



Breeze | Product Overview Deck

Purpose of this deck:

- For training purposes: this deck is more about how the features work, use cases, and technical details.
- For marketing messaging, you'll find product positioning also included.

Growth oriented leaders see the value of AI.



95%

95% of professionals using AI say it helps them **spend less time on manual tasks.**



72%

72% of business leaders say it makes their workers **more productive.**



68%

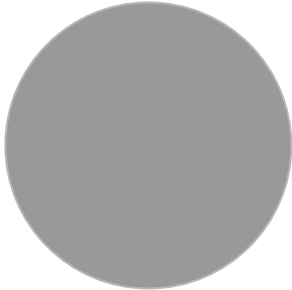
68% of business leaders say it can **help their company scale** in a way that would be impossible without it.

But many customer-facing teams find AI challenging to implement.



70%

70% of business leaders **feel overwhelmed** by the prospect of implementing AI tools.



Managers **don't have time** to learn new AI tools.

(And we've found that many managers need to vet AI tools before letting their teams use them.)

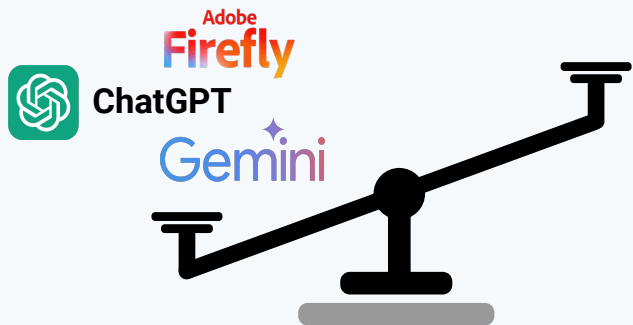


Nah, I don't trust it.

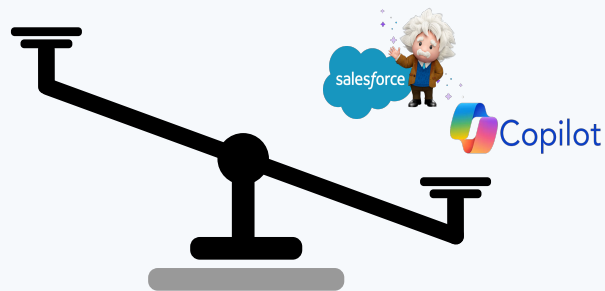
Maybe later.

Not everyone understands AI's full value, and question its risk and accuracy.

Existing AI solutions **fail** to deliver the full value of AI.



Consumer AI solutions are **disconnected** from your business and your data.



Enterprise AI solutions are **complicated** and **take time** to adopt.



Meet ✨ Breeze.

Breeze is HubSpot's AI that powers the entire customer platform.



Easy to use.



Fast time to value.



Powered by your unified data.

HubSpot's AI is rooted in trust, transparency, & accountability.

Your data is always safe.

Your data is not shared with OpenAI to train its models or improve its services.

Seamless updates and continuity

We use the best model for the job across all of our AI products, so you don't need to worry about continuity or keeping up with the latest updates.

You're always in control.

Customers have options to control their use of certain AI products, including the ability to opt in and opt out of specific functionalities.



Generative AI

Give all users in your account access to AI-powered features that use Generative AI models to generate text and media content.

Turning on this toggle alone would only use data you input for prompts. Enabling additional data access is highly recommended to keep AI output relevant to your organization.



Model training opt out

Your data plays a crucial role in training our global AI models, which enables us to continuously enhance them and provide you with an optimal experience. However, if you prefer that your data not be used for training these models, you can opt out.

[Learn more about how to opt out](#) 

✦ Breeze Copilot **works with you.**

A virtual assistant that **works with you** everywhere you go in HubSpot.

✦ Breeze Agents **work for you.**

Designed to automate manual tasks and **work for you**, so you can focus on more strategic work.

✦ AI across Hubs & Smart CRM that **improve your work.**

Improves your work by making it more productive and helping to streamline processes



Four Breeze Categories



Breeze Copilot works with you.

A virtual assistant that **works with you** everywhere you go in HubSpot.



Breeze Agents work for you.

Designed to automate manual tasks and **work for you**, so you can focus on more strategic work.



AI across Hubs & Smart CRM that improve your work.



Expand your data with **Breeze Intelligence**

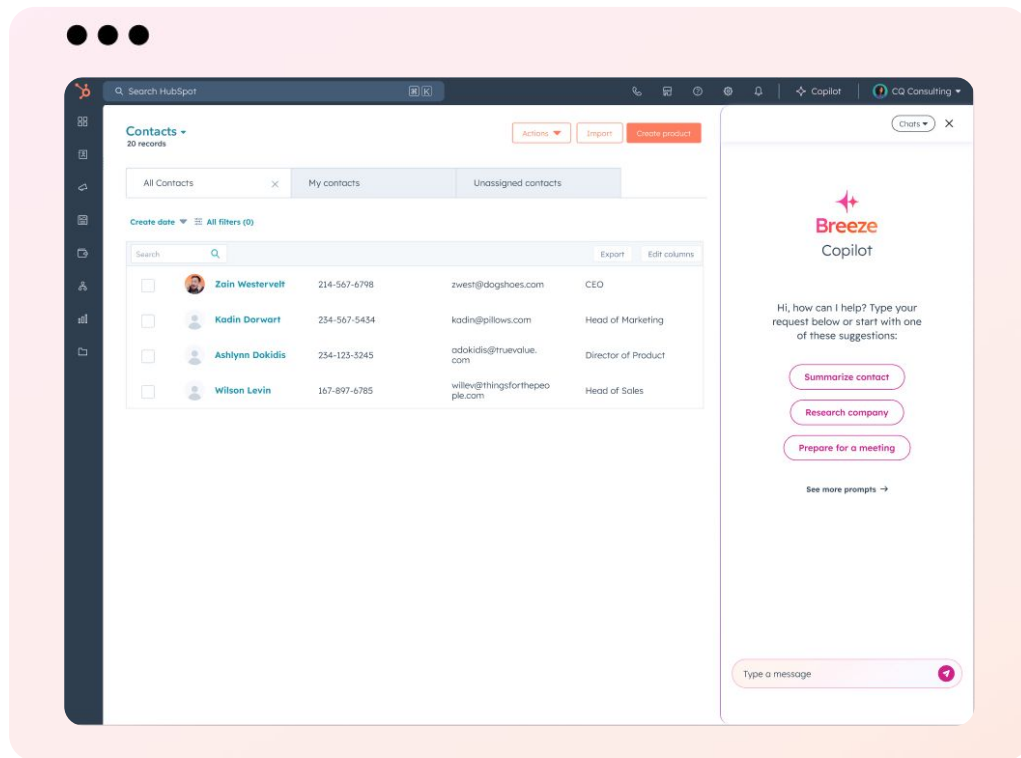
Enriches customer data and **understand** buyer intent





Breeze Copilot

Breeze Copilot is a virtual assistant that *works **with** you* everywhere you go in HubSpot.



Customer Pain

- Consumer AI solutions are disconnected from business operations and data.
- Enterprise solutions are complicated and difficult to adopt.

Solution

- Designed for ease of use.
- Accessible everywhere you work in HubSpot.
- Seamlessly connected to your CRM data.
- Designed with security as the highest priority.

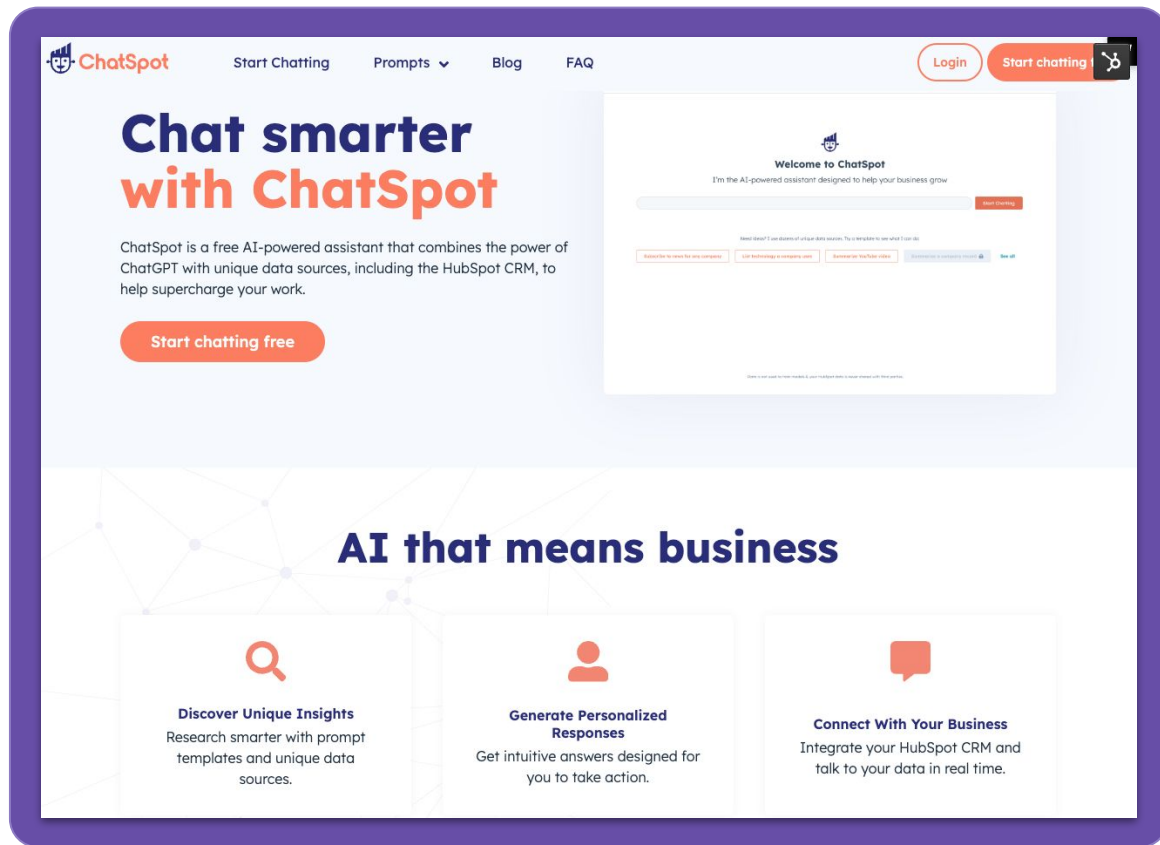
What about ChatSpot?

Recap

- It solves for various personas, use cases, and acts like an assistant
- ChatSpot connects with your HubSpot CRM, but was a standalone app outside of the HubSpot platform
- It can generate copy, research competitors, generate images, create CRM records and notes, generate reports, etc.

ChatSpot is moving *into* HubSpot as Breeze Copilot

...but that's not all



Breeze Copilot | New & Improved

Even easier to use

In-app, built into HubSpot.

Context aware

Provides insights and assistance specific to the HubSpot page you're on.

More accessible

Copilot is available everywhere—on the web, in the mobile app, and through HubSpot Sales extension.

Prompt-driven enhancements

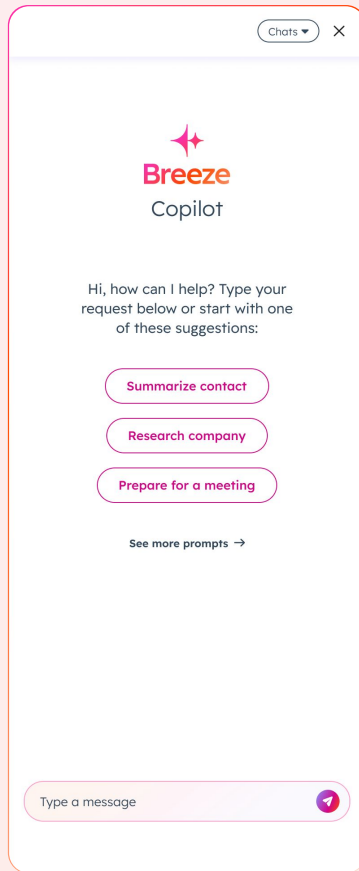
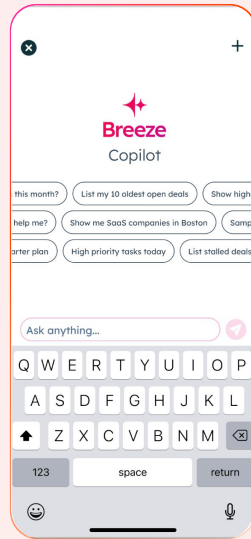
New and improved prompts, that will better summarize, relay data, generate content, make recommendations, and more.



✦ AI made easy



A virtual assistant that works with you everywhere you go in HubSpot.



Breeze Copilot | Details

Packaging: Avail to all

Languages: HubSpot AI tools may respond to customer prompts in other languages, though we recommend English for the best results.

Why it matters

Copilot helps all users work more efficiently by giving them a smart assistant that knows about everything in their portal and can quickly accomplish basic tasks across HubSpot.

Target Persona

All front office GTM personas in marketing, sales, and service.

Clarification

- **Clarification:** It's not 'proactive,' that level of automation is not yet supported
- **Clarification:** Brand voice works in Copilot, but it's a Content Hub Pro+ feature, so it can only be applied in Copilot for those with the subscription.



Your Pain

Managing tasks and workflows can be complex.

Manual processes slow productivity

Working (or using AI) across various, disconnected systems is inefficient and challenging.

Solution

Treat Copilot like your CRM command line to easily complete basic CRM tasks, get insights, and more.

Copilot is built right into your workflow, you don't even have to click and open the sidebar.

Speeds up routine tasks by generating content, summarizing emails, and researching prospects.

Connected to your Smart CRM so you can work with Copilot to complete tasks.

+ your data is always safe

EASY

FAST

UNIFIED

Breeze Copilot | Embedded in your everyday workflow

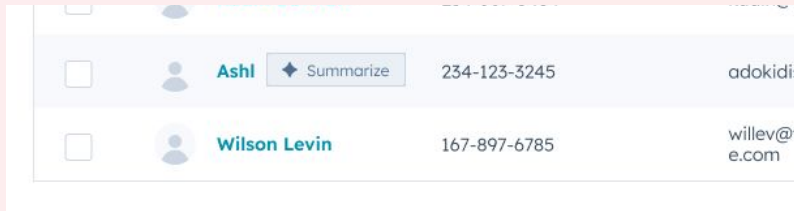
There are 3 ways to access and work with Copilot.
Embedded in your everyday workflow.

1. Global nav
2. Templates

You don't have to click and open the sidebar, make it as easy as possible to use it, by embedding it right in their journey using normal button just like they would interact with/use any other feature

In-app hooks:

3. Collaborate mode
4. Copilot previews
5. Launch buttons



Breeze Copilot | Use Case Examples

✦ Company research

Research unique company insights, like funding, competitors, technology stack, and company news.

✦ Prepare

Prepare for meetings with a company or contact.

✦ HubSpot how-to

Ask about using HubSpot and even learn with HubSpot Academy.

✦ Generate content

Write, optimize, and revise content across emails, landing pages, blogs, and images.

✦ Insights

Pull simple stats about your performance, including web traffic, deal pipelines, tickets closed, lead source, and more.

✦ Apply brand voice

Apply a consistent brand voice to all the content you create with Copilot (Content Hub Pro+ only)

✦ Summarize

Summarize deals, tickets, calls, engagements, and more.

✦ CRM command line

Quickly add companies, contacts, deals, tickets, notes and more without ever leaving Copilot.

✦ Ticket management

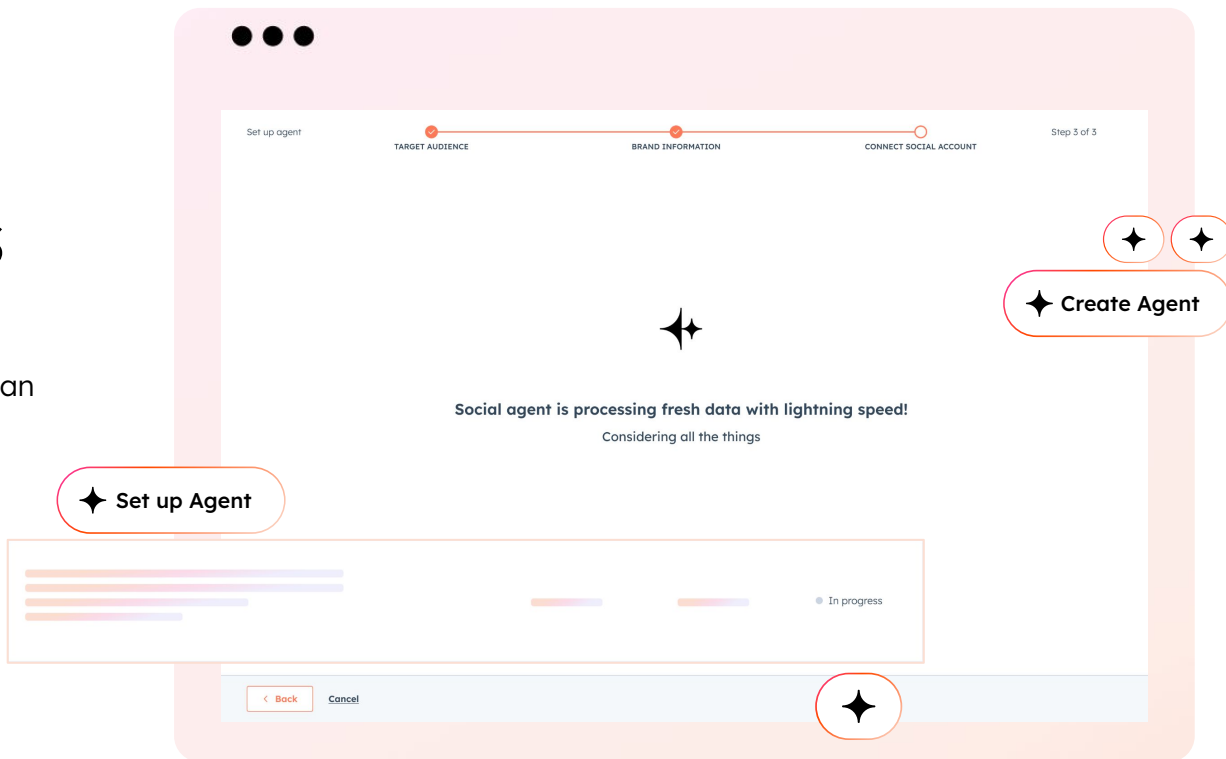
Get suggested replies and recommendations for tickets.



Breeze Agents

Breeze Agents are designed to automate manual tasks and *work for you*, so you can focus on more strategic work.

- Social Media Agent
- Content Agent
- Prospecting Agent
- Customer Agent



Social Agent | Value Props

Demo

Generates quality social posts

Generates posts tailored to your business, audience, and brand, speeding up your content process.

Drive engagement, consistently

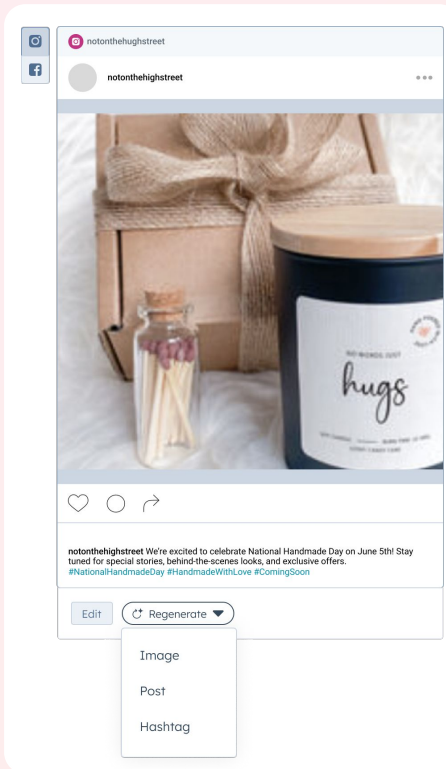
Creates regular social media posts that engage your audience and keep your brand message strong. It'll even determine the best time to post.

Leverages data-driven insights

Uses past performance, business details, and industry best practices to make your social media content more effective.



Generate social



Why this was suggested

Marketing best practices

Generate Buzz and Anticipation
Teaser posts are designed to create excitement and curiosity among your audience. By hinting at something special for National Handmade Day, you can build anticipation and engage your followers, making them more likely to pay attention to your subsequent posts and promotions.

Instagram best practices

High quality Image:
Using high-resolution images makes the post visually appealing. We're using a 1080px x 1080px image advised by Instagram best practices. The image is consistent to your brand and Instagram profile.

Length and Structure:
Captions should be concise but informative. Instagram truncates longer captions in the feed, so make sure the most important information is at the beginning.

When to publish

Publish on Wednesday June 4, 2024 to give your audience time to prepare for the event.

Publish at: 6:48PM when your audience is most active on Instagram.



Generates engaging social posts for you - all you have to do is review and approve.

Social Agent | Details

Packaging: Marketing Hub Pro+

Languages: HubSpot AI tools may respond to customer prompts in other languages, though we recommend English for the best results.

Why it matters

It saves time and resources by producing consistent, quality social content that engages the audience.

Target Persona

Social media marketers, marketing managers, content writers

How it works

- **Semi-autonomous:** This agent will generate content and the user will approve before it gets published.
- **Supports:** Facebook, LinkedIn, X, and Instagram.
- **Clarification:** It won't build a social strategy for you, but it will generate social posts that improve your strategy.

Your Pain

Making new and interesting social posts that catch people's attention is tough.

No time for creative blocks.

Posting across all social channels takes too long.

It's pulling time away from engaging with your audience.

It's hard to analyze performance and action on it.

Your last post performed so well - how do you do it again?

Solution

Generates engaging social posts that keep your brand message strong - consistently.

& recommends best times to post!

Prepares multi-channel social posts, *fast*.

Spend your time making connections instead.

Reviews your past performance, business details, & best practices to make your posts more effective.

That's how you do it again.

EASY

FAST

UNIFIED

Content Agent | Value Props

Demo

Generate high-quality content, fast

- Generate **landing pages** that drive conversions
- Diversify your content with **podcasts**
- Showcase customer success with **case studies**
- Produce SEO-optimized **blog posts**

Attracts & converts leads

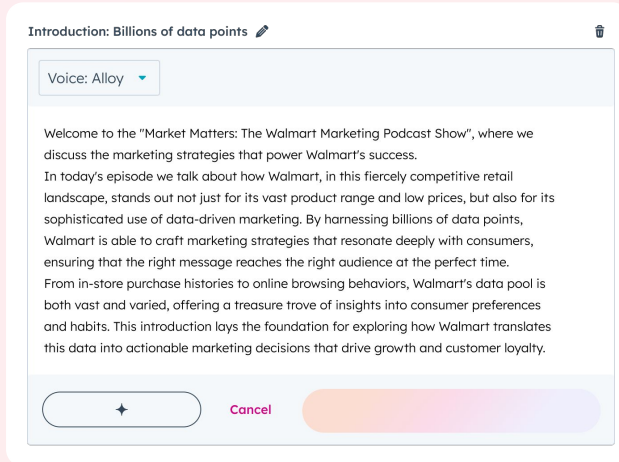
- Quickly produce different types of content that attract visitors and generate leads, including high-quality:
 - Landing pages
 - Podcasts
 - Case studies
 - Blogs

Data-driven insights

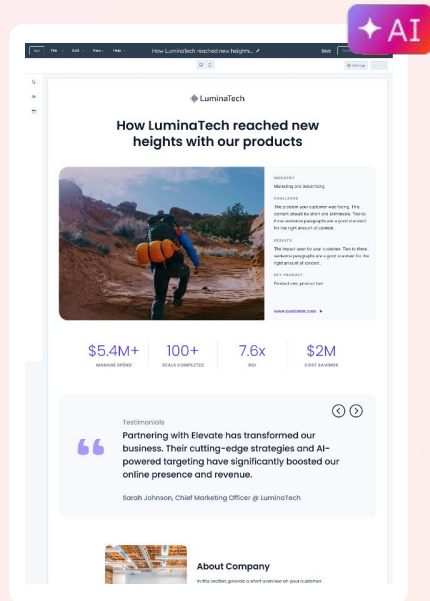
Use internal and external data to ensure content meets goals, attracts visitors, and drives leads.



✦ Generate content



Generates high-quality content **for you** using your existing content, brand voice, and CRM - taking you through a guided flow.



Content Agent | Details

Packaging: Content Hub Pro+

Languages: HubSpot AI tools may respond to customer prompts in other languages, though we recommend English for the best results.

Why it matters

It streamlines the creation of high-quality content, saving time and effort.

Target Persona

Marketing managers, content writers

How it works

- **Semi-autonomous:** This agent doesn't automatically create content. It creates content one at a time, user input is required, and is a guided flow.
- **Clarification:** It doesn't generate HubSpot CTAs.

Your Pain

Making new and interesting content that resonates is tough.

No time for creative blocks.

Creating content takes a long time to gather resources, draft, and publish.

We're talking hours, days, weeks one one piece of content.

It's hard to analyze content performance and action on it.

Dreading content creation that might not generate leads?

Solution

Generates engaging landing pages, blogs, case studies, and podcasts.

Ideation & creation made easy.

Quickly produces content that attracts visitors and generates leads.

Review, tweak, and publish - in no time.

Reviews your existing content to optimize and improve final outputs.

Create content that turns into demand.

EASY

FAST

UNIFIED

Prospecting Agent | Value Props

Focus on your ideal prospects

Assign companies and contacts in your CRM that match your ideal customer profile and target persona.

Develop personalized outreach strategies

Researches each target company and contact to develop a deep understanding of their business and needs.

Fully automate outreach

Looks for signals of intent and activity, crafts personalized emails using its research and context from your CRM, and reaches out at the right time.

✦ Engage leads



Re-engage previous leads

The agent will find leads who stopped engaging, then compose and send personalized outreach.

Re-engage previous leads

✦ AI

Initial email

[Placeholder for email content]

Edit email Change tone Regenerate



Engages your leads **for you** by researching and personalizing comms, and automating the outreach process - either review and approve before it begins, or let it run on its own.

Prospecting Agent | Details

Packaging: Sales Hub Pro+

Languages: Globally avail, but supports English only with plans to add HubSpot supported languages in the future.

Why it matters

It saves time and works 24/7 to drive pipeline with engaged leads for sales.

Target Persona

Sales Ops & Admins

How it works

- **Includes semi-autonomous & autonomous:**
 - Prepares outreach for the user to review and approve before it begins.
 - Prepares and executes outreach without review and approval needed.
- **Clarification:** It does not source new companies or contacts; they must already be in CRM.
- **Clarification:** It's not a 'sourcing agent', rather an 'engagement' agent.

Your Pain

Developing tailored and relevant outreach is hard.

Especially when you don't fully understand their needs.

Setting up outreach, timing, and relevancy takes time.

It's complex.

Solution

Generate personalized emails

Researches each company and contact, and writes personalized emails based on your data.

Fully automate outreach

Chooses the best outreach strategy and auto-sends emails, with options for manual assignment or auto-enrollment of prospects.

EASY, UNIFIED

FAST

Customer Agent | Value Props

Instant Setup

Train in minutes using your knowledge base, website, and blog content.

Natural, trustworthy customer service

- Experience conversations that feel natural and personal.
- Customize to match your brand.
- Only uses your approved content, eliminating made-up information.
- Cites sources, boosting customer confidence.

Seamless handoffs

- Handles routine queries, routing complex issues to your team.
- Stay in control while maximizing efficiency.

Data-driven insights

Track resolution rates, human handoffs, and customer sentiment.



Train your agent using your approved content to then instantly resolve customer questions for you.



Scale support

Conversations Deflected

Number of conversations deflected by the agent over time, showing how effectively it reduces the workload on human agents.



Provide the content Luma needs to be successful

To provide accurate and relevant information, your agent needs access to data sources. **You need at least one source, you can add more later.**

Add existing HubSpot content

Knowledge base x

Website x

Public URL

<https://website.com/support>



Customer Agent | Details

Packaging: Service Hub Pro+

Languages: HubSpot AI tools may respond to customer prompts in other languages, though we recommend English for the best results.

Why it matters

It helps resolve issues quickly, scale support, and increase customer satisfaction.

Target Persona

Service Reps

How it works

- **Autonomous:** This agent uses your uploaded, approved content (knowledge base, website, and blog) to then instantly resolve customer issues for you.



Your Pain

Setting up support systems can be complex.

Not to mention, current bots sound robotic.

Customer expectations are only getting higher, and get frustrated when their issues aren't resolved immediately.

It's tough to improve customer satisfaction without actionable insights.

Solution

Easily set-up in minutes using your knowledge base, website, and blog content.

Have more natural conversations that represent your brand.

Train the agent using your approved content to then instantly resolve customer questions for you.

Handles routine queries 24/7, and routes complex issues to your team.

Improve customer satisfaction with actionable insights

Track resolution rates, human handoffs, and customer sentiment.

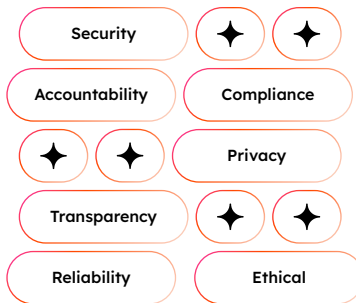
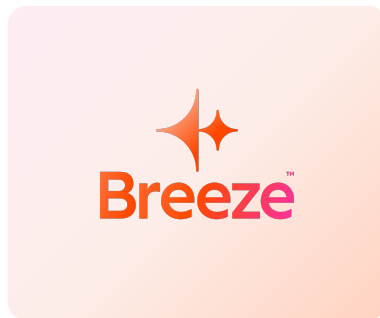
EASY

FAST

UNIFIED

Trust & Safety

AI that is rooted
in trust,
transparency, &
accountability.



HubSpot's Ethical Approach

We strive to be transparent with our customers and partners about how we develop and deploy AI across our organization. [Find out more.](#)

Behind HubSpot's AI

At HubSpot, it's important for us to be open about how our AI systems interact with your data. [Learn more](#) about how our AI-powered features work.

HubSpot's Trust Center

HubSpot is dedicated to the privacy, security, compliance, and reliability of our products, the systems they run on, and the environment that hosts those systems.

AI FAQs coming soon to [HubSpot's Trust Center.](#)