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# 7 Ways to Unlock Hidden Revenue in Your Business with HubSpot

# Your speaker.



- ▶ Ross Breckenridge  
Managing Director, Breckenridge
- ▶ Leading Breckenridge, a UK-based HubSpot Partner agency helping ambitious businesses use CRM, RevOps and automation to create more deliberate, scalable growth.
- ▶ 14 years working with leadership teams to uncover hidden revenue across the customer journey by improving visibility, process, data quality and HubSpot adoption.

# Who we help and what we do.

- ▶ We help SMEs in adopting or scaling on HubSpot across Marketing, Sales & Service.
- ▶ We are HubSpot experts who focus on revenue outcomes.
- ▶ We specialise in providing clarity – what's actually driving revenue end-to-end.
- ▶ We deliver RevOps improvement programmes with measurable outcomes.

# Today we're going to cover...

- ▶ The Hidden Revenue Map: where value leaks across the journey.
- ▶ 7 HubSpot plays that recover revenue fast.
- ▶ Breeze AI in the loop: HubSpot's Agent Suite & practical assistive automation.
- ▶ What to measure: the RevOps Scorecard.
- ▶ A 90-day roadmap you can copy.

# The hidden revenue map

Find the leaks, fix the flow...



Every stage can leak value if owners, SLAs, and automations are unclear.

Fix the 'plumbing' first: data, objects, fields, and handoffs.

**RevOps = alignment of people, process, data, and platform to stop leaks.**

## HubSpot



**One shared  
operating model**

Teams, objects,  
properties, SLAs aligned

## RevOps



**One shared  
operating model**

Dashboards everyone  
trusts

## Clarity

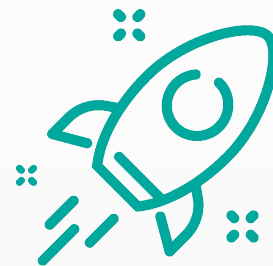


**One motion**

Automation + AI  
that supports humans

+

=



Clarity creates  
**velocity**



Baseline: common  
revenue leaks we find

# Baseline: common revenue leaks we find



Unworked inbound hand-raisers  
(slow or no first response)



Unowned MQLs/Leads, duplicate  
records, and missed follow-ups



Stale deals bloating the forecast



'Closed lost' contacts never  
re-marketed or retargeted



Silent churn risks, no structured  
upsell/cross-sell motion



Delivery teams spotting needs  
but no path to Sales



Support questions invisible to  
Sales/Marketing



## Play 1

Baseline: common revenue leaks we find

# Talk to the right people at the right time.

### ▶ **Activate Research Agent and Buyer Intent signals**

Define ICP filters, key topics/URLs, and engagement thresholds.

Create lists/alerts for Sales when intent exceeds your threshold.

### ▶ **Route & action**

Auto-assign owners, create tasks, and add to sequences.

Use Playbooks to guide first call based on the content they consumed.

### Plausible impact (first 90 days)

↗ 15-30% lead-to-meeting rate

↘ 20-30% reduction in time spent per lead

## Play 2

Never lose a lead again (Leads Object + Prospecting Agent)

**'If everything is a Lead, nothing falls through the cracks.'**

### ▶ **Standardise intake**

All net-new interest = a Lead (not just Contacts).

Set lifecycle/lead status with clear SLAs by owner role.

### ▶ **Work efficiently**

Prospecting Agent connects to data services to find new decision makers, analyzes CRM data (emails, calls, notes) to propose personalized outreach sequences

### **Plausible impact** (first 90 days)

↗ 10-20% more sales-ready conversations

↘ 30-50% reduction in lead response time

## Play 3

Triage stale deals with nudges & sequences

# Healthy pipelines produce reliable forecasts.

## ▶ Define staleness by stage

e.g. 10 days in Discovery, 20 in Proposal.

Auto-tag 'stale', notify owner, and prompt next-best action.

Surface deal score to trigger tags too

## ▶ Automate the nudge

Internal tasks for owners; external 'check-in/value add' templates.

Auto-close lost after X days with reason captured.

## Plausible impact (first 60-90 days)



10-15% better forecast accuracy



3-7% increase in win rate



8-12% reduction in cycle time

## Play 4

Re-engage closed-lost with reason-specific workflows

**Treat 'no' as 'not now'.**



### Capture the real reason

Price, timing, authority, competitor, fit?



### Build reason-based nurture tracks

'Timing' → set a re-open task in 90 days.

'Competitor' → comparison content + case studies.

### Plausible impact (per 6 months)



5-12% of closed-lost  
re-enter as opportunities



2-5% additional wins from  
recycled deals

## Play 5

Feedback surveys to prevent churn & drive expansion

**Your customers will tell you where the money is – if you ask them.**

### ▶ Instrument NPS/CSAT/CES at key moments

Onboarding, first value, renewal, ticket closure.

### ▶ Route detractors & promoters

Detractors → save play;  
Promoters → review/referral/upsell.

### Plausible impact (per 12 months)

↘ 10-20% reduction in churn

↗ 5-10% revenue expansion  
from promoter plays

## Play 6

Generate leads via delivery teams

**If you don't ask, you don't get.**

### ▶ Equip delivery & field teams

Simple playbook question set in tickets or mobile.

One-click handoff to Sales with context.

### ▶ Track service-to-sales pipeline

Custom source; separate pipeline or stage.

Reward the behaviour with leaderboards.

#### Plausible impact (per 6-12 months)



8-15%  
expansion/cross-sell



10-20% reduction in sales  
cycle time (warm intros)

## Play 7

Build a Knowledge Base that sells (indirectly)

# Every question is a buying signal.

### ▶ Capture FAQs & 'how do we...?'

Deflect tickets and reveal intent topics.

Implement the Customer Agent (Breeze AI) trained on your KB to provide instant, accurate answers and reduce support ticket volume.

### ▶ Close the loop to Marketing & Sales

Turn high-traffic KB topics into SEO and /or AEO pages, playbooks, and enablement.

Use AI to summarise patterns for campaign ideas.

### Plausible impact (per 6-12 months)

↗ 15-30% increase in ticket deflection

↗ 10-20% increase in inbound demo requests from SEO



Operational backbone:  
objects & properties



# Operational backbone: objects & properties



Clean data



Clean decisions

- ▶ Use the Data Agent (Breeze AI) to manage data cleanliness and create new custom fields using plain English chat commands
- ▶ **Standard objects** –  
Contacts, Companies, Deals, Tickets, Activities
- ▶ **Lead objects** –  
for net-new interest and SLAs
- ▶ **Custom objects** –  
for products, contracts, subscriptions as needed
- ▶ Naming conventions, required fields, and validation rules



# Automation playbook

# Automation playbook



**Automation that supports –  
never surprises – humans**

- ▶ **Trigger points –**  
form submit, page view, stage change, NPS, inactivity, buyer signals
- ▶ **Ownership rules –**  
round-robin or territory-based
- ▶ **SLA timers & alerts –**  
In the Sales Workspace, Customer Success Workspace, or Helpdesk
- ▶ **Governance –**  
test sandboxes and versioning  
Use, data quality tools if you have them? Property insights, formatting, duplicates



## Breeze AI in the loop: practical uses

# AI in the loop: practical uses



**AI accelerates good process;  
it can't fix bad process**

Breeze AI is HubSpot's umbrella suite of intelligent tools designed to increase capacity, efficiency, and speed across the entire customer journey.

# AI in the loop: practical uses

## ▶ **Research Agent –**

gathers and structures intelligence on target companies automatically from the web.

## ▶ **Prospecting Agent –**

Connects to data sources to find decision makers, emails, summaries, next best action.

## ▶ **Sales Notetaker –**

records, transcribes, and generates AI summaries of calls, pulling out next steps, guided actions and tasks.

## ▶ **Breeze Record Summaries –**

Provides instant, one-paragraph AI-generated recaps of contact, company, or deal activity for efficient handoffs and quick prep.

## ▶ **Content Assist –**

for follow-ups, comparison notes, case snippets

## ▶ **Playbooks –**

with AI suggestions inside calls

## ▶ **Customer Agents –**

that solve or qualify and route to the right team



## What to measure: the RevOps Scorecard

# What to measure: the RevOps Scorecard



If you can't see it, you can't scale

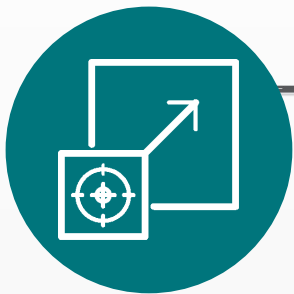
- ▶ **Key metrics –**  
Lead-to-meeting rate  
Meeting-to-SQL  
SQL-to-win
- ▶ **Response time SLAs –**  
by channel and segment
- ▶ **Pipeline health –**  
coverage, staleness, stage conversion,  
cycle time
- ▶ **Retention & expansion –**  
NRR, churn, save rate, upsell/cross-sell





# A 90-day RevOps roadmap you can copy

# A 90-day RevOps roadmap you can follow



**Deliver value fast; build for scale.**



## **Days 1-30: Baseline & quick wins**

Map objects & properties • Clean imports • Enable Buyer Intent  
Stand up Leads Object + SLAs • Basic sequences

## **Days 31-60: Pipeline hygiene & recycling**

Stale-deal rules + nudges • Closed-lost reason capture  
Reason-based nurtures • Scorecard live



## **Days 61-90: Expansion & enablement**

NPS/CSAT moments • Service→Sales play • KB + SEO/AEO loop  
Prospecting Agent playbooks across team



## 90 SECOND EXERCISE

# Where's your hidden revenue?

Make it real in 90 seconds!

- ▶ Pick one: Leads, Pipeline, Closed-lost, Service→Sales, or KB
- ▶ Ask a colleague: what's one thing you could do next week?
- ▶ Write it down – this is your 'Monday move'

# Want some help with all this in HubSpot?

Let's find your hidden revenue!

Free HubSpot Portal Review – scan the code to book your free system review to uncover where deals stall, leads slip and quick wins hide.



<https://shorturl.at/NmgLa>