



HubSpot

The CIO's Growth Playbook: Driving Business Value with Data and AI

Lead your organization into a future of sustained growth and competitive advantage.



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Introduction

The New Frontier of Technology-Driven Business Growth

Today's CIO sits at the intersection of business strategy and technological innovation. With AI, machine learning, and emerging technologies at your disposal, you can drive business value and competitive advantage in unprecedented ways.

Success in this role requires more than technical expertise. It demands the vision to apply these technologies to real business problems, the leadership to rally your organization, and the strategic mindset to align with broader business goals.



Key takeaway:

As CIO, your role has transformed from technology management to a strategic business driver. Focus on translating technical capabilities into measurable business value for your C-suite peers.



Watch out for

Don't get caught in the trap of implementing technology for technology's sake. Every initiative should demonstrate measurable value.

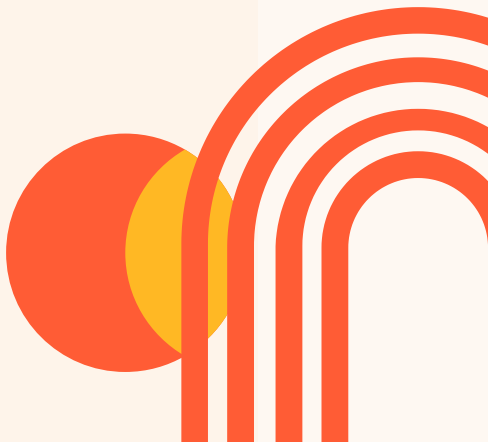


AI has refreshed every facet of software. What works today will be reimagined, what was impossible should be reconsidered, what failed should be retried. ”



DHARMESH SHAH
CTO, HUBSPOT
HubSpot

Step 1:
Building a Unified Data
Foundation



Step 1: Establishing a Robust Data Foundation

The Cornerstone of Modern Innovation

At its heart, a unified data foundation is about creating a single source of truth that enables your organization to make smarter decisions, drive efficiencies, and unlock new opportunities. It's like building the central nervous system of your organization – connecting disparate information sources into a cohesive whole that can power everything from operational dashboards to sophisticated AI applications.

This integrated data architecture becomes the springboard from which advanced technologies like artificial intelligence can truly deliver value.

AI, after all, is only as good as the data it can access.

When your AI systems can draw from clean, comprehensive, and properly governed data sources, they can spot patterns, make decisions, understand language, and solve complex problems in ways that create genuine business value.

But unified data isn't the only player in the game. The Internet of Things (IoT) is creating a world where everything from factory machines to office coffee makers can talk to each other and share data. Blockchain is revolutionizing how we keep records and verify transactions – imagine a digital ledger that's virtually impossible to tamper with. And while quantum computing might sound like science fiction, it's slowly becoming reality, promising to solve problems that would take traditional computers centuries to crack.

76%

of CIOs report that enabling data-driven decisions is their primarily goal

Evanto, 2024

78%

of users say HubSpot improved their ability to make data-driven decisions

Source: Survey of 1,474 CRM users across the globe in August 2024.

Step 2:

Strategic Technology Alignment for Business Transformation



Step 2: Strategic Technology Alignment for Business Transformation

The real magic happens when you can connect these powerful technologies with your organization's strategic goals. But here's the truth: it's not about implementing technology for technology's sake. It's about finding those sweet spots where innovation can solve real business problems and create tangible value.

Building Your Strategic Technology Roadmap

Effective technology integration begins by engaging with the real challenges within your organization. By closely collaborating with business unit leaders, you can uncover hidden opportunities, such as a sales team's lead prioritization issues or a customer service department's repetitive queries. These challenges present ideal chances for technological solutions. After gathering these insights, the next step is to align business needs with technological capabilities.

This isn't about forcing AI or other technologies where they don't belong – it's about finding those sweet spots where technology can create genuine value.

Example: A healthcare provider discovered their medical billing team spent 70% of time manually reviewing insurance claims. AI-powered document processing reduced this to 20%, freeing staff for complex cases and improving patient communication.

Look for areas where you can move the needle significantly: processes that are manually intensive, decisions that could benefit from better data analysis, or customer touch points that could be enhanced through automation.

78% of users say HubSpot improved their ability to make data-driven decisions

Source: Survey of 1,474 CRM users across the globe in August 2024

Step 2: Strategic Technology Alignment for Business Transformation

The real art comes in prioritizing these opportunities. You'll likely uncover more potential projects than you can reasonably tackle at once. This is where you need to think like both a business strategist and a technology leader. Consider not just the potential impact of each initiative, but also its feasibility, resource requirements, and alignment with broader organizational goals. Sometimes the most impactful project isn't the most technically impressive one – it might be the simple automation that saves hundreds of hours of manual work.



Key takeaway:

Build your technology roadmap by identifying business pain points first. Be a business enabler first, technologist second.



Watch out for:

Developing technology strategies in isolation. Engage regularly with business leaders to ensure adoption and real value delivery.



A successful CIO needs to be more business-oriented, think of IT as a strategic enabler, and communicate effectively with business peers.”

Atish Banerjea

Chief of Information, Meta

Step 3:

Building an Agile Tech Ecosystem



Building an Agile Tech Ecosystem

In today's fast-moving technology landscape, flexibility is your best friend. Think of your technology ecosystem as a living, breathing entity that needs to be able to adapt and evolve as your business needs change and new opportunities arise.

This requires:

- Smart partnerships: Balance internal capabilities with external expertise
- Modular architecture: Create systems that can be reconfigured and expanded as needed
- Integration capabilities: Ensure seamless data flow between systems



Cloud technologies, component-based architectures, and standardized connection points (APIs) give you the flexibility to add new capabilities or scale existing ones without major disruption.

For effective architecture, prioritize modularity and scalability. Use cloud technologies, microservices, and API-first approaches to allow flexibility for adding capabilities or scaling as needed. The focus should be on creating an adaptable system that evolves with business requirements, rather than achieving perfection.



Key takeaway:

Build modular, adaptable systems that evolve with your business needs in today's fast-moving technology landscape.



Watch out for:

Don't try to build everything in-house. Focus on core competencies and leverage partnerships for specialized capabilities.

How HubSpot Enables Agility with a Unified Platform and AI for Future Proof Growth

Flexibility and Integration

At HubSpot, we know that agility is key to digital transformation. That's why we've built a flexible platform that grows with you. Our API-first approach makes it easy to integrate with existing tools and add new features, so you can adapt to changing needs without disruption.

Smarter Decisions with AI

What sets HubSpot apart is how we use AI to power smarter decisions. From automating lead qualification to personalizing content, our AI tools help you act fast and stay ahead of the curve, all while saving time. With our unified platform, your CRM, marketing, sales, and service tools are seamlessly integrated, helping your teams collaborate around a single source of truth.

“ HubSpot's AI-powered tools and unified data have been crucial for our CX teams. We've automated over 1/3 of our tickets, and reduced resolution times by over 60%.

Jennifer Cummings
Sr. Director, Customer Engagement



Step 4:

Fostering a Culture of Innovation



Step 4: Fostering a Culture of Innovation

Here's a truth that often gets overlooked: the success of your technology initiatives depends as much on your people as it does on the technology itself. Creating a culture that embraces innovation isn't just about sending out memos or hosting training sessions – it's about fundamentally changing how your organization thinks about and approaches change.

The right conditions need to be in place for innovation to flourish. This means fostering an environment where people feel safe trying new things and where failure is seen as a stepping stone to success, not a career-ending mistake. It means celebrating the small wins and learning from the setbacks. Most importantly, it means leading by example – showing your team that you're willing to embrace new ways of thinking and working.

When it comes to skills development, think beyond just technical training. Yes, your teams need to understand the nuts and bolts of new technologies, but they also need the soft skills to work effectively in this new environment. This means developing critical thinking abilities, improving problem-solving skills, and learning how to collaborate across traditional departmental boundaries. The goal isn't to turn everyone into a data scientist or AI expert – it's to create a workforce that's comfortable working alongside these technologies and can spot opportunities to use them effectively.



Key takeaway:

Create an environment that encourages experimentation and values learning from failures over perfect execution.



Watch out for:

“Innovation theater” – hosting hackathons without changing underlying processes and incentives leads to unsustainable innovation.

How HubSpot Facilitates Technical Excellence and Fosters Innovation

Research shows that **84%** of executives believe innovation is critical for growth, yet only 6% are satisfied with their innovation performance. The gap isn't in technology – it's in culture.

This is where HubSpot becomes your strategic advantage. We've built an extensible platform that puts innovation into your developers' hands:

For your technical teams:

- A developer-first platform with comprehensive APIs and deep UI customization capabilities
- Access to 1,700+ pre-built integrations through our App Marketplace, dramatically reducing development overhead
- Direct collaboration with certified solution partners who understand enterprise-grade implementations

For your innovation pipeline:

- A robust developer ecosystem with dedicated resources, mentorship programs, and innovation accelerators
- Strategic focus – your IT teams can prioritize building what matters instead of maintaining systems
- Comprehensive technical documentation and developer tooling that speeds up deployment.

The result? Your teams don't just get tools – they get a complete innovation infrastructure. Whether it's customizing workflows, building new integrations, or scaling solutions across your enterprise, HubSpot provides the technical foundation and support to make it happen. And as your business evolves, our HubSpot Academy and extensive knowledge base ensure your teams stay ahead of the curve, mastering new capabilities as they emerge.

Step 5:
**Harnessing AI and Emerging
Technologies**



Building on Your Data Foundation

With a solid data foundation in place, AI becomes dramatically more effective. AI systems can think and learn in ways that previously only humans could—spotting patterns, making decisions, and solving complex problems by leveraging your organization's data assets.

Machine learning allows these systems to improve over time as they process more data, while deep learning uses neural networks to tackle extremely complex challenges. But AI isn't the only player—IoT creates data-rich environments where connected devices share information, blockchain provides immutable record-keeping, and quantum computing promises to solve previously intractable problems.

84% of CIOs believe AI will be as significant to their businesses as the Internet, yet implementing proper security measures and data quality are cited often as hurdles slowing adoption.

(CIO, 2024)



Practical Applications Across Industries

Let's look at how these technologies are transforming different sectors in real, tangible ways:

- **Financial Services:** AI detects fraudulent transactions in real-time and personalizes banking experiences, streamlining risk assessment and speeding up loan decisions from weeks to minutes.
- **Healthcare:** AI assists doctors by identifying patterns in medical images and predicting health issues, enhancing patient care without replacing healthcare providers.
- **Manufacturing:** Predictive maintenance prevents machine breakdowns, while advanced quality control systems detect defects that are not visible to the human eye.

That's the reality in modern smart factories, where AI and IoT sensors work together to keep production lines running smoothly and efficiently.

In retail, the transformation is perhaps most visible to everyday consumers. Behind those perfectly timed product recommendations and seamlessly stocked shelves is a complex web of AI systems. These technologies are helping retailers predict what customers want before they even know they want it, while ensuring stores have just the right amount of inventory at just the right time.



Key takeaway:

Success comes from understanding how different technologies (AI, IoT, blockchain) can work together to solve specific business problems.



Watch out for:

Avoid getting distracted by buzzwords or chasing every new technology. Focus on technologies that directly address your organization's specific challenges and opportunities.



Agicap saves 750 hours weekly and boosts deal velocity by 20% using HubSpot's AI tool, Breeze.

Breeze is HubSpot's AI engine that enhances its Smart CRM and engagement hubs. It unifies data, automates workflows, and facilitates intelligent customer interactions, making it easier to personalize outreach, analyze data, and improve results in marketing, sales, and service functions.

AI-Powered Sales Transformation

Agicap has utilized AI-driven automation to enhance sales and marketing in six countries by integrating Breeze's AI with their HubSpot CRM. This has automated tasks such as call summarization and content generation, resulting in a 20% increase in deal velocity and saving 750 hours weekly for their 150-person sales team.

Measurable Impact and Team Adoption

The solution achieved 100% CRM adoption across all markets, highlighting the scalability of its AI implementation. It transforms lengthy call transcripts into actionable follow-ups using under 10% of the original content, enhancing operational efficiency and customer engagement. This allows sales teams to focus on building stronger customer relationships, resulting in more meaningful interactions and accelerated business growth.



- “ HubSpot's AI, Breeze, takes away a lot of the mundane, standard tasks that previously used up a lot of our time. With HubSpot, everything works together in harmony, and it has helped us successfully scale into six markets. ”

Pierrick Vignon
Head of CRM
Agicap



Step 6:

Implementing AI: From Strategy to Execution

Implementing AI: From Strategy to Execution

Let's get down to the nitty-gritty of actually putting AI to work in your organization. The key to success here isn't trying to boil the ocean – it's about starting smart and scaling intelligently.

To effectively implement AI in your organization, focus on starting smart and scaling intelligently. Identify clear business problems to solve, such as inefficient customer service ticket routing or time-consuming data reconciliation. Define success with specific goals, like reducing customer service response times by 50%, instead of vague objectives like "implementing AI."

9 out of 10

Senior decision-makers are fatigued by generative AI pilots and are redirecting investments to enhance business performance.

(NTT DATA, 2024)

72%

of organizations have adopted AI in at least one business function, with 50% implementing it in two or more functions

(McKinsey, 2024)

To implement solutions effectively, begin with manageable pilot projects that are meaningful, such as automating appointment scheduling in a high-demand area. This approach minimizes risk and allows for adjustments. Start with a narrow focus, expanding once validated. Successful scaling relies on learning from experiences—document successes, setbacks, and unexpected challenges for future reference.



Key takeaway:

Start your AI implementation with small, targeted projects that demonstrate value in 3 to 6 months. Use these successes to build momentum for larger initiatives.



Watch out for:

"Big bang" implementations. Attempting to transform everything simultaneously often leads to project failure and resistance.

Unified AI Architecture: How Sandler Integrated Marketing and Sales Technology for 50% Faster Cycles

Marketing Infrastructure Integration & AI Powered Content Strategy

Sandler, a global sales training organization, adopted AI strategically in high-impact areas. They integrated HubSpot's AI assistant, Breeze, into their marketing and sales processes, focusing on enhancing human capabilities rather than replacing them. The initial phase involved content generation and campaign optimization, ensuring cohesive messaging while maintaining brand consistency. The integration expanded to sales operations with AI-driven lead qualification and personalization, connecting their customer data platform to create automated workflows that target customers based on industry and characteristics.

Sales Tech Stack Enhancement & Performance Optimization

The technical integration enhanced sales operations via Sales Hub, utilizing AI for lead qualification and personalized marketing. By linking their customer data platform with AI, they created automated workflows to segment and target customers based on industry, pain points, and persona traits.

The systematic AI implementation yielded measurable outcomes:

- 25% increase in marketing engagement with higher click-through rates and longer page sessions
- 50% reduction in sales cycle duration (from 90 to 45 days) through better lead qualification and personalized customer journeys.

The integration of AI across both marketing and sales tech stacks created a unified data feedback loop, continuously improving personalization accuracy and operational efficiency.

“Breeze creates this universal experience for everybody. We're all speaking the same language and using this one tool that's helping us tell the same story.

Emily Davidson
Director of Enterprise
Marketing

SANDLER®

Step 7:

Governance, Ethics, and Compliance in the Digital Age



Governance, Ethics, and Compliance in the Digital Age

As AI becomes integral to operations, thoughtful governance becomes essential. Develop clear principles and review processes:

- **Technical Review:** Validate model accuracy and test for potential biases in your training data and outputs
- **Privacy Review:** Ensure compliance with GDPR, CCPA, HIPAA, and other relevant data protection regulations
- **Ethics Review:** Evaluate potential impacts on customers, employees, and business operations

When navigating regulatory requirements, 78% of CIOs/CTOs rely on formal security certifications

71% conduct in-depth vendor security assessments rather than relying on informal recommendations.

Source: HubSpot, 2025, CIO/CTO & CRM Admin Survey



73% believe a cybersecurity incident will disrupt their business in the next 12-24 months.

(Cisco report, 2024)



87% of CIO and IT leaders plan to increase cybersecurity budget in 2025, making it a leading areas of investment

Gartner, 2025



Key takeaway:

Develop clear principles for AI use, including appropriate human oversight and bias prevention measures.



Watch out for:

Treating privacy and security as afterthoughts. These must be foundational considerations in all technology initiatives.

Step 7: Governance, Ethics, and Compliance in the Digital Age

Data privacy and security need to be baked into everything you do, not bolted on as an afterthought. This means thinking carefully about what data you collect, how you use it, and how you protect it. It means being transparent with users about how their data is being used and giving them meaningful control over it.

A few data security safeguards might include:



Configuring your data classification system to automatically tag and track PII, financial data, and other sensitive information.



Enforcing data minimization by regularly auditing data collection points and removing unnecessary fields.



Building clear consent management and opt-out mechanisms into all customer-facing AI systems.



Monitoring how AI systems access and use sensitive data.



Step 8:

Measuring ROI and Continuous Optimization



Measuring ROI and Continuous Optimization

Let's dive into a topic that's on everyone's mind: demonstrating the value of our investments. Evaluating the return on AI and innovation projects can be complex, yet it's essential for sustaining momentum and securing support for your transformation initiatives.

It's important to look beyond conventional financial metrics. While cost savings and revenue increases are significant, other types of value should not be overlooked, such as enhanced customer satisfaction, quicker decision-making, lowered risk, and improved employee productivity. The most effective measurement frameworks create clear links across three levels of impact:



Technology Outcomes:

These are the tangible outcomes of your technology investments that you can influence, such as system adoption rates, response times, and enhancements in workflow efficiency.



Intermediate Outcomes:

These indicate how your technology impacts behavior and performance, such as customer satisfaction scores, employee productivity metrics, and process acceleration rates.



Business Outcomes:

These are the key business outcomes your technology drives, including revenue growth, market share, and operational costs.

Step 8: Measuring ROI and Continuous Optimization

While measuring ROI provides a glimpse into the success of technology investments, the real value emerges from leveraging these insights for continuous optimization. This ongoing process involves measuring, learning, and refining technology strategies. Initial solutions may have limitations, but an agile technology ecosystem—characterized by modular architectures and cloud systems—offers the flexibility needed for improvement based on data analysis. By utilizing data effectively, organizations can pinpoint both successes and areas for enhancement, actively listen to users and stakeholders, and remain open to making necessary adjustments to foster growth and innovation.

HubSpot users are 54% more likely to rate their CRM as high ROI than users of competing CRMs - HS(43%) vs. competitors (28%)

Source: Survey of 1,474 CRM users across the globe in August 2024.



Key takeaway:

Consider factors beyond financial metrics when measuring technology ROI, including customer satisfaction, employee productivity, and operational efficiency.



Watch out for:

Hidden costs of technology initiatives, including training, change management, and ongoing maintenance.



Step 9:

Future-Proofing: Preparing for the Next Wave of Disruption



Future Trends and Preparing for Disruption

In the technology world, the only constant is change. As a CIO, part of your job is to keep one eye on the horizon, watching for the next wave of innovations that could impact your business.

Stay ahead of emerging trends with potential to impact your business:

- Generative AI is revolutionizing content creation and problem-solving
- Edge computing and 5G enable real-time processing at the point of action
- Advanced automation is transforming workflows across industries

Position your organization to leverage these trends by:

- Building flexibility into your technology infrastructure
- Investing in continuous learning for your team
- Maintaining strong technology partnerships



Key takeaway:

Building adaptability into your organization's DNA is more important than predicting specific trends. Focus on creating flexible systems and processes that can evolve with changing technology.



Watch out for:

Following every trend. Focus on emerging technologies with potential to disrupt your industry or create new business opportunities.

Step 10:

Next Steps: Power Growth Through Technology



Next Steps: Power Growth Through Technology

Ready to turn your CIO vision into reality?

You've seen how modern technology leaders are driving business transformation - now it's your turn.

HubSpot's customer platform brings these strategies to life, unifying your marketing, sales, service, and operations teams in one powerful platform. Deliver AI-powered features with confidence using Breeze, HubSpot's AI that powers the entire platform. Automate tasks and unlock predictive insights that give you a competitive edge. As you innovate, HubSpot's enterprise-grade platform evolves with you, delivering the security, APIs, and integration capabilities today's CIOs demand.

Transform your customer experience technology today at [Hubspot.com](https://www.hubspot.com)



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