What's new in

Sales Hub Professional

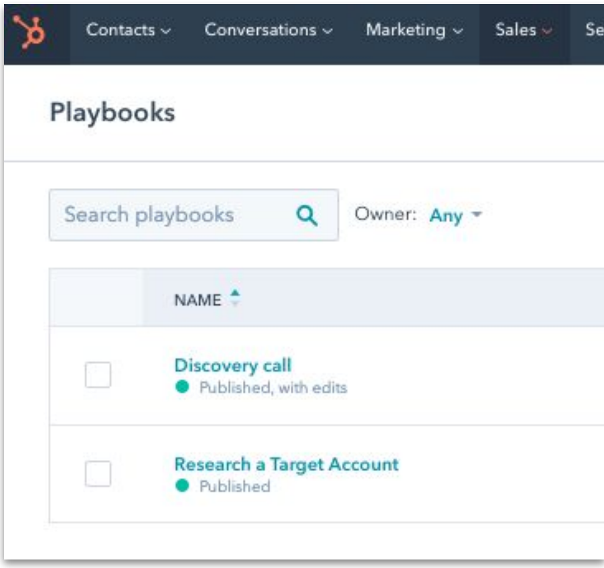
Sales Hub Professional is the easy-to-use, powerful CRM your whole team will love - and now it's getting better than ever.

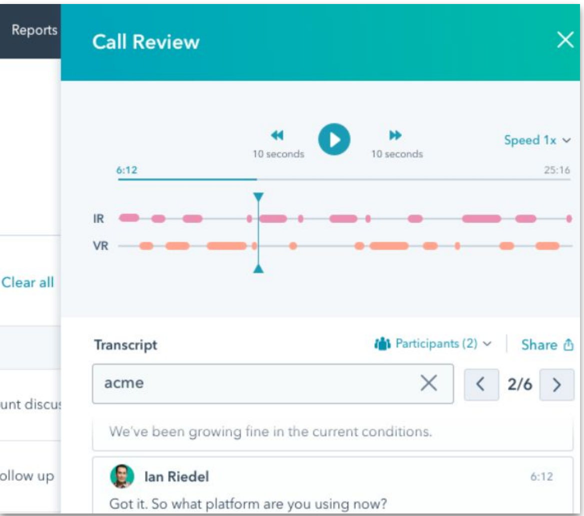
NEW

Playbooks

Build a library of sales best practices & resources to share with your team. Easily access playbooks inside your CRM.

- **Create up to 5 playbooks -** Build a library of sales best practices that you can share across your team.
- **Surface playbooks in CRM -** Reps can easily search for and open playbooks right from any CRM record.
- **Embed notes fields in playbooks -** Add a notes field to capture and log important details to your CRM.





NEW

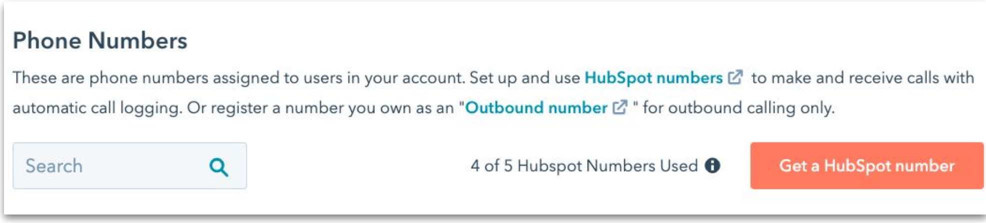
Call Transcription & Coaching

Free your team to focus on their customers while helping managers turn conversations into coaching opportunities.

- **Call transcription -** Automatically transcribe calls placed from HubSpot or a connected third party provider like Zoom.
- **Call review & commenting -** Review transcripts and leave comments at specific moments from desktop or mobile.
- **Search transcripts -** Search for mentions of specific terms inside individual calls or across all of your calls.

...plus new inbound calling functionality and HubSpot-provided phone numbers:

Place and receive calls using a HubSpot-provided US, UK, or Canada phone number and centralize all conversation records and transcripts in one place.



What's new in

Service Hub Professional

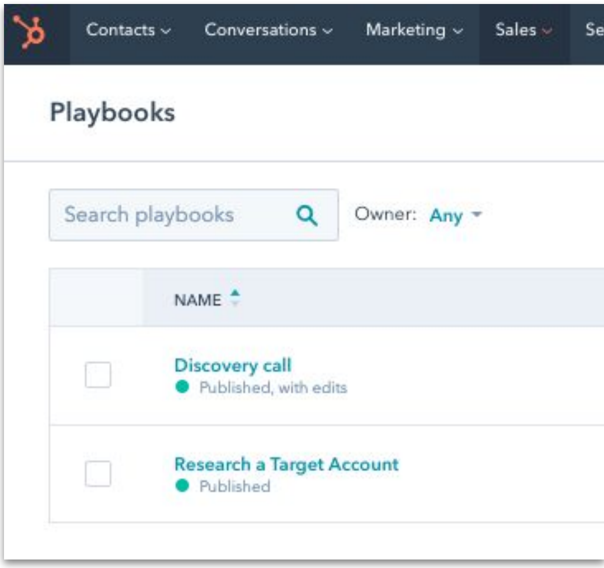
Service Hub Professional is an easy to use helpdesk solution your whole team will love now it's getting better than ever.

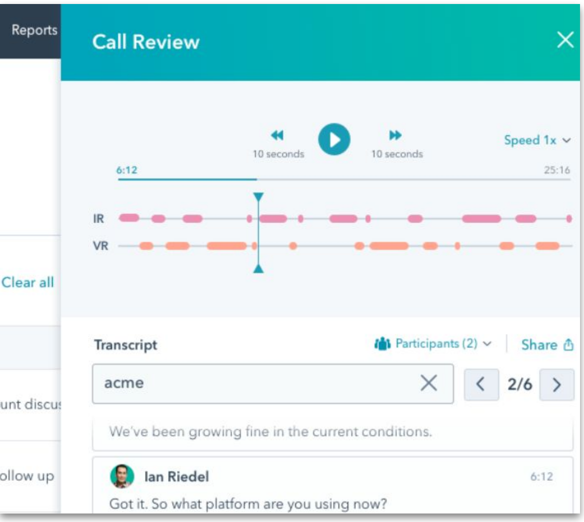
NEW

Playbooks

Build a library of best practices & knowledge articles to share with your service agents. Easily access playbooks inside CRM and helpdesk.

- **Create up to 5 playbooks -** Build a library of best practices that you can share across your team.
- **Surface playbooks in CRM -** Reps can easily search for and open playbooks right from any CRM record.
- **Embed notes fields in playbooks -** Add a notes field to capture and log important details to your CRM.





NEW

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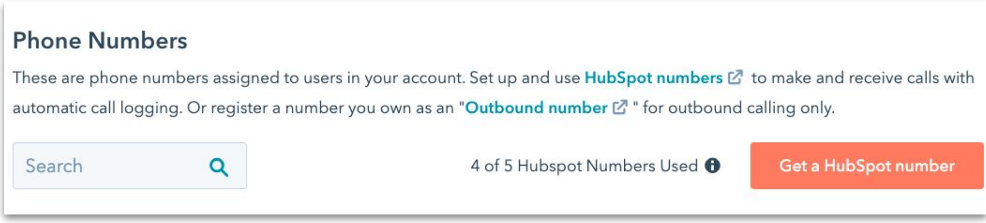


Meet

Inbound Calling with HubSpot-Provided Phone Numbers

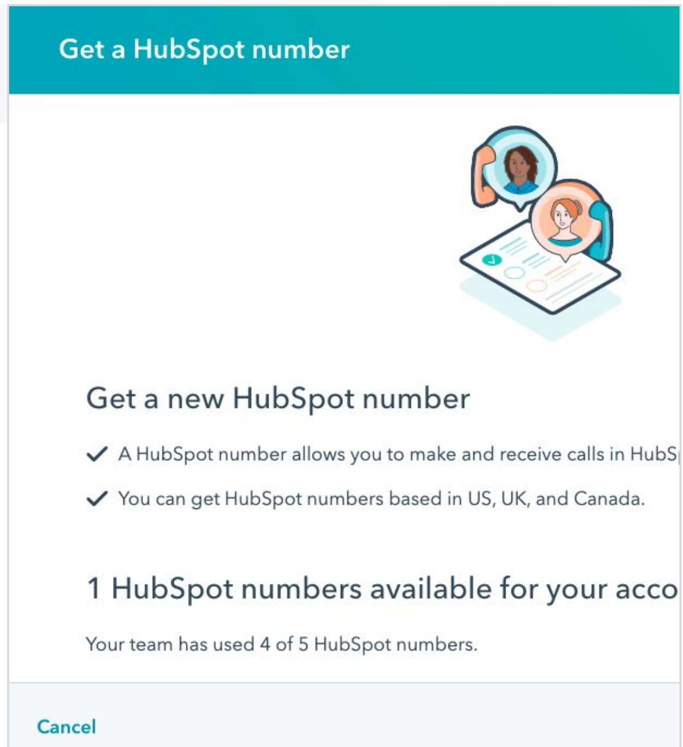
HubSpot-provided phone numbers are available in Starter+ accounts

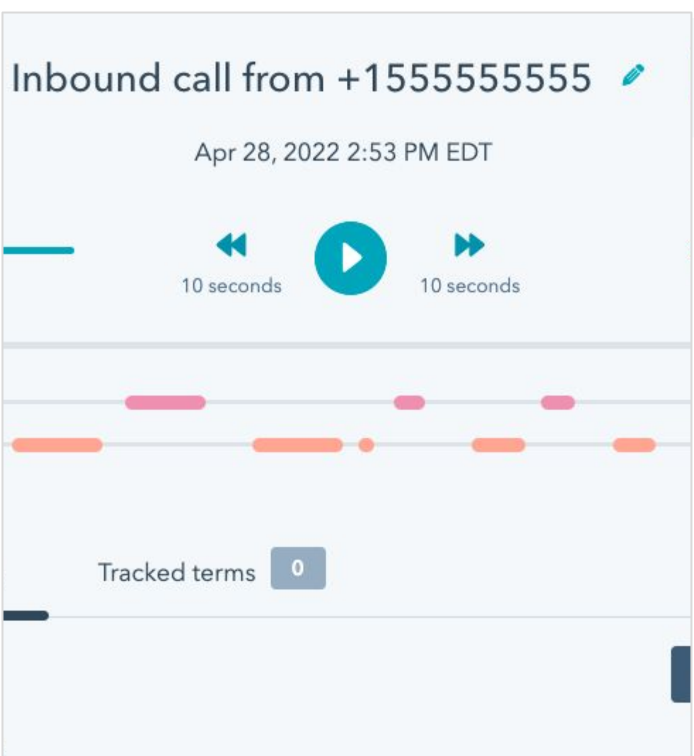
Acquire HubSpot-provided phone numbers connected to your CRM

Reps and agents can now place and receive calls using a HubSpot-provided US, UK, or Canada phone number. These phone numbers can be used to place outbound calls and forward inbound calls to personal devices. All inbound and outbound call records, recordings, and transcriptions live in the CRM.

Features include…

- Ability to acquire multiple phone numbers per account *(1 in Starter, 3 in Pro, 5 in Enterprise)*
- Inbound calls forwarded to personal mobile phone





Inbound Calling available in Starter+ subscriptions

Close the conversation loop with inbound calling

Now reps can record their incoming calls in their CRM, allowing them to communicate with and service contacts on their own time.

Calls can be recorded and auto-logged in your HubSpot database on the contact record. To receive calls, you must use a HubSpot-provided phone number.

Features include…

- Minute Limits by subscription *(500 minutes/account for Starter, 3,000/account for Pro, 12,000/account for Enterprise)*
- Voice prompt for inbound recording consent

Meet

Call Transcription and Coaching + Conversation Intelligence

Transcription & Coaching in Sales + Service Hub Professional:

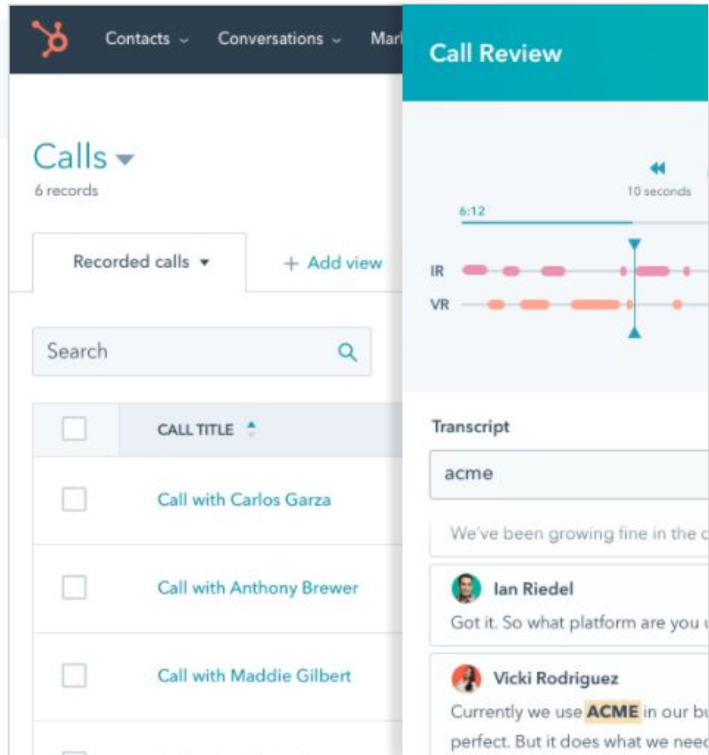
Easily turn calls into coachable moments

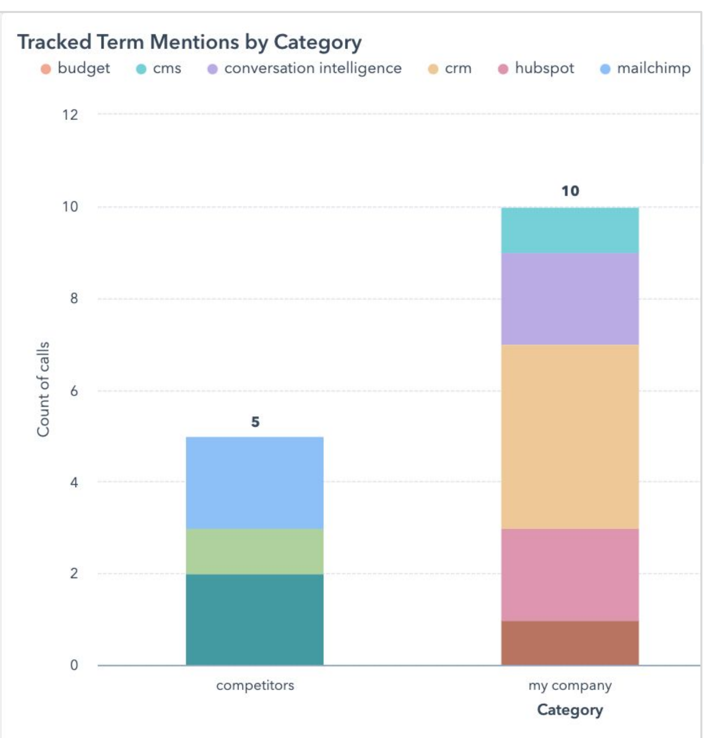
With Call Transcription & Coaching in Sales & Service Hub Professional, every call between your team and your prospects & customers is automatically captured.

Reps are freed from note-taking to focus on the customer in the moment. Managers can more easily find and act on coaching opportunities with search and call commenting, from either their desktop or a mobile device.

Features include…

- Call transcription (750hrs/month)
- Review + comment on calls (desktop + mobile)
- Search (single transcript or across all transcripts)





Conversation Intelligence in Sales + Service Hub Enterprise:

Gain deeper insight into your teams' calls

In Sales & Service Hub Enterprise, call transcription is even more powerful with additional capacity and the help of AI.

Create a list of tracked terms mentioned during calls like top competitors, product names, or terms that signify key parts of your team's process. Use these tracked terms to easily track mentions of keywords, build detailed reports on the contents of your teams' calls.

All of the features in Professional, plus:

- Additional transcription (1,500hrs/month total)
- Tracked terms (track mentions + drive reports)

Meet

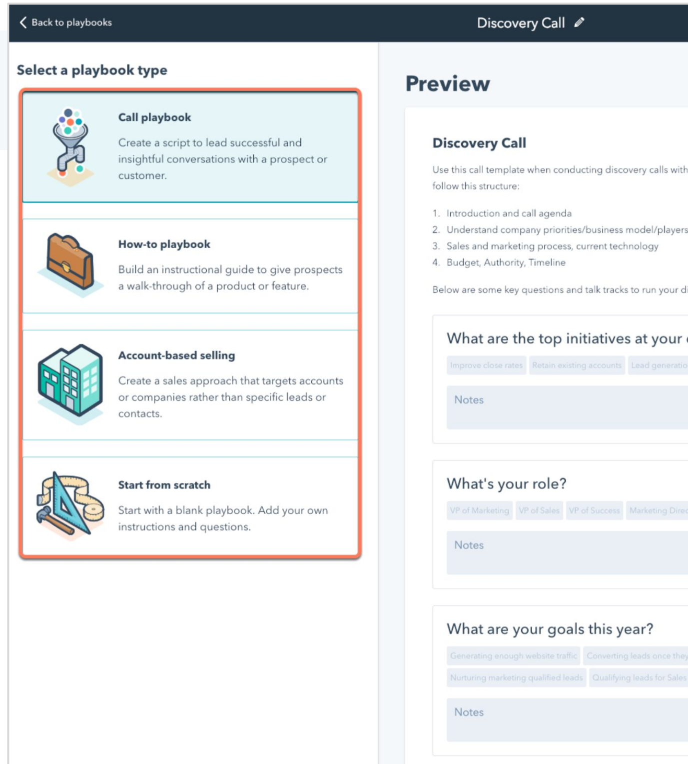
Playbooks

Playbooks in Sales + Service Hub Professional:

Build a library of sales & service best practices

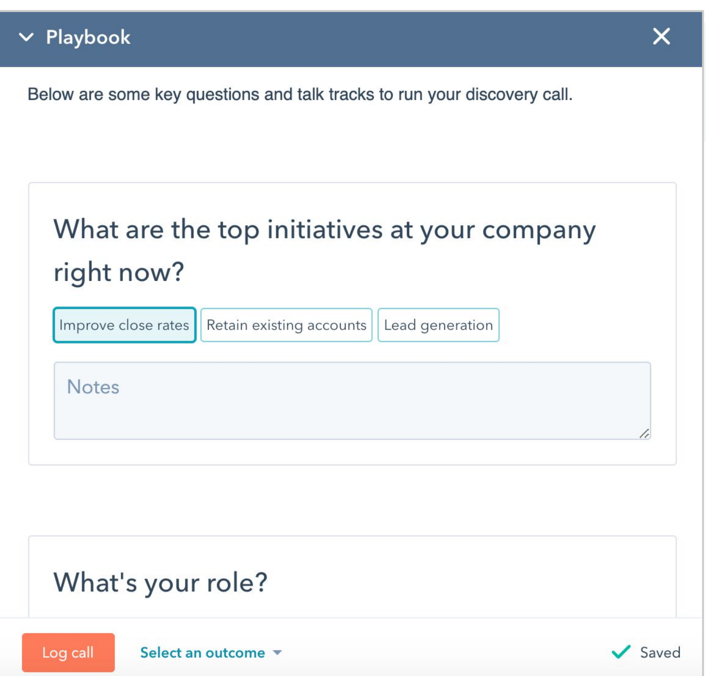
Build content for anything your team needs to win the day, from product sheets to pricing guidelines. Then search for and access playbooks right from the contact, company, deal and ticket records in HubSpot.

On a discovery call? Pull up a call script to ask the right questions. Talking to a prospect who's evaluating a competitor? Access the battlecard to clearly outline the differences between your solution and theirs.



Features include…

- Create up to 5 playbooks
- Access playbooks from CRM records
- Capture & log notes from your playbooks



Playbooks in Sales + Service Hub Enterprise:

Scale your library & capture valuable context

Playbooks are even better with Sales + Service Hub Enterprise. Additional playbook capacity means you can build a library of up to 5,000 playbooks. Embedded properties allow you to ask specific questions right inside your playbooks that can be used to drive reports, and trigger actions inside HubSpot through automation.

All of the features in Professional, plus:

- Additional playbook capacity (5,000)
- Embed properties in playbooks

Getting Started Tips for Customers

Congratulations! As a Sales or Service Hub Professional customer, you now have access to features that will help your teams sell and service more effectively.

Getting Started - Inbound Calling, with Call Transcription + Coaching

With new inbound calling* and call transcription & coaching in Sales & Service Hub Professional, every call between your team and your prospects & customers is automatically captured in your CRM. Reps can receive incoming calls forwarded to their personal device and are freed from note-taking to focus on the customer in the moment. Managers can more easily find and act on coaching opportunities with search and call commenting, from either their desktop or a mobile device.

Resources to get started with

- To get started, you'll need to be using one of the following -
    - Calling in HubSpot (with a HubSpot-provided phone number to activate ability to receive inbound calls)
    - Zoom integrated with HubSpot (be sure to check the box to sync data from recordings and transcripts on the integration settings page)
    - Another third party calling tool that supports Conversation Intelligence and is (e.g., JustCall, CallRail, or Kixie) integrated with HubSpot
- Once you are set up, learn how to review calls in HubSpot, or on a mobile device.
- Learn more about best practices in our Academy lesson on Conversation Intelligence.

*HubSpot-provided phone numbers are currently available for US, UK, and Canada phone numbers

Getting Started - Playbooks

Creating a playbook is an easy way to document things like call scripts, or other processes and best practices your sales and services teams are carrying out on a regular basis. Once created, your team can easily access these playbooks from CRM records in HubSpot, and can even use a playbook to capture notes that are later logged to the CRM's timeline.

Resources on Playbooks

- If you are a self starter, consider jumping right in by visiting the Playbooks tool in HubSpot.
- For a short and simple walkthrough of how to get started, check out our knowledge base resource on how to use Playbooks.
- Want to understand the strategy that should go into using Playbooks effectively? Check out our Academy course on Standardizing Your Approach With Playbooks.