by Brand	Roselen Fernandez	--	XEN B2B Rev...

User-Friendly Formula Field Options in Reports

(HubShots Lesson)

What is it

- When creating formula fields in custom report builder, you will now see two simple formula options Conditional Logic and Summary Measure.

MEDIUM IMPACT

Cancel Number of Associated Quotes

Choose how you want to build this field

Formula Conditional logic **Summary measure**

CALCULATE COUNT OF DEAL.quote_date ☒ Use as

+ Add conditional block

Formula Review
This is a preview of data included in your formula calculation.

Number of Associated Quotes	Record ID - Deals
1	Schnubbs New Website and Marketing (1005544869)

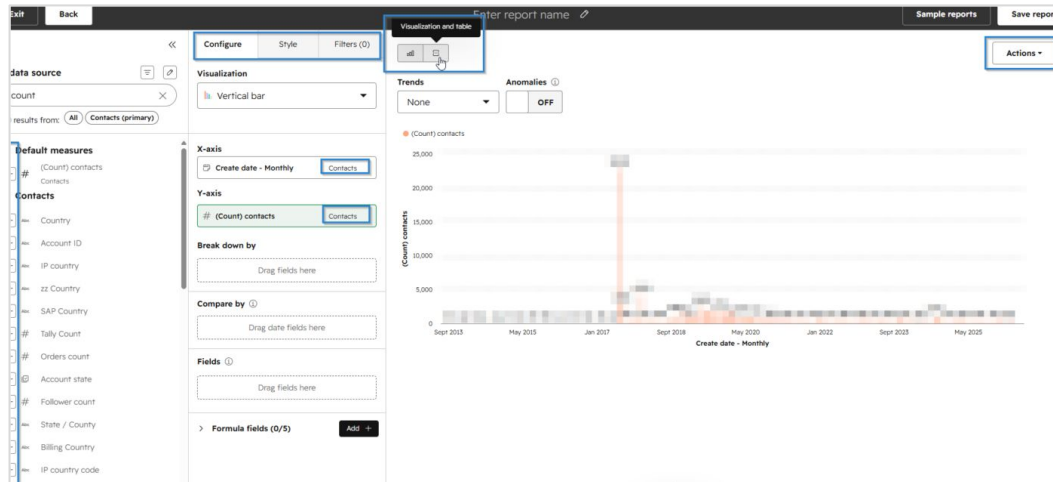
New Report Builder Experience

(HubShots Lesson)

What is it

- The new report builder is more user-friendly and easier to navigate.

● LOW IMPACT



Loop Marketing



Loop Marketing

What is it

- A 4-stage marketing process to prioritise the tools and features you should focus on, to implement HubSpot's [Loop Marketing Playbook](#) and maximise your marketing results

01

Express who you are

A focus on:
Messaging

02

Tailor your approach

A focus on:
Content

03

Amplify your reach

A focus on:
Promotion

04

Evolve in real-time

A focus on:
Improvement

Bonus tips



Bonus tips

Record Customisation

What is it

- Customise the information that you see on your left sidebar (link)
- Customise/rearrange the associated objects you see on the right sidebar of a record

LOW IMPACT

The screenshot displays the HubSpot CRM interface with several customization options highlighted by orange boxes:

- Left Sidebar:** A box highlights the "About this com..." section, which lists account details like "Account Name", "Company owner", "Digital Coordinator", "HubSpot Strategist", "VIP Client", "Account Type", "Company Domain Name", and "Description".
- Activities Panel:** A box highlights the "Activities" tab, showing a list of upcoming meetings with details like "Meeting - Craig", "Meeting - Craig", and "Meeting - Hubspot Partn...".
- Right Sidebar:** A box highlights the "Contacts" section, which lists associated contacts like "awellingham@hubs...", "HubSpot Billing", and "Leroy Dean".

The interface also includes a top navigation bar with "Companies", "Actions", and "Customize" options, and a central panel for "Activities" with tabs for "All activities", "Notes", "Emails", "Calls", "Tasks", and "Meetings".

Bonus tips

Quick Actions on Views

What is it

- On list view of any object, quickly re-organise your columns by right clicking on a column

LOW IMPACT

Deals 170,189 records

Actions Import

All deals My deals + Add view (2/50) All Views

Sales Pipeline Deal owner Create date Last activity date Close date + More Advanced filters Hide Metrics

TOTAL DEAL AMOUNT	WEIGHTED DEAL AMOUNT	OPEN DEAL AMOUNT	CLOSED DEAL AMOUNT	NEW DEAL AMOUNT	AVERAGE DEAL AGE
\$1	\$1	\$0	\$1	\$0	161.3 days
Average per deal: \$1	Average per deal: \$1		Average per deal: \$1		

Search name or description

DEAL NAME	DEAL OWNER	LAST CONTACTED (GMT+8)	LAST ACTIVITY DATE (GMT+8)	DEAL STAGE
☐ Luke Turnbull - Hugo - Vetland Hospital And Emergency	No owner	--	Today at 3:05 PM GMT+8	Pending (Sales Pipeline)
☐ Test Test - Test Dog - Lilydale Veterinary Centre	No owner	--	Today at 3:05 PM GMT+8	Checked in (Sales Pipeline)
☐ Daniel Galvin - Cody - Lilydale Veterinary Centre	No owner	--	Today at 3:05 PM GMT+8	Pending (Sales Pipeline)
☐ Jessica Sakareassen - Dana - Lilydale Veterinary Centre	No owner	--	Today at 2:08 PM GMT+8	Completed (Sales Pipeline)
☐ Philip Stokoe - Bobby - Lilydale Veterinary Centre	No owner	Today at 8:00 AM GMT+8	Today at 2:08 PM GMT+8	Pending (Sales Pipeline)
☐ Jessica Sakareassen - Dana - Lilydale Veterinary Centre	No owner	--	Today at 2:08 PM GMT+8	Pending (Sales Pipeline)
☐ Queenie Kooy - Meatball - Vetland Hospital And Emergency	No owner	Today at 2:53 PM GMT+8	Today at 2:53 PM GMT+8	Pending (Sales Pipeline)
☐ Erin Simmons - Molly - Lilydale Veterinary Centre	No owner	Today at 2:52 PM GMT+8	Today at 2:52 PM GMT+8	Pending (Sales Pipeline)
☐ Sue Moon - Tom - Lilydale Veterinary Centre	No owner	--	Today at 1:08 PM GMT+8	Completed (Sales Pipeline)
☐ Penny - Lilydale Veterinary Centre	No owner	--	Today at 1:07 PM GMT+8	Completed (Sales Pipeline)

Bonus tips

Inline Association Table

What is it

- See associated records on any index page and preview associated records without leaving the page

● LOW IMPACT

The screenshot displays the HubSpot 'Companies' list view. At the top, there's a 'Companies' dropdown menu. Below it are tabs for 'All companies' and 'My companies'. A search bar contains 'xen', and there are 'Filter' and 'Sort by' buttons. Below the search bar are columns for 'Company owner', 'Create date', 'Last activity date', and 'Lead status', along with a '+', a link icon, and an 'Advanced filters' button. The main table has columns for 'Company name', 'Company → Deals', 'Type', and 'Company owner'. Two rows are visible, both for 'XEN Systems'. The first row is a 'Partner' and the second is a 'Prospect'. The 'Deals' column for the 'Prospect' row shows '11 records'. The 'Company owner' column shows a profile picture and the name 'XEN Service'.

☐	Company name	Company → Deals	Type	Company owner
☐	> XEN Systems	--	Partner	XEN Service
☐	> XEN Systems	11 records	Prospect	XEN Service

Questions / Comments

01

Add Text Here

02

Add Text Here

03

Add Text Here

04

Add Text Here

Prioritised List of Recommendations

#	Item	Description	Next Steps	Priority
01	Buyer Intent	AI Powered tool that surfaces companies that are showing high buyer intent	Setup TAM and Views Training	High
02	Goal & Forecasting	Report on revenue goal and forecasted revenue	Set up Goals and Forecasting	High
03	Call and Meeting Notetaker	AI meeting recording that syncs recording and transcript to HubSpot	Enable betas and organise next steps with Profectus	Medium
04	Campaigns: Report on Goal	Track and report on campaign goals	Add goals to campaigns starting with Maturity Diagnostic	Medium
05	Breeze Assistant	AI companion for getting work done in HubSpot	HubSpot users to start testing	Low

Next Steps



01 XEN to share this slide deck with you

02 Start implementing key takeaways

03 Email team@xen.com.au for enquiries

04 Feel free to book in another session with XEN

05 Sign up for the HubShots daily tip ([link](#))

06 Sign up for the HubShots Community to access Courses ([link](#))

Options for Working with XEN



Item:

HubSpot On-Demand

Flexible, ongoing HubSpot support
and guidance as needed



Key Benefits

- Rapid response from dedicated HubSpot specialists
- Fast turnaround times
- No minimum number of hours each month
- Use the On-Demand service for as long as you need



Cost

\$275 per hour +GST (in blocks of 10 hours minimum)



Resources

- HubSpot On-Demand details ([link](#))

Item:

HubSpot Training

HubSpot training tailored to your sales team



Key Benefits

- Tailored training sessions to address specific needs
- Practical implementation during training calls
- Focuses on quick wins and addressing immediate problems
- Training is recorded for future reference



Cost

\$6,000 +GST



Resources

- HubSpot Training details ([link](#))
- Brochure ([link](#))

About XEN



Join these companies
getting the most
out of HubSpot



What Our Clients Say

“ They really are an
extension of our
marketing team.

XEN brought a lot of knowledge and experience in HubSpot. XEN's combination of technical knowledge, processes, attention to detail and digital campaign strategy development make them an asset.



Alex Tesoriero
Brother

What Else can we Help You With?

HUBSPOT BEST PRACTICE



Strategy and implementation
HubSpot **process** best practices

Onboarding
Optimisation
Training

Solid Foundations

VISUAL AND GRAPHIC DESIGN



Visual
HubSpot **design** best practices

Websites
Graphic design
Video editing

Beauty & Calm

EDUCATION



Education
Coaching

(with Ian Jacob)
Podcast & YouTube show
HubShots Framework
HubShots Community

Empowerment

Contact Craig



+61 413 489 388



craig@xen.com.au



www.xen.com.au



Level 3
116 Military Road
Neutral Bay NSW 2089

Thank You!

XEN

