Activating AI in HubSpot:

The First 30 Days for CMOs & Marketing Leaders

Built for
MARKETING LEADERS
who want business
OUTCOMES,
not experiments.

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From Curiosity To Capability: How CMOs Can Lead The AI Era Of HubSpot

Over the last decade, we've watched marketing technology evolve from **automation to intelligence.**

But in 2025, the shift is no longer about tools - **it's about transformation.** Artificial Intelligence has moved from the edges of experimentation to the **center of go-to-market execution.**

Yet for many CMOs, the gap remains wide:

"Where do I start? How do I activate AI inside HubSpot in a way that actually impacts revenue?"

This playbook was written to answer that exact question.

The OneMetric Perspective

At **OneMetric**, we've helped hundreds of organizations - from high-growth SaaS startups to global enterprises - move from traditional operations to **AI-powered GTM systems.**

What we've learned is simple:

Success doesn't come from doing more AI - it comes from weaving AI into the motions you already run every day.

- Your campaigns.
- Your segmentation.
- Your content creation.
- Your reporting.

That's where transformation begins.

The HubSpot AI Revolution

HubSpot's evolution - from **Assistants → Agents → Breeze Intelligence** - has redefined what a marketing system can do.

But these tools only create value when they are:

- Set up with **intention,**
- Aligned with **your brand voice,**
- Trained on **your data,** and
- Governed by **your people.**

That's exactly what this playbook will help you accomplish.

What You'll Achieve In The Next 30 Days

Each week of this journey is designed to build momentum and measurable outcomes:

- **Establish your AI foundation -** define your brand voice and central knowledge base.
- **Create visible wins -** let HubSpot AI assist in your first real campaigns.
- **Enable data intelligence -** make faster, smarter marketing decisions.
- **Deploy agents & automations -** scale your GTM without adding headcount.
- **Measure impact -** build your 90-day roadmap toward AI maturity.

Each chapter includes **actionable steps, checkpoints, and pro tips** pulled from real OneMetric client implementations - giving you the clarity to go from **AI-curious → AI-operational** in just one month.

> HubSpot has always been the system of engagement. Now, with AI, it becomes the system of intelligence.

Leadership teams that move first will shape how revenue is generated, managed, and optimized in the next decade.

Let's Get Started.

You'll be surprised how much your team can achieve in just **30 days.**

Week 1 – Foundation & Fluency

Build The Base. Train The Team. Align Your AI With Your Brand.

Why This Week Matters

Before your GTM team can automate or scale anything, HubSpot AI needs context - your voice, your knowledge, and your people.

This week sets the foundation for every AI output that follows.

Step 1 – Set Up Your Brand Voice & Assistant

Purpose - Your Brand Voice Teaches HubSpot AI How To Sound Like You.

Without it, AI content is generic; with it, every blog, email, and campaign feels authentically on-brand.

Action Items:

1. **Navigate to Settings**
   - Go to Settings ⚙️ → Account Defaults → Brand Voice & Tone in HubSpot.
   - If you manage multiple Business Units, confirm you're editing the correct one..

2. **Create Your Brand Voice Profile**
   - Click "Create Brand Voice."
   - Name it clearly (e.g., "ONE METRIC – Corporate Voice") and select your primary language.

3. **Upload Representative Samples**
   - Add 2–5 recent assets (emails, case studies, web pages, social posts).
   - HubSpot AI analyzes tone, pacing, and vocabulary to generate a summary like "Confident, conversational, customer-centric."

4. **Review and Customize Tone Descriptors**
   - Refine the AI summary.
   - Add up to five tone adjectives (e.g., Authoritative, Friendly, Story-driven).
   - Set clear language rules - e.g., "Use HubSpot AI, not HS AI" or "Say customers, not clients."

5. Add Writing Examples (Optional but Powerful)
- Upload up to 1 MB per sample for deeper training.
- Use assets that best reflect your tone for outbound or thought-leadership content

6. Activate Brand Voice for All AI Tools
- Once saved, your profile syncs with all AI Assistants and Agents.
- When generating content (blogs, emails, landing pages), toggle *"Apply Brand Voice."*

7. Test and Validate in Real Workflows
- Open the Blog Editor → /ai prompt:

"Write an intro paragraph about AI adoption in our brand voice."

Compare AI output with your own version and refine until tone alignment is consistent.

Review and edit brand voice
✦ AI

The following personality and tone characteristics were generated based on the writing sample you provided. Edit these characteristics to best match your brand voice.

Personality *
Your brand's personality is the set of human traits and characteristics that your brand embodies.

Compassionate × | Trustworthy × | Supportive ×

3 / 4 characteristics max

Default tone *
Your brand's tone describes the way that your brand communicates with customers. Set channel-specific tones in Channel Optimizations.

Respectful × | Understanding × | Empathetic × | Informative ×

4 / 4 characteristics max

✅ **Pro Tip**

Create two profiles:

- **Primary Voice** (for brand marketing & corporate comms)
- **Product Voice** (for campaigns and technical content)
  Then A/B test which drives higher engagement across AI-generated emails and landing pages.

Benchmark: Teams with an approved Brand Voice profile see up to 40% less manual editing of AI content after setup (according to HubSpot beta data).

Step 2 – Centralize Knowledge For Better AI Outputs

Purpose: Your AI Can Only Be As Smart As The Data It Has.

Without it, AI content is generic; with it, every blog, email, and campaign feels authentically on-brand.
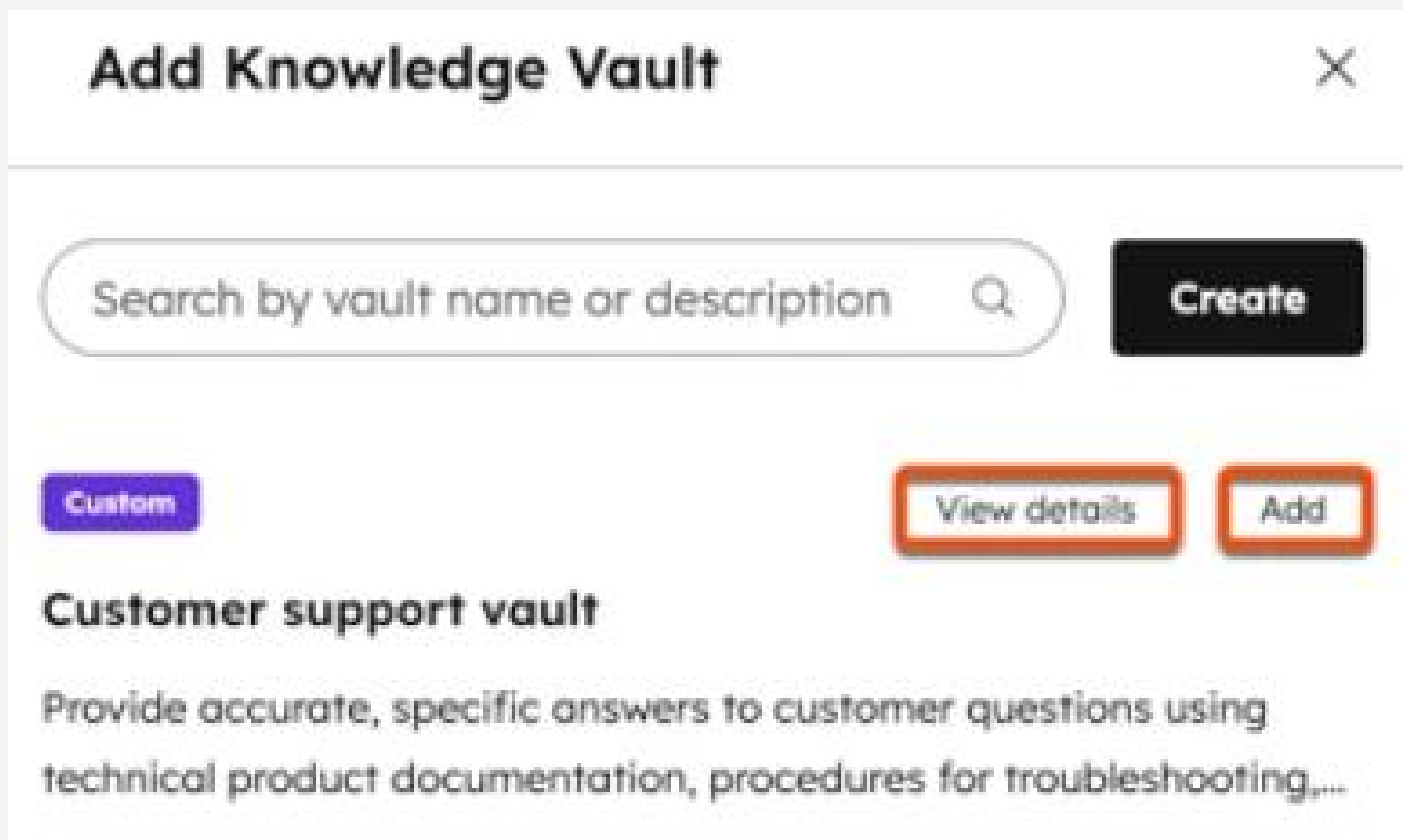
Action Items:

1. **Access Knowledge Vaults in Breeze**
   - Go to Breeze → Knowledge → Knowledge Vaults.
   - You'll see a default list of your active vaults (if any).
   - Click "Add Vault" in the upper-right corner.

2. **Create a New Vault**
   - Name the vault clearly, e.g.,
     - *"Product Messaging 2025"*
     - *"Customer Case Studies"*
   - Add a short description explaining what kind of data it holds.

3. **Add Sources to the Vault**
   You can add 3 types of content sources:
   - **Files** – Upload PDFs, DOCXs, or TXT files (max 100MB per file).
   - **Web URLs** – Add public pages like your product site, help center, or blog.
   - **Knowledge Base Articles** – Sync content directly from your HubSpot-hosted KB.

4. **Attach Vaults to Agents or Assistants**
   - Go to **Breeze → Agents or Assistants → Select Agent → Settings.**
   - Under Knowledge Source, click **Attach Vault.**
   - Choose which vaults the agent can access.
   - Eg: attach "Support FAQs" to a Customer Agent, & "Product Docs" to a Sales Agent.

5. **Manage & Update Regularly**
   - To keep answers accurate, revisit your vaults monthly.
   - Use the "Last Updated" timestamp to identify stale content.

> ☑️ **Pro Tip**
>
> **Segment Vaults by Function:**
>
> - Marketing Vault → blog guidelines, brand playbooks, persona documents.
> - Sales Vault → pitch decks, case studies, pricing sheets.
> - Support Vault → FAQs, chat scripts, troubleshooting docs.

Step 3 – Build AI Fluency Across The Marketing Org

Purpose - Technology Adoption Succeeds Only When Your Team Feels Confident.

A structured enablement framework replaces ad-hoc training with measurable fluency.

The 3-Layer AI Enablement Framework
Layer 1 - Awareness (Leadership & Strategy)

Goal: Build understanding of why AI matters and where it fits into your GTM model.

Action Items:

1. Host a **Leadership Alignment Session (45 mins)** for your senior marketing, RevOps, and sales leads.
   Cover:

- The role of AI in HubSpot's GTM ecosystem
- Where humans add strategic value vs. where AI automates
- ROI model → "hours saved vs. incremental growth generated"

2. Share a short "State of AI in HubSpot" deck (include Breeze, Brand Voice, Content Remix, and Agents).

3. End with a decision: Which 2–3 processes will we AI-enable this month?

Tie every AI initiative to a business metric (pipeline velocity, content cycle time, campaign lift). CMOs need data to justify scale.

Layer 2 - Enablement (Practitioners & Operators)

Goal: Equip your team with skills and guardrails to confidently use HubSpot's AI tools.

Action Items:

1. Run a 60-minute hands-on enablement session led by your AI Champion or HubSpot Partner.
   - Demo live use cases:
      - /ai commands in blog, email, and workflow editors
      - Brand Voice application
      - Content Remix in action
      - Breeze Dashboard overview

2. Introduce a Prompt Library, organized by:

   - Content Creation
   - Campaign Optimization
   - Data & Insights
   - Customer Communication

3. Share the team rule:
   "If it's repetitive, data-driven, or draftable - start with AI."

Run an AI Confidence Pulse survey pre- and post-training to track comfort level over.

Layer 3 - Application (Execution & Review)

Goal: Move from theory to tangible outputs and continuous improvement.

Action Items:

1. Assign each marketer one live AI experiment, e.g.:
- "Use AI to optimize an email campaign."
- "Remix one blog into a video script."

2. Review results in a 30-minute retrospective using this format:
- What we tried
- Time saved
- What AI got right/wrong
- How we'll improve prompts next time

3. Capture "AI Wins" in a shared Slack channel (#hubspot-ai-wins) and celebrate publicly; recognition drives adoption.

> ✅ **Pro Tip**
>
> **Create an AI Portfolio Dashboard in HubSpot to track:**
>
> - % of AI-generated assets
> - Time-to-publish reduction
> - AI adoption by user or team

WEEK 1 OUTPUT – AI FOUNDATION ESTABLISHED

Focus Area	Key Deliverable	Success Indicator
Brand Intelligence	Brand Voice profile active in HubSpot	Tone consistency across AI outputs
Knowledge Context	3 Vaults created and linked to Assistants	Factual accuracy ↑ across responses
Team Enablement	AI Fluency Framework executed	80 % team trained + 1 AI use case each
Governance Baseline	AI settings reviewed & documented	Smooth activation for Week 2

Week 2 – Quick Wins In Content & Campaigns

Theme: Prove Early ROI By Creating And Optimizing Real Campaigns Using HubSpot's Built-In AI Tools.

Step 4 – Run A Content Remix Sprint

Why this matters:

Your content library already holds more growth potential than any new campaign idea.

HubSpot's **Content Remix** tool (powered by AI) turns a single high-performing asset - a blog, webinar, or case study - into a full multi-channel campaign in minutes.

Remixing saves time, keeps your brand voice consistent, and drives more value from every dollar you've already spent on content.
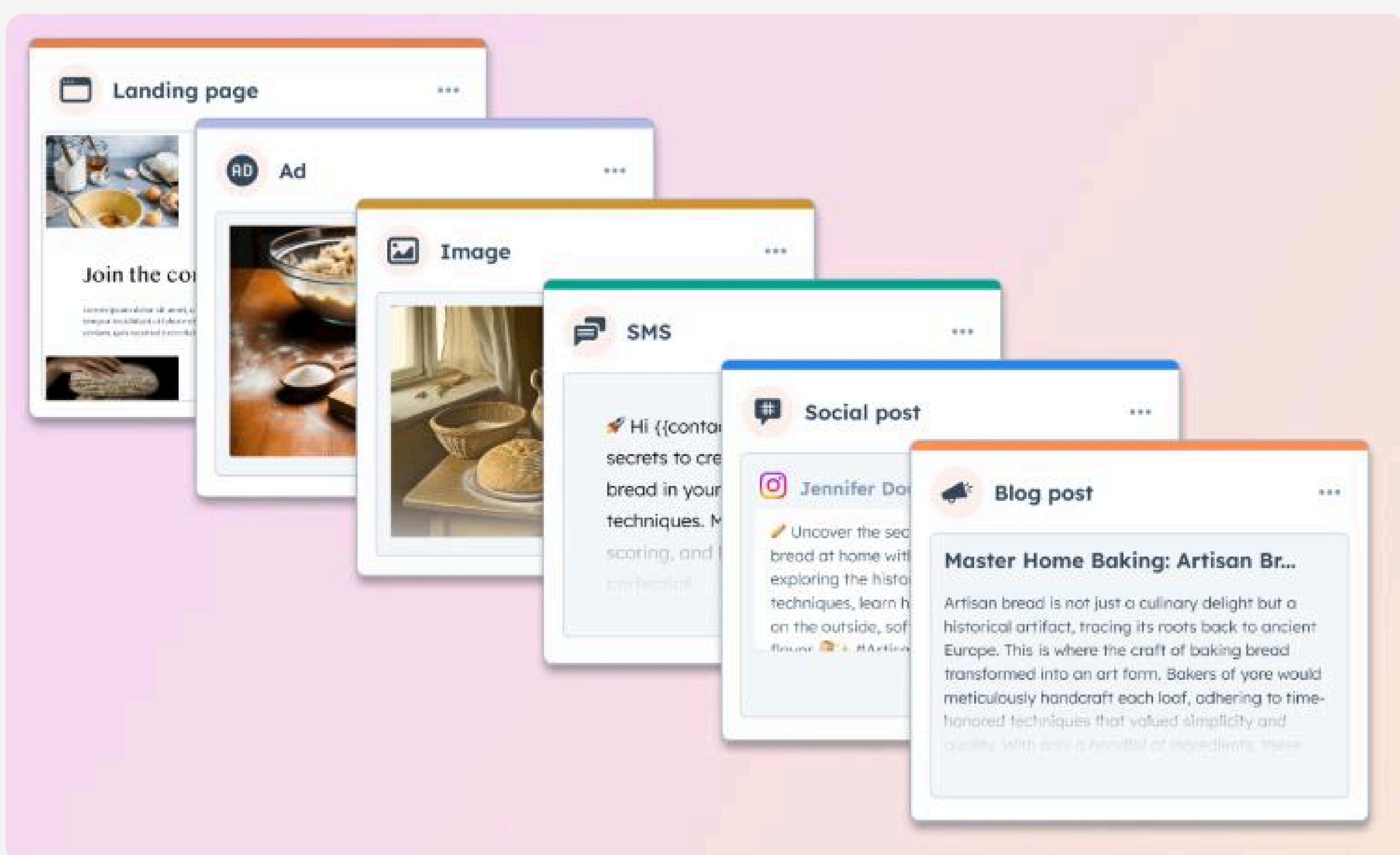
How HubSpot Content Remix Works (2025 Update)

1. **Access Remix:**
   - Go to Marketing → Content → Remix, or click "Remix with AI" in any blog, email, or page editor..

2. Select a Source Asset:
- Choose an existing HubSpot post, page, or blog - or upload a text file/transcript.

3. Pick Output Formats:
- AI instantly creates new content - LinkedIn posts, email copy, landing page intros, ad snippets, or YouTube descriptions.

4. Customize & Apply Brand Voice:
- Your Brand Voice (from Week 1) automatically applies.
- Refine tone, target audience, or channel style before finalizing.

5. Publish or Schedule:
- Send approved assets to your publishing queue or tag them for your next campaign.

Result: Within 15–30 minutes, you'll have a 5–10-asset campaign mapped, consistent in tone, and backed by your original data.
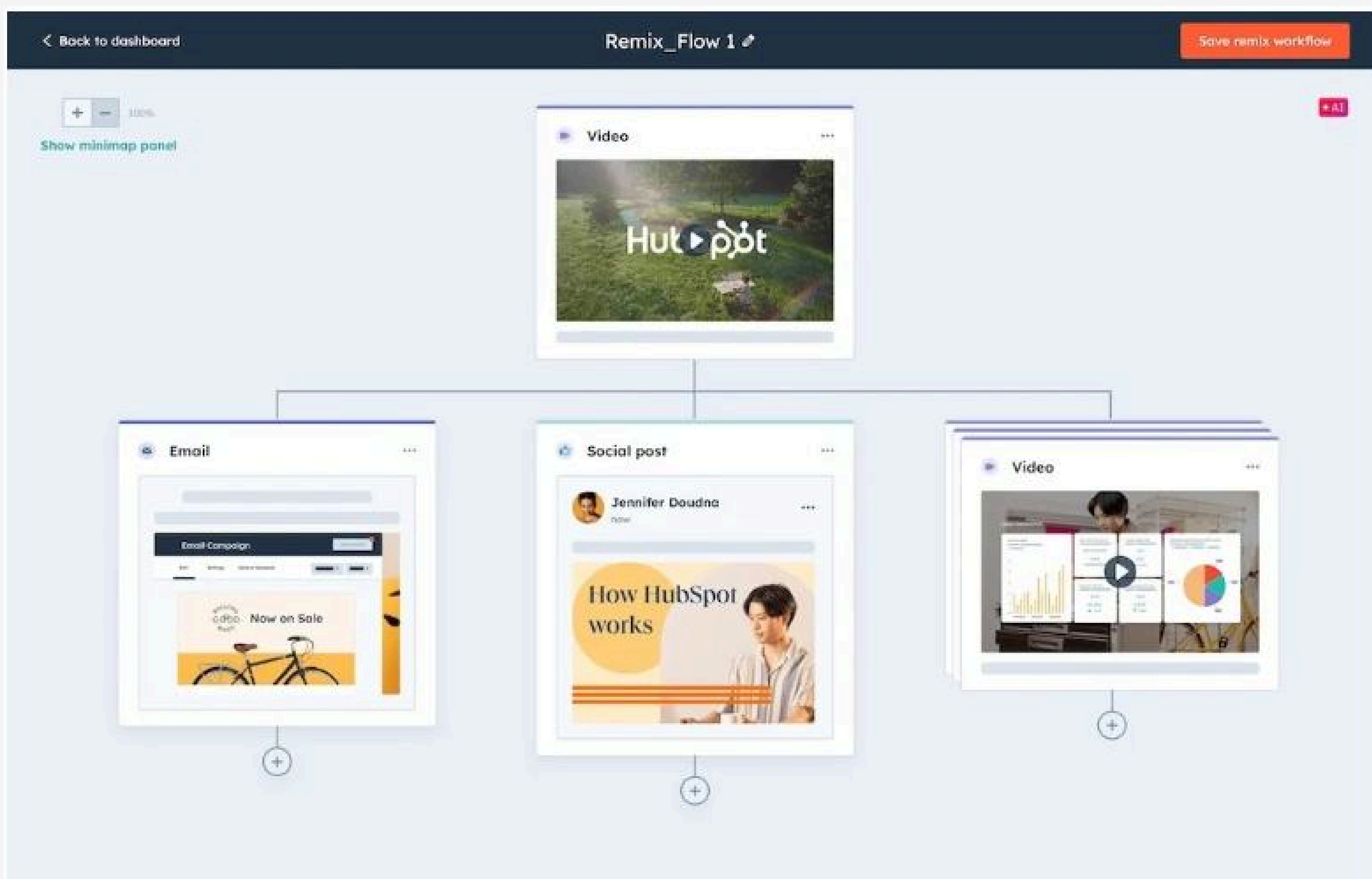
5 High-Impact Remix Use Cases By GTM Motion

1. **Sales-Focused GTM Companies**

Goal: Accelerate outbound and deal enablement with content that helps reps sell.

Use Case	How to Execute with Remix
Turn Case Studies into Email Sequences	Remix customer stories into 3-step drips: Problem → Solution → ROI.
Convert Battlecards into Social Posts	Upload sales decks or internal docs → Remix into "Why Us" snippets for LinkedIn.
Remix Product Launches for Sales Collateral	Generate slide decks, one-pagers, or call scripts from a single launch post.
Create Personalized Follow-Ups from Event Content	Upload event decks → Remix into tailored, account-specific recap emails.

Pro Tip (Sales GTM):

Use Remix + HubSpot Sequences: feed remixed copy directly into rep templates so outbound messaging stays aligned with marketing.

2. Marketing-Focused GTM Companies

Goal: Increase reach, consistency, and velocity across campaigns.

Use Case	How to Execute with Remix
Remix Blogs into LinkedIn Threads	Transform long-form blogs into 5–7 LinkedIn posts.
Turn Webinars into Launch Campaigns	Upload transcripts → auto-generate emails, landing copy, and social teasers.
Remix Ebooks into Ads	Drop PDFs → extract key insights → craft ad headlines and CTAs.
Remix Customer Stories by Industry	Adapt 3 case studies for 3 verticals (e.g., SaaS, healthcare, fintech).
Remix blog familes	Remix one top blog into a comparison article, checklist, and infographic brief.

Pro Tip (Marketing GTM):

Run a Remix Sprint Board per campaign::
- Writer → Blog → Remix
- Designer → Ad Visuals
- Marketing Ops → Automation setup

This keeps AI outputs integrated with your live campaign workflow.

3. Companies with Longer Sales Cycles

Goal: Maintain engagement and thought leadership throughout the nurture period.

Use Case	How to Execute with Remix
Turn Reports into Weekly Insights	Remix long PDFs into "Stat of the Week" social or blog posts.
Convert Webinars into Multi-Part Series	Create 3–4 serialized blogs from a single recorded session.
Remix Wins into Nurture Emails	Turn customer success stories into segmented email updates.
Repurpose Whitepapers into ROI Decks	Generate CFO-friendly slides or visuals highlighting business impact.
Automate Renewal Content	Remix QBR notes into executive summaries and renewal prompts.

Pro Tip (Long Cycle):

Use Remix + AI Workflows → auto-remix every webinar or gated asset into 3 nurture touches once uploaded.

4. Companies with Short Sales Cycles

Goal: Drive high-frequency engagement and fast conversion.

Use Case	How to Execute with Remix
Turn Ads into Micro-Blogs	Remix winning ad copy into SEO short posts
Remix Landing Pages into SMS/WhatsApp Snippets	Shrink CTAs for mobile touchpoints
Remix Daily Product Tips into Social Posts	Turn CRM data into a daily "Tip of the Day" post
Repurpose Offers Automatically	When a campaign ends → run Remix → auto-create next week's email and social batch.

Pro Tip (Short Cycle):

Automate Remix triggers in Workflows to keep your content calendar full - without extra team effort.

Step 5 – Supercharge Emails With AI

Purpose:

Email remains your most measurable marketing lever - and HubSpot's AI Email Writer makes it 3× faster to produce personalized, on-brand emails that actually convert.

By blending your Brand Voice and CRM data, HubSpot AI helps your team ideate, write, and optimize every element - from subject lines to CTAs - right inside the HubSpot editor.

How It Works (Inside HubSpot)

1. **Access the AI Email Writer**
   - Go to **Marketing → Email → Create Email → AI Email Creation**.
   - Click "Generate with AI." Start from scratch, repurpose an existing email, or enter a short prompt.

2. **Write or Select a Prompt**

   Example prompts:
   - "Promote our new webinar for SaaS founders."
   - "Re-engage inactive customers with a friendly tone."

3. **Refine Using Brand Voice & Context**
   - Make sure your Brand Voice (from Week 1) is active.
   - Use quick commands - Rewrite, Shorten, Expand, or Change tone - to fine-tune copy and emotion

4. **Preview, Personalize, and Test**
   - Add personalization tokens (first name, company, last activity).
   - Preview on mobile and desktop.
   - Run quick A/B tests — AI will suggest subject lines and optimize preview text for higher open rates.

5. **Optimize and Schedule**
   - Use AI Send-Time Optimization to identify the best delivery window.
   - Schedule or send immediately — HubSpot tracks performance in real time.

Use Cases by GTM Type

GTM Motion	How to Use HubSpot's AI Email Writer	Expected Outcome
Sales-Focused GTM	Generate 3-email nurture sequences after demos or events.	Frees SDRs from manual writing; speeds MQL→SQL conversion.
Marketing-Led GTM	Create campaign newsletters and nurture emails using your Brand Voice.	2–3× faster campaign execution with consistent tone.
Long Sales Cycle	Summarize case studies or whitepapers into drip series.	Keeps prospects engaged between buying stages.
Short Sales Cycle	Build "Quick Launch" campaigns — flash sales, events, product updates.	Enables fast campaign launches without writer dependency.

Pro Tips for Scale & Team Type

Team Type	Pro Tips
Larger / Enterprise Teams	• Build **modular templates** (headers, tokens, CTAs) so AI drafts fit instantly. • Keep a **shared prompt library** for events, launches, reactivations - ensures tone consistency across regions. • Require **human review** before send; tag AI-generated emails for analytics. • **Bonus:** Pair with **Content Remix** (Step 4) to auto-generate nurture emails from remixed blogs or case studies.
Mid-Market / Lean Teams	• Set a rule: *every campaign gets one AI draft* - speeds brainstorming. • Test 2 AI subject lines per campaign; build a running **"Subject Line Bank."** • Rewrite top emails in 3 tones — *Warm, Confident, Data-led* — for persona fit. • **Bonus:** Use **Breeze Intelligence** to find patterns like *"Emotion-led CTAs = +17% clicks.*

Step 6 – Generate SEO-Ready Blogs Using AI

Why this matters:

Organic content remains the most cost-efficient and sustainable pipeline driver - but it's also the hardest to scale consistently.

HubSpot's AI Blog Assistant turns your content strategy into a repeatable engine by helping your team ideate, outline, and draft SEO-optimized articles directly inside HubSpot.

Every post automatically aligns with your Brand Voice and existing keyword strategy, reducing content creation time by up to 60%.

How It Works In HubSpot (2025 Update)

1. **Access the AI Blog Assistant**
   - Go to **Marketing → Website → Blog → Create Blog Post.**
   - In the blog editor, click **"Generate with AI."**
   - If the AI toolbar isn't visible, enable AI Assistants in **Settings → AI & Machine Learning → Allow generative AI.**

2. **Generate a Blog Topic**

   In the prompt box, type a clear instruction, such as:
   - "Write a blog about how AI is transforming B2B sales enablement."
   - "Generate a list of blog ideas around CRM automation for SMBs."

   The AI Assistant will create multiple topic ideas - select the one most relevant to your audience.

3. **Generate or Customize the Outline**
   - Click **"Generate Outline."**
   - HubSpot automatically structures the article (intro, subheadings, conclusion) using SEO best practices.
   - You can refine any section with contextual prompts like:
     "Add examples from SaaS industry."
     "Focus on HubSpot use cases."

4. Create the Full Draft

- Click "Generate Full Post."
- The AI will draft an entire article based on your chosen topic and outline.
- Review each section - expand or rewrite with commands like "Make it more data-driven" or "Add statistics."

5. Optimize for Search & Brand Voice

- Apply your **Brand Voice profile** to ensure tone consistency.
- Use HubSpot's built-in SEO recommendations (right sidebar) to fine-tune keywords, meta description, and readability.
- Add relevant CTAs and internal links to your landing pages or gated content.

6. Publish or Remix

- Save as Draft for review or publish directly.
- Optionally, use **Content Remix** (Step 4) to repurpose the article into LinkedIn posts, newsletters, or ads.

Pro Tips for Different Team Sizes

Team Type	Pro Tips
Larger / Enterprise Teams	• Build a Content Pod Workflow — strategist → editor → SEO specialist — to scale AI-assisted publishing. • Centralize SEO rules in HubSpot (keyword libraries & topic clusters) so every AI draft aligns with shared data. • Treat AI as first draft, human as final edit — writers become curators, not typists. • Bonus: Create an AI Blog Tracker Dashboard to monitor time-to-publish, AI vs. human contribution, and traffic lift.
Mid-Market / Lean Teams	• Start with one AI blog per week — fill gaps when writers are bandwidth-limited. • Sync your SEO keyword strategy directly in HubSpot or via CSV import. • Focus on repurposing, not volume — Remix each blog (Step 4) into 3–4 micro-assets for email and social. • Bonus: Use a consistent prompt format: "Write a blog for [persona] on [topic] emphasizing [benefit]." This keeps tone and structure uniform.

Week 2 – COMBINED OUTPUT SUMMARY – CONTENT VELOCITY ACTIVATED

Theme: Turning Ideas Into Campaigns - Faster, Smarter, And On-Brand.

By the end of Week 2, your team should have moved from setup to visible impact. AI is no longer theoretical - it's now embedded in your core marketing workflows.

What You've Achieved This Week

Dimension	Outcome	Measurement	Impact
Campaign Velocity	Launched AI-powered Remix sprint and 1–2 full campaigns	3–5 new assets per source content	Time-to-campaign reduced by 40–50%
Email Personalization	AI Email Writer in use across nurture and promo flows	A/B tests show +15–20% open rate improvement	Brand Voice now applied to all outbound emails
Organic Content Scale	First AI-assisted SEO blog published	Avg content production time ↓ 60%	Summarize case s
Cross-Channel Consistency	Unified tone via Brand Voice & Remix	Tone variance reduced across social, email, and blogs	Seamless brand experience across campaigns
Operational Efficiency	Team capacity increased	2× more content per week with same resources	AI tools adopted in daily workflows

Week 3 – Intelligence Layer: Insights, Segments & Summaries That Drive Smarter GTM Decisions

Theme: You've Built Your AI Engine - Now It's Time To Let It Think.

HubSpot's AI segmentation, campaign analysis, and summarization tools turn your marketing data into decisions, giving GTM leaders real-time visibility into what's working and what needs focus.

Step 7 – Build Smart Segments With AI

Why this matters:

Segmentation is where marketing strategy becomes revenue reality. HubSpot's AI-Powered Segments and AI List Assistant help you uncover audience patterns, behaviors, and lifecycle trends automatically - no manual filters or spreadsheets required.

You describe who you want to reach; HubSpot AI builds the list for you.

How It Works

1. **Navigate to Lists**
   - Go to CRM → Lists → Create List → Use AI Assistant.

2. **Describe Your Segment in Plain English**

   Type prompts like:
   - "Contacts who opened an email in the last 30 days but haven't clicked a CTA."
   - "Companies with more than 50 employees who requested a demo."
   - "Leads generated from events in Q1 that haven't been nurtured."

3. **AI Builds the Filters Automatically**
   - HubSpot interprets your description → generates a list with all relevant filters (e.g., lifecycle stage, engagement, form submissions, property values).

4. Refine and Save

- Review, adjust, and name your segment.
- Sync it instantly with your campaigns, workflows, or ads.

5. Activate Across Channels

- Connect lists to your HubSpot Ads tool, Email Hub, or Sales Sequences.
- Segment-level personalization is now automated.

Use Cases by Marketing Function

Use Case	How to Execute with HubSpot AI Segments	Outcome
Lifecycle Nurturing	"Show me leads that became MQLs last month but haven't booked meetings."	Automate re-engagement campaigns.
Event & Webinar Follow-Up	"List everyone who registered for our webinar but didn't attend."	2–3× faster campaign execution with consistent tone.
Account Expansion (ABM)	"Find companies with >3 deals closed and renewal in 90 days."	Drive upsell campaigns and renewal sequences.
Ad Retargeting	"Contacts who visited the pricing page twice but haven't converted."	Auto-sync segment to LinkedIn Ads or Google Ads.
Persona Testing	"Contacts engaging with product-led content vs. thought leadership."	Compare conversion rates across content themes.

✅ Pro Tip

Combine AI Segmentation with Content Remix (Step 4) - use behavior-based segments to deliver remixed content dynamically. Example: leads who engaged with "AI Agents" blogs automatically receive a remixed follow-up via email.

Step 8 – Unlock Campaign Intelligence

Why this matters:

HubSpot's Campaign Assistant gives you visibility into what's driving revenue, not just clicks.
It uses AI to summarize campaign performance, detect trends, and recommend optimizations - without requiring analysts or dashboards.

How It Works

1. **Open Your Campaign**
   - Go to **Marketing → Campaigns → Choose Campaign → Insights Tab.**
   - Click **"AI Summary"** or **"Ask AI"** to start analysis.

2. **Ask Natural Language Questions**

   Example queries:
   - "Which channel contributed most to new contacts?"
   - "What was the best-performing asset?"
   - "Where did engagement drop?"

   The AI Assistant answers in full sentences - not just numbers.

3. **Get Optimization Recommendations**
   - The AI highlights underperforming CTAs, timing issues, or unbalanced asset allocation.
   - Example: "Landing page conversions are strong, but email click rates are low - test a shorter preview text."

4. **Export Insights for Review**
   - Save summaries for leadership updates or link them to dashboards.
   - Use Breeze Intelligence (optional) for deeper multi-campaign analysis.

Practical Use Cases

Use Case	How to Execute	Outcome
Marketing & GTM Alignment	Ask: "Which campaign delivered the most SQLs?"	Lets GTM teams focus spend on what converts fastest.
Creative Optimization	Ask: "Which ad copy variant had the best CTR?	Use AI findings to refine tone or creative angle.
Budget Planning	Ask: "Where did we over-invest with low ROI?"	AI identifies wasted spend channels for reallocation.
Multi-Channel Attribution	Ask: "Which combination of blog + email + ad delivered conversions?"	Creates cross-channel visibility for leadership.
Performance Summary for QBRs	Use AI summaries to generate campaign reports for leadership decks.	Saves 3–5 analyst hours per report.

☑️ **Pro Tip**

Connect **Campaign Assistant** with **HubSpot Dashboards** for leadership-ready summaries.
Create a monthly "AI Campaign Performance Digest" that automatically pulls highlights into Slack or email - making data storytelling effortless.

Step 9 – Summarize Everything For Faster Collaboration

Why this matters:

Information overload slows GTM teams. HubSpot's AI Summarization capabilities - available in records, inboxes, and emails - ensure every marketer, seller, and service rep can catch up in seconds.
This is where speed compounds. Summaries make your CRM conversational and meetings more productive.

How It Works (And Where It Lives)

Area	Feature	What It Summarizes	How to Use
CRM Records	Summarize Records	Notes, activities, recent interactions	Click "Summarize Record" in contact or deal views.
Marketing Emails	Email Summaries	Past email performance and engagement	In Marketing → Email, click "Summarize" to auto-generate campaign insights.
Conversations Inbox	AI Inbox Summaries	Long customer threads and multi-agent conversations	Click the AI icon → "Summarize this thread."
Sequences / Deals	Meeting & Sequence Recaps	Key takeaways and follow-up actions	AI generates meeting summaries from logged calls.

Use Cases For GTM Teams

Marketing Teams

Scenario	How to Apply	Benefit
Post-Campaign Reporting	Summarize campaign performance using Email Summaries + Campaign Assistant.	Reduces report creation time by 80%.
Team Handoffs	Summarize content briefs or workflows for designers/writers.	Faster onboarding and alignment.
Agency Coordination	Share AI summaries of campaign performance with agencies.	Transparent collaboration with less manual documentation.

Sales & RevOps Teams

Scenario	How to Apply	Benefit
Contact Record Recap	AI summarizes full contact history in one click.	Sellers prep for calls in seconds.
Deal Review Prep	Summarize all emails, notes, and meetings for that deal.	Saves time before QBRs or pipeline meetings.
Cross-Team Sync	Auto-summarize shared Slack/email threads.	Keeps marketing → sales alignment tight.

✅Pro Tip

Encourage every marketer and AE to start their day by saying, "Summarize my last 10 activities."

It's the fastest productivity boost you can give your GTM org.

For larger teams - create a shared "AI Summary Feed" dashboard in HubSpot that displays summarized highlights of key deals, campaigns, and service tickets in one view.

Week 3 – OUTPUT SUMMARY - AI INTELLIGENCE ACTIVATED

Theme: From Information To Intelligence - Week 3 Marks Your Transition Into Data-Driven Marketing.

Dimension	Outcome	Measurement	Impact
Smart Segmentation	AI-generated segments live for lifecycle, ABM, and behavior-based targeting	≥ 5 AI-generated lists active	Personalized nurture and retargeting
Campaign Intelligence	Campaign Assistant used to summarize and optimize live campaigns	100% of active campaigns reviewed weekly	Improved ROI visibility for CMO
AI Summarization	Record, inbox, and email summaries active	80% of GTM users adopt "Summarize" workflows	Collaboration and handoff speed ↑ 50%
Decision Enablement	Insights embedded into GTM workflows	AI summaries visible in reports & dashboards	Leadership decisions backed by real-time data

Week 4 – Agents & Automation: Where AI Starts Doing The Work

Theme:

Your Team Has Learned, Optimized, And Analyzed. Now, It's Time To Let HubSpot AI Handle The Repetitive, High-Volume, And Insight-Driven Tasks - Freeing Your GTM Teams To Focus On Creativity And Strategy.

HubSpot's AI Agents And AI Workflows Are The Final Unlocks That Make HubSpot A Self-Optimizing GTM Engine.

Step 10 – Activate Your First AI Agents

Why this matters:

AI Agents are the newest layer in HubSpot's AI ecosystem - designed to act on your behalf inside Marketing, Sales, and Service workflows.

Each agent is specialized - handling specific processes like prospecting, RFPs, customer responses, or deal loss analysis.

Think of them as AI teammates that execute tasks across your GTM system with context from your CRM and Knowledge Vaults.

A Simple Framework: Choosing the Right AI Agent

Business Need	Recommended Agent	What It Does	Impact
Generate New Pipeline	Prospecting Agent	Identifies warm leads, prioritizes outreach, drafts first-touch emails.	Saves SDRs 6–8 hrs/week.
Respond to RFPs Fast	RFP Agent	Auto-drafts personalized proposals using product vaults and templates.	Speeds deal response cycles.

Analyze Lost Deals	Deal Loss Agent	Reviews closed-lost deals, surfaces common reasons, suggests fixes.	Improves win rates.
Monitor Customer Health	Customer Health Agent	Flags churn risk via support, NPS, and renewal data.	Boosts retention.
Scale Customer Support	Customer Agent	Answers FAQs, manages tickets, escalates complex cases.	Automates Tier-1 support.
Ensure Brand Consistency	Brand Assistant	Reviews AI-generated content for tone and phrasing accuracy.	Keeps messaging on-brand.
Align Sales & Marketing	Sales-to-Marketing Feedback Agent	Analyzes pipeline feedback and campaign impact.	Improves targeting & messaging.
Track Expansion Readiness	Company Research Agent	Pulls firmographic + intent data for upsell opportunities.	Grows customer revenue.

How To Get Started

1. **Go to Breeze → Agents → Add Agent.**

2. Browse or search in the **HubSpot Agent Marketplace** → Explore All Agents.

3. Choose the agent relevant to your GTM focus.

4. Review details:
   - Description
   - Data sources (CRM, Vaults, Emails)
   - Permissions required

5. Click **"Install"** or **"Clone & Customize."**
  - Attach the appropriate **Knowledge Vaults** (from Week 1).
  - Define triggers and handoff conditions (e.g., "Escalate to human after 2 failed responses").

6. Test for one use case → Evaluate → Scale.

> ✅ **Pro Tip: Start with Two Agents**
>
> - **Marketing-Led Teams:** begin with the **Prospecting Agent + RFP Agent.**
>
> - **Sales-Led Teams:** begin with the **Deal Loss Agent + Customer Agent.** Activate only what can drive measurable ROI in the first 30 days - then expand.

Advanced Framework for Scaling Agents

Phase	Focus	Agents to Add	Success Indicator
Phase 1 (30 Days)	Activation	Prospecting / Deal Loss	Basic automation live
Phase 2 (60 Days)	Optimization	Customer / RFP Agents	25% manual reduction in process time
Analyze Lost Deals	Intelligence	Sales-to-Marketing Feedback / Health Agent	Predictive insights driving strategy

Step 11 – Automate Workflows With AI

Why this matters:

Workflows are the backbone of HubSpot automation - and with AI embedded, they evolve from rule-based triggers to intent-based orchestration.

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Workflows are the backbone of HubSpot automation - and with AI embedded, they evolve from rule-based triggers to intent-based orchestration.

HubSpot's AI Assistants in Workflows allow you to describe what you want to automate in plain language - and the system builds it for you.
For GTM teams, this means faster campaign launches, auto-personalized outreach, and a living operations layer that adapts as your business changes.

How It Works

1. **Access the AI Workflow Builder**

    - Go to **Automation → Workflows → Create → Start with AI.**

2. **Describe What You Want to Automate**

    Example prompts:
    - "Nurture all MQLs who downloaded our AI report."
    - "Notify the sales owner when a deal goes inactive for 14 days."
    - "Send a 3-part welcome sequence to new customers."

3. **AI Suggests Triggers, Actions & Properties**

    It automatically configures enrollment triggers, branching logic, and key actions like:
    - Send marketing email
    - Update lifecycle stage
    - Create a task for sales
    - Summarize record (via Breeze AI)

4. **Refine & Add Personalization**

    - Add conditions, delays, or goals.
    - Apply personalization tokens for account name, region, or intent score.

5. **Test, Launch & Measure**

    - Test the workflow before activation.
    - Use the Performance tab to review engagement, conversion, or velocity impact.

✅**Pro Tips for Workflow Automation**

For Larger / Complex GTM Teams

- **Create Modular AI Workflows:**
  Instead of one massive workflow, build smaller reusable modules (e.g., "Lead Enrichment," "Qualification," "Handoff").
  Then connect them using triggers and enrollment filters.

- **Use Summarize Actions:**
  In workflows, add the "Summarize Record" action → Breeze will auto-write deal or contact recaps after major updates.

- **Governance Tip:**
  - Review all active AI workflows monthly.
  - Label them by department and owner (e.g., "MKT-AI-Workflow-LeadNurture").

For Lean / Mid-Market Teams

- **Automate First, Refine Later:**
  Let AI create your base nurture sequence - then refine tone and visuals manually.

- **Turn Meeting Notes into Follow-Ups:**
  Use "Summarize Record" + "Send Email" to generate personalized follow-ups after discovery calls.

- **Speed Metric:**
  Measure "Time-to-Automation" - how long it takes from campaign idea → workflow live.
  Aim for 48 hours or less.

Week 4 - Output Summary - AI Automation In Motion

Dimension	Outcome	Measurement	Impact
AI Agents Activated	2–3 agents live (Prospecting, Deal Loss, Customer Agent)	50+ hours saved per month	Automated repetitive tasks
AI Workflows Deployed	Nurture + Reminder + Reporting workflows built	100% accuracy on automation rules	Reduced manual campaign ops
Governance Established	Review cadence & naming convention live	Audit compliance achieved	Scalable automation foundation
Cross-Team Efficiency	Marketing, Sales & CS connected via AI	Time-to-campaign ↓ 40%	GTM motion unified under automation

Days 29–30 Measure, Report, And Plan Ahead

By the end of 30 days, your marketing team has gone from experimenting with AI to operationalizing it inside HubSpot.

Now it's time to measure what changed, report it clearly to leadership, and decide how to scale sustainably - with data-backed confidence.
AI adoption without measurement feels like momentum; **AI adoption with metrics creates movement.**

Step 12 – Measure What Matters: The AI Activation Report

Quantify the impact of your 30-day AI rollout across productivity, engagement, and pipeline outcomes.

1. Collect Platform Metrics (from HubSpot & Breeze)

Business Need	Recommended Agent	What It Does	Impact
Metric Category	# of AI-generated assets vs. manual	Breeze Dashboard → "AI Usage"	≥ 60 % of new content
Campaign Performance	Open / CTR / Form-fill improvement	Marketing → Campaign Insights	+15–25 % lift
Workflow Efficiency	Avg time saved per task	Automation → Workflow Reports	35–50 % reduction
Adoption & Usage	# of team members using AI weekly	Settings → AI Usage Dashboard	80 %+ activation
AI Credits Consumption	Credits used / remaining	Settings → Billing → Usage & Limits	Within budget cap

2. Collect Human Metrics (Qualitative Impact)

- **Time Freed:** "How many hours per week per marketer are now spent on strategy instead of drafting?"
- **Creative Quality:** Run an internal survey: "Do AI-generated assets meet brand standards?"
- **Confidence Curve:** Track increase in prompt fluency - early users become mentors for others.

3. Build Your 30-Day AI Impact Report

Section	Data Inputs	Narrative Focus
Executive Summary	Top 3 wins, quantified	"AI saved us X hours, improved Y KPIs."
Adoption Snapshot	Breeze usage, team adoption chart	Visual proof of culture shift
Campaign Insights	Week 2 & 3 campaign metrics	Tie performance to business outcomes
Efficiency Metrics	Workflow + Agent automation	Prove productivity gains
Next Steps (Roadmap)	90-day action plan	Map to GTM outcomes, not tools

> ✅ **Pro Tip**
>
> Present the report in your next Marketing Leadership Review - positioning it as the "AI ROI Scorecard."

Step 13 – Calibrate & Plan Ahead: The 90-Day AI Scale Roadmap

Convert learnings into scalable systems - expand what worked, refine what didn't, and re-forecast AI ROI for the next quarter.

1. Use OneMetric's AI Tools to Re-Calibrate Your Roadmap

AI Credit Calculator (Replit App) → *[Launch Calculator]*
- Input your current number of AI assets, workflows, and agents.
- Identify where credits are being consumed and forecast 3-month credit needs.
- Adjust subscription tiers or allocate credits to high-ROI use cases (e.g., Prospecting Agent, Remix, Workflows).

AI Readiness Assessment Tool (Replit App) → *[Run Assessment]*
Evaluate maturity across 4 pillars:
- Process - How integrated is AI into marketing ops?
- People - How confident is your team in using it?
- Platform - Are key features (Brand Voice, Vaults, Workflows) active?
- Performance - Are you tracking ROI consistently?

Generate a readiness score with recommendations for your next 90-day roadmap.

(These tools become your recurring AI "health check" - run them every quarter.)

2. Build Your 90-Day Roadmap Framework

Roadmap Horizon	Focus Area	Key Actions	Owner	KPI
Next 30 Days	Optimize	Fine-tune Agents + Workflows; expand segmentation	AI Champion / Ops	+10 % efficiency gain
Next 60 Days	Scale	Introduce multi-agent orchestration (Prospecting ↔ Customer Agent)	RevOps / GTM Lead	2× automation throughput
Next 90 Days	Integrate	Extend AI to Sales & CS Hubs, unify dashboards	CMO / Ops Head	Unified AI reporting across GTM

3. Institutionalize AI Inside GTM

- **Create an AI Council:** cross-functional pod of Marketing, Sales, CS, Ops leaders.
- **Document AI SOPs:** naming conventions, quality standards, approval flows.
- **Quarterly Audit:** use Breeze Intelligence + OneMetric tools to track credit usage and feature adoption.
- **Incentivize Experimentation:** reward teams who launch new AI use cases monthly.

Week 5 / Final Output Summary - AI Proven & Planned

Dimension	Outcome	Measurement	Impact
ROI Visibility	30-Day AI Activation Report completed	Leadership deck	Measurable business outcomes presented
Budget Calibration	AI Credit Calculator used to forecast	Budget forecast	Predictable spend vs return
Maturity Assessment	AI Readiness Assessment completed	Readiness score	90-Day roadmap prioritized
Operational Scale	Governance & council established	Quarterly cadence	Sustainable AI culture embedded

Closing Notes - From Playbook To Practice

If you've made it to this point, you've done something most organizations never do: you've taken AI from concept to capability inside your GTM engine. **In 30 days, you've:**

- Established your **Brand Voice** so AI speaks your language.
- Centralized knowledge with **Vaults and Assistants.**
- Launched campaigns with **Content Remix** and **AI Email Writer.**
- Transformed analytics into intelligence with **AI Segments** and **Campaign Assistant.**
- Automated repetitive work through **Breeze Agents** and **AI Workflows.**
- Measured impact with **OneMetric's AI Credit Calculator** and **AI Readiness Assessment Tool**

But this is just the start.

HubSpot's AI foundation is evolving fast - and the teams who capitalize on it first are the ones that will lead in efficiency, pipeline generation, and creative velocity.

The next stage isn't about learning new tools - it's about building a new operating model.

Partner With OneMetric: Your GTM AI Enablement Partner For HubSpot

We don't just implement HubSpot - we operationalize intelligence.

OneMetric is a **HubSpot Elite Partner** and a global leader in **AI-driven GTM and RevOps consulting.**

We help CMOs, CROs, and RevOps leaders turn HubSpot into a fully connected revenue operating system - powered by AI, automation, and real-time insights.

Our Core AI Consulting Offerings

Practice Area	What We Do	Typical Impact
HubSpot AI Enablement	Design & deploy AI workflows, Brand Voice profiles, Knowledge Vaults, and Agent automations.	40–60% faster campaign cycles.
GTM AI Architecture	Map AI to your GTM motion - define which AI tools (Remix, Segments, Agents, Workflows) to use for which outcome.	Clear roadmap from adoption → scale.
AI + RevOps Implementation	Integrate AI across Marketing, Sales, and Service Hubs with unified data & performance dashboards.	Unified pipeline visibility & automation.

Revenue OS Buildout	Build a modular "GTM AI Operating System" customized for your business, leveraging HubSpot's latest AI ecosystem.	End-to-end automation, from awareness to renewal.
Training & Governance	Enable teams with prompt playbooks, AI training sessions, and governance frameworks.	80% team adoption within 60 days.

The future of GTM isn't automated - it's intelligent.

You've built the foundation.
We'll help you scale the system.

Who we are

(And What It's Like to Work With Us)

Clarity in strategy. Scale in execution.

We're OneMetric, a team of RevOps builders and GTM thinkers spread across the US, UK, and India.

Our job? Making sure your revenue systems actually work, not just look pretty. Along the way, we built Suprdense - a HubSpot-native toolkit that makes delivery faster, cleaner, and way easier.

OneMetric.

A few of the 750+ brands that trust us..

150+
HubSpot, RevOps and DevOps Experts

750+
HubSpot customers serviced

2000+
Onboardings completed

Qashio | overIT | KEYSIGHT

Westernacher | terrapay | Pearson

TATA | FENDAHL | Giift | LIXIL

HubSpot Elite SOLUTIONS PARTNER PROGRAM

HUBSPOT ONBOARDING ACCREDITATION

HubSpot PAC

We're proactive, precise, and people-first

★★★★★ 5/5

Professional, great communicators, commercially minded and quick to deliver

I have worked with a few HubSpot partners who promised the world and but delivered very little or when they delivered it took twice the amount of time originally agreed on. I found the team at OneMetric really easy to deal with. What I like best is the fact that there is no ticketing system for support. I can reach out to my dedicated project manager and move tasks priorities at will. I can upload tasks to our OneMetric dashboard and when urgent deadlines have come up the team at OneMetric has been quick, willing and able to help me deliver them. OneMetric conducts themselves professionally even when under pressure and are able to juggle multiple projects successfully with competing deadlines. The technical support they have provided on fully integrated marketing campaigns, platform integration and Salesforce CRM migration has been invaluable.

Services provided

Account based marketing, Website Development, Full Inbound Marketing Services, Email Marketing, Programmable Automation, Sales Enablement, and Custom API Integrations

Barreto-Tilman, M. | Technology - Software | 10,001 or more employees

★★★★★ 5/5

Excellent consulting partner for implementing HubSpot and HubSpot connected solutions

We were new to HubSpot and are using it for learner enrollment for trainings so the use case was fairly specialized. The OneMetric team has strong HubSpot expertise and have been able to develop user flow journeys and implement solutions to address our business needs. Our work is time sensitive and we receive quick replies and high quality work. We also appreciate their question and recommendations which often lead to better solutions.

Services provided

Website Development, Email Marketing, Programmable Automation, CRM Implementation, and Website Design

Phifer, J. | Education | 10,001 or more employees

Qashio

OneMetric.

63%
More Sales Targets Hit by Re-engineering Sales Process in HubSpot

$35,000+
saved in manual sales ops

Working with OneMetric was fantastic!

They transformed our sales process from day one. We needed HubSpot to bring visibility and structure, and they delivered.

Not only did they built dashboards, but also shaped our sales process and trained our team. Now, HubSpot shows exactly what's happening.

Armin M.
CEO & Co-Founder, Qashio