

A HubSpot AI whitepaper

The 22 HubSpot AI processes *every business should know about* — but most don't.

A plain-language guide to what HubSpot Breeze AI can do for marketing, sales and customer service teams, and what you need to have in place before each process will deliver. Includes current credit costs from the HubSpot Product & Services Catalog.

PUBLISHED BY

**Intergage
Marketing Engineers**

AUDIENCE

**B2B marketing, sales
& service leaders**

EDITION

**2026
Breeze AI release**

What's *inside*

An orientation to Breeze, how its credit system works, the sequencing principle that makes the difference between AI working and AI looking foolish — then 22 processes in plain language across marketing, sales and service.

FOUNDATIONS

—	Introduction	03
—	What is Breeze AI?	04
—	How the credit system works	05
—	The sequencing problem	07

PART ONE · MARKETING

01	Define target audience	09
02	Plan campaigns	10
03	Tailor content for channels	11
04	Optimise for AI search (AEO)	12
05	Report on campaigns	13

PART TWO · SALES

06	Capture & qualify leads	15
07	Enrich contact & company data	16
08	Identify buyer intent	17
09	Send personalised outreach	18
10	Prep & follow up on meetings	19

PART TWO · SALES (CONTINUED)

11	Identify at-risk deals	20
12	Analyse & forecast pipeline	21
13	Coach sales reps	22
14	Create quotes & close deals	23
15	Pass customers to service	24

PART THREE · SERVICE

16	Resolve support tickets	26
17	Review & route tickets	27
18	Personalised CS outreach	28
19	Identify at-risk customers	29
20	Analyse customer feedback	30
21	Drive renewals & upsells	31
22	Create & maintain knowledge base	32

CLOSING

—	Where to start	33
—	Get in touch	34

Introduction

The question we get asked, *over and over.*

"What does HubSpot AI actually do — and where should we start?"
There are 22 distinct AI-enabled processes in HubSpot today. Most teams know three or four. This guide is the rest.

It usually comes from a marketing director who has just seen a HubSpot demo, or a sales manager who has heard their CEO mention AI in a meeting, or a customer success lead who is drowning in tickets and wondering if there is a better way.

The honest answer is that it depends. It depends on what your team is struggling with. It depends on the state of your CRM data. It depends on whether you have the automation foundations in place for AI to build on. And it depends on what commercial outcome you are trying to drive in the next twelve months.

What we *can* tell you is this. There are twenty-two distinct AI-enabled processes available in HubSpot today, spanning marketing, sales and customer service. Most businesses are aware of maybe three or four of them. The rest are either misunderstood or completely off the radar.

We've worked with hundreds of B2B businesses on HubSpot. We're a Diamond Partner. We have seen what works and what doesn't — and we've watched too many businesses turn on AI features before they were ready for them, get underwhelming results, and conclude that the technology was overhyped.

The technology isn't overhyped. *But the readiness requirements are underappreciated.*

Read this with a coffee. Argue with the bits that don't apply. Dog-ear the ones that do.

What *Breeze AI* actually is.

Breeze is HubSpot's umbrella term for all of its AI capabilities. Because it sits inside HubSpot, it can use your actual CRM data — not a generic model trying to guess.

Generic AI tools like ChatGPT are powerful, but they don't know your business. Breeze does. It has access to your contacts, deals, tickets, emails, call recordings and content — which means its outputs are specific and useful rather than generic and approximate.

Breeze has *four components*.

Breeze *Copilot*

The conversational AI assistant built into HubSpot. You talk to it like a colleague — summarise a contact, draft a follow-up, update a deal stage or pull a quick report.

Breeze *Agents*

Autonomous AI workers you set up once. There are agents for prospecting, customer service, content creation and data enrichment that get on with the work without prompting.

Breeze *Intelligence*

The data layer. Enriches contact and company records with third-party data, tracks buyer intent signals across the web and keeps the CRM accurate without manual input.

Breeze *AI Tools*

Individual feature-level capabilities built into specific parts of HubSpot — email generation, campaign planning, ticket routing, content remix and many more.

How the *credit system* works.

Most Breeze AI features run on a unified credit pool. Rates below are from HubSpot's Product & Services Catalog at legal.hubspot.com, current as of May 2026.

The *basics*

Credits cost **\$0.010 each** — so 1,000 credits = \$10. Your monthly allocation depends on your plan tier.

Plan tier	What's included	Monthly credits
Starter	Entry-level Hub subscriptions across marketing, sales and service.	500
Professional	Standard professional subscriptions. Data Hub & Customer Platform bundles get 5,000.	3,000
Enterprise	Enterprise subscriptions. Data Hub & Customer Platform bundles get 10,000.	5,000

Additional credits can be purchased as a **Capacity Pack** at \$10 per 1,000 credits per month, or on a **Pay-as-You-Go** basis at \$0.010 per credit (billed in 10s). Credits reset monthly and unused credits do not roll over.

What's *free*

Not everything costs credits. HubSpot has made a meaningful set of capabilities free to drive adoption.

Breeze *Copilot*

Drafting emails, summarising records, answering CRM questions — included with all Core Seats at no extra credit cost.

Standard *enrichment*

Company revenue, industry, employee count and location — free with all Core Seats since INBOUND 2025.

What *consumes credits*

The rates below apply to the credit-consuming features covered in this whitepaper. They draw from a single shared pool — Customer Agent, Prospecting Agent, Data Agent and enrichment all compete for the same monthly allocation, so plan usage across functions before committing to a credit level.

Feature	Used for	Cost
Customer Agent	Resolved support & sales conversations. Outcome-based from April 2026: you pay only on full resolution.	50 credits (\$0.50) per resolution
Prospecting Agent	Per-contact monitoring of buying signals.	100 credits (\$1.00) per contact/month
Prospecting • research	Company deep research outputs.	10 credits (\$0.10) per company
Prospecting • lead recs	Lead recommendations for outreach (April 2026).	100 credits (\$1.00) per lead
Data Agent	Custom research questions against contacts & companies.	10 credits (\$0.10) per response
Smart Properties	AI-researched custom CRM fields.	10 credits (\$0.10) per record per field
Buyer Intent	Continuous intent monitoring on target accounts.	10 credits (\$0.10) per company/month
AI Workflow Actions	Breeze actions inside workflow steps.	10 credits (\$0.10) per action
Smart data capture	Custom properties extracted from call transcripts (April 2026).	10 credits (\$0.10) per property per transcript

Credit rates are set by HubSpot and may change. *Always check the current catalog at legal.hubspot.com before budgeting.*

AI does not fix *broken foundations*.

If your CRM data is patchy, AI produces patchy outputs. If your sales process isn't defined inside HubSpot, AI can't automate it. The teams that get the best results from Breeze are the ones that have already done the groundwork.

Think of it in three layers. The order matters. Skip a layer and the one above it will silently underperform.

01

Layer one • *Data*.

Your CRM records are complete and accurate. Contacts have job titles, company sizes, engagement history. Deals have stages, amounts and close dates. Standard enrichment is now free with Core Seats, so there's no excuse for leaving basic fields blank.

02

Layer two • *Process*.

Your sales, marketing and service processes are defined inside HubSpot. Lifecycle stages are clear. Handoffs are documented. Workflows exist for the key journeys.

03

Layer three • *AI*.

Breeze AI features are activated on top of clean data and defined processes. AI has something real to work with and amplifies what already works.

If you are at Layer 1, start with data enrichment. If you are at Layer 2, the AI features in this guide will work well. If you're not sure, the readiness questions at the end of each process page will help you figure it out.

Part one

Marketing.

Five AI processes for marketing teams. Most marketing teams are running on caffeine and spreadsheets — too much to produce, not enough people to produce it. AI doesn't shrink the brief. It makes the bandwidth problem manageable.

01 Define target audience

02 Plan campaigns

03 Tailor content for channels

04 Optimise for AI search (AEO)

05 Report on campaigns

Define *Target Audience*

Faster data-driven targeting with more robust, behaviour-based segments.

BEFORE AI

Marketers rely on basic demographics and manually segment lists. Nobody really owns the ICP definition. It lives in people's heads and varies between whoever you ask. Segments are built once and never revisited.

WITH BREEZE AI

AI reads your CRM data and identifies the patterns in your best customers: job titles, company sizes, industries, engagement behaviour and deal outcomes. It builds segments based on how closely a contact matches that pattern.

BREEZE TOOLS INVOLVED

Breeze Assistant	Summarises your highest-value customers from CRM data based on deal notes and engagement history.
Audience Segments	Builds audiences based on ICP match score and contact interest signals.
Lookalike Lists	Identifies high-potential contacts already in your database who match your best customers.
Brand Identity	Ensures every piece of AI-generated content expresses your specific voice and style.

METRICS TO WATCH

Time to define ICP

Number of segments created

% of contacts matched to ICP

CREDIT COST & EXAMPLE

Cost. Included at no extra credit cost on Professional and Enterprise plans. Standard enrichment used to fill ICP-relevant fields is free with Core Seats.

Example. A Professional plan customer analyses 3,000 closed-won deals using Breeze Assistant to identify ICP patterns. Three audience segments and a 200-contact lookalike list are built in an afternoon rather than two weeks. Monthly credit cost: zero.

ARE YOU READY?

- ✓ Is your HubSpot CRM populated with meaningful contact and deal data — job titles, industries, engagement history?
- ✓ Are you tracking engagement inside HubSpot (emails opened, pages visited, forms submitted)?
- ✓ Do you have enough closed-won deal records for AI to identify meaningful patterns?
- ✓ Is there a defined ICP today, even an informal one, that could serve as the starting point?

Plan Campaigns

Faster campaign launch and better alignment across the team.

BEFORE AI

Campaign planning takes days of meetings and disconnected back-and-forth. Someone owns the brief, someone else owns the assets, someone else owns the channel plan, and by the time everything is coordinated the moment has passed.

WITH BREEZE AI

You start with a single campaign idea. AI generates a complete multi-channel strategy with recommended assets for each channel, based on your goals and your existing HubSpot data. The team refines and executes from a shared plan.

BREEZE TOOLS INVOLVED

Breeze Assistant

Generates campaign concepts based on your commercial goals and business context.

Marketing Studio

Takes a campaign brief and produces a mix of content assets by channel and format.

METRICS TO WATCH

Campaign planning time reduced

Assets generated per campaign

Launch date vs target

CREDIT COST & EXAMPLE

Cost. Included on Marketing Hub Professional and Enterprise. Subscription-tier features with no per-campaign credit charges for ideation or brief generation.

Example. A marketing team runs eight campaigns a year. Each brief generates email copy, social variants, landing page text and ad headlines in one session. Annual credit cost: zero. The team saves approximately two days per campaign — 16 working days returned to strategic work.

ARE YOU READY?

- ✓ Are you using HubSpot's Campaigns tool to plan, track and report on campaigns today?
- ✓ Does your team have capacity to review and refine AI-generated briefs and creative?
- ✓ Is there a defined campaign planning process, even a basic template, in place?
- ✓ Do you have multiple channels active that would benefit from coordinated AI planning?

Tailor Content *for channels*

Faster campaign creation with personalised content that launches in days, not weeks.

BEFORE AI

Marketers manually write blogs, emails, social posts and ads for every channel. Each format starts from scratch. Repurposing exists in theory but in practice rarely happens because there is never enough time.

WITH BREEZE AI

AI takes one piece of content and transforms it into multiple channel-ready formats. A blog post becomes a LinkedIn post, a short email, an ad headline and a newsletter section. Humans refine the outputs. The bottleneck shifts from writing to editing.

BREEZE TOOLS INVOLVED

Content Remix	Repurposes existing content into different formats in a few clicks.
Breeze Assistant	Refines copy, expands ideas and brainstorms using your style guide and business context.
AI-Powered Email	Uses CRM data to generate a personalised version of an email for each recipient.
Brand Identity	Ensures AI-generated content matches your established voice and style.

METRICS TO WATCH

Content pieces per week

Time to publish

Click-through rate

Conversion rate

CREDIT COST & EXAMPLE

Cost. Included on Marketing Hub Professional and Enterprise. Content Remix, Breeze Assistant and AI-Powered Email are subscription-tier features with no per-asset credit charges.

Example. A team of two produces one blog post per week. Content Remix turns it into four social variants, a short email and a newsletter introduction in under an hour. Output increases from roughly one asset per week to seven without additional headcount. Monthly credit cost: zero.

ARE YOU READY?

- ✓ Do you have a brand style guide or voice guidelines that AI content could follow?
- ✓ Are you using HubSpot's content tools as your primary publishing platform?
- ✓ Does your team have bandwidth to review and refine AI-generated drafts?
- ✓ Do you have existing content assets that could be repurposed as starting material?

Optimise for *AI search* (AEO)

High-converting leads from AI-powered search discovery, with better attribution.

BEFORE AI

Buyers increasingly search with AI tools — ChatGPT, Perplexity, Gemini — instead of going to Google. They ask questions and get synthesised answers citing specific sources. If your content is not structured to be cited, you are invisible at the moment a buyer is actively researching.

WITH BREEZE AI

You optimise your content so AI search engines cite your brand when they answer buyer questions. HubSpot's AEO tools show you how your brand currently appears in AI-generated answers, give you a share-of-voice score, and tell you specifically what to do to improve.

BREEZE TOOLS INVOLVED

AEO Tool

Shows how your brand appears in AI-generated answers and provides specific improvement recommendations.

AEO Grader

Provides a brand-level assessment with scores for recognition, sentiment and share of voice.

METRICS TO WATCH

Leads from AEO sources

Lead quality score

Conversion rate from AEO traffic

Share of voice

CREDIT COST & EXAMPLE

Cost. AEO is currently in beta. Beta features do not consume credits — HubSpot aims to provide 30 days notice before any beta begins doing so. Available on Marketing Hub Professional and Enterprise.

Example. A B2B software company uses the AEO Grader and finds it appears in 14% of relevant AI answers vs a competitor at 41%. The tool identifies five content gaps. After publishing three targeted articles over six weeks, visibility climbs to 27%. Credit cost during beta: zero.

ARE YOU READY?

- ✓ Do you have an active content marketing programme with a library of published articles and guides?
- ✓ Are you using HubSpot Marketing Hub for content publishing and performance tracking?
- ✓ Is anyone on your team responsible for SEO today, and how mature is that practice?
- ✓ Do you have baseline organic traffic and conversion data to measure improvement against?

Report on *campaigns*

Faster optimisation and clearer ROI visibility.

BEFORE AI

Marketers wait for quarterly reviews to look at performance. By then, campaigns that were not working have already spent their full budget. The data exists somewhere, but pulling it together takes hours. Attribution is unclear.

WITH BREEZE AI

AI tracks performance across all assets, segments and channels in real time. When a campaign is live you can see what is working and what is not, and make changes before the budget runs out. After it ends, AI identifies patterns and recommends what to change.

BREEZE TOOLS INVOLVED

Breeze Assistant

Analyses campaign performance and produces specific recommendations for the next campaign.

Custom Reports

Brings together performance data from all assets, segments and channels into a single view.

METRICS TO WATCH

Campaign ROI

Cost per acquisition

Marketing-lead to SQL conversion

CREDIT COST & EXAMPLE

Cost. Included on Marketing Hub Professional and Enterprise. Campaign reporting and Breeze Assistant analysis are subscription-tier features with no credit cost.

Example. A marketing manager runs a post-campaign analysis across a three-month demand generation campaign. Breeze Assistant identifies LinkedIn drove 58% of pipeline despite receiving 25% of the budget. It recommends reallocation and a messaging adjustment. Time taken: six minutes.

ARE YOU READY?

- ✓ Are your campaigns and assets currently tracked inside HubSpot?
- ✓ Is marketing performance reviewed on a regular cadence with defined KPIs?
- ✓ Do you have consistent UTM tagging and attribution tracking across all active channels?
- ✓ Do you have historical campaign data in HubSpot to use as a benchmark?

Part two

Sales.

Ten AI processes for sales teams. Sales is the function that loses the most time to administration that AI can now handle. The best reps spend most of their day on conversations. Average reps spend most of it on everything around the conversations. AI changes that ratio.

06 Capture & qualify leads

08 Identify buyer intent

10 Prep & follow up on meetings

12 Analyse & forecast pipeline

14 Create quotes & close deals

07 Enrich contact & company data

09 Personalised outreach

11 Identify at-risk deals

13 Coach sales reps

15 Pass customers to service

Capture and *qualify leads*

More meetings from inbound traffic with faster follow-up and warmer first touches.

BEFORE AI

Website visitors ask questions outside business hours or when reps are tied up. By the time someone responds, the lead has often moved on to a competitor — or simply lost momentum. The follow-up the next morning goes to a colder prospect than the one who visited at 9pm.

WITH BREEZE AI

AI engages inbound visitors around the clock, qualifies them against your criteria, books meetings directly into rep calendars and compiles a structured summary of what the prospect did, asked and said before the rep picks up the conversation.

BREEZE TOOLS INVOLVED

Customer Agent	Qualifies prospects automatically, answers product questions and books meetings 24/7.
Lead Scoring	Predicts which leads are most likely to convert based on fit and engagement signals.
Prospecting Agent	Identifies net-new contacts and re-engagement signals from existing contacts.
Customer Handoff Agent	Compiles a structured handoff covering campaign touches, content consumed and qualification.

METRICS TO WATCH

Inbound-to-meeting rate

After-hours conversion rate

Time from MQL to first touch

CREDIT COST & EXAMPLE

Cost. Customer Agent: **50 credits (\$0.50)** per resolved conversation (outcome-based from April 2026 — you pay only on full resolution). Lead Scoring and Customer Handoff Agent included on Professional and Enterprise.

Example. A B2B company receives 80 inbound enquiries per month via website chat. Customer Agent resolves 52 without human involvement (65% resolution rate). Monthly cost: $52 \times 50 = 2,600$ credits = \$26 — roughly eight hours of out-of-hours engagement.

ARE YOU READY?

- ✓ Do you have meaningful website traffic and inbound form submissions generating leads today?
- ✓ Do you have clearly defined lead qualification criteria that could be configured into an AI agent?
- ✓ Is HubSpot tracking visitor behaviour and connecting it to contact records?
- ✓ Is there a documented handoff process between marketing and sales for inbound leads?

Enrich contact & company data

Complete, accurate CRM data with significantly less time spent on manual research.

BEFORE AI

CRM records have blank fields. Industry is missing. Company size is missing. Job title says "Director" with no further context. Reps either spend time filling these in manually before every outreach, or skip it and personalise shallowly.

WITH BREEZE AI

AI fills in missing data fields automatically by researching companies and contacts. It adds job titles, seniority levels, company sizes, industries and more to HubSpot records without anyone touching a spreadsheet. It also monitors for changes — new jobs, funding, headcount shifts.

BREEZE TOOLS INVOLVED

Data Enrichment	Standard fields now free with Core Seats. Smart Properties: 10 credits per record per field.
Prospecting Agent	Monitors prospects for buying signals. Company deep research: 10 credits per company.
Data Agent	Answers custom research questions about contacts or companies: 10 credits per response.
Data Studio	Brings customer data from multiple tools into one organised, enriched view.

METRICS TO WATCH

Data completeness rate

Research time saved per rep per week

Fill rate on key fields

CREDIT COST & EXAMPLE

Cost. Standard enrichment (revenue, industry, employee count, location) is **free** with all Core Seats. Smart Properties: **10 credits (\$0.10)** per record per field. Data Agent: **10 credits** per prompt.

Example. A sales team has 1,500 contact records. Standard enrichment of company size and industry: free. Two Smart Properties for tech stack and recent funding: $1,500 \times 2 \times 10 = 30,000$ credits = \$300 as a one-time exercise. Ongoing cost for 50 new contacts per month: \$10.

ARE YOU READY?

- ✓ Is HubSpot your primary CRM and system of record for contacts and accounts?
- ✓ Are you using any existing enrichment tools (ZoomInfo, Cognism) and how is that flowing into HubSpot?
- ✓ What is your current fill rate on the five or six fields that matter most for targeting?
- ✓ Is there clear ownership of CRM data quality on your team?

Identify *buyer intent*

Higher response rates through better timing and warmer conversations.

BEFORE AI

Reps manually monitor CRM activity, news alerts, LinkedIn and various intent tools, trying to guess when a prospect might be ready to buy. The signals are scattered across too many places. Hot leads get missed because the timing was off or the signal was buried in noise.

WITH BREEZE AI

AI monitors accounts continuously for genuine buying signals — funding rounds, leadership changes, hiring spikes, website visits, competitor searches, review-site activity. When it spots real interest it flags the opportunity and explains why now is the right moment.

BREEZE TOOLS INVOLVED

Buyer Intent	Tracks buying intent across web and on-site activity: 10 credits per company per month.
Prospecting Agent	Monitors enrolled contacts for buying signals: 100 credits per contact per month.
Company Research Agent	Deep background on workforce, funding and online presence: 10 credits per prompt.

METRICS TO WATCH

Signal-to-meeting conversion

Response rate

Time to first touch

Hours saved on research

CREDIT COST & EXAMPLE

Cost. Buyer Intent: **10 credits (\$0.10)** per company per month. Prospecting Agent contact monitoring: **100 credits (\$1.00)** per contact per month.

Example. Monitor 200 target accounts via Buyer Intent: 2,000 credits = \$20/month. Enrol your 40 hottest prospects in Prospecting Agent: 4,000 credits = \$40/month. Total \$60/month across 240 accounts — a single extra meeting typically pays back several months.

ARE YOU READY?

- ✓ Is HubSpot tracking website visits and engagement for your known contacts?
- ✓ Are you using third-party intent tools (Bombora, 6sense) that need to be considered alongside HubSpot?
- ✓ Are reps disciplined about logging activity so engagement data is reliable?
- ✓ Do you have enough contact and company records for AI to have meaningful signal data?

Send *personalised outreach*

Higher engagement rates, more replies and more meetings booked.

BEFORE AI

Even when reps know who to contact, they write outreach one message at a time. Research per account takes time, so personalisation is usually shallow — a company name and industry. Templates exist but everyone uses them differently.

WITH BREEZE AI

AI uses known context and recent signals to craft outreach that references specific events, timing signals and pain points relevant to that company at that moment. The rep reviews and sends. Personalisation is deeper and volume is no longer rep-hours-limited.

BREEZE TOOLS INVOLVED

Prospecting Agent	Researches accounts and personalises outreach. Lead recommendations: 100 credits per lead.
Breeze Assistant	Refines outreach copy based on deal context and customer history. No extra credit cost.
Data Agent	Provides account-level insights for personalised outreach: 10 credits per prompt.

METRICS TO WATCH

Reply rate

Meeting booking rate

Lead-to-opportunity conversion

CREDIT COST & EXAMPLE

Cost. Prospecting Agent lead recommendations: **100 credits (\$1.00)** per lead (from April 2026). Breeze Assistant drafting: included at no extra cost. Data Agent: 10 credits per prompt.

Example. A rep uses Prospecting Agent across 100 target prospects. The agent identifies 35 showing meaningful intent and recommends them with personalised context: $35 \times 100 = 3,500$ credits = \$35. If three convert at an average deal value of £18,000, the spend is recovered many times over.

ARE YOU READY?

- ✓ Are reps using HubSpot Sequences for outreach or sending manually?
- ✓ Do reps have defined ICP personas and messaging playbooks that AI can use as a foundation?
- ✓ Is there enough contact and deal data in HubSpot to power meaningful personalisation?
- ✓ Are reps open to AI-assisted drafting, or is there cultural resistance to this kind of change?

Prep for & follow up *on meetings*

Faster deal momentum and less time lost to meeting administration.

BEFORE AI

Reps spend fifteen minutes before each call pulling together context from three different places. Notes taken during the call are too brief. The follow-up goes out the next day, if at all. Action items get forgotten. Customers repeat themselves in the next meeting.

WITH BREEZE AI

AI pulls full contact and deal context before every meeting automatically. During the call it captures notes and action items. Afterwards it generates a follow-up email and a CRM update. Reps spend their energy on the conversation itself.

BREEZE TOOLS INVOLVED

Breeze Assistant	Prepares meeting summaries, talking points and full customer history.
AI Meeting Notetaker	Records meetings, creates transcripts and generates follow-ups with action items.
Call Recap Agent	Transforms call transcripts into clean notes and follow-up email drafts.
Customer Handoff Agent	Compiles complete account context for internal handoffs.

METRICS TO WATCH

Meeting-to-next-step rate

Deal progression speed

Prep & follow-up time saved

CREDIT COST & EXAMPLE

Cost. Copilot meeting prep, Call Recap Agent and AI Meeting Notetaker included on Sales Hub Professional+. Smart data capture custom properties: **10 credits** per property per transcript (from April 2026).

Example. A rep has twelve meetings per week. Prep drops from 15 to 2 minutes per meeting; notes are generated automatically. Around 2.5 hours per week returned to selling. With three custom smart properties: $12 \times 3 \times 10 = 360$ credits = \$3.60/week.

ARE YOU READY?

- ✓ Are reps using HubSpot's meeting scheduler and are calls being recorded in HubSpot?
- ✓ Do reps have access to deal history and contact context in one place, or is it scattered?
- ✓ Is call recording accepted as a normal part of the workflow?

Identify *at-risk deals*

Revived sales opportunities and fewer deals that quietly die.

BEFORE AI

Reps lose track of prospects who went quiet after a demo or said "not right now" six weeks ago. Re-engagement emails go out but they are generic. The prospect has moved on. The deal is effectively dead but still sits in the pipeline because nobody has officially killed it.

WITH BREEZE AI

AI tracks what has changed for a prospect since they went quiet — new funding, a leadership change, a job posting, a return to your website. When something meaningful changes it surfaces the deal and suggests a specific, relevant reason to re-engage.

BREEZE TOOLS INVOLVED

AI Deal Intelligence	Flags at-risk deals, scores likelihood to close and recommends specific actions.
Prospecting Agent	Researches what has changed since last contact. Lead recs: 100 credits per lead.
Breeze Assistant	Surfaces deal history and suggests re-engagement angles. No extra credit cost.

METRICS TO WATCH

Re-engagement rate

Dormant-to-active conversion

Reply rate on re-engagement

CREDIT COST & EXAMPLE

Cost. AI Deal Intelligence and Breeze Assistant included on Sales Hub Professional and Enterprise. Prospecting Agent re-engagement recommendations: **100 credits (\$1.00)** per lead.

Example. A manager reviews a pipeline of 50 open deals. AI Deal Intelligence flags 14 as at-risk. Prospecting Agent identifies new developments for nine of those and recommends re-engagement: 900 credits = \$9. Two convert to active opportunities — the spend is recovered many times over.

ARE YOU READY?

- ✓ Are deals and pipeline stages consistently updated in HubSpot so AI has accurate data?
- ✓ Is there a formal re-engagement process for dormant deals, or does it rely entirely on rep initiative?
- ✓ Do you have enough activity history for AI to identify what has changed since last contact?
- ✓ What percentage of your current pipeline is past its expected close date?

Analyse & forecast *pipeline*

More predictable revenue and better use of manager time.

BEFORE AI

Sales managers produce forecasts based on rep self-reporting and gut feel. The pipeline review involves a lot of "tell me where this is at" rather than analysis. By the end of the quarter, the forecast and actual number differ for reasons nobody fully predicted.

WITH BREEZE AI

AI analyses all your deals for patterns, predicts close probability based on historical data and surfaces opportunities that need attention before they are lost. Managers spend pipeline reviews coaching rather than gathering information.

BREEZE TOOLS INVOLVED

Breeze Assistant	Analyses deal history and identifies patterns across won and lost deals.
AI Deal Intelligence	Predicts close probability and surfaces deals needing attention.
Deal Loss Agent	Analyses closed-lost deals to identify trends and improve win rates.

METRICS TO WATCH

Pipeline velocity

Forecast accuracy

Deals needing manager intervention spotted early

CREDIT COST & EXAMPLE

Cost. All three tools are included at no extra credit cost on Sales Hub Professional and Enterprise. Subscription-tier features.

Example. A sales director uses AI Deal Intelligence every Monday. It surfaces the seven deals most likely to slip that week with specific reasons. The director coaches on those seven rather than asking where everything is at. Time saved across a six-rep team: ~3 hours of meetings per month.

ARE YOU READY?

- ✓ Is your pipeline actively managed in HubSpot with consistent deal stage updates, close dates and amounts?
- ✓ Are deal stages and their exit criteria clearly defined and consistently understood?
- ✓ Do you have at least one to two years of closed-won and closed-lost deal data in HubSpot?
- ✓ Is forecasting currently happening in HubSpot or primarily in spreadsheets?

Coach *sales reps*

Higher and more consistent rep performance across the team.

BEFORE AI

Managers identify coaching needs by instinct, by what reps flag themselves, or by reviewing a small sample of calls when they have time. Coverage is inconsistent. Problems are caught after deals are already lost. New reps take a long time to ramp.

WITH BREEZE AI

AI analyses calls, meetings and deal progression across the whole team in real time. It identifies the patterns that correlate with winning and losing, flags issues on specific deals and creates a coaching agenda grounded in actual data.

BREEZE TOOLS INVOLVED

Conversation Intelligence	Analyses call recordings, identifies top performer behaviours, creates coaching playlists.
Sales Coach Assistant	Uses call and deal data to personalise coaching recommendations for each rep.
Sales Meetings	Analyses meeting effectiveness and tracks performance trends.
Deal Loss Agent	Reviews lost deals using call transcripts to identify coaching patterns.

METRICS TO WATCH

Win rate

Time for new reps to reach full productivity

Productivity per rep

CREDIT COST & EXAMPLE

Cost. All included on Sales Hub Professional and Enterprise at no extra credit cost. Note: Conversation Intelligence requires Professional or above — it is not available on Starter.

Example. Eight reps generate ~40 recorded calls per week. Without AI a manager realistically reviews six. With Conversation Intelligence all 40 are analysed; the manager receives a weekly digest of the three moments most needing attention. Value: faster ramp, not credits.

ARE YOU READY?

- ✓ Are calls being recorded and logged in HubSpot, and has the team accepted this as normal?
- ✓ Is there a formal coaching programme, or is coaching largely reactive and informal?
- ✓ Is Conversation Intelligence available in your current HubSpot tier?
- ✓ Do managers have the bandwidth to act on AI coaching recommendations?

Create quotes & close deals

Faster deal cycles and fewer stalled signatures.

BEFORE AI

Buyers ask detailed questions about pricing, discounts, configurations and terms. Reps go away, build the quote, get internal approval and come back with an answer. In complex deals it can take days. The buyer fills that time talking to competitors or losing momentum.

WITH BREEZE AI

AI answers buyer questions about pricing, discounts and terms immediately from a configured knowledge base of your products and pricing. It auto-fills proposals using past responses and generates quote cover letters. Deals move faster because buyers get answers faster.

BREEZE TOOLS INVOLVED

Closing Agent Answers buyer questions about quotes, products, pricing, discounts and terms instantly. Beta.

Breeze Assistant Generates quote cover letters and adjusts line items using plain-language instructions.

METRICS TO WATCH

Quote-to-close time

Deal cycle length

Time to answer buyer pricing questions

CREDIT COST & EXAMPLE

Cost. Closing Agent is currently in beta on Sales Hub Professional and Enterprise — beta features do not consume credits today. Breeze Assistant for cover letters: included at no extra cost.

Example. A rep is finalising a deal and the buyer asks nine detailed questions about pricing tiers, discount thresholds and terms. Closing Agent answers all nine immediately from the product catalogue. Previously: 45 minutes of gathering and formatting. Time saved: 45 minutes.

ARE YOU READY?

- ✓ Are you using HubSpot Quotes or Commerce Hub for creating and sending proposals?
- ✓ Do you have a product catalogue in HubSpot with standard pricing, packages and line items?
- ✓ Do you have a library of past RFP responses that could power an AI proposal system?
- ✓ Is there a discount approval process that would need to be incorporated into any automation?

Pass customers *to service*

Smoother transitions and stronger customer relationships from day one.

BEFORE AI

When a deal closes, the context that made it close lives in the rep's head, their inbox and a few scattered CRM notes. The CSM who inherits the account pieces it together from incomplete information — or just asks the customer to repeat everything.

WITH BREEZE AI

AI compiles a complete account handoff from everything in HubSpot — recent communications, deal history, what was promised, key contacts, relevant public context. The CSM picks up a relationship already fully briefed.

BREEZE TOOLS INVOLVED

Customer Handoff Agent	Compiles communications, deal status, commitments and key contacts into a brief.
Company Research Agent	Adds broader account context: 10 credits per research prompt.
Breeze Assistant	Surfaces deal history, call summaries and commitments made during the sales process.
Customer Health Agent	Provides initial account health context for the incoming CS team.

METRICS TO WATCH

Time to first value

Onboarding satisfaction score

Context completeness at handoff

CREDIT COST & EXAMPLE

Cost. Customer Handoff Agent and Breeze Assistant: included at no extra credit cost. Company Research Agent for additional external context: **10 credits (\$0.10)** per prompt.

Example. A team closes 20 new customers per month. Handoff Agent generates a brief for each one automatically. Monthly cost: zero. Adding Company Research for five higher-value accounts: 50 credits = \$0.50.

ARE YOU READY?

- ✓ Are both your sales team and your customer success team in HubSpot with access to shared records?
- ✓ Are call recordings, deal notes and email threads consistently logged and accessible after close?
- ✓ Is there a documented handoff process, even a basic one, currently in place?
- ✓ Are any special commitments or custom terms made during the sale tracked somewhere visible?

Part three

Service.

Seven AI processes for customer service and success. This is where AI arguably delivers the most immediate, measurable impact. The problems are concrete: ticket resolution times, first response, CSAT, the volume of tickets a team can handle before things start breaking.

16 Resolve support tickets

18 Personalised CS outreach

20 Analyse customer feedback

22 Create & maintain knowledge base

17 Review & route tickets

19 Identify at-risk customers

21 Drive renewals & upsells

Resolve *support tickets*

Shorter resolution times and 24/7 support coverage without 24/7 staffing.

BEFORE AI

A customer submits a ticket. An agent picks it up, reads the whole thread, works out the answer, writes a response and sends it. For straightforward questions this takes ten minutes. For questions the agent has answered a hundred times this week — still ten minutes. The maths does not work at scale.

WITH BREEZE AI

AI resolves common questions instantly using your knowledge base. For complex issues it drafts a contextual response for the agent to review rather than starting from a blank screen. Agents respond significantly faster. Customers get answers at any hour.

BREEZE TOOLS INVOLVED

Breeze Customer Agent	Resolves common inquiries instantly using knowledge base content, 24/7.
Reply Recommendations	Generates contextual draft responses for agents. No extra credit cost.
Ticket Summary	Automatically summarises ticket threads for faster triage.
Knowledge Sources	Surfaces relevant articles based on the specific inquiry.
Knowledge Base Agent	Drafts new articles from historical ticket data. Beta.

METRICS TO WATCH

First response time

Full resolution time

CSAT

% of tickets resolved by AI

CREDIT COST & EXAMPLE

Cost. Customer Agent: **50 credits (\$0.50)** per **resolved** conversation (outcome-based — no charge on escalation). Reply Recommendations, Ticket Summary, Knowledge Sources: included on Service Hub Professional and Enterprise.

Example. A support team handles 500 enquiries per month. Customer Agent resolves 325 without human involvement (65%). Monthly cost: $325 \times 50 = 16,250$ credits = \$162.50 — effectively part-time support coverage including nights and weekends.

ARE YOU READY?

- ✓ Are you using HubSpot Service Hub as your ticketing platform?
- ✓ What % of your current tickets are repetitive questions with consistent documented answers?
- ✓ Do you have a knowledge base in HubSpot, and how current and complete is it?
- ✓ Do you have email, chat or phone channels connected inside HubSpot?

Review and *route tickets*

Faster routing and the right tickets reaching the right people first.

BEFORE AI

Tickets come in and someone has to decide who they go to. For smaller teams this is manual. For larger teams it relies on automation rules that are complex to maintain. Priority tickets do not always get treated as priority.

WITH BREEZE AI

AI automatically categorises incoming tickets, detects the language they are written in, generates a meaningful name for each ticket and flags urgency based on sentiment. An angry customer who mentions cancelling gets routed to the right person immediately.

BREEZE TOOLS INVOLVED

Ticket Summaries Faster routing through automatic ticket-level summarisation.

Ticket Sentiment Prioritises urgent issues by detecting frustration and urgency signals.

Ticket Naming Generates a clear ticket title automatically.

Ticket Language Detects language for automatic language-based routing.

METRICS TO WATCH

Routing accuracy

Time to first assignment

SLA compliance rate

CREDIT COST & EXAMPLE

Cost. All Help Desk AI features included on Service Hub Professional and Enterprise at no extra credit cost. Subscription-tier features.

Example. A team of six handles 350 tickets per month across three product lines. Manual triage previously took two people ~3 hours per day. With AI handling categorisation, naming, sentiment and language detection, triage drops to under 30 minutes per day — ~50 hours per month returned to customer work.

ARE YOU READY?

- ✓ Are tickets being managed in HubSpot Service Hub with pipelines and properties configured?
- ✓ Do you have a clear shared definition of what a high-priority ticket looks like?
- ✓ Do you have routing rules or ticket assignment workflows set up today?
- ✓ Is ticket sentiment or urgency data currently being captured or acted on in any form?

Send *personalised CS outreach*

Higher engagement from customer success outreach and better retention as a result.

BEFORE AI

CS teams reach out with templated messages on a schedule. The content is generic. The timing is based on renewal dates rather than customer signals. CSMs manage too many accounts to personalise meaningfully for each one.

WITH BREEZE AI

AI identifies which customers need attention based on ticket sentiment, conversation patterns and account activity. It helps draft outreach that references specific context — a recent issue resolved, a feature being used heavily, a challenge mentioned in a call.

BREEZE TOOLS INVOLVED

Breeze Assistant Analyses customer interaction history and helps craft contextual outreach.

Data Agent Researches individual accounts for personalised messages: 10 credits per prompt.

METRICS TO WATCH

CS outreach response rate

CSAT improvement

Churn rate reduction

CREDIT COST & EXAMPLE

Cost. Breeze Assistant drafting: included at no extra credit cost. Data Agent for account research: **10 credits (\$0.10)** per prompt.

Example. A CSM manages 65 accounts and wants to personally check in with 25 showing declining engagement. Breeze Assistant drafts each message with specific references. For eight needing deeper external context, Data Agent runs a prompt: 80 credits = \$0.80. Templated outreach typically returns ~8% response vs 30%+ for personalised.

ARE YOU READY?

- ✓ Is the service team using HubSpot for customer outreach today?
- ✓ Do CSMs have visibility into CRM and deal history for the accounts they manage?
- ✓ Is customer interaction history (tickets, calls, survey responses) accessible within HubSpot?
- ✓ Are customers segmented in any way that would allow targeted outreach at scale?

Identify *at-risk customers*

More customer saves and higher retention through early intervention.

BEFORE AI

Risk assessment is reactive. By the time a CSM realises an account is unhappy, the customer has often already made their decision. The signals were there earlier — more tickets, a change in tone, a competitor mention, a survey score that dropped — but nobody was watching systematically.

WITH BREEZE AI

AI continuously analyses call transcripts, ticket sentiment and survey responses across the customer base. It tracks the words and patterns that correlate with churn risk. When an account starts showing those signals it flags it early enough for a CSM to intervene.

BREEZE TOOLS INVOLVED

Customer Health Agent	Assesses health from conversations and public context; generates talking points and next best actions.
Conversation Intelligence	Tracks terms like "cancel", "frustrated", "competitor" and "budget".
Ticket Sentiment	Tracks sentiment trends to surface accounts with declining satisfaction.
Feedback Survey Summaries	Analyses survey responses to identify themes and concerning patterns.

METRICS TO WATCH

Retention rate

Churn reduction

At-risk accounts flagged proactively vs reactively

CREDIT COST & EXAMPLE

Cost. All four tools are included on Service Hub Professional and Enterprise at no extra credit cost. Subscription-tier features.

Example. A CSM team manages 130 accounts. Sentiment flags six showing consistent negative trends over 30 days. Conversation Intelligence surfaces three more where "competitor" and "pricing" appeared. Nine accounts flagged for proactive intervention before any formal escalation. Monthly cost: zero.

ARE YOU READY?

- ✓ Are customer health signals being tracked in HubSpot (ticket volume, sentiment, survey scores)?
- ✓ Do you run NPS, CSAT or CES surveys, and is that data connected to HubSpot records?
- ✓ Is Conversation Intelligence capturing and analysing calls from CS and support interactions?
- ✓ Are renewal dates and subscription data tracked in HubSpot?

Analyse *customer feedback*

Faster insight from feedback and more consistent action on what customers tell you.

BEFORE AI

Feedback is collected. NPS scores come back. CSAT surveys get completed. And then nothing happens — combing through individual responses at volume is time-consuming and nobody has a clear process for turning themes into action. The same complaints come up quarter after quarter.

WITH BREEZE AI

AI scans all feedback simultaneously and identifies themes, sentiment patterns and emerging concerns across the whole dataset. What used to take a person a week of analysis takes minutes. The themes reach product, marketing and leadership in time to act.

BREEZE TOOLS INVOLVED

Feedback Survey Summaries

Analyses all survey responses and surfaces key themes without manual review.

Conversation Intelligence

Tracks topics mentioned across calls to surface feedback themes.

METRICS TO WATCH

Themes identified per quarter

Time from feedback to actionable insight

NPS trend over time

CREDIT COST & EXAMPLE

Cost. Both included on Service Hub Professional and Enterprise at no extra credit cost. Subscription-tier features.

Example. A business runs a quarterly NPS survey and receives 220 responses. Previously: two days of manual categorisation. Feedback Survey Summaries surfaces the top six themes in under five minutes. The themes reach the product team the same day the survey closes rather than two weeks later.

ARE YOU READY?

- ✓ Are you running NPS, CSAT or CES surveys through HubSpot Service Hub?
- ✓ Is feedback data connected to contact and company records in HubSpot?
- ✓ Is there a process for taking insights back to product or leadership, or is it ad hoc?
- ✓ Do you have call recording data that could contribute qualitative feedback alongside surveys?

Drive renewals *and upsells*

Higher renewal rates and more expansion revenue from existing accounts.

BEFORE AI

CS manually tracks renewal dates and starts conversations when the calendar reminds them. Expansion opportunities are identified when customers bring them up — rather than when the data suggests readiness. Timing is driven by contract dates, not signals.

WITH BREEZE AI

AI identifies accounts showing expansion-readiness signals — increased usage, headcount growth, mentions of new use cases in calls. It also surfaces accounts where renewal conversations should start earlier than usual based on health.

BREEZE TOOLS INVOLVED

Customer Health Agent

Identifies expansion-ready accounts based on usage, engagement and health signals.

Conversation Intelligence

Flags customers mentioning expansion needs, new team members or interest in features.

METRICS TO WATCH

Renewal rate

Expansion revenue

Upsell opportunities identified proactively

CREDIT COST & EXAMPLE

Cost. Both included on Service Hub Professional and Enterprise at no extra credit cost. Subscription-tier features.

Example. A CSM team of four manages 95 accounts with £1.4m of contract value renewing next quarter. Conversation Intelligence surfaces seven where team growth and new feature interest have appeared. Those conversations happen four weeks earlier than they otherwise would. Three result in upsells averaging £5,000 each: £15,000 from earlier intervention.

ARE YOU READY?

- ✓ Are renewal dates, subscription values and contract terms tracked in HubSpot?
- ✓ Is any form of customer health scoring in place today, even a basic version?
- ✓ Is Conversation Intelligence capturing call discussions that might surface expansion interest?
- ✓ Is there a defined expansion playbook or upsell process that CSMs follow?

Create & maintain *knowledge base*

A complete and current knowledge base that reduces ticket volume and improves self-service.

BEFORE AI

Support teams identify knowledge gaps by reviewing tickets manually. Writing new articles takes significant time. The knowledge base becomes outdated as products change. Customers search for answers, find outdated or no information, and raise a ticket instead.

WITH BREEZE AI

AI monitors ticket patterns to spot emerging gaps. When it identifies a question being asked repeatedly without a documented answer, it drafts an article from the relevant historical responses. It also flags articles that have not been updated recently.

BREEZE TOOLS INVOLVED

Knowledge Base Agent

Identifies gaps from ticket patterns, drafts articles from historical responses, flags outdated content. Beta.

METRICS TO WATCH

Ticket deflection through self-service

Time to publish new articles

% of tickets resolved without agent

CREDIT COST & EXAMPLE

Cost. Knowledge Base Agent is currently in beta on Service Hub Professional and Enterprise — beta features do not consume credits today.

Example. A team has a KB of 80 articles. After six months, Knowledge Base Agent identifies 14 that have not been updated in 90+ days and spots three new question clusters with no existing article. It drafts three articles from historical responses. AI analysis: minutes. Manual equivalent: half a working day.

ARE YOU READY?

- ✓ Are you using HubSpot's Knowledge Base tool in Service Hub?
- ✓ Is there clear ownership of knowledge base maintenance on your team?
- ✓ Do you have a meaningful backlog of historical support tickets that AI could analyse?
- ✓ Do you have a customer-facing knowledge base, an internal one, or both?

Closing

Don't try to do *all 22 at once*.

Twenty-two processes is a lot. The point isn't to send you away with a 22-item to-do list. It's to help you find the three or four that would make a real difference — and understand what it takes to make them work.

In our experience, most businesses should start with one of three things, depending on where they are today.

IF

Your *data* is the problem.

Start with data enrichment.

Standard fields are now free with Core Seats. Smart Properties for custom fields cost 10 credits per record. Everything else in this guide depends on having decent data underneath it.

IF

Your *sales efficiency* is the problem.

Start with Buyer Intent and Personalised Outreach.

The credit cost is low, the time saving is immediate, and results are easy to measure against your existing reply rate and meeting booking rate.

IF

Your *service volume* is the problem.

Start with Customer Agent.

At 50 credits per resolved conversation, you're paying \$0.50 for something that would cost significantly more in human time — and you get 24/7 coverage on top.

Get in touch

If you're not sure where to start, *that's exactly what we're here for.*

Three ways to move from reading about Breeze AI to actually putting it to work — scan a code, or type the URL into your browser.



01 DIAGNOSE

AI *readiness* calculator

A short scored assessment across data, process, lifecycle, team alignment and change readiness — with a personalised report on where to begin with Breeze.

marketing.marketing-engineers.co.uk/ai-readiness-calculator



02 MATCH

Breeze AI *process finder*

Tell us your situation in four minutes and we'll map you to the processes most likely to deliver results — drawn from the 22 in this guide.

marketing.marketing-engineers.co.uk/hubspot-readiness/tools/ai-finder



03 TALK TO US

Get a Breeze AI *readiness review*

A focused conversation with someone who's done it before — where you are today, which processes would move the needle, and what readiness work needs to happen first. No pitch.

www.marketing-engineers.co.uk/contact

Intergage Marketing Engineers

HubSpot Diamond Partner

© 2026 Intergage Marketing Engineers Ltd.
All rights reserved.