



HubSpot Deep Research Connector AI Readiness Toolkit and Prompt Library

The background is a high-contrast, teal-toned aerial photograph of ocean waves. The water's surface is covered in intricate, swirling patterns of white foam and deep blue-green water. Overlaid on this background is a white, thin-lined geometric frame. The frame consists of a large, downward-pointing chevron shape, with a smaller, similar shape nested inside it at the top right. Centered within this frame is the text "AI Readiness Toolkit" in a bold, white, sans-serif font. The word "AI" is slightly larger and more prominent than the rest of the text.

AI Readiness Toolkit

Prerequisite: Clean HubSpot CRM Data

Deep Research will only be as good as the data it reads. Quick hygiene checklist:

- **Owners & lifecycle:** consistently set Contact/Company Owner, Lifecycle Stage, Lead Status.
- **Associations:** deals ↔ companies ↔ contacts linked; primary associations set.
- **Standardized properties:** stages, sources, industries, personas, territories use controlled picklists.
- **Activity logging:** meetings, emails, calls captured; next steps populated.
- **Duplicates & gaps:** dedupe high-value records; fill missing ICP fields (revenue, employee count, industry).

Need help? Get a Free AI Readiness HubSpot Audit —
<https://www.vye.agency/ai-readiness-hubspot-audit>

Setting up and using the HubSpot Deep Research Connector

Set Up

1. In ChatGPT, go to Profile → Settings → Connectors.
2. Find HubSpot → Connect, sign in, and authorize. (Admins may need to enable connectors for your workspace.)
3. You're set—HubSpot will appear as a selectable source in chats and Deep Research.

Using the Connector

1. Open a new chat → Tools → Run deep research → select HubSpot → ask your question.
2. Review the report and click citations to open the exact HubSpot records or docs referenced.

HubSpot is supported for Deep Research on Team, Enterprise, Edu, Pro ChatGPT accounts

Prompting Best Practices

- **Name the objects & filters:** e.g., “Deals closing this month with last activity >14 days ago; show Deal Name, Owner, Stage, Amount.”
- **Be explicit about sources:** “Use HubSpot only—do not use the web.”
- **Specify output & format:** “Return a table; include link to the record; sort by Amount desc.”
- **Constrain the scope:** date ranges, pipelines, regions, ICP tiers, personas.
- **Ask for the action:** “Draft the follow-up email/InMail for the top 10; include a one-line next step.”
- **Iterate:** “Before drafting, list your assumptions; ask clarifying questions if fields are missing.”
- **Data care:** avoid unnecessary personally identifiable information in prompts; keep scopes minimal; prefer picklists over free text.



Prompts for Sales and Marketing

Prospecting

- "Identify contacts with "VP" or "C-Level" titles who opened an email in the last 7 days but have no next activity scheduled. Draft a LinkedIn InMail opener for the top 10 by engagement score" **(SALES)**
- "List the top 25 companies by deal value that have had no logged activity in the past 30 days." **(SALES)**
- "Find companies with multiple high-value closed-lost deals tagged "No Decision." Identify decision-maker roles and draft reactivation messaging" **(SALES)**
- "Find companies where marketing emails were opened more than 5 times by associated contacts but have no contact owner assigned. Recommend warm outreach messaging" **(MARKETING)**

Deal Prioritization

- "List the 10 open deals most likely to close this month (based on close-date, last-modified date, and deal amount). Draft a one-sentence follow-up nudge for each" **(SALES)**
- "Find companies with multiple open deals where deal owners differ. Flag revenue risk and suggest consolidation or coordinated follow-up" **(SALES)**
- "List deals with close dates in the next 14 days that show low recent activity. Draft urgency nudges based on deal context" **(SALES)**

Lead Nurture

- "Segment contacts created in the past 90 days by persona. For the persona with the highest conversion to Customers, generate a three-email nurture sequence" **(SALES)**
- "Identify deals that have been stuck in the same stage for more than 45 days. Surface common objections based on notes or emails" **(SALES)**
- "Find the highest-converting persona among recent contacts and generate a tailored three-email nurture sequence to boost engagement" **(MARKETING)**
- "Segment contacts created in the past 90 days by persona. Identify the persona with the highest conversion to "Customer" and draft a targeted nurture sequence" **(MARKETING)**
- "Create a Lifecycle nurture series. When a new persona is detected on a deal, drafts a five-email drip and personalizes metrics pulled from that very deal." **(MARKETING)**

Performance & Analytics

- "Compare win rate and average sales-cycle length for deals > \$XX,XXX this quarter vs. last. Highlight the three slowest stages and recommend one friction-busting tactic per stage" **(SALES)**
- "Generate a quarterly executive snapshot: pipeline created, closed-won revenue, average deal size, and new logos by deal stage. Add a brief narrative on emerging trends" **(SALES)**
- "Analyze open deals by industry and company size. Identify the segments with the highest close rates this quarter" **(SALES)**
- "Compare win rates by deal source (e.g., referral, inbound, outbound) for companies with >\$XX,XXX in revenue. Identify top-performing sources" **(SALES)**
- "Segment contacts by source (e.g., webinar, content download, paid social). Compare conversion rates to customer and identify the best-performing cohort" **(MARKETING)**

Targeting & Segmentation

- "Segment my target companies by annual revenue, industry, and technology stack. Identify the top opportunities for enterprise expansion" **(SALES)**
- "Compare an open deal to historical closed-won lookalikes based on look-alikes and recommend the play or asset that most often sealed the win" **(SALES)**
- "Identify the personas that converted fastest from lead to customer in the last 90 days. Recommend key attributes to target in future campaigns" **(MARKETING)**
- "Segment top-performing campaigns by industry based on contact activity. Identify industries with the highest engagement" **(MARKETING)**



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