

Spotlight.

HubSpot User Groups
Appleton



Host

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Weidert Group

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Today

- 01 Loop Marketing
- 02 Accessing Betas
- 03 Brand Identity
- 04 Breeze Studio (Assistants, Agents, and HubSpot Credits)
- 05 Marketing Studio
- 06 Sales Hub: Prospecting Agent
- 07 Additional Resources



Loop

Marketing

HubSpot User Groups Appleton

Loop Marketing

A framework for growth in the AI era of marketing.

01

Express who you are

Define your taste, tone, and point of view — informed by your ideal customer profile. Turn that into a style guide for your campaigns and AI.

02

Tailor to your audience

Use AI to make interactions personal, contextual, relevant. More “How did they know?” and less “Dear {First Name}.”

03

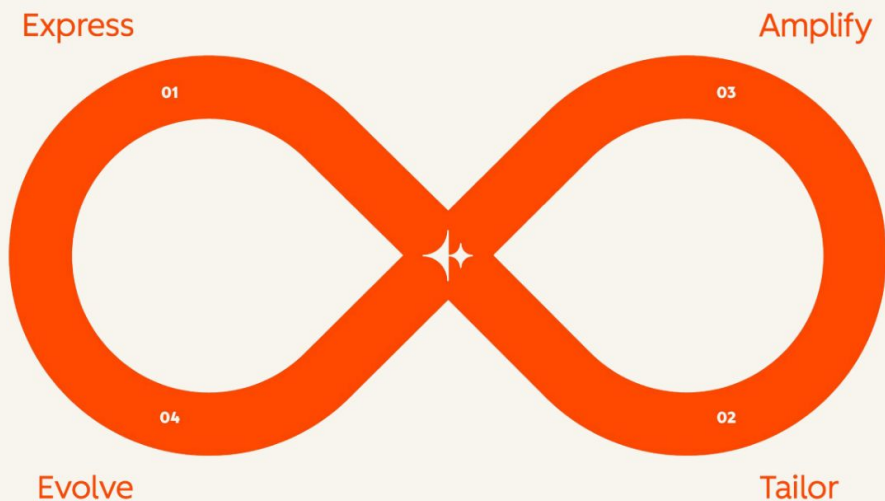
Amplify across channels

Diversify your content across channels for humans and bots — YouTube and social video, email, LLMs, search, creator feeds, and more.

04

Evolve in real time with AI

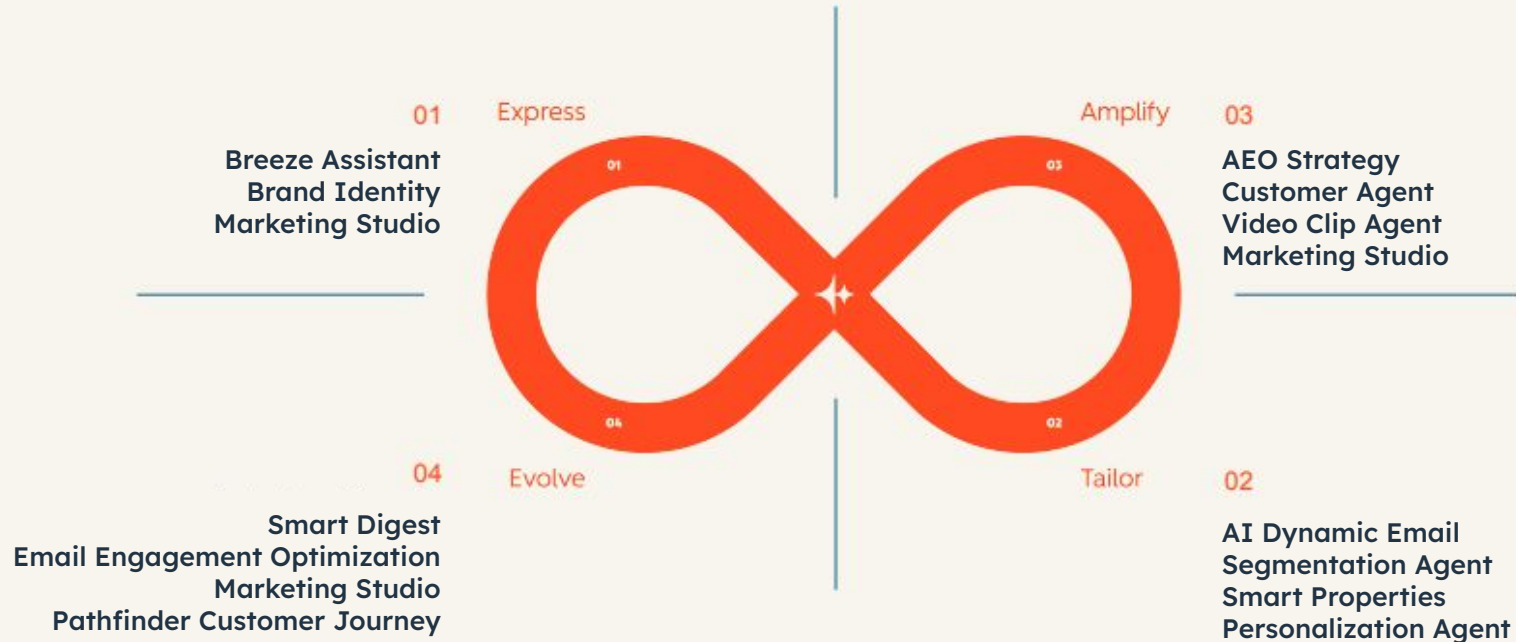
Iterate quickly and effectively with the help of AI. Then watch your loop velocity — the speed from idea to execution to iteration — start to take off.

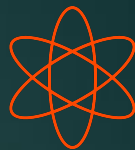


HubSpot

Loop Marketing

A framework **+ TOOLS** for growth in the AI era of marketing.





Settings & Betas

HubSpot User Groups Appleton

Available Product Updates

How to Enable Beta Features

To see what product updates apply to your account and opt into any public betas Super Admins can:

- Log into your portal
- Click on your profile
- Click on Product Updates
- Review the list of available updates
- Click “join beta” on applicable updates

The screenshot displays the HubSpot Product Updates interface. At the top, a pink banner reads "All the data makes all the difference. See what's new across Smart CRM, Data Hub, Breeze, and more at HubSpot". Below this, the "Product Updates" section is visible. On the left, a sidebar shows filters for "New to you" (40), "Your Betas", "Recommended", and "Scheduled for release". A legend indicates update statuses: "Live" (green dot), "In beta" (orange dot), "In development" (grey dot), and "Sunset" (red dot). The main content area, titled "New to you", shows a table of updates. The first update is "Closing Agent" (Breeze), marked as "Public Beta - Not taking part in beta" with a "Medium" impact level. The second is "AI Referrals in Website Traffic Analytics" (Live), marked as "Live" with a "Low" impact level. The third is "Availability Status Selector: Set Tempor..." (Public Beta), marked as "Public Beta - Not taking part in beta" with a "Low" impact level. A sidebar on the right shows the user profile for "Kelly Wilhelme" (WG HS Demo Portal), including links for "Profile & Preferences", "Theme", "Account", "Create a user", "Pricing & Features", "Account & Billing", "HubSpot Credits", "Product Updates", "HubSpot Academy", "Training & Services", "Projects", "Sign out", and "Privacy policy".

UPDATE	RELEASE IMPACT	PRODUCTS
Closing Agent + Breeze Public Beta - Not taking part in beta	Medium	Commerce Products & Quotes
AI Referrals in Website Traffic Analytics Live	Low	Free (all hubs & tiers) Analytics Tools
Availability Status Selector: Set Tempor... Public Beta - Not taking part in beta Scheduled for release - Expected October 28, 2025	Low	Customer Platform, Service Help Desk Routing and Assignment Help Desk

Brand Kit

Brand Identity

Instead of setting up in various tools, do this in your settings!

- Log into your portal
- Click on Settings
- Account Defaults > Branding > Brand Voice
- Configure like your own custom GPT!
- Applies to Breeze Assistants and Agents throughout the portal as overarching training
- Resource:
<https://knowledge.hubspot.com/branding/set-up-brand-voice-using-ai>

The screenshot shows the HubSpot Brand Kit settings interface. On the left is a sidebar with a 'Back' button and a search icon. The sidebar categories are: Settings, Your Preferences (General, Notifications), Organization Management (Multi-Account, BETA), and Account Management (Account Defaults, Audit Log, Users & Teams, Product Updates, Integrations, Marketplace Downloads, Tracking & Analytics, Privacy & Consent). The 'Account Defaults' section is active. The main content area is titled 'Account Defaults' and has tabs for General, Branding, User Defaults, Notification Profiles, Currency (NEW), and More. Below the tabs is a description: 'Set your logo and colors for tools where you can show your branding. These settings will help you quickly choose brand options when creating public facing content.' The 'Brand Kit' section shows a preview of the 'BIGLYTICS' logo. Below this are tabs for Logo, Colors, Themes, and Brand voice. The 'Logos' tab is selected, showing a dropdown for 'Biglytics logo (default)'. Below the dropdown are input fields for 'Logo name *' (containing 'Biglytics logo'), 'Logo alt text' (containing 'Biglytics logo'), and 'Logo URL' (with an information icon). To the right of these fields is a large dashed box containing the 'BIGLYTICS' logo.

Chrome

File Edit View Window Help

Prospecting Agent | HubSpot x Settings x Brand Identity | HubSpot x Generate your brand identity x Set up and use the brand as x Set up brand voice using AI x +

app.hubspot.com/settings/65360/account-defaults/branding/brand-kit/91050/logo

☆ f [icons] [icons] [icons] [icons] [icons] [icons] [icons]

Finish update [icon]

[icon] Assistant Weidert [dropdown]

Bookmarks

CRM

Marketing

Content

Sales

Commerce

Service

Data Management

Automation

Reporting

Breeze

Development

Partner

Settings

Your Preferences

General

Notifications

Organization Management

Multi-Account BETA

Account Management

Account Defaults

Audit Log

Users & Teams

Product Updates

Integrations

Marketplace Downloads

Tracking & Analytics

Privacy & Consent

Sandboxes

Security

Approvals

Routing

Account Defaults

General Branding User Defaults Notification Profiles Currency NEW Data Hosting Feature Releases

Set your logo and colors for tools where you can show your branding. These settings will help you quickly choose brand options when creating public facing content.

Brand Kit

Logo Colors Themes Brand voice

Logos

> Weidert Group

> Weidert Group Inbound Marketing

> W white

<> Weidert 2024 horizontal (default)

Logo name *
Weidert 2024 horizontal

Logo alt text
Weidert Group Industrial Marketing & Sales Agency

Logo URL ⓘ
/

Width Height



HubSpot



Breeze Assistant

Breeze Assistant is your AI companion that understands your business and works where you do, while custom assistants are specialized experts created for your specific business needs.

- Prepare for meetings and create content using your actual CRM data and business context.
- Access company-specific expertise instantly with custom assistants that know your processes.
- Work faster without leaving HubSpot or switching between different AI tools.

Launch region: Global

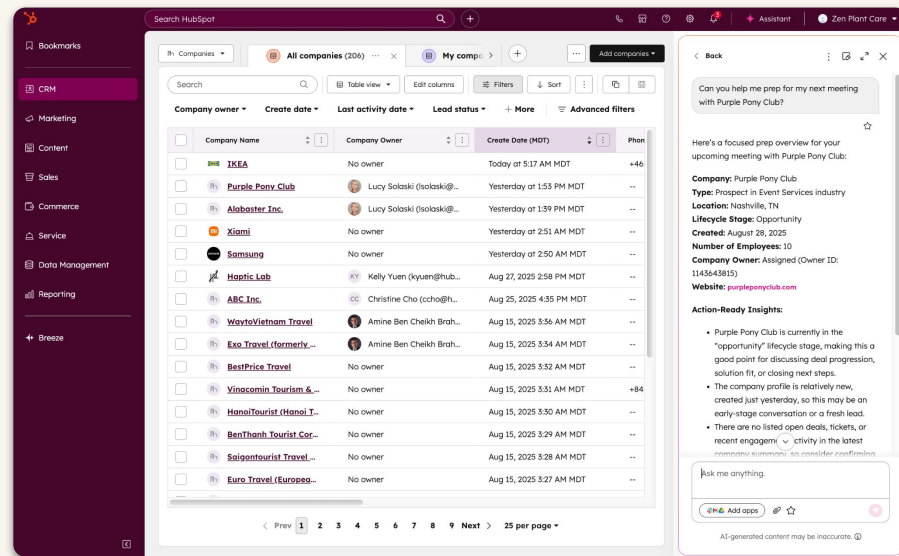
Free

Starter

Pro

Enterprise

Public Beta



Breeze Marketplace & Breeze Studio

Discover and browse powerful HubSpot-built agents and assistants in the **Breeze Marketplace**, then install, customize, or build new ones in **Breeze Studio** to improve your team's productivity right away.

- Get quick and easy access to powerful HubSpot-built Agents and Custom Assistants.
- Customize and launch AI teammates tailored to your specific business needs — no coding required.
- Consolidate workflows with tailored agents and custom assistants that have your business context to work faster and more efficiently.

[Visit the Breeze Marketplace](#)

Launch region: Global

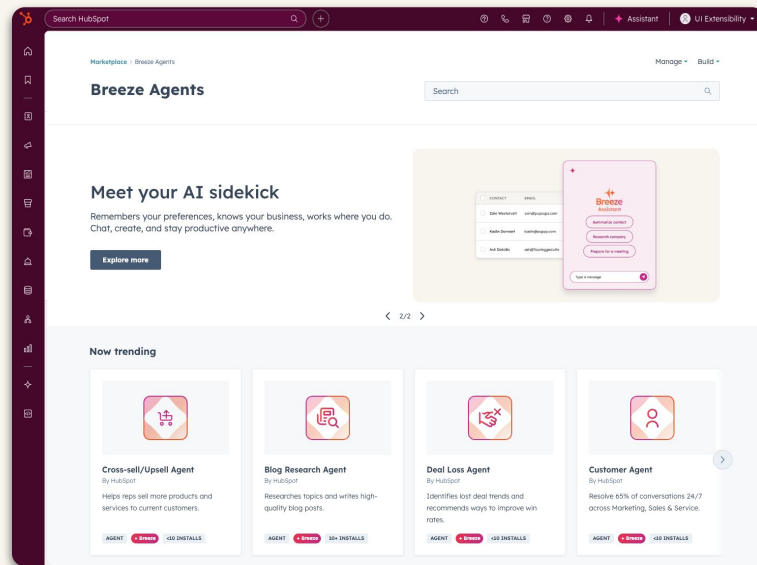
Free

Starter

Pro

Enterprise

Public Beta





Data Agent

Data Agent does data work for you. It researches and answers custom questions about your customers by analyzing your CRM, calls, emails, documents, and the web—giving you the insights you need, without the manual work.

- Generate custom insights in seconds, and immediately use those insights in your CRM, workflows, and data studio.
- Pulls customer intelligence from all data sources by combining CRM data, conversations, documents, and web research into unified insights.
- Scale your data operations infinitely and handle enterprise-level data needs with no coding or complex integrations needed.

Launch region: Global

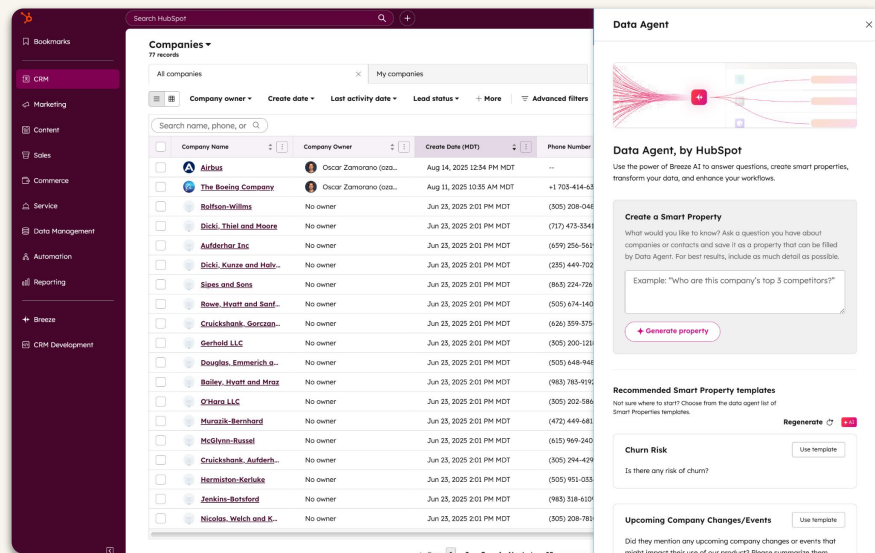
Free

Starter

Pro

Enterprise

Public Beta





Customer Agent

Breeze Customer Agent is your always-on AI concierge—turning every conversation into a growth opportunity. From guiding visitors into your pipeline to resolving customer issues on the spot, freeing your team to focus on higher-value work.

- Instantly handles more than half of support inquiries while nudging engaged visitors toward qualified leads.
- Connect your website, knowledge base, and CRM—no complex workflows or developer time required.
- Use historical conversations to test the agent, pinpoint ongoing knowledge gaps, and fine-tune responses so the customer agent gets smarter with every exchange.

Launch region: Global

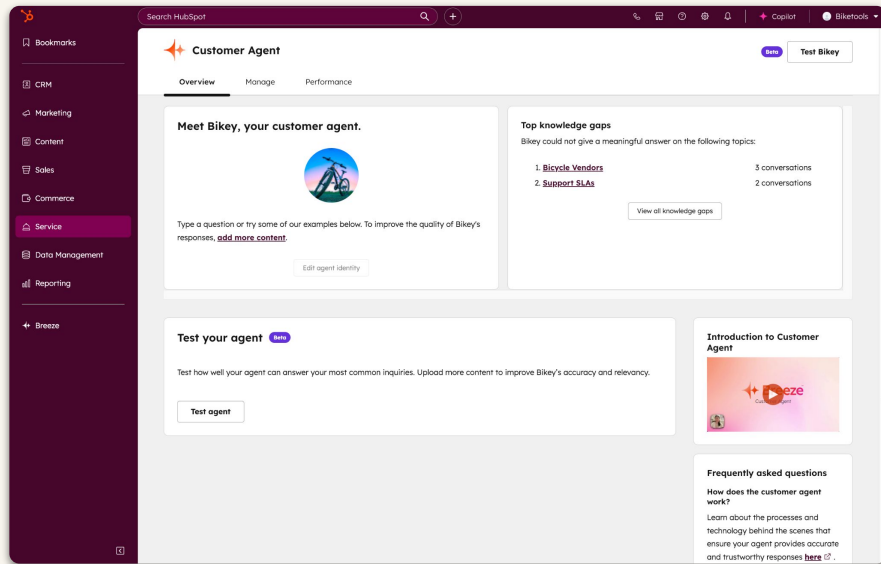
Free

Starter

Pro

Enterprise

Live



HubSpot Credits

HubSpot Credits are a simple, flexible way to pay for what you use. Credits work across usage-based features.

- Used by agents and data enrichment tools, such as Customer Agent, Prospecting Agent, Data Agent, Breeze Workflow actions, Buyer Intent
- HubSpot Credits are managed by users with billing permissions or super admin access.
- Monitor usage in Account & Billing > Limits. Set overage limits.
- See what tools are consuming credits most
- Contact your partner agency for help estimating credit needs

FEATURE ▾	CREDITS USED ▾	STATUS ▾
Workflows Breeze Actions	0	● Active
Prospecting Agent	200	● Active
Intent	0	● Active
Enrichment	0	● Active
Data Studio Sync BETA	0	● Active
Data Agent BETA	0	● Active
Customer Agent	0	● Active
Closing Agent BETA	--	● Active



Marketing Hub®

HubSpot

Marketing Studio

Marketing Studio makes campaign creation easier with an AI-powered drag-and-drop canvas that brings your entire team together to plan, create, and launch multi-channel campaigns faster.

- Provides a single, collaborative canvas where teams can seamlessly orchestrate every aspect of their campaigns.
- Share your campaign vision and watch AI turn it into actionable plans with ready-to-use assets.
- Campaign insights and leads sync directly with your HubSpot tools and data.

Launch region: Global

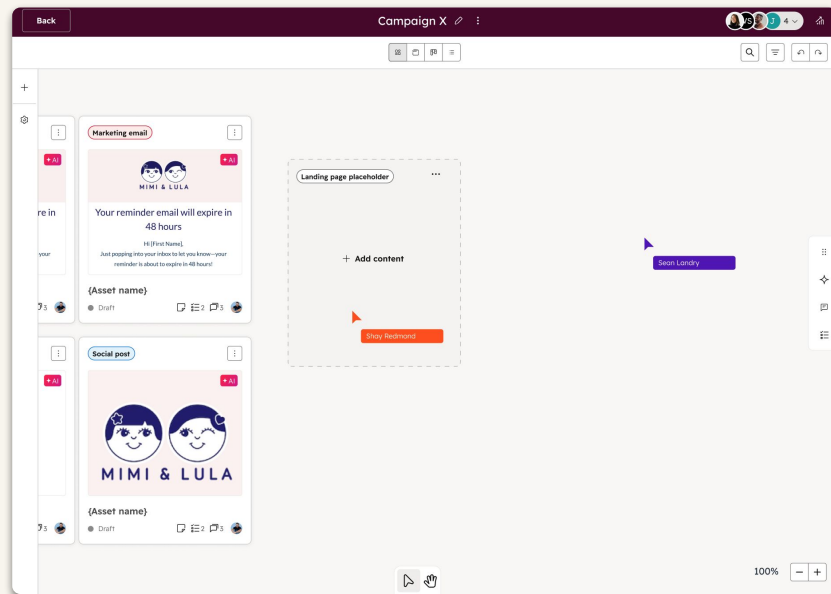
Free

Starter

Pro

Enterprise

Public Beta





AI-Powered Email

Transform manual email work into intelligent automation that creates, personalizes, and optimizes every send using your CRM data for higher engagement and conversions.

- Go from idea to inbox in minutes with AI-generated campaigns from simple prompts and instant template recreation from any platform.
- Stop guessing, start converting with AI that predicts engagement so you can target the right people at the right time.
- Advanced personalization accessible to any marketer—no coding required to create unique content for every recipient.

Launch region: Global

Free

Starter

Pro

Enterprise

Public Beta

Create email with AI

Let's create your email 2/3

Tell us about your email, attach files, and choose your preferred layout.

Tell us about your email *

The goal of this email is for small local business owners to RSVP for our networking event. Here's the key information: Join us for a casual evening of networking with fellow small business owners in Grand Canal Dock this Thursday at 9pm. Free food. Connect, share ideas, and grow your local network. CTA: RSVP Here. Link: www.hubspot.com/event

> Information you should include

Attach images, documents or product info

Upload or drop files here

Choose layout

☒ Use a template

My saved template

Logosum

Hello <Your name>

After our emails have finished downloading we were made can really have an when you have to say. The reader personal and reader why your marketing can

Every email should try to lead the reader to some kind of action. Our focus is to describe why the reader should want to click.

☐ Clone an existing email

[Check AI-generated content for bias or inaccuracy](#)

[Cancel](#) [+ Generate email](#)

AI-Powered Email

Add a dynamic text token

Prompt suggestions

PromoteEvent inviteWelcomeProduct launchWebinarRe-engagement

Prompt *

Write to the contact who is a Job Title at Company name a company in the Industry sector located in City. Address a common challenge faced by professionals in their role within that industry and location. Briefly explain how our new FlowSync Pro - an AI-powered project management platform that unifies team workflow, deadlines, and communication in one dashboard can help the customer solve problems in the Industry industry. Features include intelligent task prioritization, built-in video collaboration, automated progress reporting, seamless integrations with Slack/Google/Microsoft 365, and mobile access. Focus on making sure to relate to why this product helps the Industry industry, and in particular some who is in a Job Title role.

Personalize

855/1500

Insert tokenCancel

Choose up to 5 contacts to see examples *

Erica Crawford <mwilcox+engage98840@hubspot.com>

Anita Hardy <mwilcox+engage99603@hubspot.com>

Test

< 10 / 10 >

Text example for Erica Crawford

Hi {{contact.firstname}},
As a Director at Brightleaf Wellness Group, you're likely aware of the challenges in managing team communication and project timelines in the Health, Wellness and Fitness sector. FlowSync Pro is designed to address these issues by unifying your team's workflow, deadlines, and communication all in one intuitive dashboard. With features like intelligent task prioritization, automated progress reporting, and seamless integrations with Slack, Google, and Microsoft 365, you can enhance productivity and ensure your projects stay on track. Take advantage of our AI-powered solution to streamline operations and focus on what truly matters for your clients' well-being. Sign up for your free trial today!

Text example for Anita Hardy

Hi {{contact.firstname}},



Sales Hub®

HubSpot

Prospecting Agent

Breeze Prospecting Agent is an intelligent sales BDR that understands your business. It monitors prospects for buying signals, researches target accounts, personalizes outreach, and engages at the perfect moment.

- Monitors enrolled prospects for buying signals like leadership changes, funding rounds, or engagement spikes, alerting reps when it's time to reach out.
- Delivers personalized, dynamic outreach at scale based on prospect engagement, research, and unified customer data.
- Scale globally with multi-language support and advanced customization options for research and outreach.

Launch region: Global

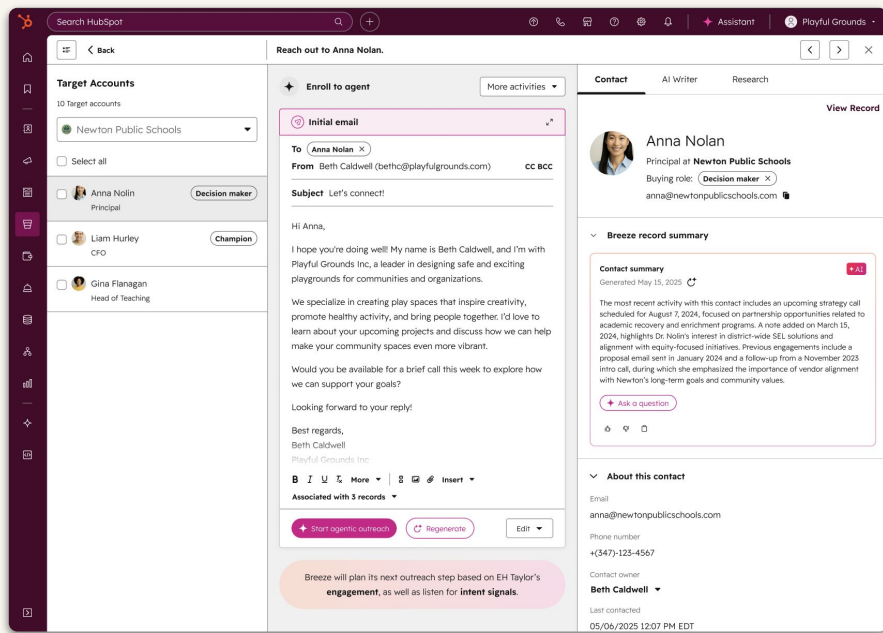
Free

Starter

Pro

Enterprise

Live



Chrome File Edit View History Bookmarks Profiles Tab Window Help

Prospecting Agent | HubSpot

app.hubspot.com/prospecting-agent-ui/65360/onboarding

Search HubSpot

Prospecting Agent

Put your prospecting on auto-pilot

- ➔ **Assign companies and contacts** in your CRM that match your ideal customer profile and target persona.
- ➔ **Develop personalized outreach strategies** based on information the prospecting agent gathers about each prospect's business and needs.
- ➔ **Fully automate outreach** by detecting intent and activity, reaching out with the right information at the right time.

Use **Breeze AI** to define your selling needs and let your agent do the rest. In minutes, your agent will be ready to start prospecting leads on your behalf.

Set up agent

Prospecting Agent

Agent set up | **Set up**

Overview Performance

Automated enrollment

FORMS IN USE	WEB PAGES IN USE	FILTER SETS IN USE
4	5	1

[View all automations](#)

Emails sending today

TOTAL	ALREADY SENT	NEEDS REVIEW
121	21	12

[View all emails sending today](#)

Enrollments

[View all enrollments](#)

Contacts currently enrolled	Finished
10	0

Albert Blanton CEO at Buffalo Trace	Researching Albert Blanton	...
Lance Lazarus The Most Handsome Man on Dos Equis	1 emails ready for review	Review emails for Lance ...
Daisy Jones From Watson on The Six	1 emails ready for review	Review emails for Daisy ...
Marcus Mumford Sed Bar at Mumford and Sons	Email 1 of 3 sending today Estimated send time: 10:12AM EST	Review conversation with Marcus ...
Chappell Roan Midwest Princess at Pink Pony Club	Email 1 of 3 sent today Sent: July 22, 2024 at 9:34AM EST	Review conversation with Chappell ...
Chappell Roan Midwest Princess at Pink Pony Club	Email 2 of 3 sending tomorrow Send time calculated on day of send	Review conversation with Chappell ...



Smart CRM™

HubSpot

Self-generating CRM data

Self-generating CRM automatically enriches contact and company records with HubSpot's proprietary data, AI-driven smart properties, and insights pulled straight from your team's conversations.

- Never miss a detail by automatically pulling contact and company insights from every email and calls.
- AI scans the web and your uploaded documents to populate custom fields so you know what matters before you reach out.
- Teams get deeper visibility into the details that drive deals and relationships without manual effort.

Launch region: Global

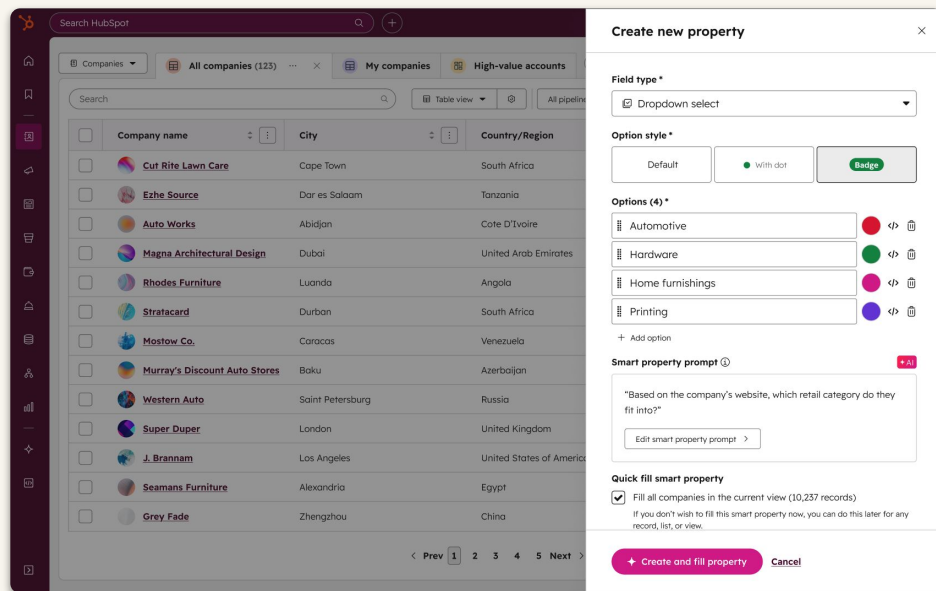
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Starter

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Enterprise

Live





Commerce Hub™

HubSpot

CPQ

HubSpot's AI-powered CPQ is a fast, easy-to-use quoting tool that helps sales teams close deals faster by automating quote creation, approvals, and payments in one seamless flow.

- Allows sales reps to generate professional, accurate quotes in minutes with AI-assisted workflows.
- Real-time quote tracking and automated payment triggers create a smoother, more convenient buyer journey.
- Integration with Smart CRM unifies revenue data and equips teams with lifecycle insights to drive upsell, cross-sell, and accurate forecasting.

Launch region: Global

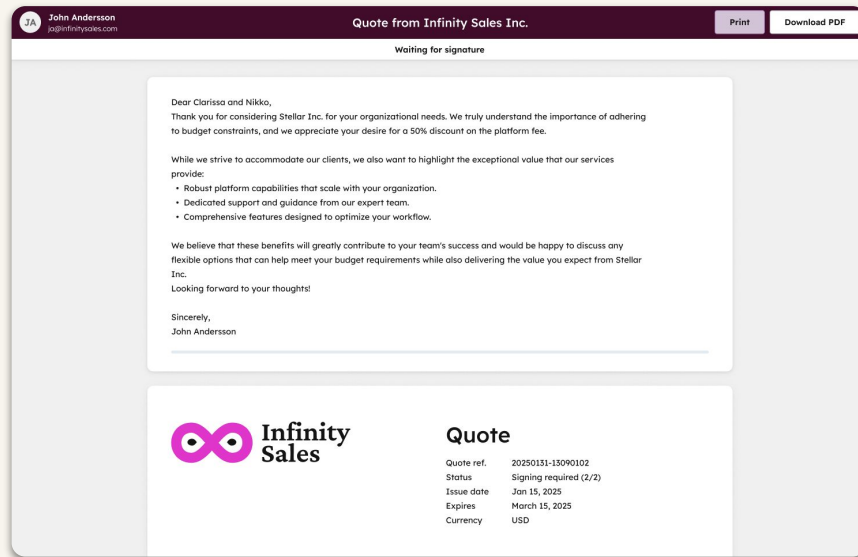
Free

Starter

Pro

Enterprise

Public Beta



Resources

Learn more about all the Fall Spotlight 2025 product updates



- Visit hubspot.com/spotlight
- Visit loopmarketing.com
- HubSpot Academy Playlist: search “Fall 2025 Spotlight”
- Inspiration: [Breeze Case Studies](#)
- [The ChangeOver](#) podcast by Weidert (also on Apple, Spotify, YouTube)

Q&A