XEN

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

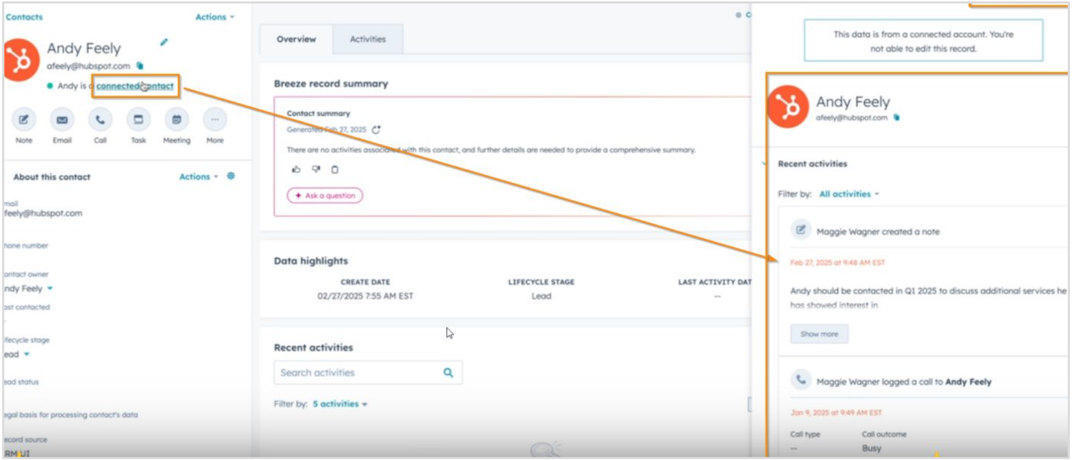
1

General CRM

Multi-Account Management

[(HubShots Lesson)]

HIGH IMPACT



What is it

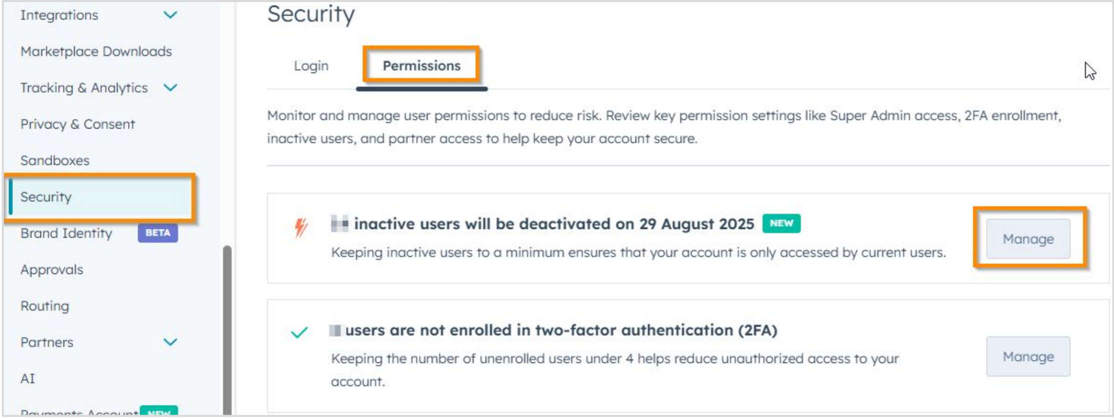
- Allows up to 5 HubSpot portals to be separate from each other while still enabling them to see each other's records and respective activities.
- Additionally, users can copy some assets between these portals.

General CRM

Automated Inactive User Deactivation

[(HubShots Lesson)]

HIGH IMPACT



What is it

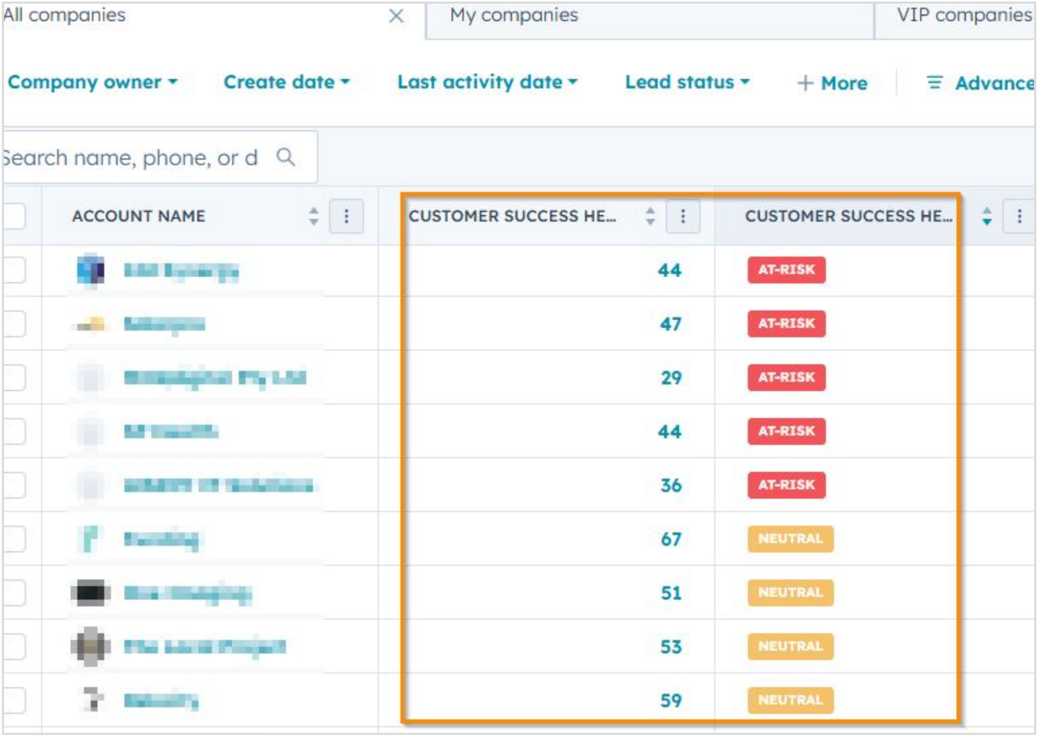
- By default, HubSpot requires users to log in at least once every 90 days to prevent their account from being deactivated.
- This can be turned HubSpot wide or per user.

General CRM

Health Score Builder

[(HubShots Lesson)]

MEDIUM IMPACT



What is it

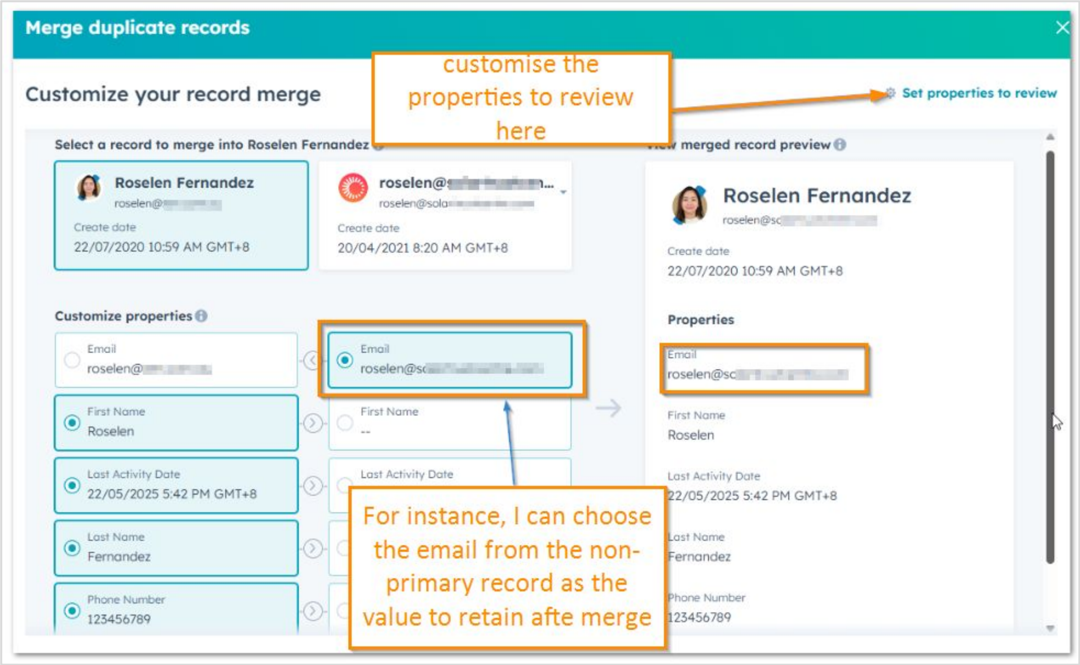
- Assigns points to customer properties and activities, consolidating them into a single, automated score on a record.
- Use to evaluate account health and identify potential churn risks.

General CRM

Property Control in Record Merges

[(HubShots Lesson)]

HIGH IMPACT



What is it

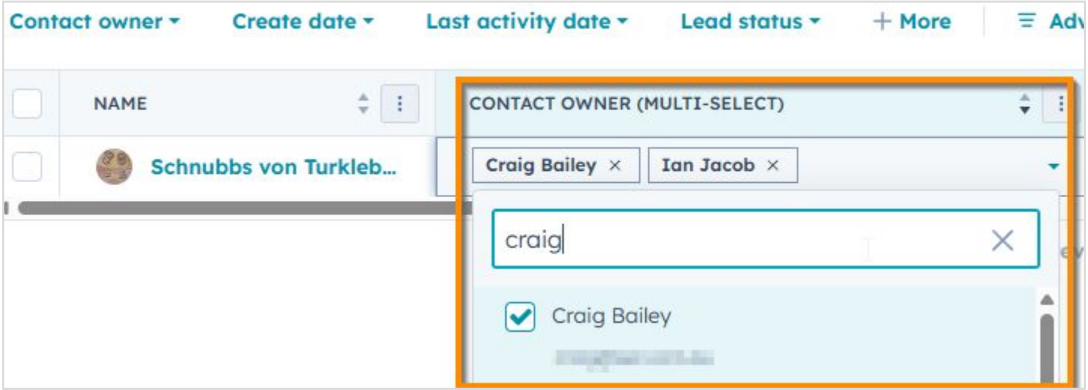
- Have full control to select which property values are kept on the final record.

General CRM

Multi-Select User Property

(HubShots Lesson)

HIGH IMPACT



What is it

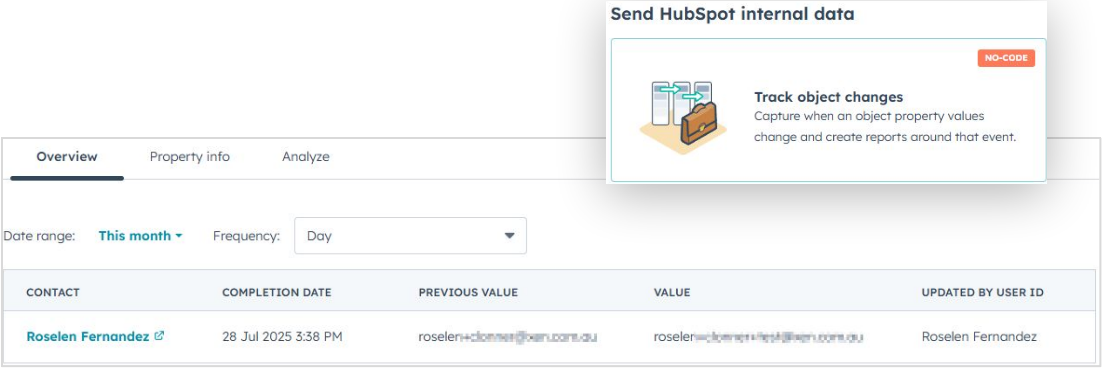
- Assign multiple owners to a record using a single property.
- Perfect for businesses with multiple brands in one HubSpot portal where contacts engage with different brands.

General CRM

Custom Events: Track Property Changes

[(HubShots Lesson)]

MEDIUM IMPACT



What is it

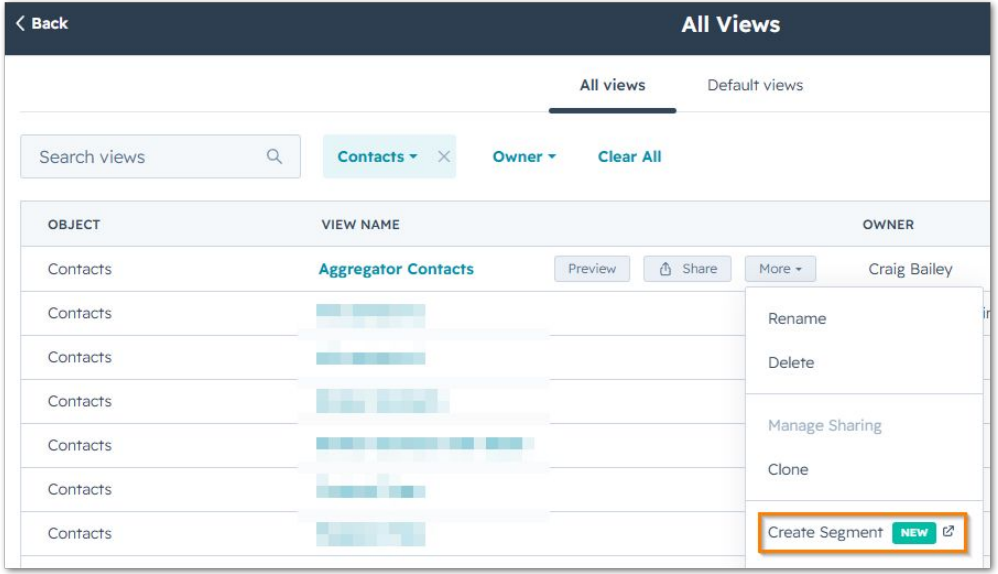
- Track historical changes to property values with Custom Events.
- For example, track email address changes and see when and who updated it.

General CRM

Convert Views to Segment

(HubShots Lesson)

LOW IMPACT



What is it

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

General CRM

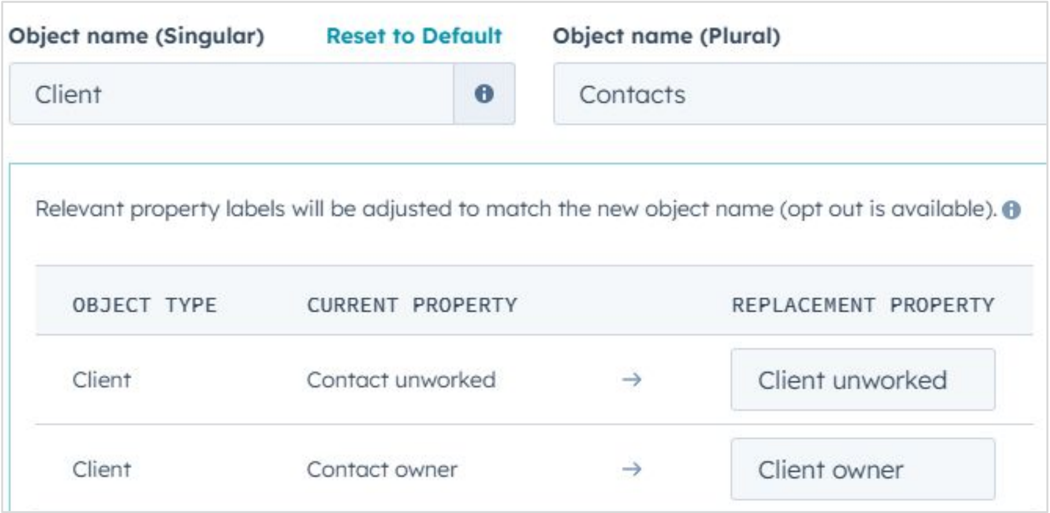
Rename HubSpot Defined Objects

[(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’]

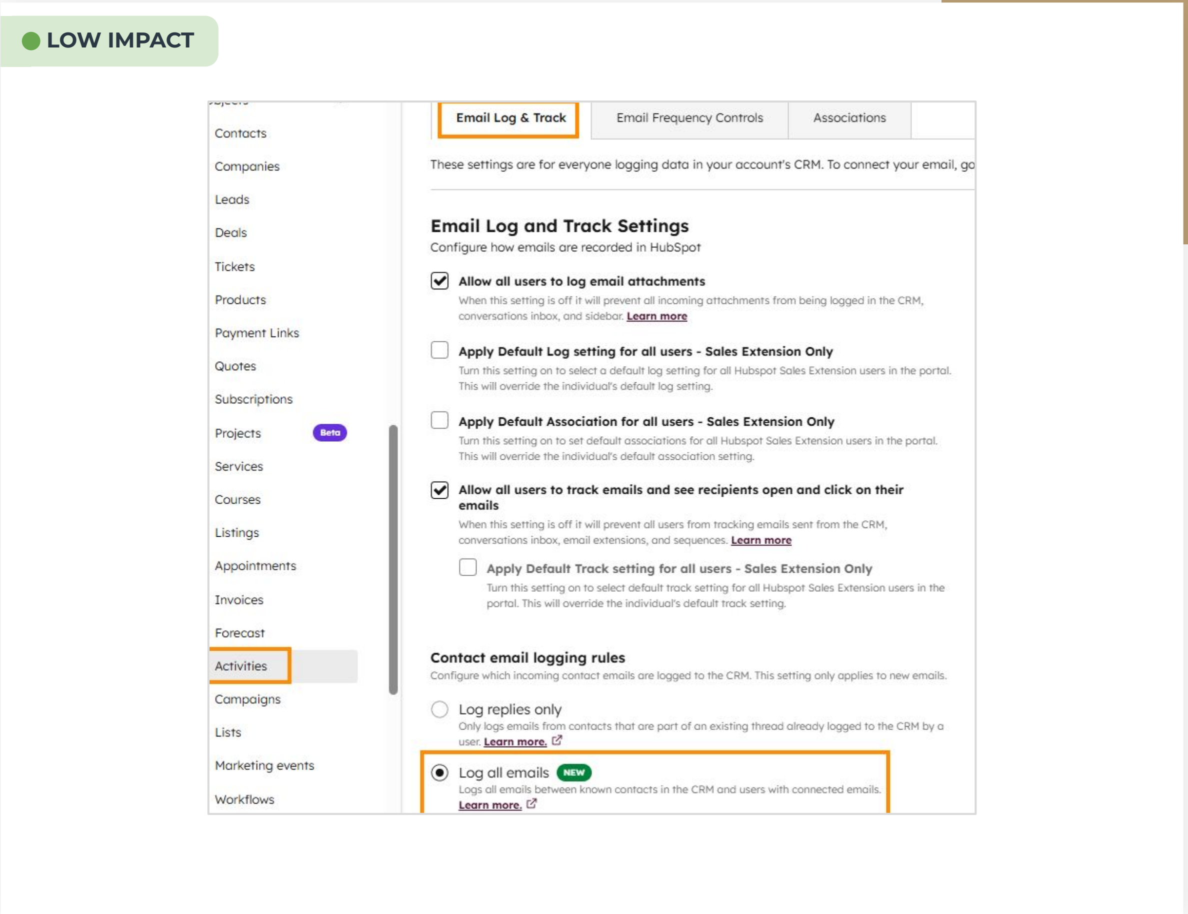
LOW IMPACT



General CRM

Contact Email Logging Rules

[(HubShots Lesson)]



What is it

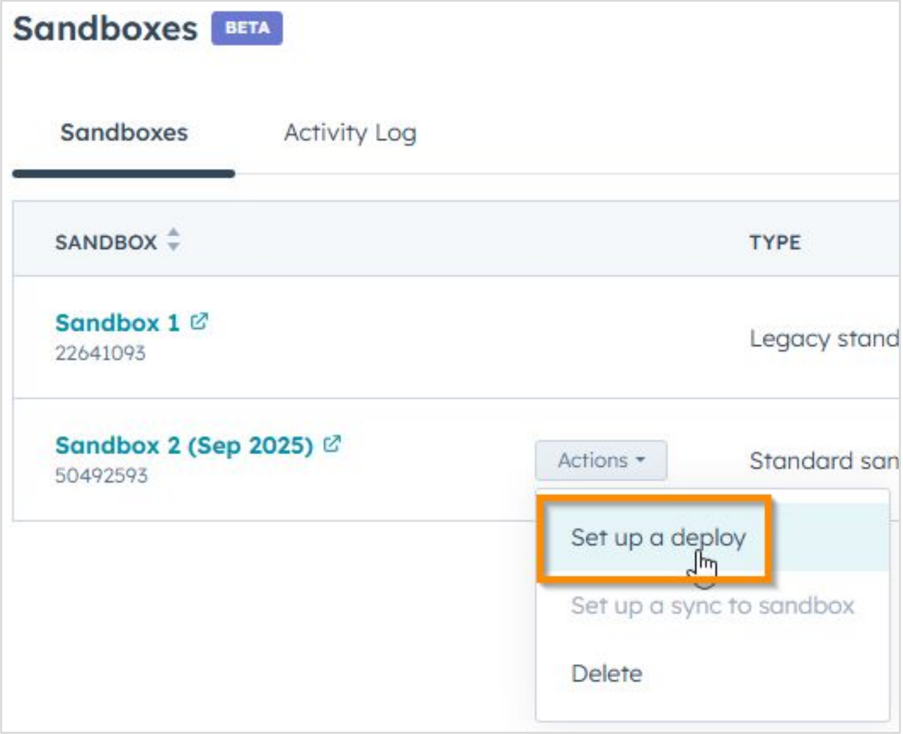
- HubSpot currently only logs emails that are direct replies to emails you have already logged
- This new option will log all emails from existing contacts to users directly into the CRM

General CRM

Build a New Sandbox and Deploy to Production

[(HubShots Lesson)]

MEDIUM IMPACT



What is it

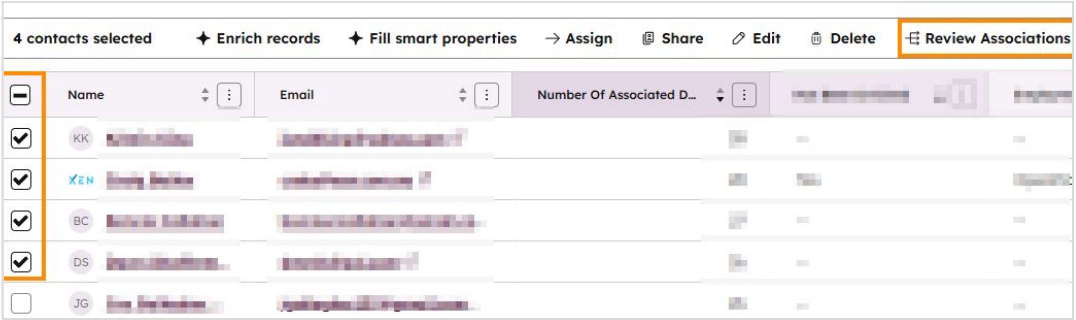
- The new HubSpot Standard Sandbox allows you to safely build and test supported assets, then deploy them directly to production.

General CRM

Manage Associations in Bulk

[(HubShots Lesson)]

HIGH IMPACT



What is it

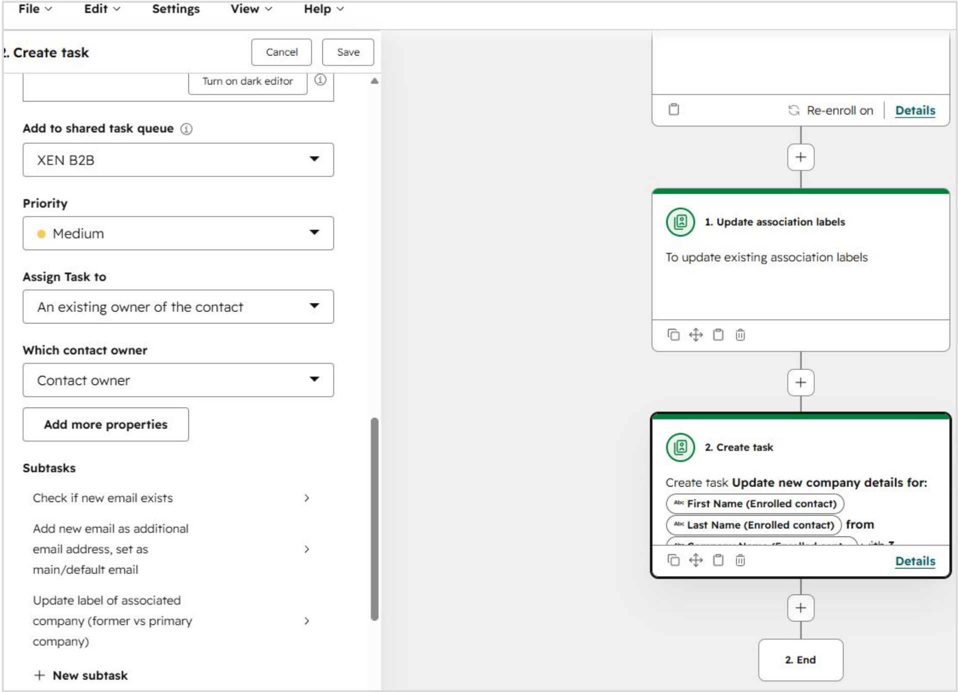
- Bulk update and review associations

General CRM

Adding Subtasks to a Parent Task

[(HubShots Lesson)]

HIGH IMPACT



What is it

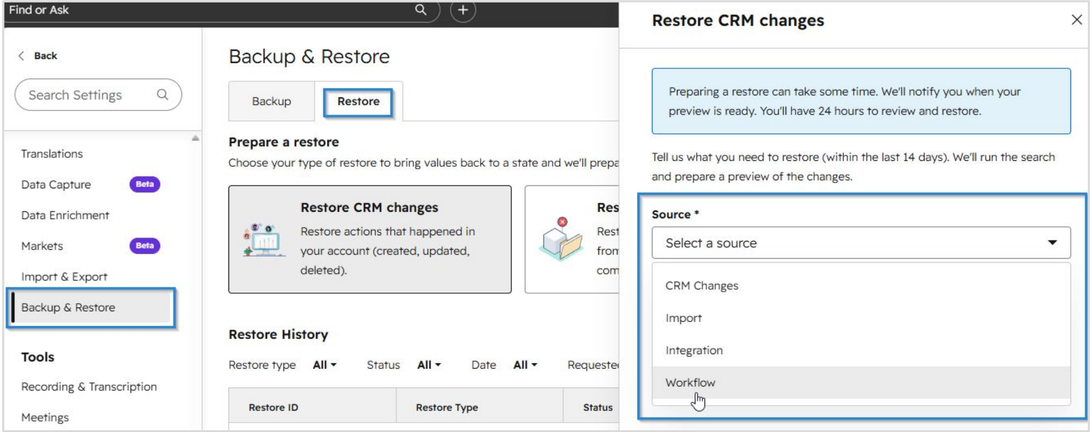
- Add multiple subtasks to a parent task manually or through a Workflow.

General CRM

Restore CRM Changes

[(HubShots Lesson)]

HIGH IMPACT



What is it

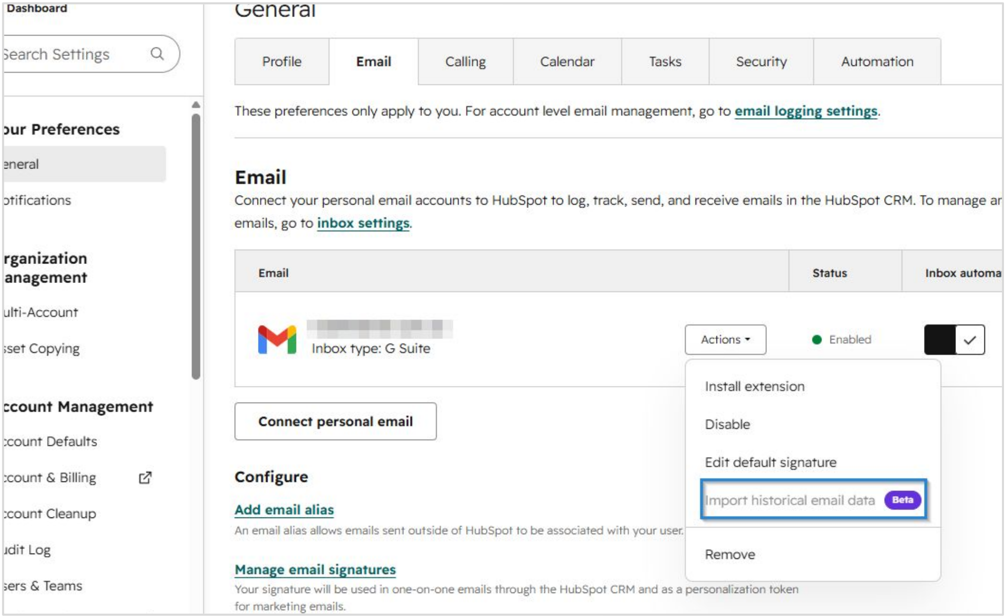
- Quickly undo changes and restore previous versions of their CRM data from the past 14 days directly within the platform.

General CRM

Import Historical Email from Gmail

(HubShots Lesson)

HIGH IMPACT



What is it

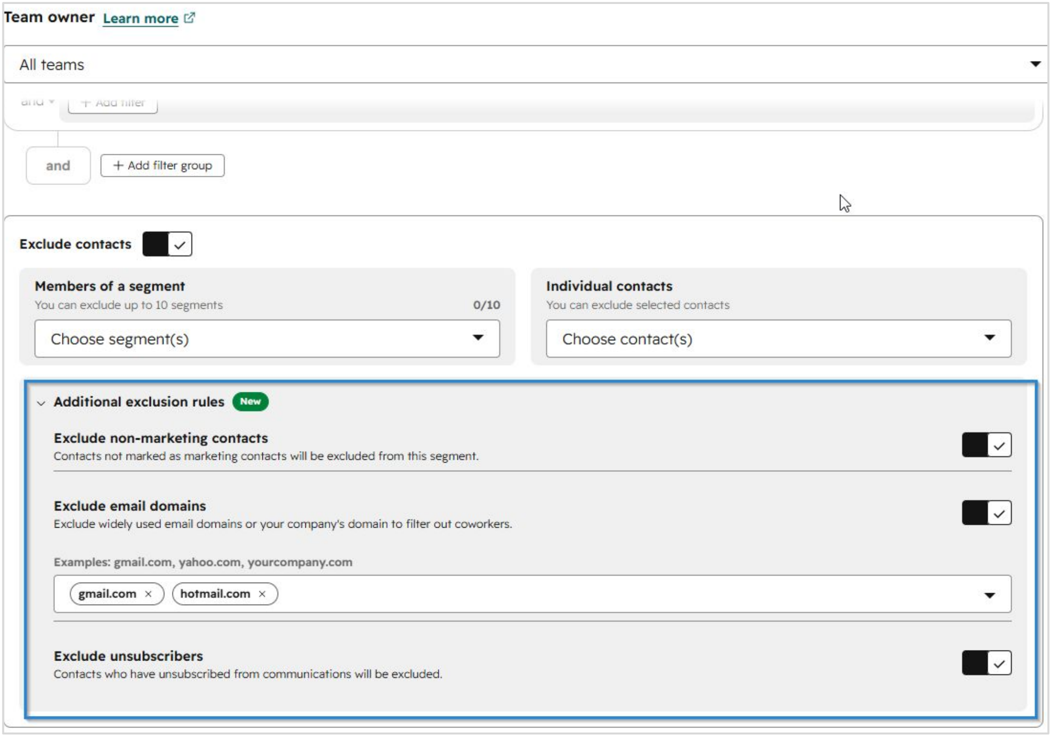
- This allows Sales Hub Pro+ users to bring existing contacts and past email threads from their Gmail inbox directly into the HubSpot CRM.

General CRM

Update Exclusions in Segments

[(HubShots Lesson)]

HIGH IMPACT



What is it

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

Sales Hub

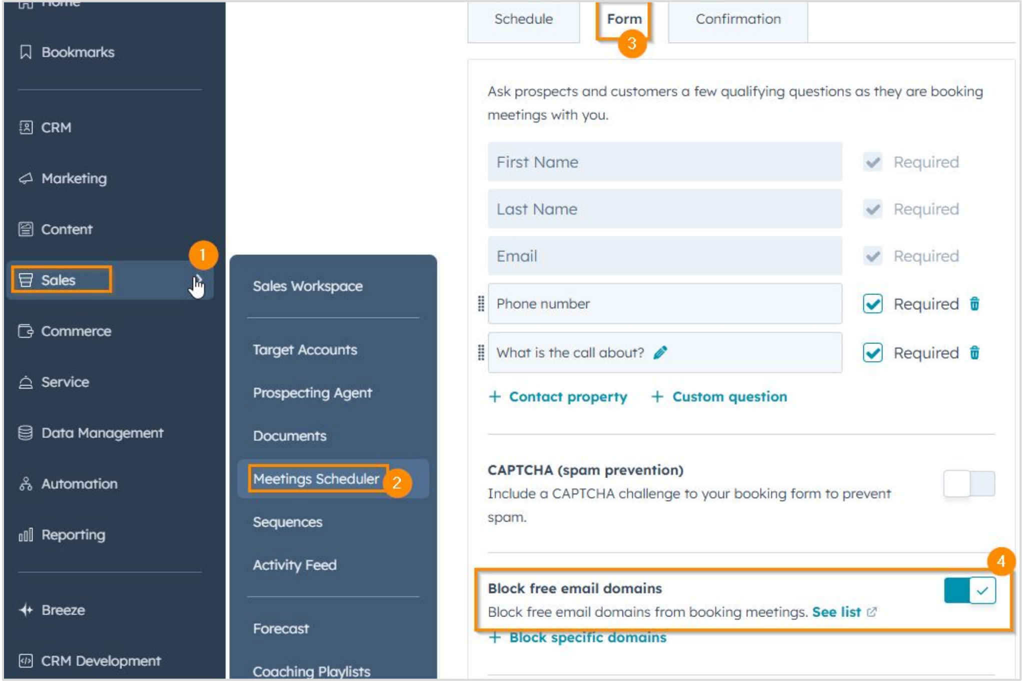
2

Sales Hub

Block Free Email Domains from Booking a Meeting

[(HubShots Lesson)]

● HIGH IMPACT



What is it

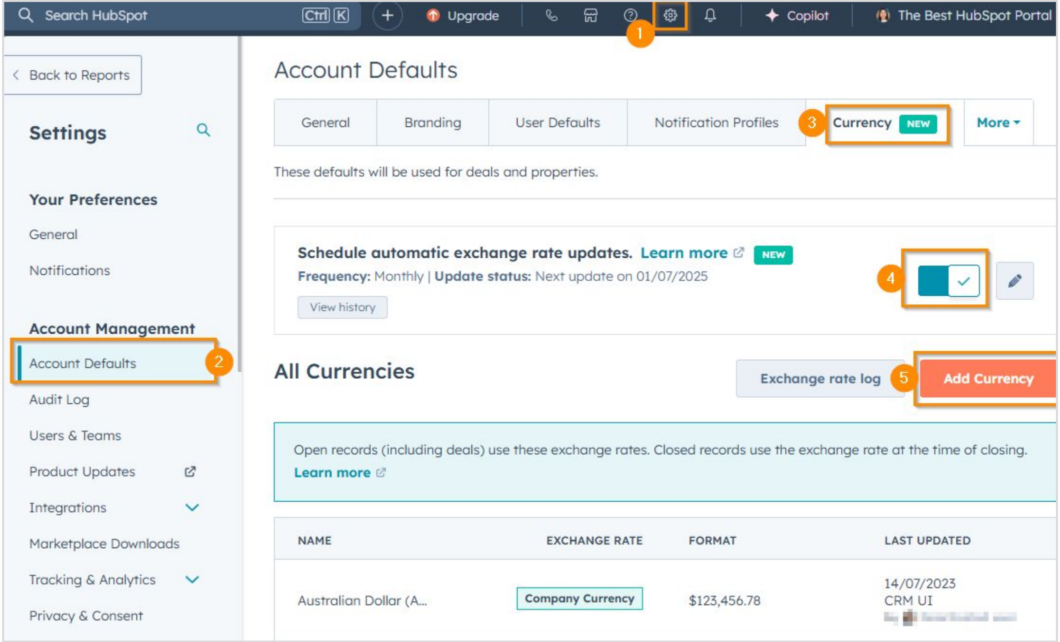
- A one-click option to block free domains from scheduling a meeting with you using HubSpot Meetings

Sales Hub

Schedule Automatic Exchange Rate Updates

[(HubShots Lesson)]

HIGH IMPACT



What is it

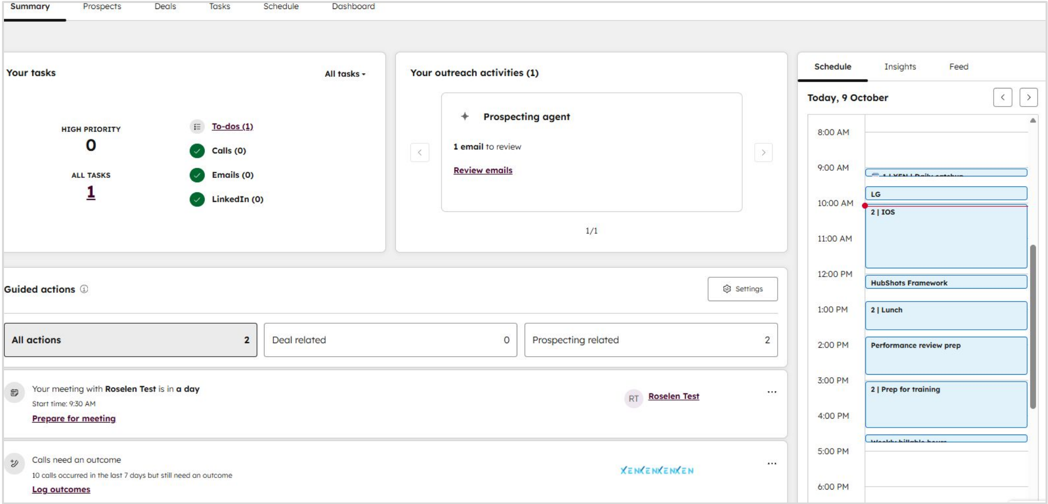
- Set exchange rates to update automatically every month, quarter, or year keeping your exchange rates accurate and current.
- Exchange rate applies to open deals and other HubSpot records that use exchange rates. Deals you've already closed will keep the exchange rate from their close date.

Sales Hub

Sales Workspace Overview

[(HubShots Lesson)]

MEDIUM IMPACT



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

Sales Hub

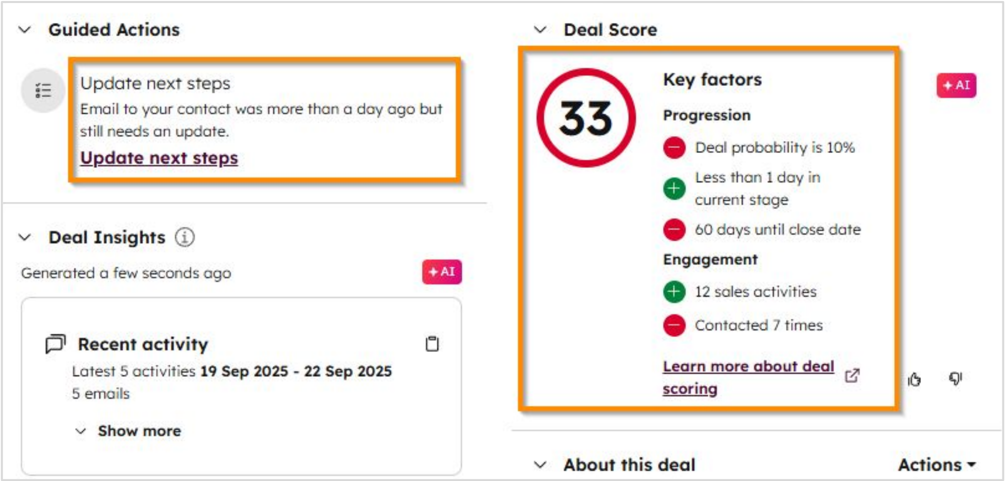
Sales Workspace: Guided Actions & Deal Risks

[(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



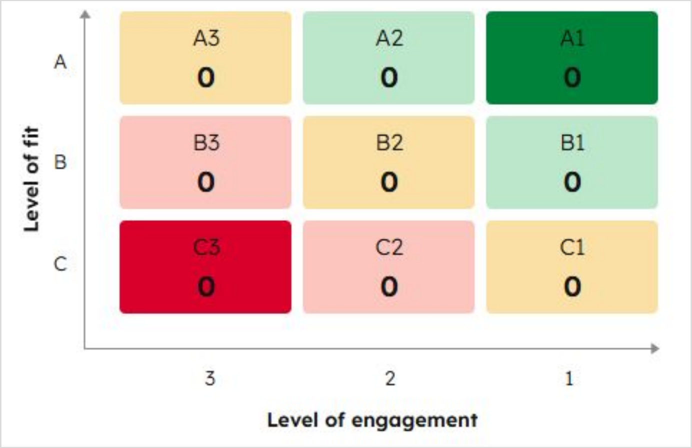
Sales Hub

Lead Scoring

[(HubShots Lesson)]

HIGH IMPACT

Deal Name	Deal Score |...	Deal Score Engagem...	Deal Score Fit | Early Sta...	Deal Score | Early Stage
[redacted]	15	0	15	C3
[redacted]	5	0	5	C3
[redacted]	5	0	5	C3



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

Sales Hub

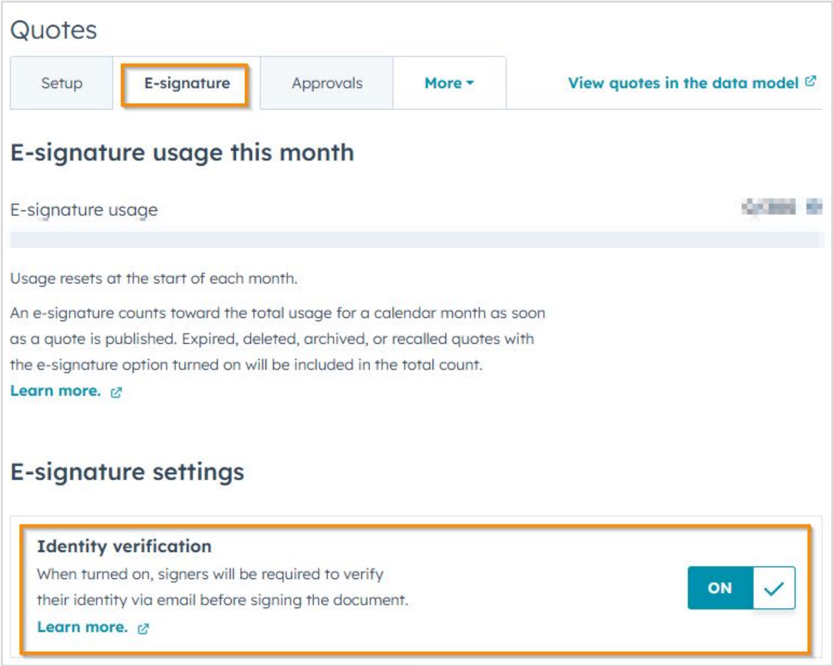
Quotes: Verification for E-Signatures

[(HubShots Lesson)]

What is it

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

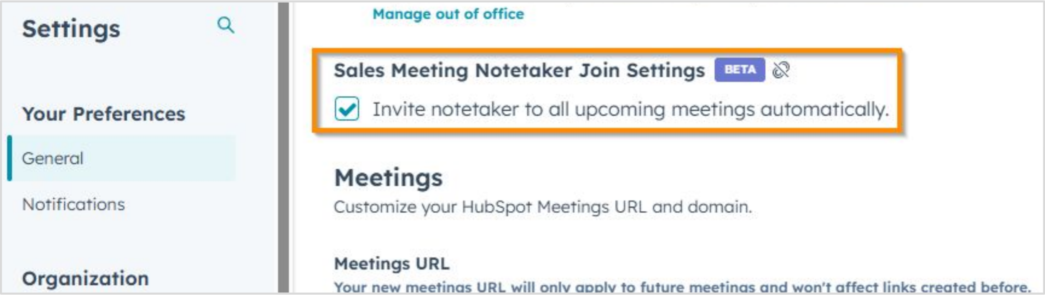
MEDIUM IMPACT



Sales Hub

Call and Meeting Notetaker (Beta)

HIGH IMPACT



What is it

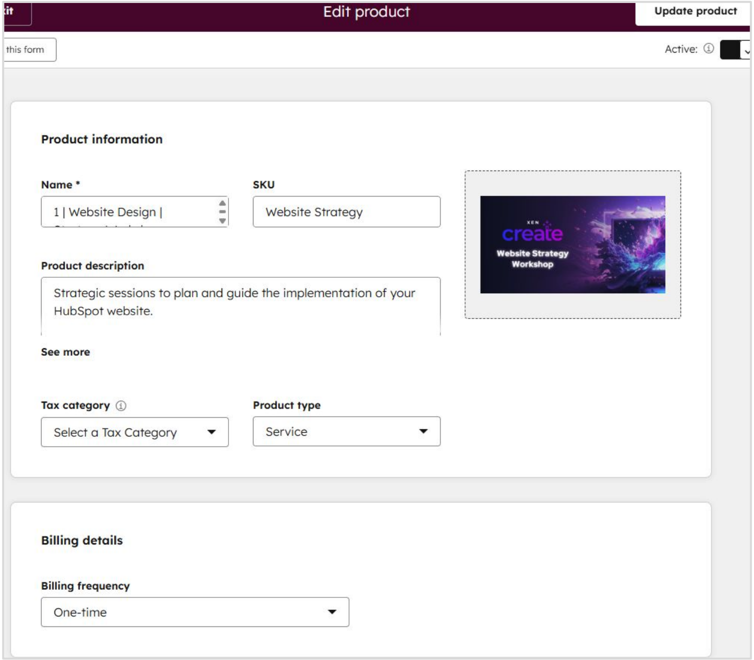
- **Calling Notetaker (Beta)**
  - HubSpot calling now supports live call transcription & AI powered note taking.
- **Sales Meeting Notetaker**
  - Meetings are automatically recorded, transcribed, and stored in HubSpot.

Sales Hub

Product Builder

[(HubShots Lesson)]

LOW IMPACT



What is it

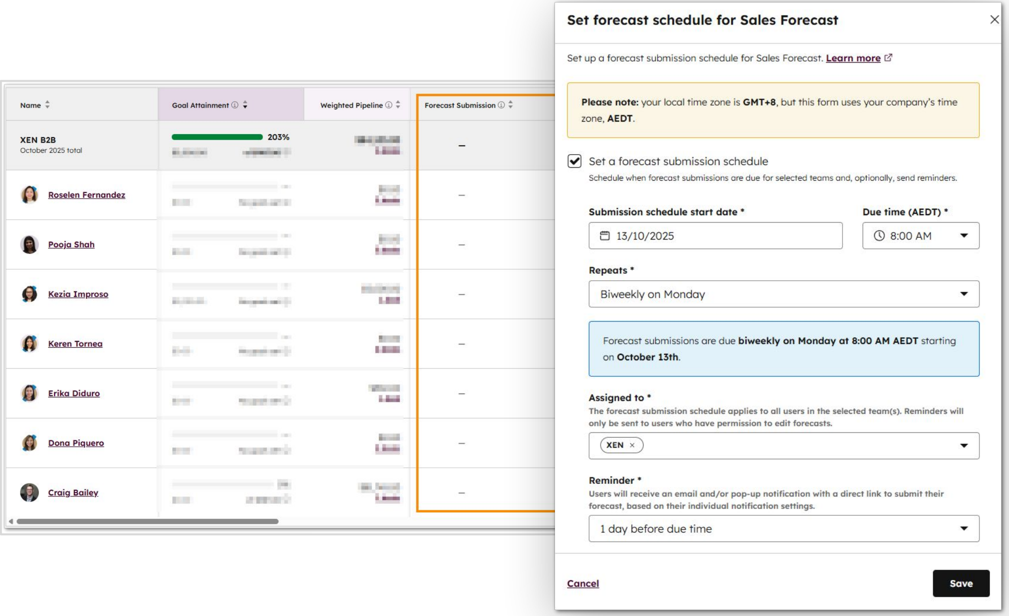
- New Product Builder with Product Status

Sales Hub

Forecast Submissions Cadence & Reminders

[(HubShots Lesson)]

LOW IMPACT



What is it

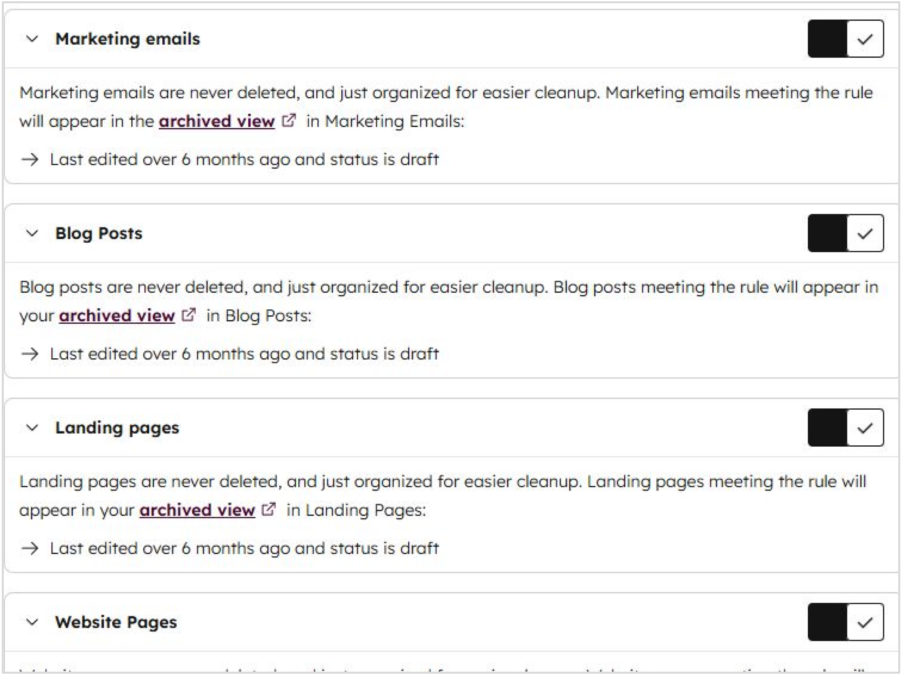
- Set a regular schedule for forecast submissions and send automated reminders to your team to ensure they are always submitted on time.

Sales Hub

Account Cleanup

(HubShots Lesson)

HIGH IMPACT



What is it

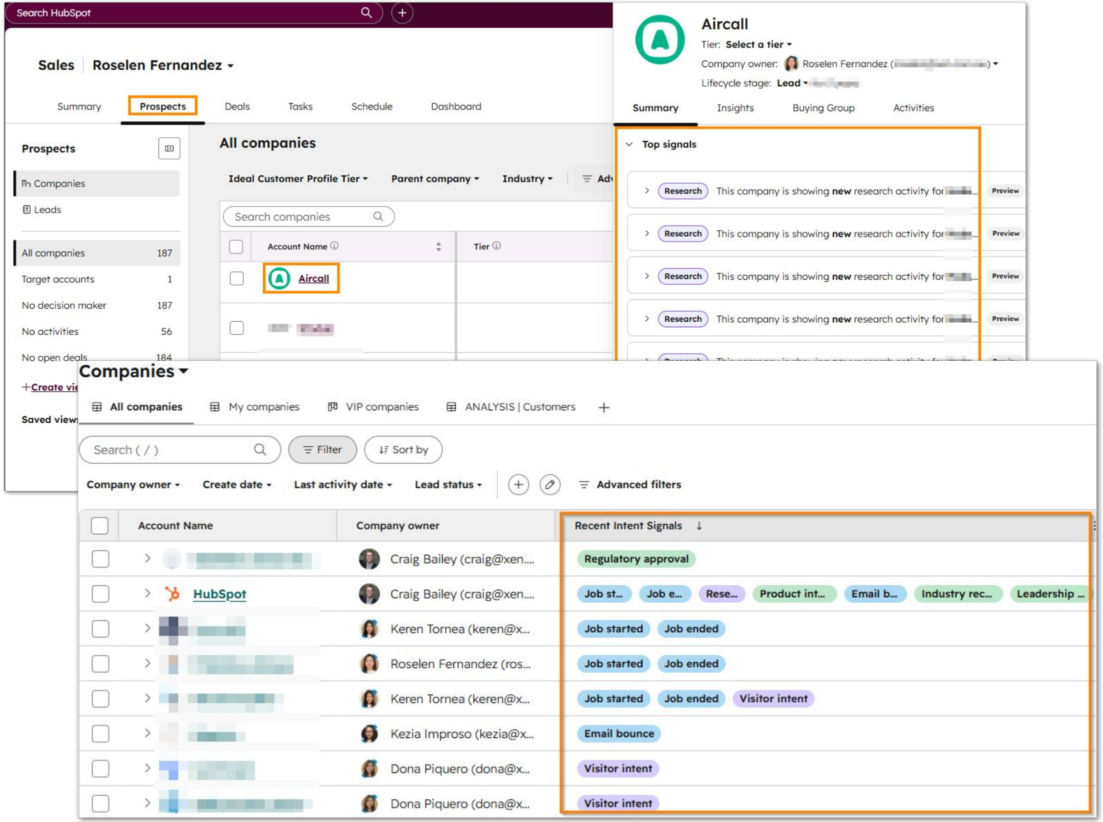
- [Enterprise only]
- Find opportunities to clean up and declutter your HubSpot portal with the Account Cleanup feature.

Sales Hub

Intent Signals

[(HubShots Lesson)]

HIGH IMPACT



What is it

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

Service Hub

3

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

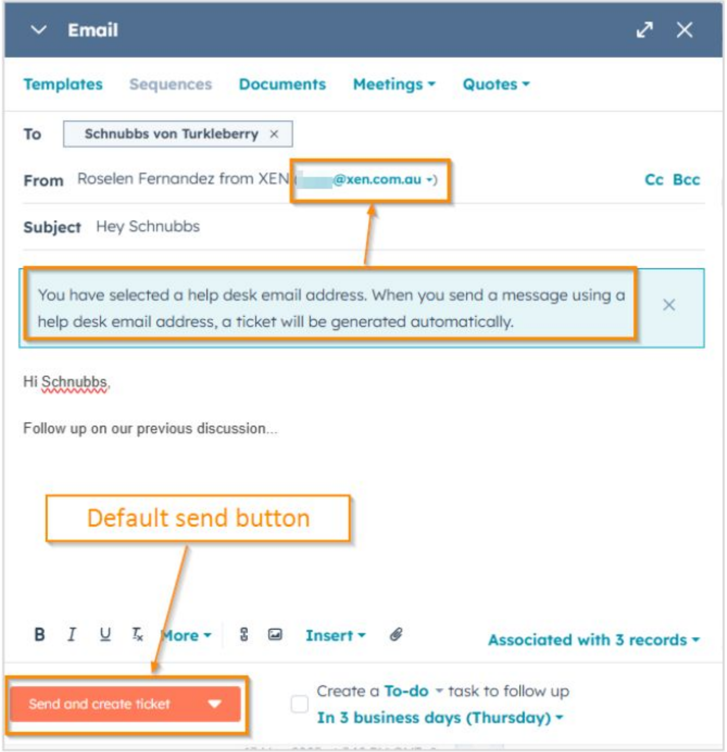
- Consolidates all omnichannel communication (email, chat, social)
- Integrates AI-powered tools (eg Knowledge Sources Sidebar)
- Features the familiar Board View like ticket pipeline

Service Hub

Auto Create Ticket When Replying to an Email

[(HubShots Lesson)]

MEDIUM IMPACT



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.

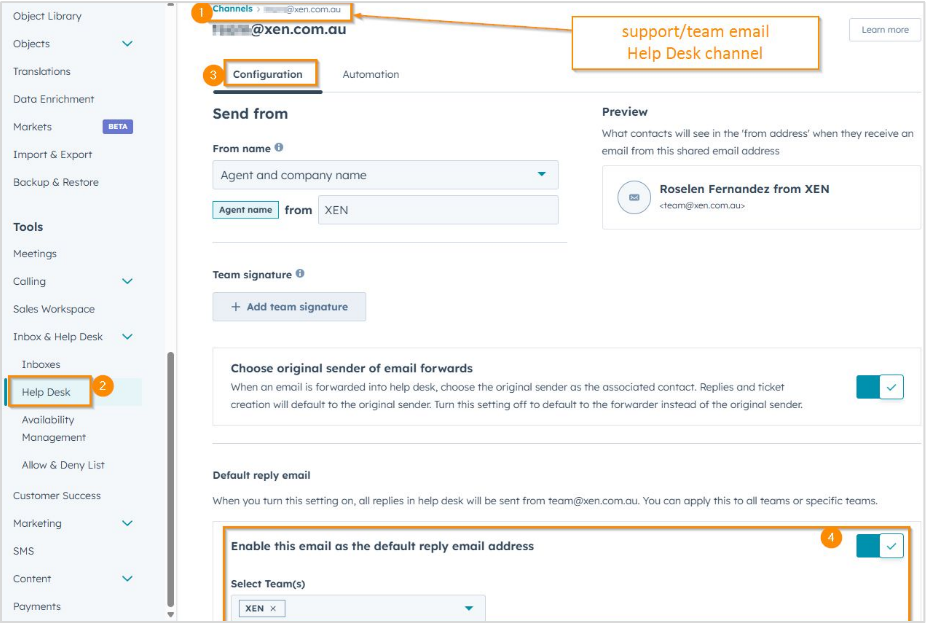
Service Hub

Help Desk: Setting Default Reply Email Address

[(HubShots Lesson)]

(Enterprise feature)

MEDIUM IMPACT

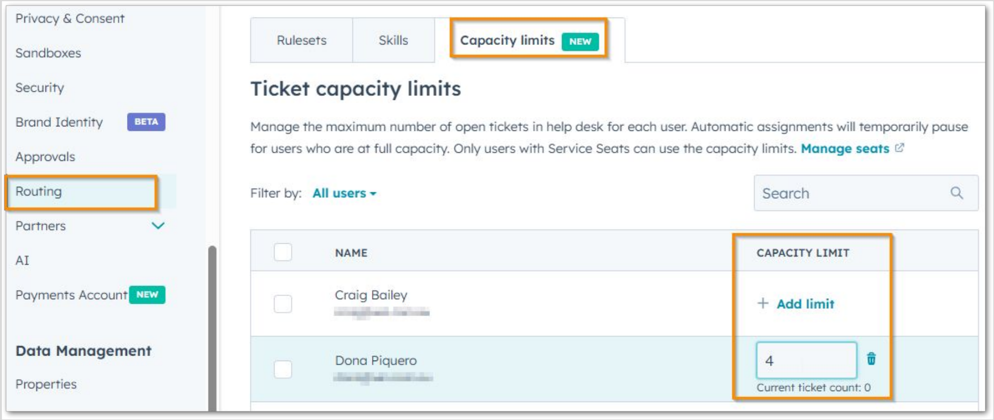


Service Hub

Help Desk: Open Tickets Capacity Limit Per User

[(HubShots Lesson)]

LOW IMPACT



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

Service Hub

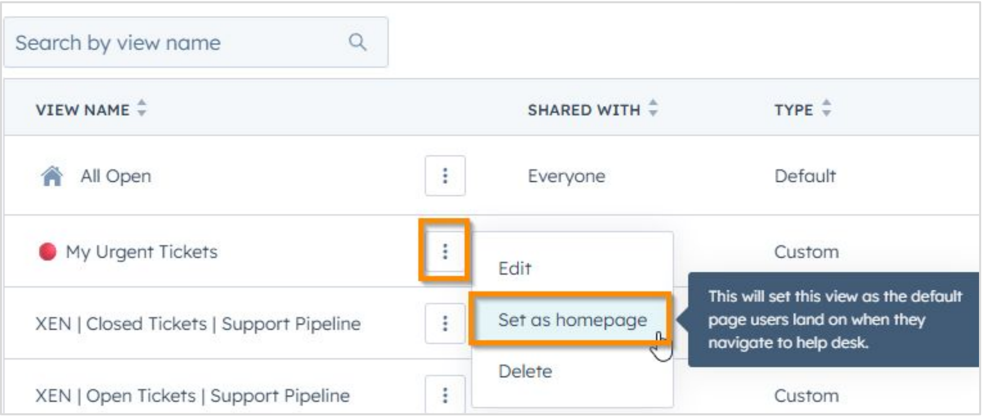
Help Desk: Set Default View

[(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

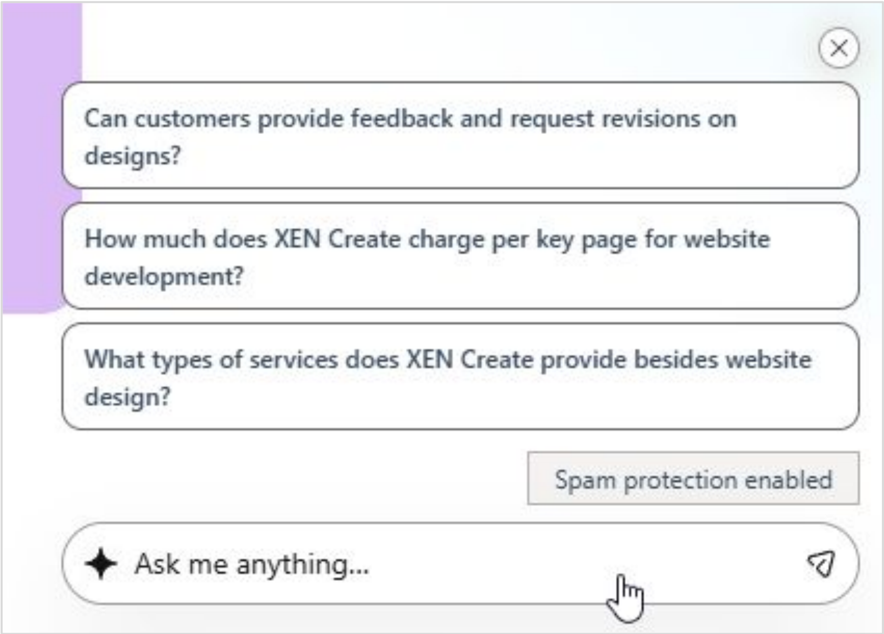


Service Hub

Customer Agent Suggested Prompts

(HubShots Lesson)

MEDIUM IMPACT



What is it

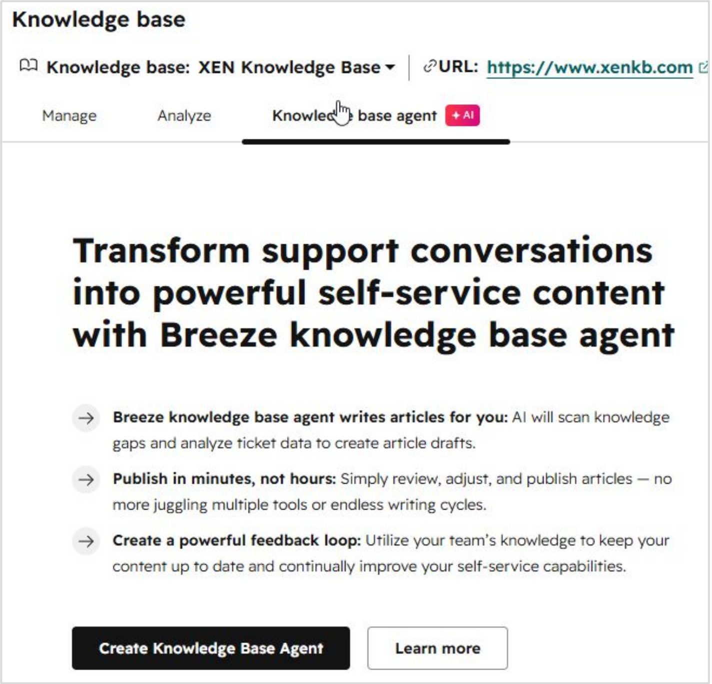
- Customer Agent now serves page-specific prompt suggestions, automatically displaying relevant questions only when it has the verified knowledge to answer them

Service Hub

Knowledge Base Agent

[(HubShots Lesson)]

HIGH IMPACT



What is it

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

Marketing and Content Hub

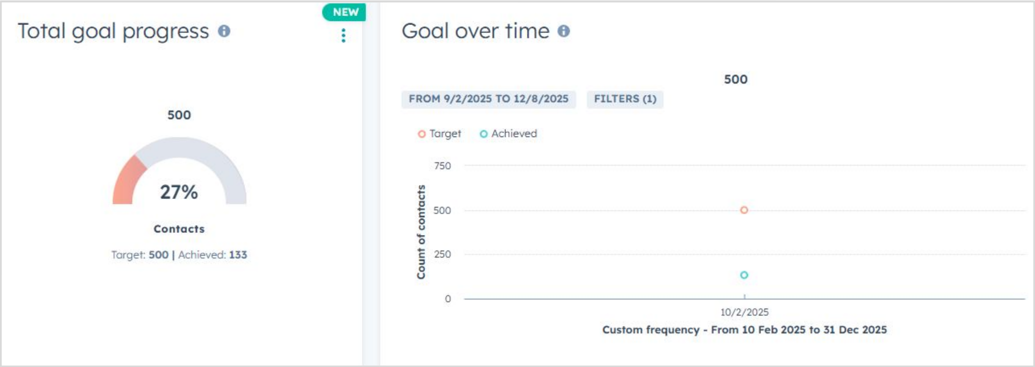
4

Marketing and Content Hub

Campaigns: Report on Goal

[(HubShots Lesson)]

MEDIUM IMPACT



What is it

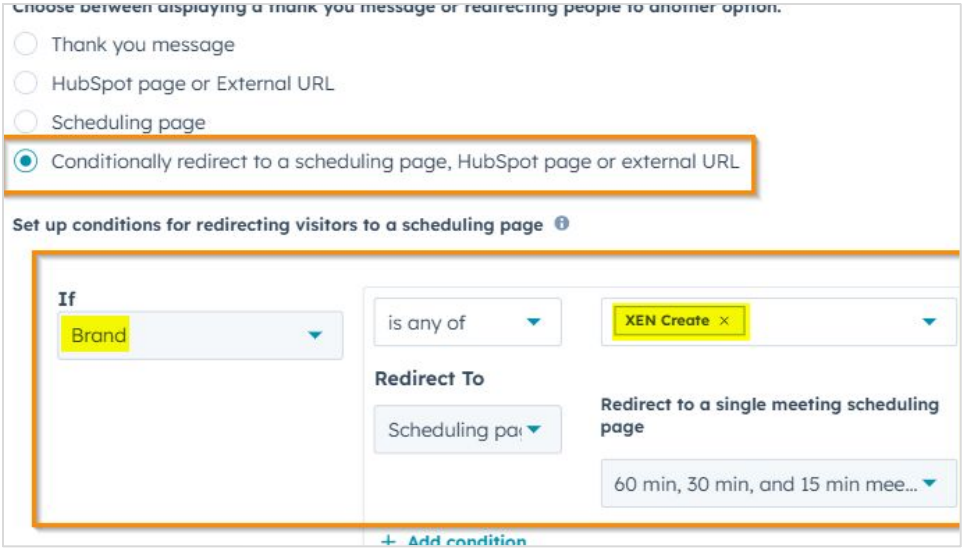
- The goal field in HubSpot campaigns is no longer a simple text field; it now allows you to track and report on campaign progress directly.

Marketing and Content Hub

Form: Use Hidden Fields in Conditional Logic

[(HubShots Lesson)]

MEDIUM IMPACT



What is it

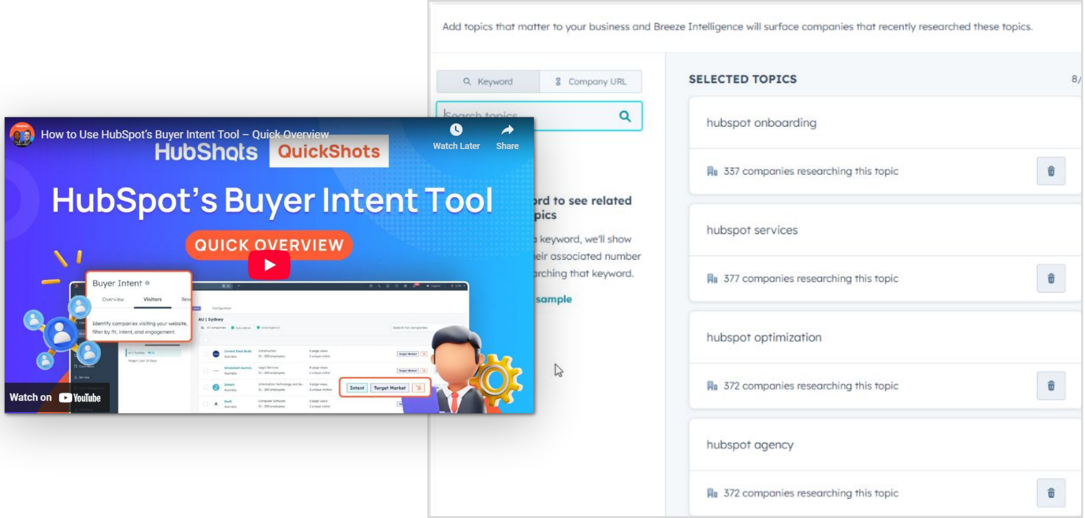
- This update allows you to use hidden fields, to trigger conditional logic within forms and to power custom redirects after submission.

Marketing and Content Hub

Buyer Intent: Research Intent

[(HubShots Lesson)]

HIGH IMPACT



What is it

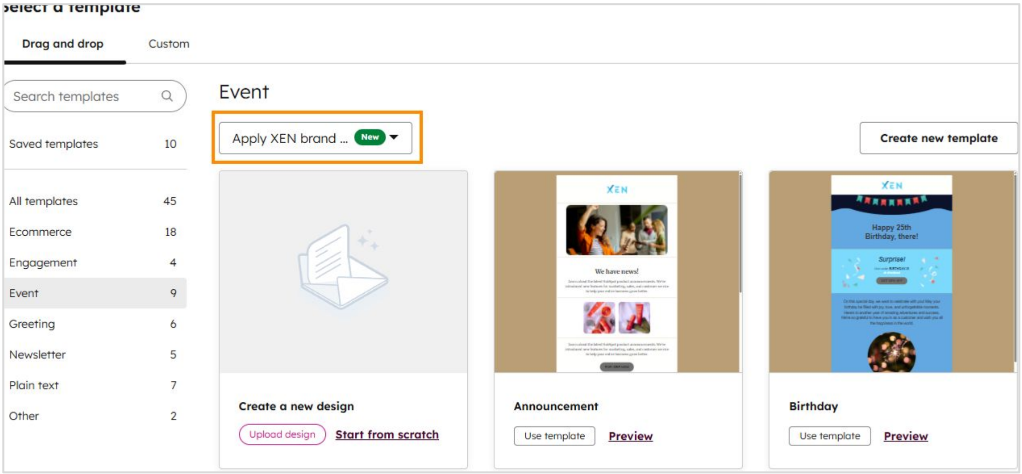
- Identify companies showing buyer intent, based on their search topics, even if they aren't existing HubSpot records.
- New Signals

Marketing and Content Hub

Branded Email Templates

[(HubShots Lesson)]

LOW IMPACT



What is it

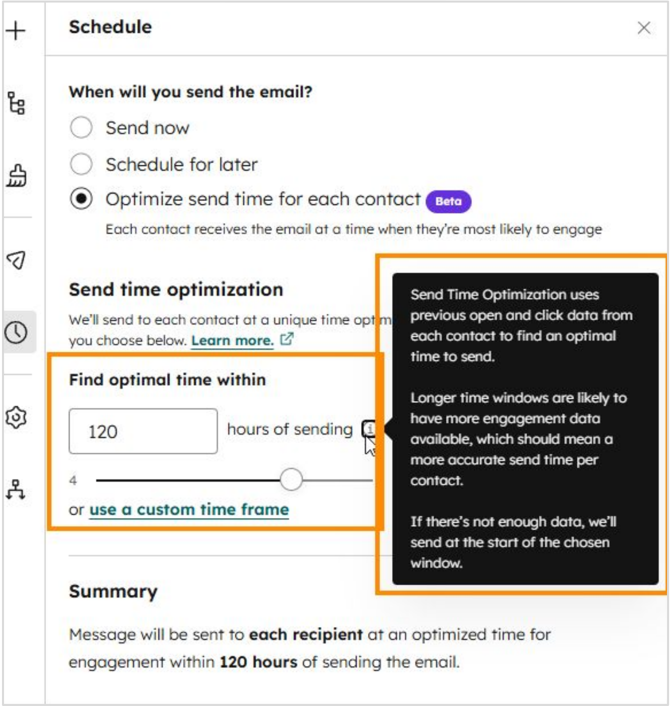
- Use HubSpot default email templates and automatically apply your company's branding to it.

Marketing and Content Hub

Throttle Marketing Email

[(HubShots Lesson)]

HIGH IMPACT



What is it

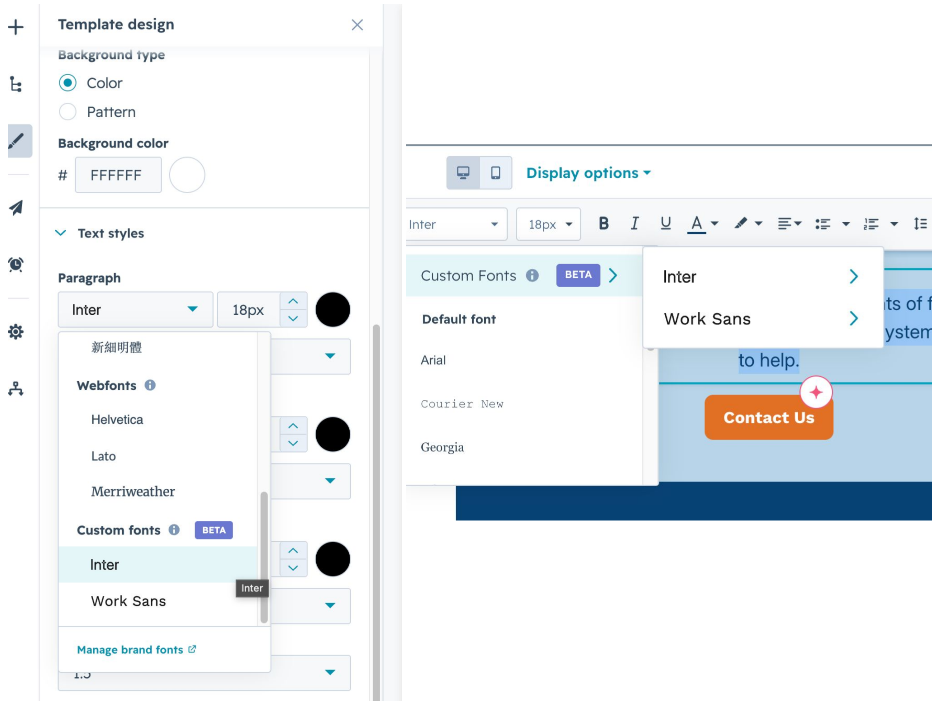
- Throttle marketing email send, especially if you're sending to a large number of contacts. This will help with your email deliverability.

Marketing and Content Hub

Custom fonts in marketing emails

[(HubSpot KB)]

HIGH IMPACT



What is it

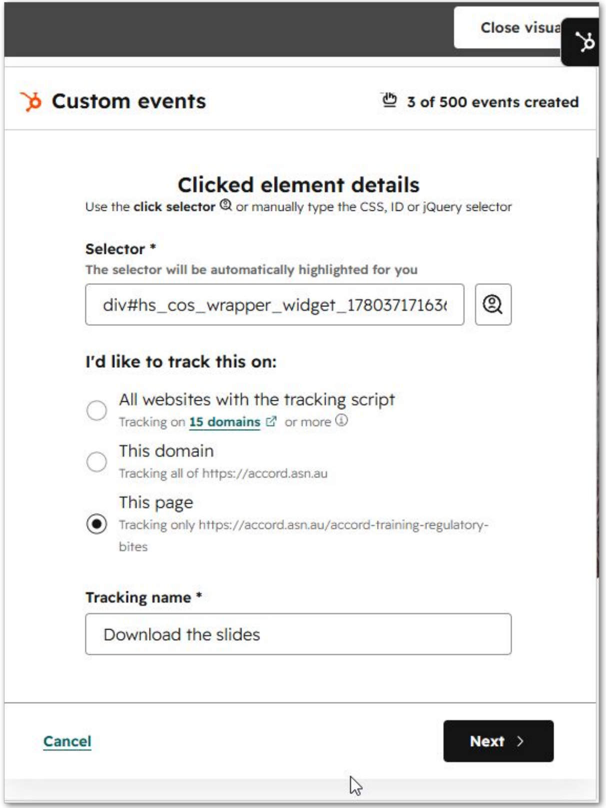
- Use custom fonts in marketing emails to match your brand

Marketing and Content Hub

Auto Capture Website Events

[(HubSpot KB)]

MEDIUM IMPACT



What is it

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

Breeze AI

(HubSpot AI)

5

Breeze 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

Breeze AI

Record Enrichment

[(HubShots Lesson)]

HIGH IMPACT

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

What is it

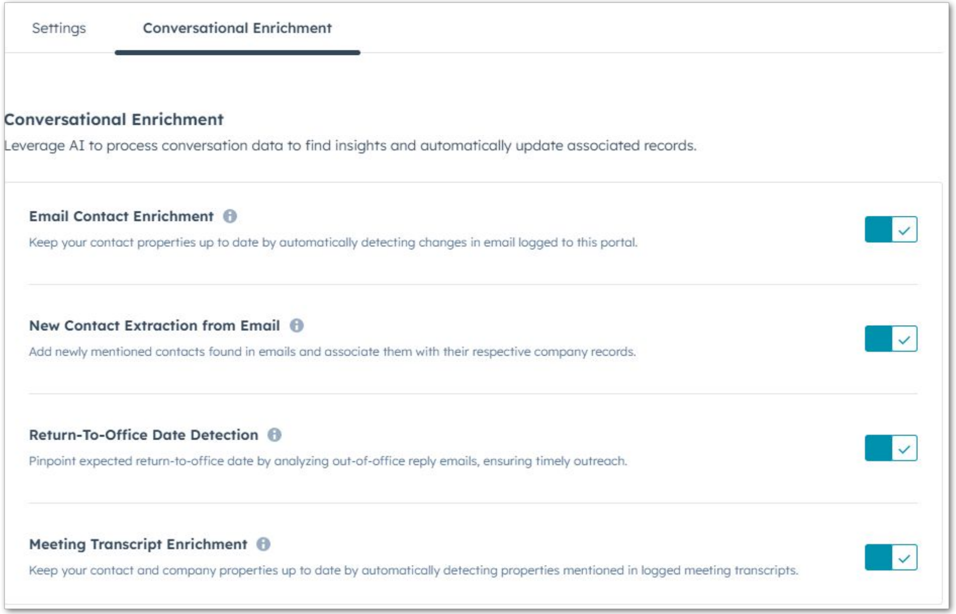
- HubSpot AI could populate some properties like name, country and employment role for contacts or company name and industry for companies.

Breeze AI

HubSpot Credits: More Control of Enrichment

(HubShots Lesson)

MEDIUM IMPACT



What is it

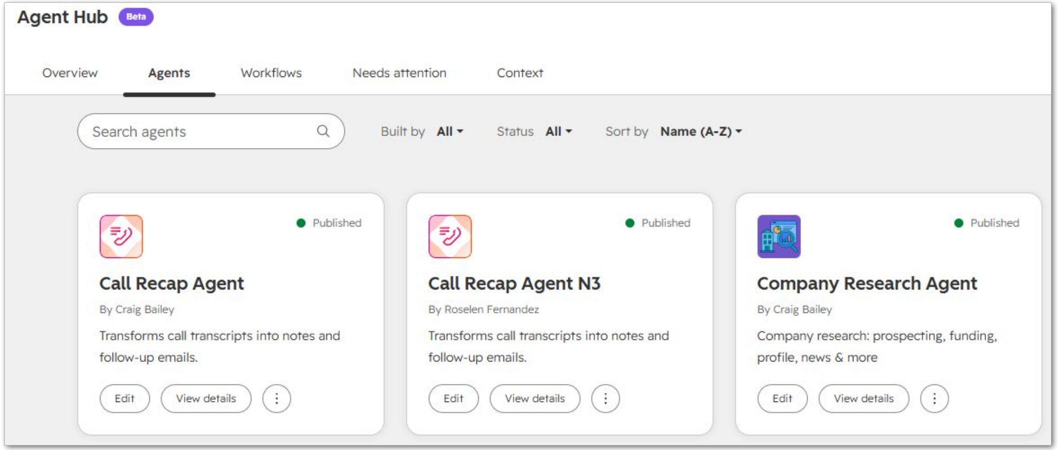
- More enrichment options (link)

Breeze AI

HubSpot Agents Overview

[(HubShots Lesson)]

HIGH IMPACT



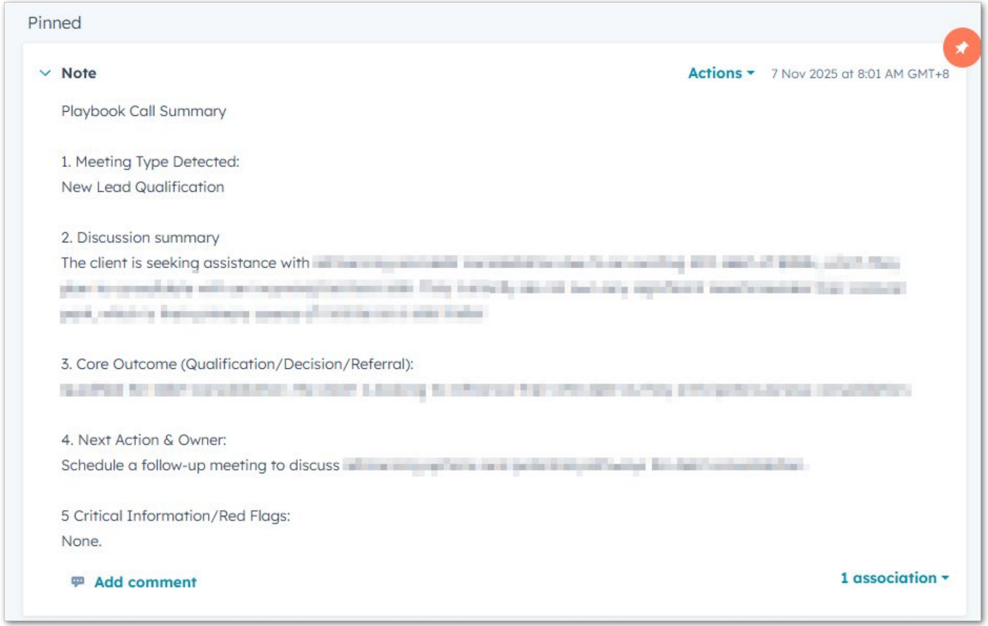
What is it

- 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

Breeze AI

Data Agent: Custom Prompt in Workflow

MEDIUM IMPACT



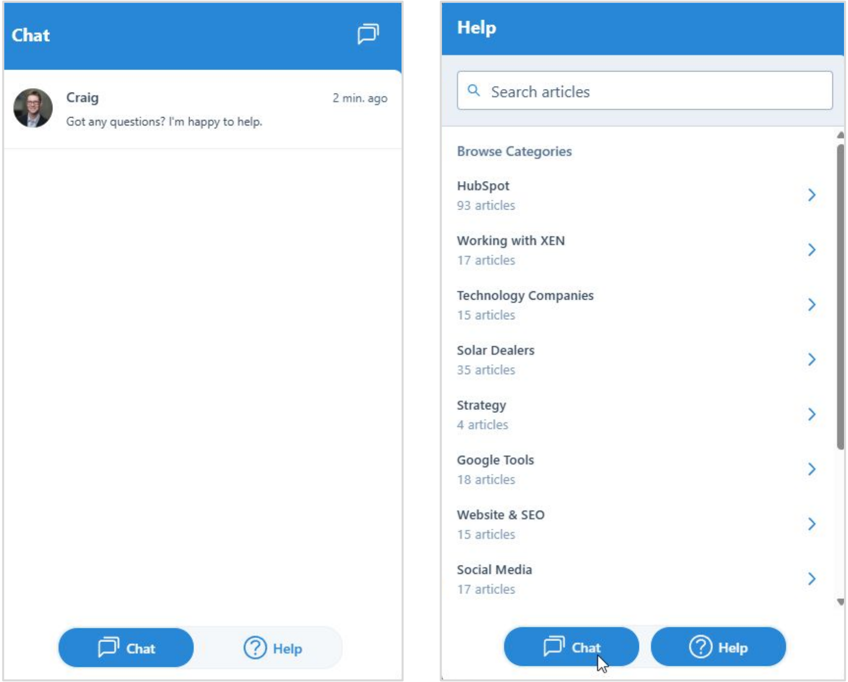
What is it

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

Service Hub

Customer Agent

HIGH IMPACT



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

Breeze AI

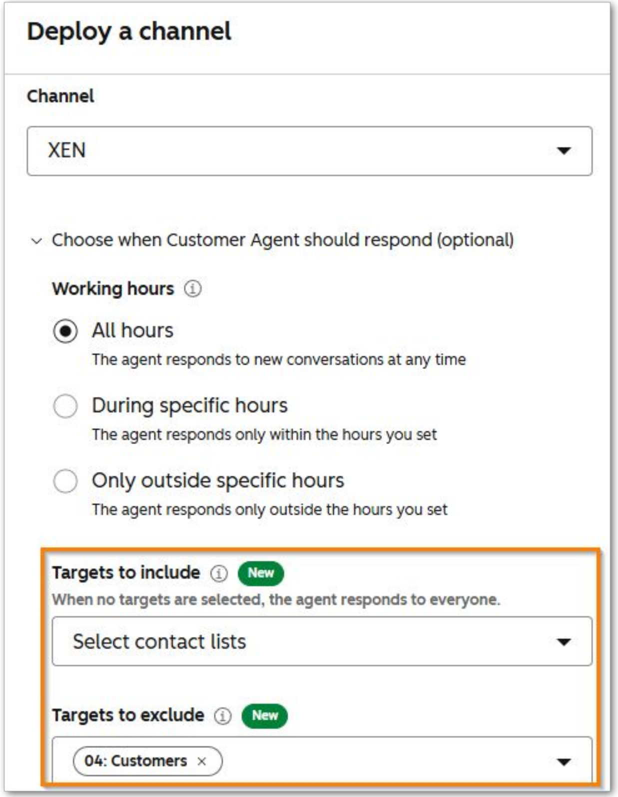
Who Customer Agent Responds to on Email

(HubShots Lesson)

What is it

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

HIGH IMPACT



Breeze AI

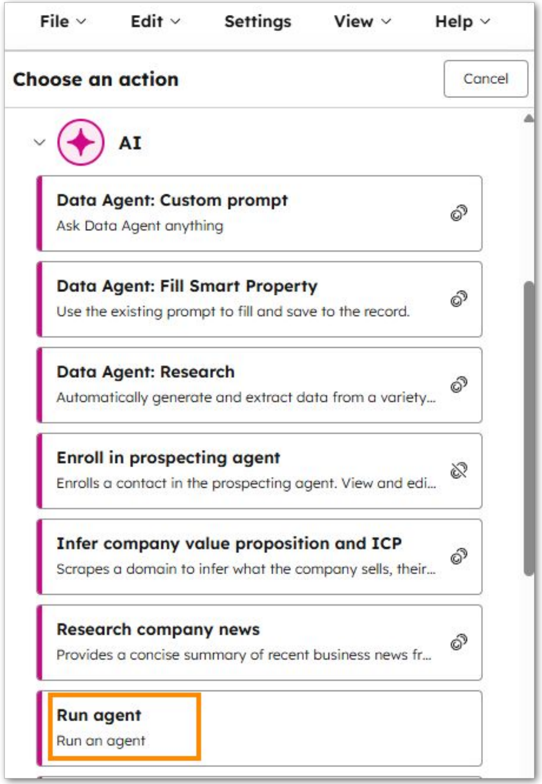
Run Agent Workflows Action

(HubShots Lesson)

What is it

- Trigger a Breeze Agent using Workflows

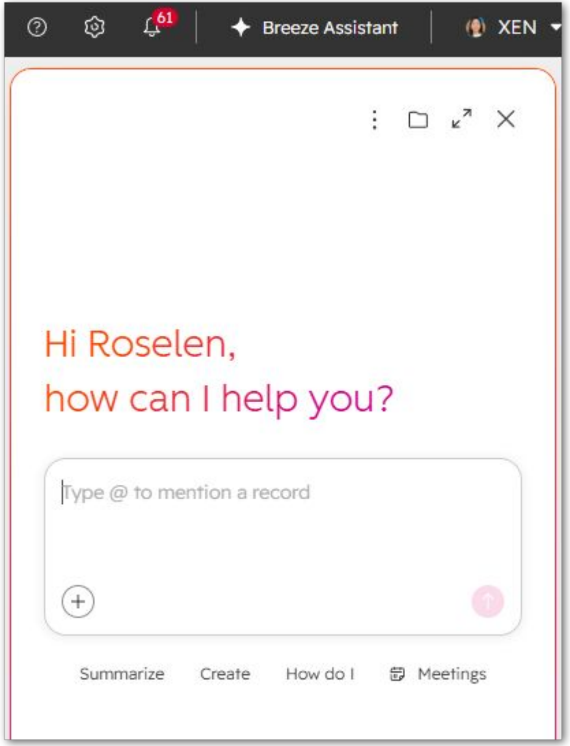
HIGH IMPACT



Breeze AI

Breeze Assistant

HIGH IMPACT



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

Breeze AI

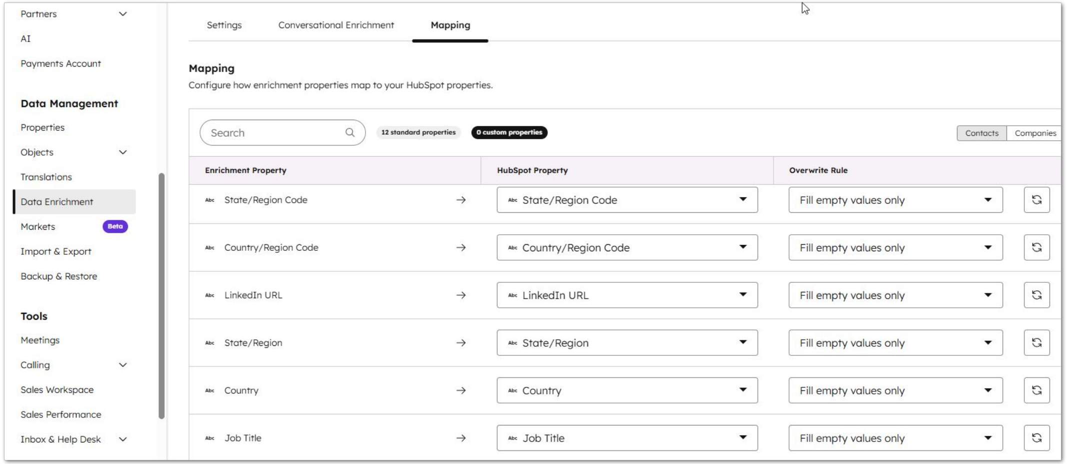
Map Enriched Data to Custom Property

[(HubShots Lesson)]

MEDIUM IMPACT

What is it

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



Dashboards and Reports

6

Dashboards and Reports

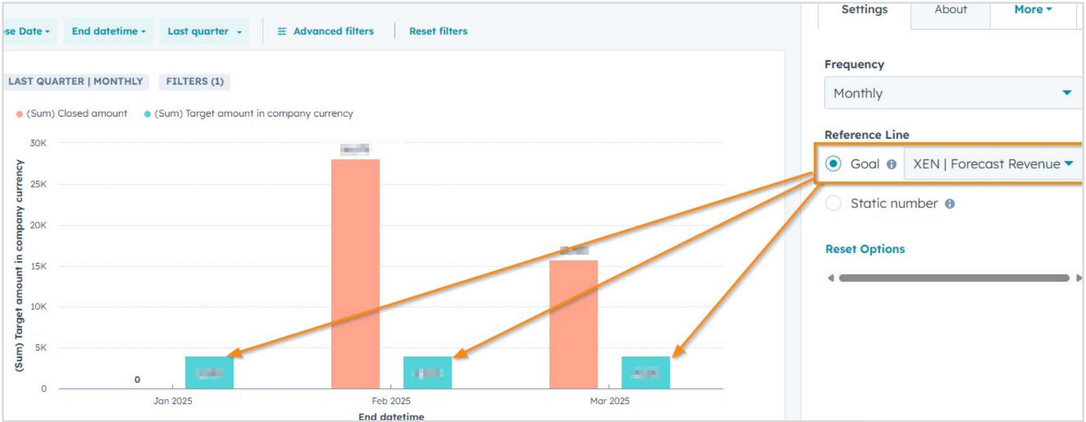
Goal as a Reference Line in Reports

[(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.

HIGH IMPACT

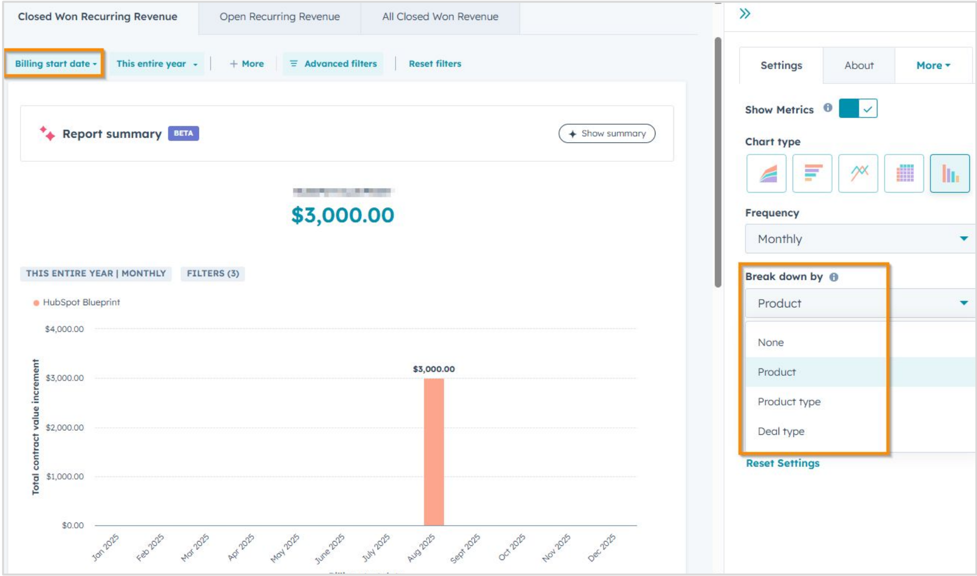


Dashboards and Reports

Line Item Revenue Reports

[(HubShots Lesson)]

HIGH IMPACT



What is it

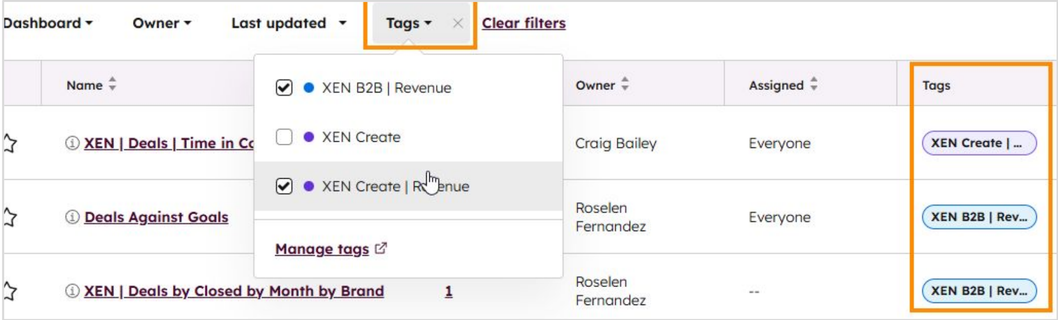
- Get more accurate insights by reporting on closed or forecasted revenue using the billing start and end dates for each line item

Dashboards and Reports

Organise Reports with Tags

(HubShots Lesson)

LOW IMPACT



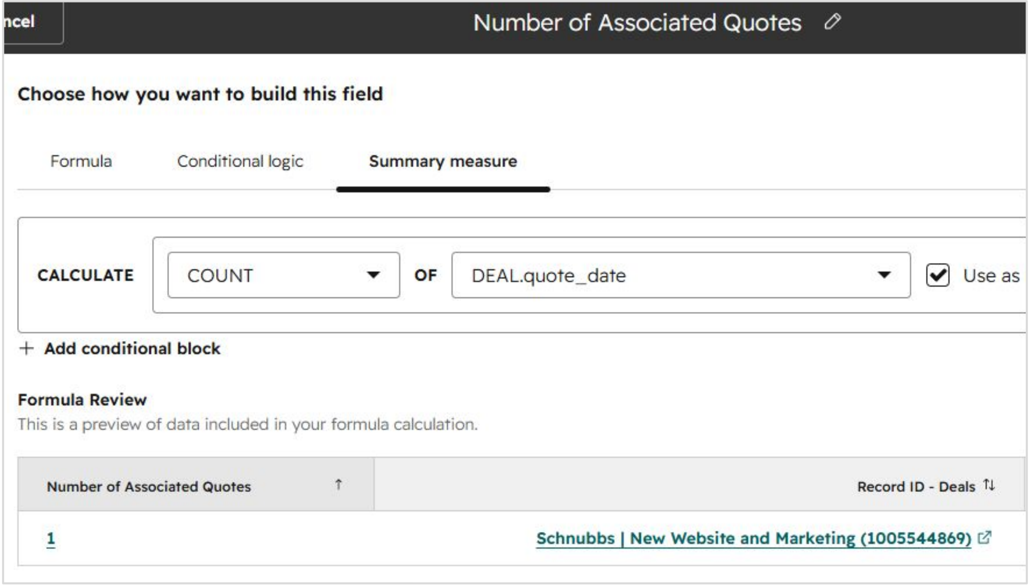
What is it

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

User-Friendly Formula Field Options in Reports

[(HubShots Lesson)]

MEDIUM IMPACT



What is it

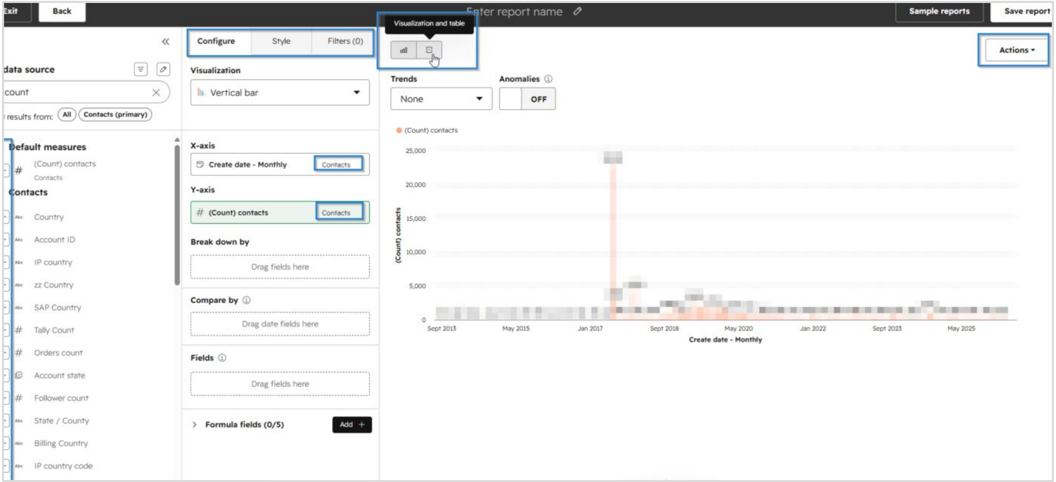
- When creating formula fields in custom report builder, you will now see two simple formula options Conditional Logic and Summary Measure.

Dashboards and Reports

New Report Builder Experience

(HubShots Lesson)

LOW IMPACT



What is it

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

Loop Marketing

7

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

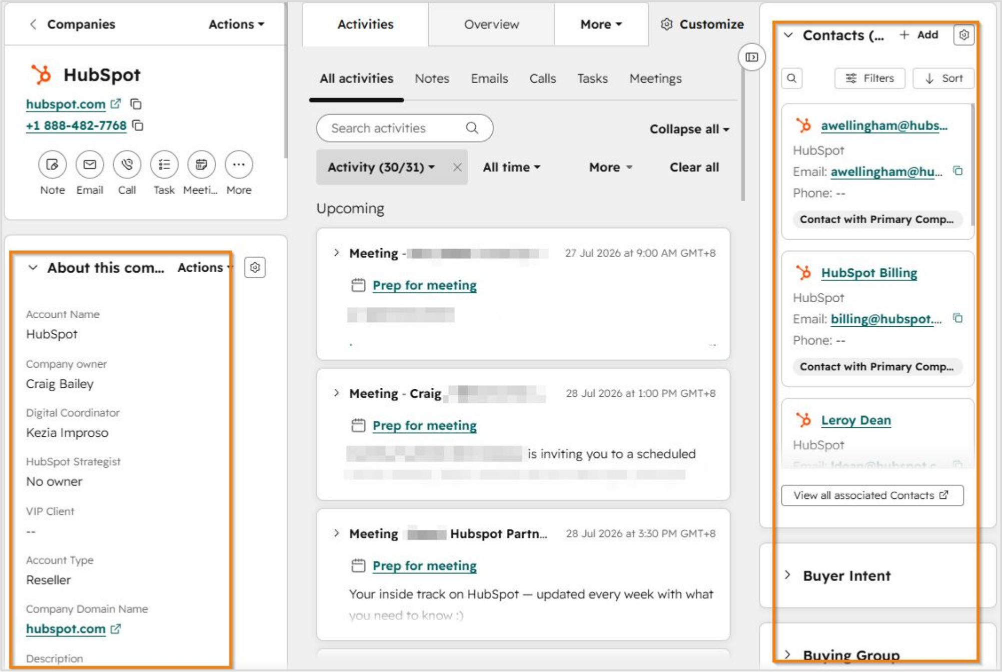
Bonus tips

8

Bonus tips

Record Customisation

LOW IMPACT



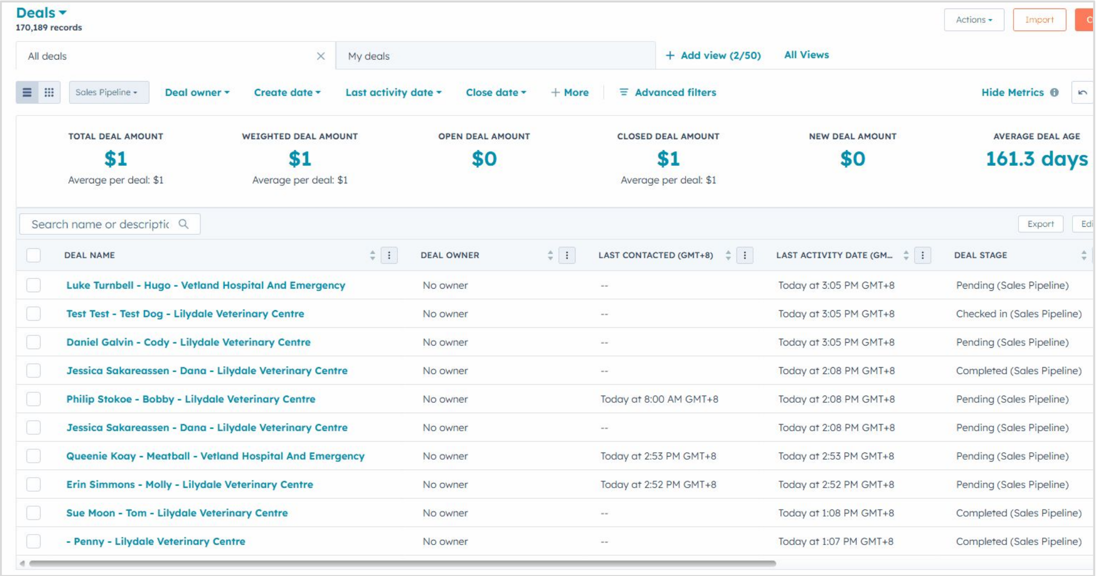
What is it

- 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

Bonus tips

Quick Actions on Views

LOW IMPACT



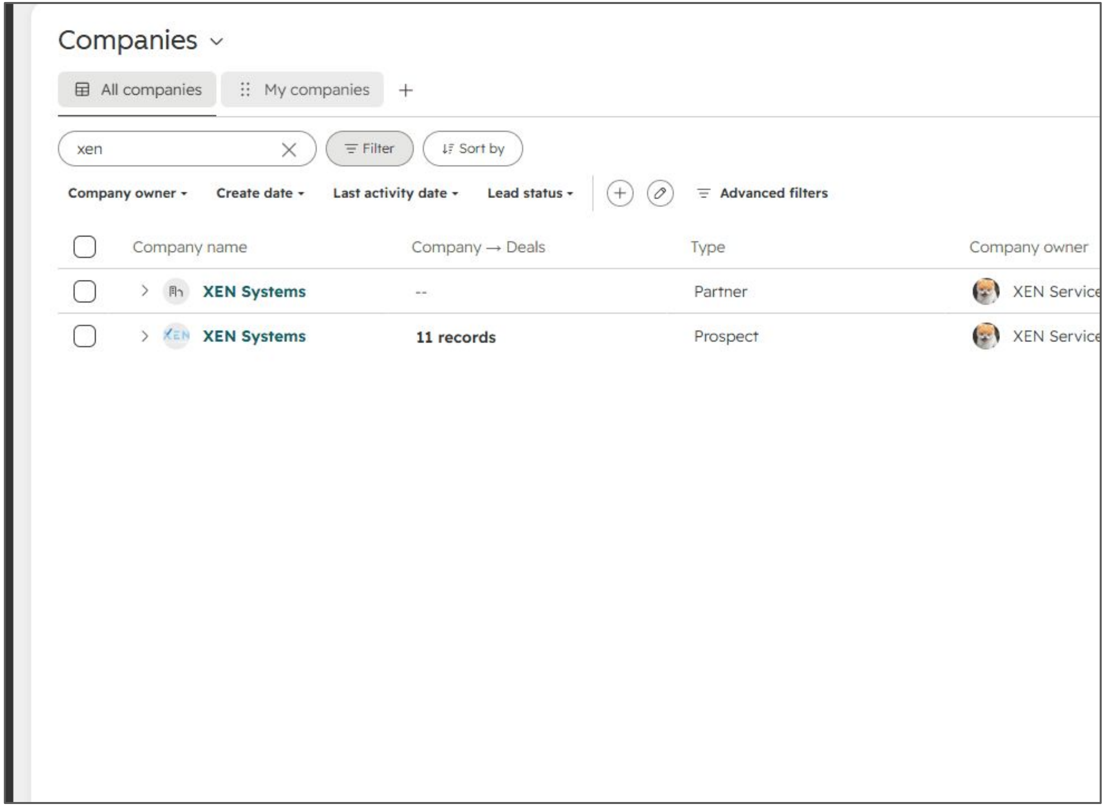
What is it

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

Bonus tips

Inline Association Table

LOW IMPACT



What is it

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

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

9

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

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Join these companies getting the most out of HubSpot

secure agility

dijital team

BRAUMS
Smarter Safer Greener Living

SMART WFM
Tailoring UKG® Solutions

allume

Profectus
Your Compliance and Recovery Insider

funding

Langley Group®

HealthBright.

integrated os

Quatrix

SENTRAL

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

XEN

Strategy and implementation
HubSpot **process** best practices

Onboarding
Optimisation
Training

Solid Foundations

VISUAL AND GRAPHIC DESIGN

XEN create

Visual
HubSpot **design** best practices

Websites
Graphic design
Video editing

Beauty & Calm

EDUCATION

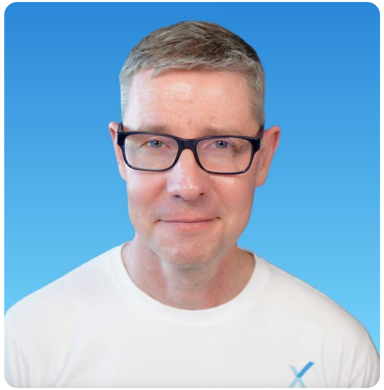
HubShots

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!