



# 8 Ways to Augment Your Services with AI

## Quick-Win Use Cases for HubSpot Partners

As AI continues to transform how professional services are delivered, HubSpot Solutions Partners are uniquely positioned to gain efficiencies, expand capabilities, and scale operations without dramatically increasing headcount or overhead.

This guide highlights eight impactful, real-world use cases that small to medium-sized consulting firms are using today to augment their services with AI.

Each is selected for its relevance, feasibility, and high return on effort—perfect for partners looking to experiment and gain a competitive edge quickly.



# Accelerate Development with AI Coding Assistants

## Use Case:

AI pair programming with tools like GitHub Copilot, Amazon CodeWhisperer, Replit, Cursor, and many others.

## Benefit:

Expedites website and app development and/or provides you a quick prototype you can showcase to a client for early feedback and to demonstrate quick value.

Many B2B consultancies are shortening development cycles by integrating AI coding assistants into their tech stack. These tools autocomplete boilerplate code, suggest bug fixes, and even generate snippets for custom HubSpot modules and APIs.

This allows smaller teams to punch above their weight in terms of delivery speed and output quality.



## Stat

88% of developers cited that they're more productive when using GitHub Copilot, while 74% say it gives time back to focus on more satisfying work.

## Quick Win Tip:

Start with a trial in your dev environment and benchmark performance on common module builds or integrations.



# Automated Proposal and Document Generation

## Use Case #1

First-draft creation of proposals, RFPs, strategy docs, and audit reports using generative AI

### Benefit:

Saves time and accelerates sales and delivery cycles

Responding to RFPs, writing proposals, and creating strategy decks are essential but time-intensive parts of consulting. Generative AI tools like ChatGPT and proposal-specific assistants can now generate high-quality first drafts based on your templates, historical work, and client information.

This lets your team skip the blank page and focus on refining the final 20%.



### Stat

In a 2023 experiment of 750 consultants, those using GPT-4 produced higher-quality content, faster, than those working alone ([axios.com](https://www.axios.com)).



### Quick Win Tip:

Use your existing proposal templates and case libraries as training material. AI can draft 80% of a proposal or scope doc—just be sure to QA it before sending.



## Enhance Proposal Accuracy with AI-Powered SOW Audits

### Use Case:

Proposal review and cost-coverage analysis using tools like Gemini, ChatGPT, or Claude.

### Benefit:

Identify underpriced work and improve profitability

Partners are using LLMs to analyze their past proposals and statements of work (SOWs), flagging tasks they often deliver but fail to charge for. This helps firms optimize how they scope and price future projects—without relying on expensive manual audits or post-mortem reviews.



### Quick Win Tip:

Upload anonymized past proposals into an AI model and ask it to identify patterns in missed billable items.



# Streamline Knowledge Management and Document Summarization

## Use Case:

Summarize reports, transcribe meetings, and extract insights from internal documentation

## Benefit:

Reduce time spent reviewing information and increase decision-making speed

Consulting runs on information—market research, meeting notes, client reports, best practices—and AI can now help teams tame that information overload.

AI summarization tools digest long-form content and surface key points in seconds. Consultants can drop a 30-page whitepaper into a summarizer and receive a one-page highlight reel with actionable insights.



## Quick Win Tip:

Use AI tools built into common platforms (e.g., Zoom, HubSpot, Teams, Google Meet) to auto-generate meeting notes.

Use document summarizers (like ChatGPT or Claude) to extract key points from client deliverables and build searchable internal knowledge hubs.



## Deliver Hyper-Personalized Client Insights with Custom LLMs

### Use Case:

Internal knowledge bots trained on client-specific data

### Benefit:

Speed up onboarding, knowledge transfer, and client strategy planning

Some firms are training lightweight custom models on their project histories, client documentation, and meeting transcripts.

These internal assistants provide consultants with instant access to insights like “What were last quarter’s KPIs?” or “What CRM issues did we identify in the discovery phase?”—reducing time spent digging through docs or Slack threads.



### Quick Win Tip:

Use vector databases like Pinecone or open-source tools like LangChain to build a retrievable Q&A system over client folders.

## Automate Content Strategy and Creation for Clients

### Use Case:

Use AI for SEO research, campaign briefs, and content drafts

### Benefit:

Augment marketing service delivery with faster outputs on outlines, brainstorming, and more – then put your personal human touch to it.



### Quick Win Tip:

Add AI content assistants (such as Breeze) to your marketing playbooks and charge clients for accelerated content velocity or A/B testing variants.



# Scale Client Training and Support with AI Agents

## Use Case:

AI chatbots trained on onboarding docs, help guides, and SOPs

## Benefit:

Offload repetitive client support tasks and scale enablement

Consulting firms are deploying custom GPTs or support agents that act as always-on training assistants for clients.

These bots handle common onboarding questions (“How do I set up a workflow?”) and reinforce best practices—freeing up your team to focus on higher-value consulting.



## Quick Win Tip:

Use HubSpot’s Knowledge Base and existing support docs to quickly train a support agent using tools like ChatGPT’s custom GPT feature or HubSpot Customer Agent.



**Watch this short demo of Customer Agent to learn more.**



# AI-Driven Data Analysis and Reporting

## Use Case:

Analyze and visualize client or internal data with natural language queries

## Benefit:

Accelerate insights without the need for a dedicated data analyst

AI is becoming the virtual data analyst for consultancies without in-house BI resources. Small firms often collect a wealth of data—CRM records, campaign metrics, web analytics—but lack the time or expertise to turn it into actionable insights.

Generative AI tools now allow teams to analyze this data through simple, natural language prompts—no formulas or manual spreadsheets needed.



## Quick Win Tip:

Start using tools like HubSpot Copilot to generate weekly CRM, campaign, or performance reports. Use AI to draft client-ready dashboards or spot hidden patterns—without hiring a data analyst. Or use ChatGPT Deep Research for market analysis.





## **Final Thoughts:**

The future of professional services is augmented, not replaced. AI enables partners to deliver more value, more efficiently—with leaner teams and tighter turnaround times.

These eight approaches are just the beginning. By starting small and iterating, HubSpot Solutions Partners can create compounding benefits that grow with every project, saving you time, resources and helping you generate more profit.

**Pro Tip:** Assign one internal AI champion to lead experimentation and build lightweight internal tools or prompts to start scaling immediately.