

What's **REAL** from **UNBOUND**™ 26

Cut through the post-UNBOUND noise with live demos of HubSpot AI tools and hapily integrations you can use immediately.

October 21th | 10AM CT

ABOUT VONAZON

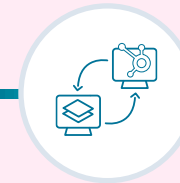
Vonazon is proud to rank in **the top 1% of HubSpot Elite Solutions Partners.**



**FULL-SERVICE
SALES, MARKETING
AGENCY**



**250+
5-STAR
REVIEWS**



**2,500+
IMPLEMENTATION
STRATEGIES**

Too many updates. Here's what we think deserves **your time**.



Build the right
foundation



Prepare sales
to act



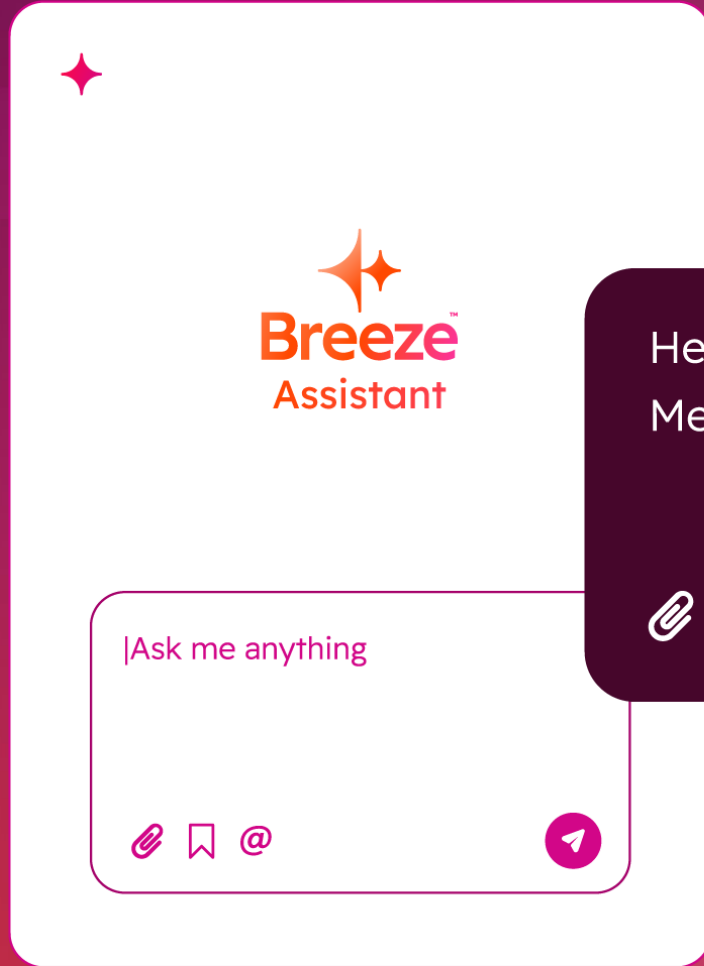
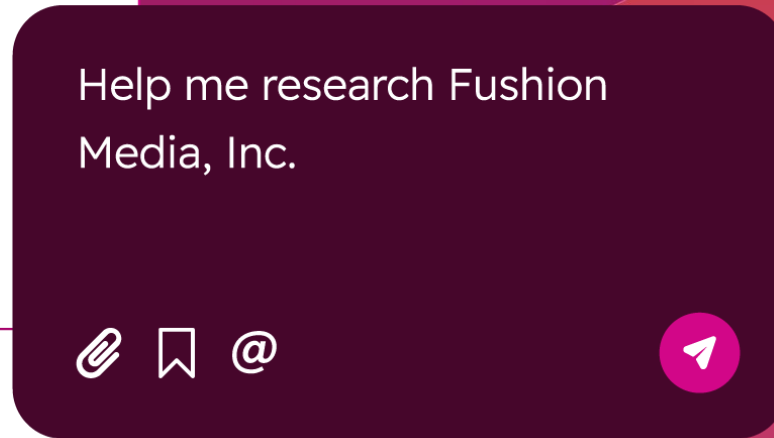
Put AI
agents to
work



Create
campaigns
faster



Connect the live
event back to
HubSpot



The connective thread
running through every
demo you'll see today.

90%
OF COMPANIES
USE AI.

Only 6% are seeing
transformational results.
The difference is **context**.

Who you'll hear from & what we'll cover

Learn the tools from the people who build and use them



HOST

Miles England

Vonazon, Onboarding Team Manager &
Director of Partnerships



AGENT HUB

Becca Stamp

HubSpot, Senior Product Manager



SMART DEAL PROGRESSION

Chloe Papke

Vonazon, Elite HubSpot
Implementation Specialist



MARKETING STUDIO

Ryan Gunn

HubSpot, Senior Product Marketing
Manager



DATA QUALITY & CONTEXT

Lily Papke

Vonazon, HubSpot Enablement &
Onboarding Specialist



EVENT MANAGEMENT & BADGE SCANNING

Dax Miller

hapily, Founder/Chief Care Officer



LILY PAPKE

DATA QUALITY & CONTEXT

What is **context**?

BUSINESS CONTEXT

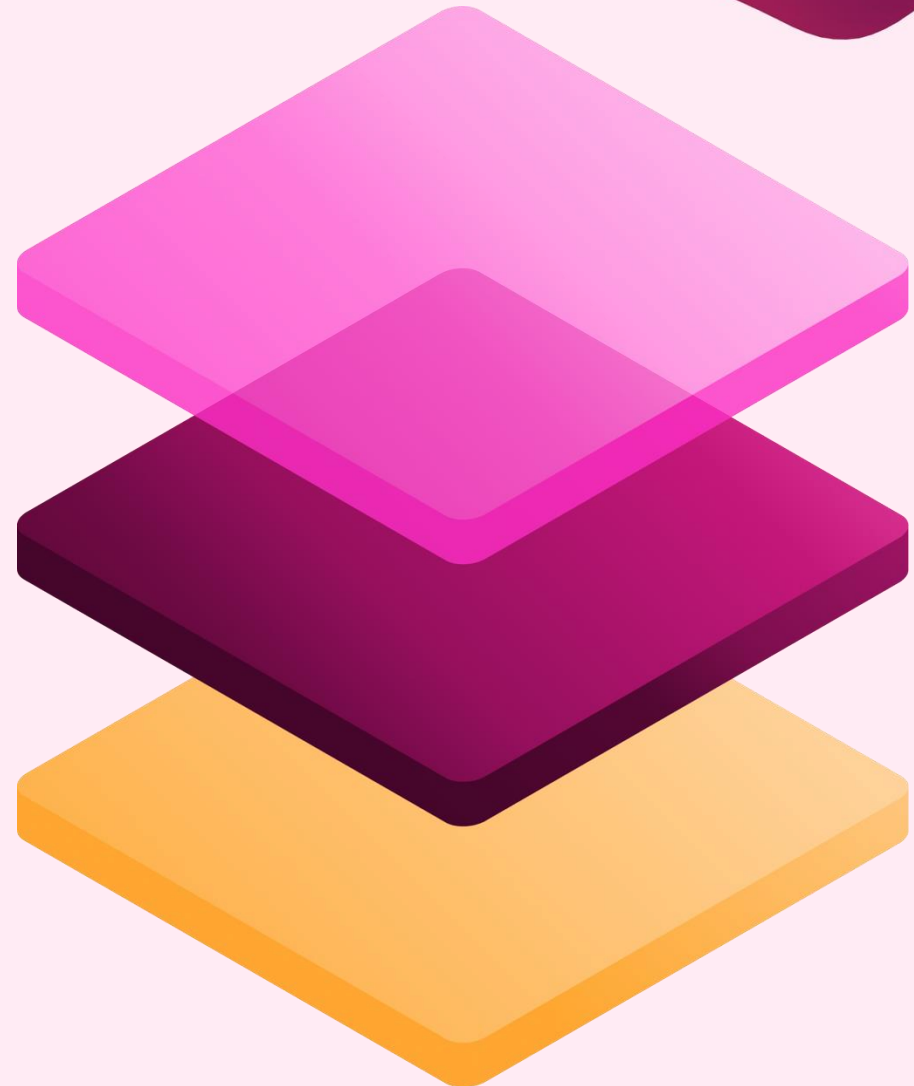
Brand, voice, positioning, products, priorities

CUSTOMER CONTEXT

Conversations, ideal customer profile, behaviors, buying signals

TEAM CONTEXT

Roles, goals, approvals, processes, methodology



The BIG finding



+264%

MQLs Generated



-28% MQLs generated



+224%

Deals Closed



-31% Deals Closed

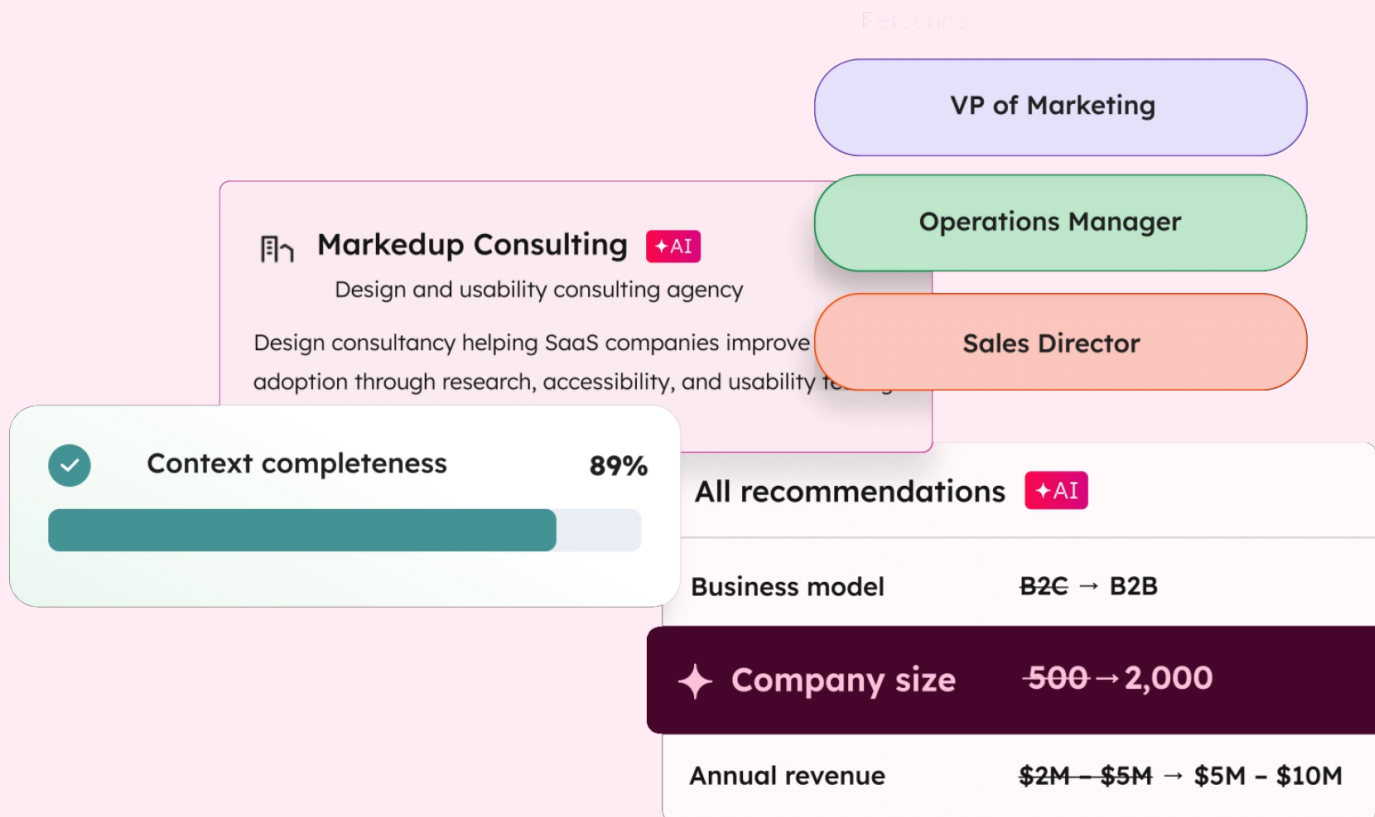


+200%

Customer Meetings
Booked



-49% Customer
Meetings Booked



Bad context is worse than no AI

- Recommending a product that's no longer in the catalog
- Running pipeline analysis with the wrong definition
- Sending an approval to a manager who just changed roles.

What changes when the foundation is fixed?

BEFORE

- Dirty data
- Multiple CRMs
- AI layered on top of existing problems

FOUNDATION FIRST

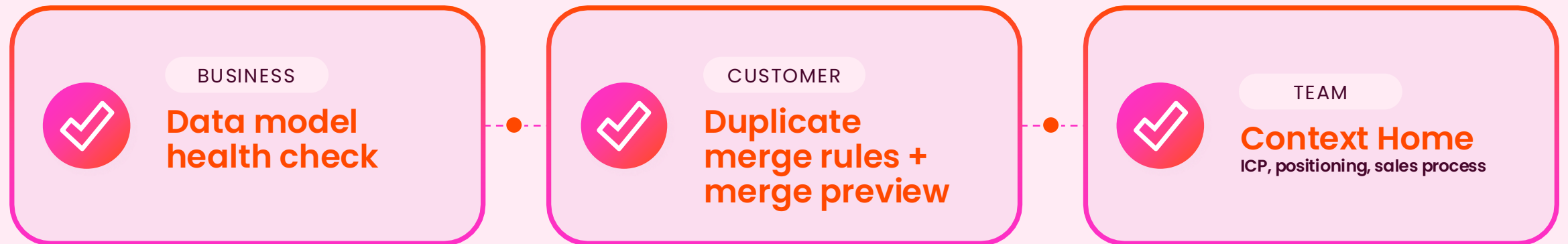
- Unified the customer journey in HubSpot
- Added buyer intent
- Built a custom engagement score
- Activated the Prospecting Agent

RESULTS

Meeting booking rate increased from **11% to 43%**

Kim Cormier, Revenuewell

Northline gets ready



Before you add more AI, audit the foundation



ACCURATE

Is your data current, complete, and trustworthy?



DOCUMENTED

Is your business, customer, and team context captured where AI can use it?



OWNED

Does someone have responsibility for keeping that context current?



MarkedUP Consulting AI

Design and usability consulting agency

Design consultancy helping SaaS companies improve product adoption through research, accessibility, and usability testing.



Austin, TX, USA



156 employees

Attribute	Value	
Headquarters location	Austin, TX, US	
Company size	51 - 250 employees	
Annual revenue	\$10M - \$50M	
Founded year	2006	



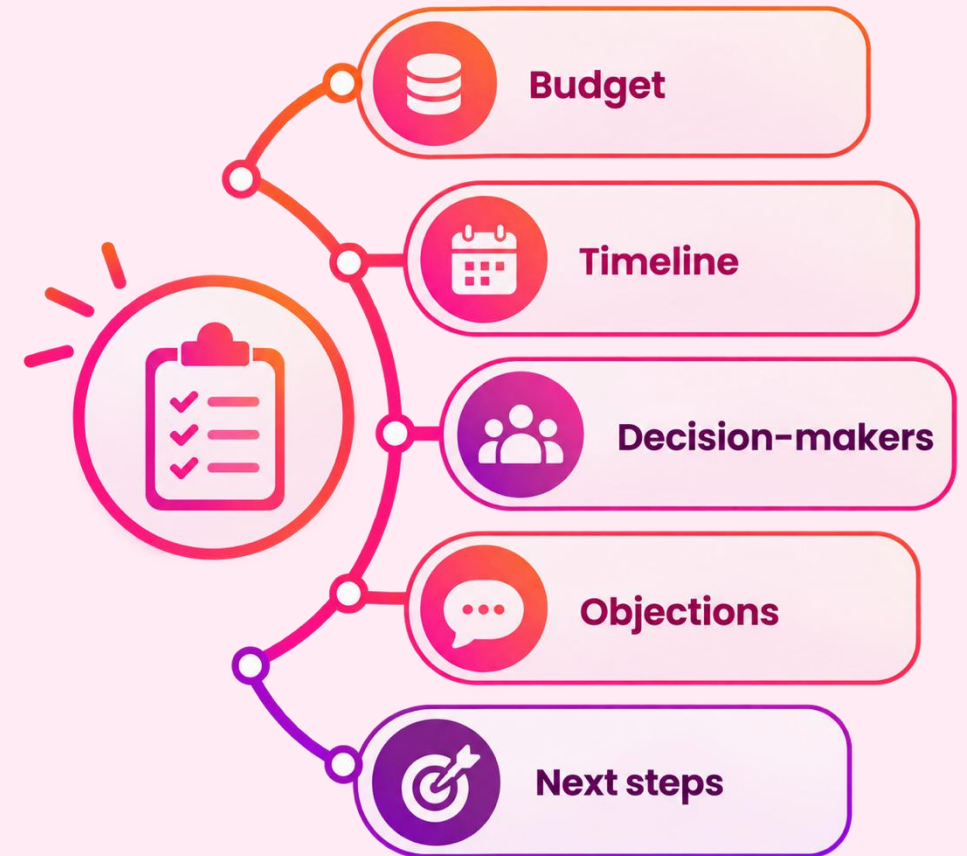
CHLOE PAPKE

SMART DEAL PROGRESSION

Your deals aren't stuck. Your CRM is.

When reps update deals later from memory, important details get lost:

- Budget
- Timeline
- Decision-makers
- Objections
- Next steps



Momentum dies in the space
between conversations.

☐	Deal Name
☐	✦ <u>Newton Elementary Outdoor Refresh</u>
	<u>Play Zone</u>
	<u>Outdoor</u>
	<u>On-Site Install</u>
☐	<u>Riverside Urban Play Concept</u>

Last meeting needs follow-up

A draft follow-up email, action items, and suggested CRM property updates are ready for review.

Review & approve

What if the CRM **updated** you?

Smart Deal Progression turns conversations into next steps.



SUGGESTED UPDATES

Budget, timeline, decision-makers, objections



NEXT BEST ACTIONS

Scheduling a meeting, creating a task, or re-engaging a stalled deal



DRAFTED REPLIES

Follow-up emails that already know the deal history



UPDATED DEAL PLAN

A shared plan that keeps the buyer aligned on next steps

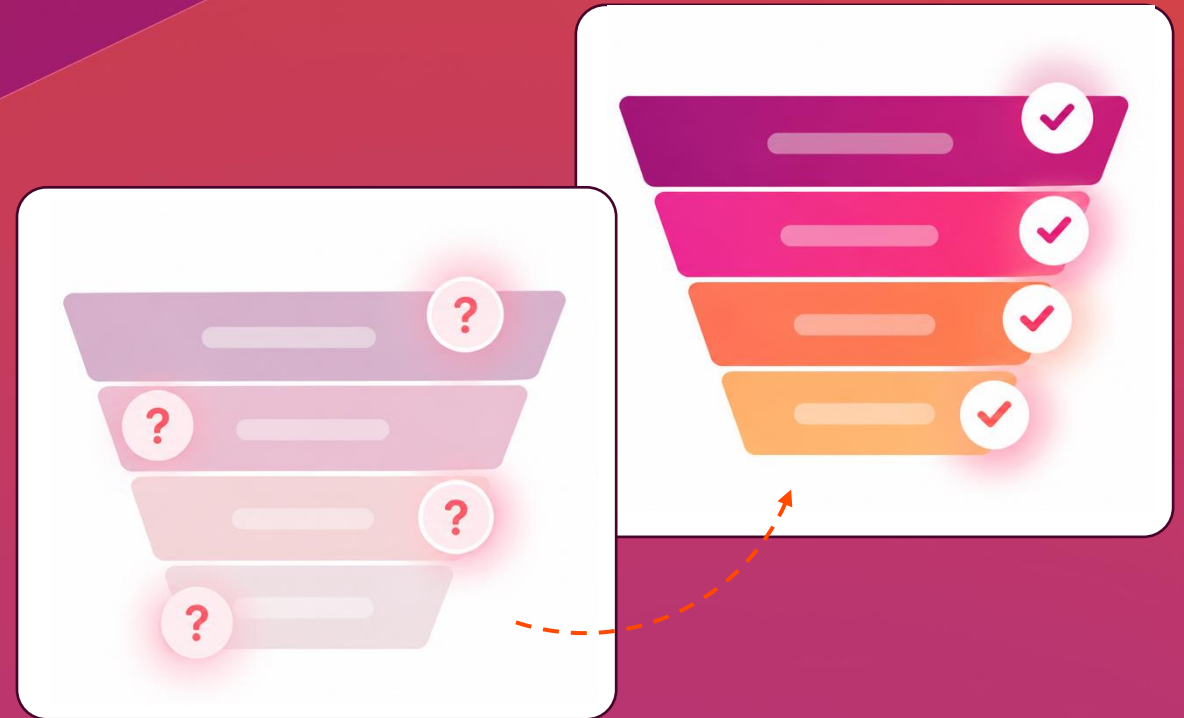
A more **HONEST** pipeline

**Your number only
means something if
your pipeline is real.**

Smart Deal Progression helps
keep deal data aligned with
what is actually happening in
calls, meetings, and emails.

Better deal data.

Better forecasting.





DEMO



With

CHLOE PAPKE

Vonazon

What **else** it does.

Smart Deal Progression keeps working after the call.



PUBLIC BETA

Deal Plans

A shared plan that keeps the buyer aligned on milestones and next steps.



PRIVATE BETA

Email

CRM suggestions pulled straight from buyer email threads, not just calls.



PUBLIC BETA

Stalled Deals

A re-engaged nudge after 14 days of silence.

Day 14 Not day 90

Results

2.2x
MORE DEALS

HubSpot reports customers using Deal Progression win **2.2x more deals on average.**

"We're saving an hour and a half a day per rep"

- CREVENTA

"The system suggests the next step, the rep confirms it, and the behavior sticks."

- JEN SPENCER

What you **need** in place

Before Smart Deal Progression can work well, the right foundation has to be there.



RECORDED CALLS AND MEETINGS

Use HubSpot Notetaker or connect your existing notetaker.



CONNECTED INBOXES

Reps need connected email and the right Sales or Service Hub access.



PUBLIC BETA ENABLED

A Super Admin needs to enroll the portal



UNDERSTAND YOUR CREDITS

Default property suggestions are free. Custom properties use credits.



ADD YOUR SALES METHODOLOGY

BANT, MEDDIC, SPICED, or your own framework can improve the quality of suggestions.

Clean data in. Useful AI out.

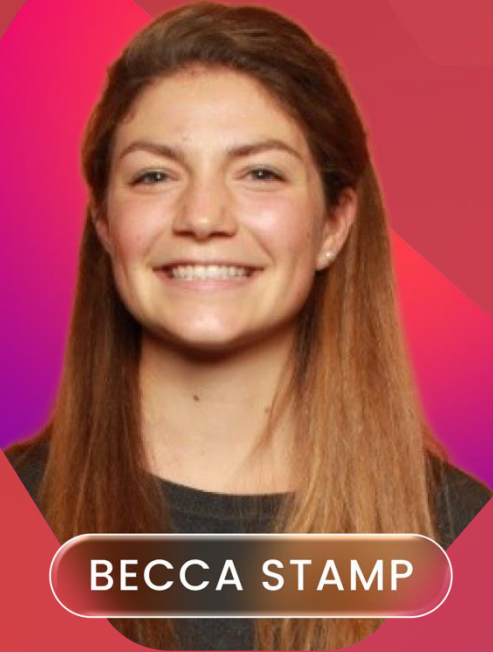
Start with one **TEAM**

Put Smart Deal Progression to the test:

- Choose one sales team.
- Turn on Deal Progression.
- Run it for 30 days.
- Compare the pipeline to the rest of the organization.



Not ready yet? We can help!



BECCA STAMP

HubSpot

Agent Hub

How to build custom AI agents with Breeze Assistant.

Every custom agent it built from **three components**.

STEP 01

Instructions

A role, goal, method, and desired output written in plain, natural language. These act as the cognitive guardrails and primary operating parameters for the agent

STEP 02

Actions

Read/write access to the HubSpot CRM, note creation, transcript summarization, and connection to external platforms via Model Context Protocol (MCP).

STEP 03

Knowledge

Reusable vaults of internal documentation, competitive battle cards, templates, and playbooks that the agent can actively reference dynamically at runtime.



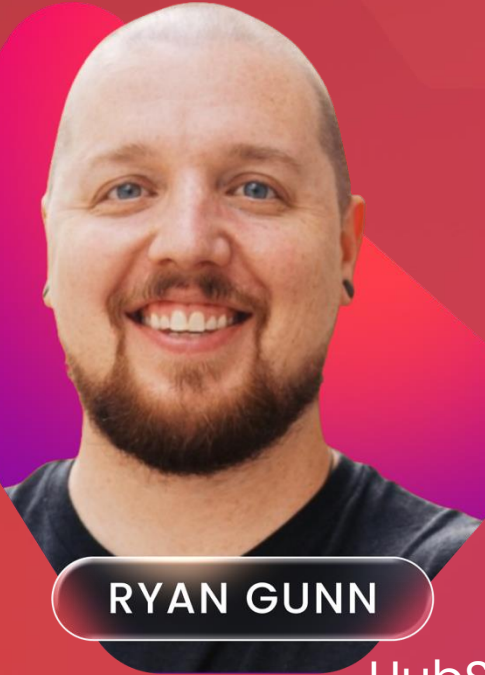
DEMO



With

BECCA STAMP

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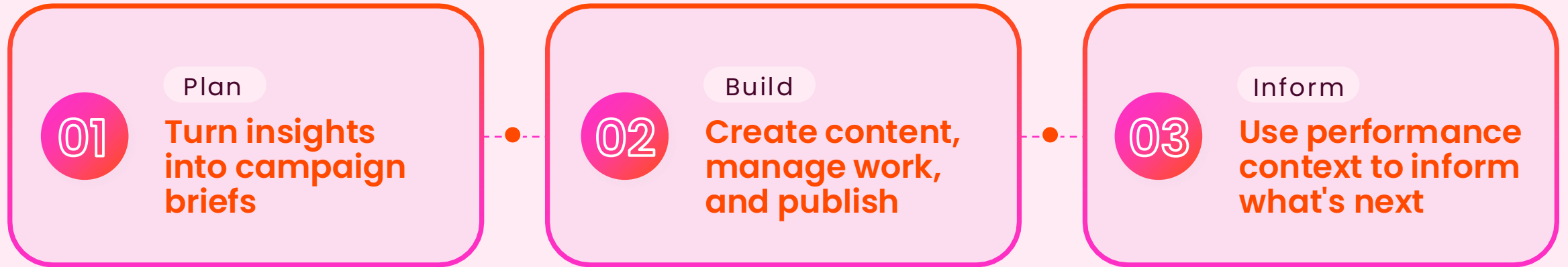
RYAN GUNN

HubSpot

Marketing Studio

How teams build complete
campaigns through Breeze
Assistant's Campaign Agent.

Marketing Studio has **evolved beyond** campaign planning



Marketing Hub®

An intelligent marketing workspace that gets smarter with every campaign.

Drive **measurable outcomes** across your entire funnel.

81%

More campaigns

On average, customers that use HubSpot Marketing Studio create 81% more campaigns.

[Source](#)

2.2x

More leads

On average, customers that use HubSpot Breeze Assistant generate 2.2x more leads.

[Source](#)

3.4x

More deals

On average, customers that use HubSpot Breeze Assistant create 3.4x more deals.

[Source](#)

+14%

Marketing reach

On average, customers that use Content Agent increase marketing reach by 14% and improve brand visibility by 9%

[Source](#) • [Source](#)



DEMO



With
Ryan Gunn
HubSpot



DAX MILLER

hapily

Event Management & Badge Scanning

How badge scanning and
event lead capture sync
directly back to HubSpot.

So...how's that memory of yours?

1,000's of steps, dozens of conversations,
here's how to save context and make it stick.

MOBILE LEAD CAPTURE

From Scan To HubSpot, In One Loop.

STEP 01

Scan the badge

Any phone with the hapily app. Tap "scan," point at the badge, you're done. No license per scanner — bring your whole booth team.

STEP 02

Qualify quickly

Add interest, fit, next steps, notes — all fields configurable per event to get the most qualified leads through the door.

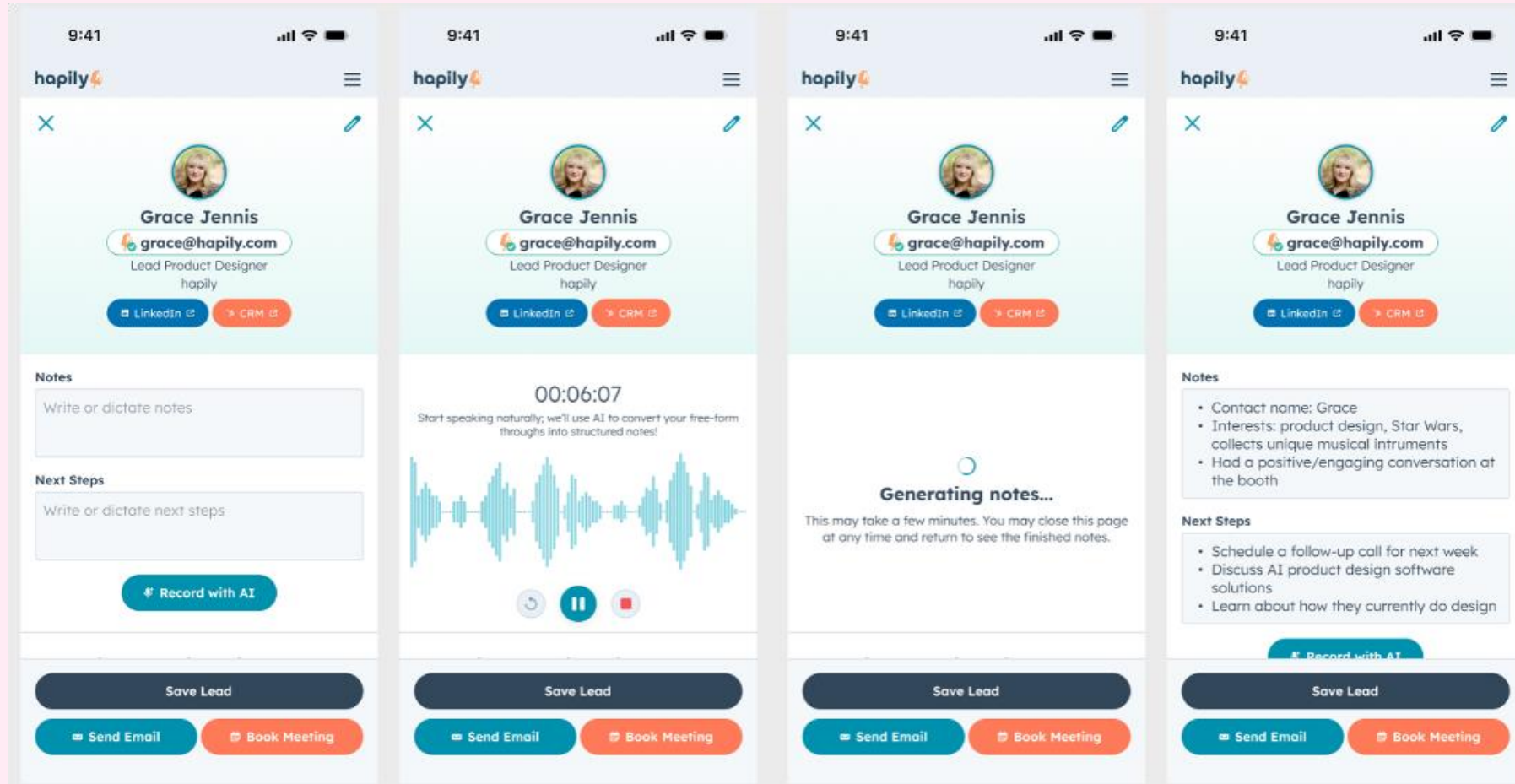
STEP 03

Lands in HubSpot

Lead automatically becomes a HubSpot Contact, attributed to your event, with every property you captured. Workflows fire instantly — sequences, routing, alerts.

IN ACTION

Kickstart the Attribution



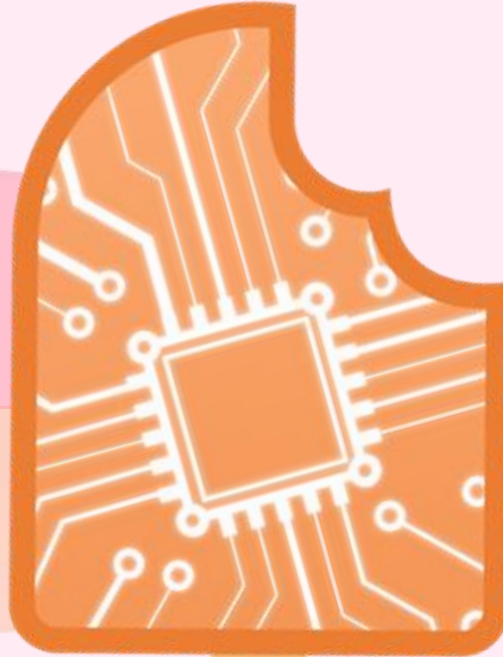
Your Event and
Revenue Data

hapily's Attribution
Engine

Prove Event ROI

Event Data

Revenue Data



Sourced
Deals



Influenced
Revenue



Scheduled
Meetings

MAGIC BEHIND THE SCENES

Build Your Attribution Model

Attribution Model

☒ **Last Touch**
If there are multiple Events, the Deal will be associated to the more-recent Event chronologically that meets your attribution settings.

☐ **First Touch**
If there are multiple Events, the Deal will be associated to the first Event chronologically that meets your attribution settings.

☐ **All Events**
If there are multiple Events, the Deal will be associated to all Events that meet your attribution settings. Revenue totals will not be divided across Events, and will be attributed 100% to each Event.

Attribution Level

☒ **Company-Level Attribution**
Attribute any Deal associated to a Company where any Contact matches your attribution settings.

☐ **Contact-Level Attribution**
Attribute only Deals where an associated Contact matches your attribution settings.

ON

▼

Track Sourced Deals

If new Deals are created after an Event, we will attribute them to the Event as a Sourced Deal if they meet the attribution criteria below:

Attribution Window (Days)

Deals created within this many days after the event ends will be attributed to this event.

60

Days

Contact-Event Association Label(s)

Attended

Event Lead

Meeting Scheduled

Meeting Completed

Pipelines and Deal Stages

All Pipelines & Stages ☒ Select & Filter

Pipeline

Select a pipeline

▼

Deal Stage(s)

Select deal stages

+ Add Pipeline

THE WHY IN NUMBERS

Data Right in HubSpot

hapily events

Actions

Membership Gala 2027

Record ID: 55281849385

Note

Email

Call

Task

Mee...

More

About this Event

Actions

Description

A wonderful event for our members and non members.

Event ROI

Communications

Registration & Attendance

More

Customize

Sourced & Influenced Pipeline Breakdown

SOURCED DEALS	SOURCED PIPELINE	INFLUENCED DEALS	INFLUENCED PIPELINE
0	--	3	\$60,500

Event ROI Metrics

TOTAL EXPENSES	CLOSED WON REVENUE	NET REVENUE	EVENT ROI
\$100	50,000	\$49,900	49,900%

Average Return on Eventsment					
AVERAGE EVENT COST	AVERAGE ATTRIBUTED REVENUE	AVERAGE NET REVENUE	AVERAGE EVENT ROI	(AVERAGE) SOURCED PIPELINE	(AVERAGE) INFLUENCED PIPELINE
\$40,100.00	70,642.86	\$37,777.78	344.34%	78,285.28	\$61,562.50



DEMO



With

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hapily

Connected workflow recap.



Q & A

If you have any further questions,
you can book a 1:1 meeting.

A recording link will be sent to all attendees!

EXCLUSIVE OFFER FOR WEBINAR ATTENDEES

Don't just learn about AI agents. **Put one to work.**

**Get early access to a FREE 60-minute
HubSpot AI Agent Build session.**

Bring us one repetitive task or business challenge. Our team will help you select, configure, and test a HubSpot AI agent for your business.



**SCAN TO CLAIM
YOUR FREE SESSION**

*Eligible use cases are
confirmed before scheduling.*

THANK YOU