

OUTCOME-BASED RECIPES

# HubSpot AI Cookbook



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# Welcome to the AI Cookbook

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Dear Reader,

If you work in HubSpot right now, you are probably feeling two things at the same time. Excitement about what AI might unlock. A little bit of overwhelm about where to start.

Every week there seems to be a new feature, a new agent, a new promise about what AI can do for marketing, sales, or service. The demos look incredible. The possibilities are real. But when teams sit down inside their own HubSpot portal, the path forward is often a lot less clear.

What should you actually build first? What problems are worth solving with AI right now? And how do you implement it in a way that makes your teams better instead of creating another layer of complexity?

These are the questions we hear every day at Aptitude 8. As an Elite HubSpot Solutions Partner working across a wide range of organizations and industries, we spend a tremendous amount of time helping teams translate AI potential into practical workflows that run inside the CRM.

No one needs another whitepaper about the future of AI. They need something much simpler and more practical. They need recipes. Recipes that start with a real business outcome, outline the ingredients you need, and walk you step by step through how to bring the solution to life inside HubSpot. That is why this cookbook exists.

Inside these pages, you will find a collection of practical AI recipes built for go-to-market (GTM) teams, crafted by the expert team at Aptitude 8 through years of implementing HubSpot across thousands of teams and business processes. Each one focuses on a specific outcome, like smarter prospecting, seamless marketing to sales handoffs, faster customer onboarding, earlier expansion signals, or more intelligent support.

Every recipe breaks down the necessary ingredients, the preparation required, and the steps to bring it to life inside your HubSpot instance. They're designed to be practical, repeatable, and grounded in the way GTM teams actually operate.

Think of this cookbook as a starting point. The best chefs take a recipe and adapt it to their kitchen, their timing, and their palate. I am confident these recipes will help you move from experimentation to execution faster, unlock meaningful efficiency gains, and level up how your team uses HubSpot to drive real results. Now let's get cooking.



**Emily Wingrove**  
Chief Marketing Officer  
Aptitude 8

# Preparing Your HubSpot Portal for AI

## What needs to be in place before AI can run reliably inside HubSpot

This recipe takes you through all the necessary steps to prepare your portal for AI features. Following these instructions will prevent incomplete outputs, conflicting recommendations, and silent data issues before they impact teams. The result is faster AI implementation, fewer surprises after launch, better adoption, and long-term confidence in AI-driven workflows across sales, marketing, and service.

|   |   |
|---|---|
| <b>Ingredients</b> <ul style="list-style-type: none"><li>• User Permissions &amp; AI Access Settings</li><li>• HubSpot System Limits Dashboard</li><li>• Data Quality Workspace</li><li>• Integration &amp; Data Sync Health Dashboard</li><li>• Data Agent</li></ul> | <b>Prep Time</b> <p>8–10 Hours</p> <b>Cook Time</b> <p>2–3 Hours</p> <b>What You Need</b> <ul style="list-style-type: none"><li>• RevOps</li><li>• Solutions Architect</li><li>• Strategy</li></ul> |
|---|---|

## Important Notes from the Chef Before Cooking



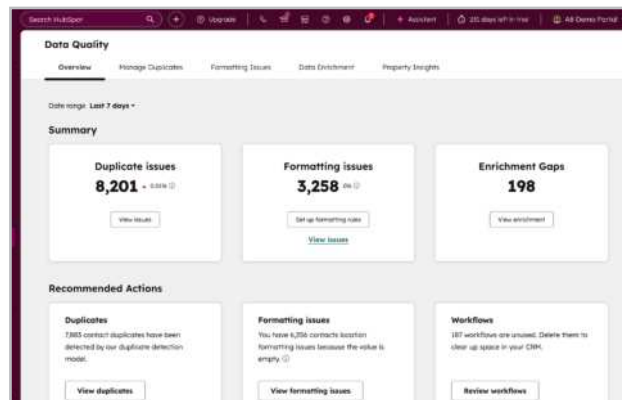
Before introducing any AI functionality into your HubSpot portal, ensuring it has proper governance, capacity, and clean data foundations is critical. This includes configuring permissions intentionally, confirming system limits can support new AI workflows, and auditing integrations and data sources to ensure information is complete, accurate, and consistently synced. Additionally, validate the data model and record relationships so AI can interpret context correctly and deliver reliable insights, automation, and recommendations.

# Directions

## STEP ONE

### Strengthen Data Quality & Standardization

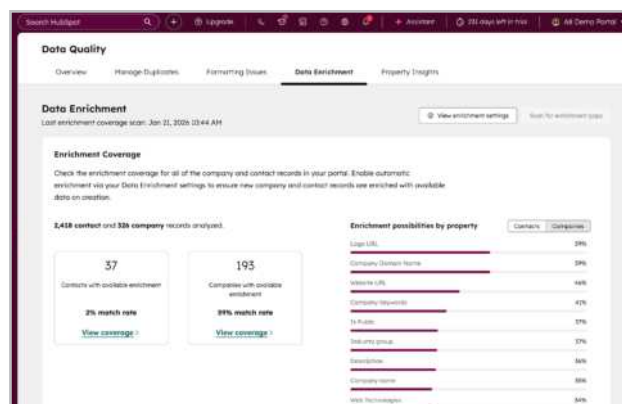
- Review existing HubSpot data quality tools, rules, and validation processes.
- Identify inconsistencies: naming conventions, required fields, and property usage.
- Use agent-based analysis to surface deeper issues that traditional validation rules may miss.



## STEP TWO

### Enrich Records to Fill Data Gaps

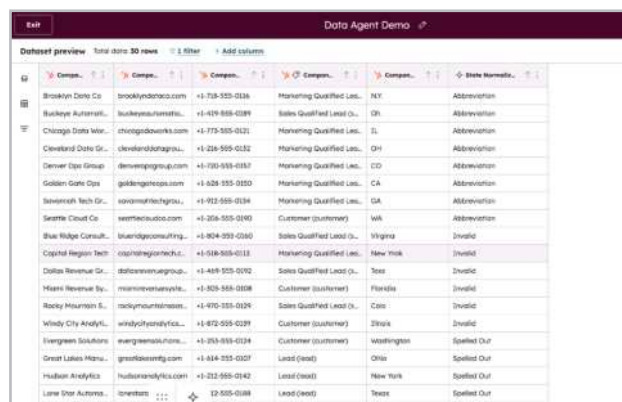
- Identify missing firmographic, technographic, and behavioral data across key records.
- Apply enrichment strategically to strengthen signals AI uses for evaluation and automation.
- Prioritize enrichment in areas that directly impact decision-making workflows.



## STEP THREE

### Monitor Data Health with Data Agent

- Implement ongoing monitoring of data health rather than treating readiness as a one-time audit.
- Detect new issues early as teams, systems, and automation scale.
- Surface emerging risks before they impact AI workflows or reporting accuracy.



# Smart Prospecting



How teams identify, prioritize, and engage the right prospects using AI

This recipe creates a repeatable prospecting motion grounded in shared signals, not opinion. Teams drive higher-quality conversations without increasing outreach, improve cross-team prioritization, and reduce manual research, accelerating movement from first touch to qualified opportunity as they scale.

### Ingredients

- Company Research Agent
- Data Agent
- HubSpot Datasets
- Smart Columns
- AI Lead Scoring
- Prospecting Agent
- ICP Assistant

### Prep Time

1 Hour

### Cook Time

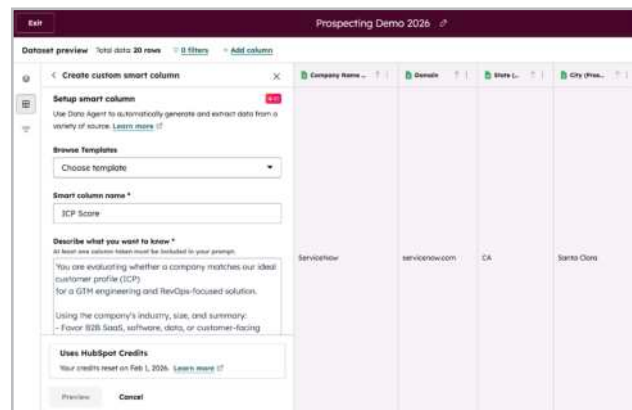
3–5 Hours

## Directions

### STEP ONE

#### Identify + Score the Right Companies & Contacts

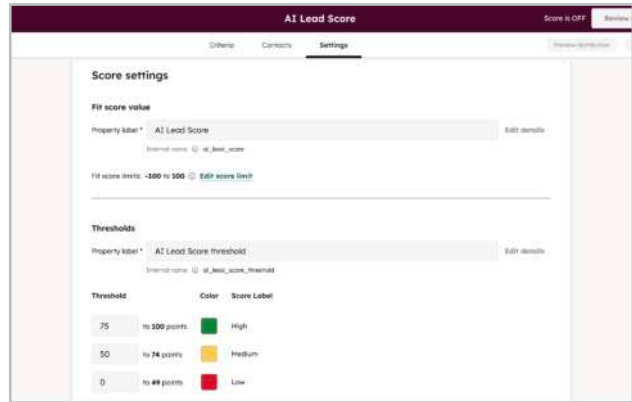
- Start with an external company prospecting list and map it against existing HubSpot companies to identify net-new vs. known accounts, then use Smart Columns to research growth signals and evaluate account-level fit.
- Use Datasets to connect contact records with account-level insights, combining internal CRM data and external research to assess overall ICP alignment.
- Apply Smart Columns to calculate a contact-level ICP score based on role, seniority, lifecycle stage, engagement history, and company context.



## STEP TWO

### Prioritize Prospects Using AI Scoring

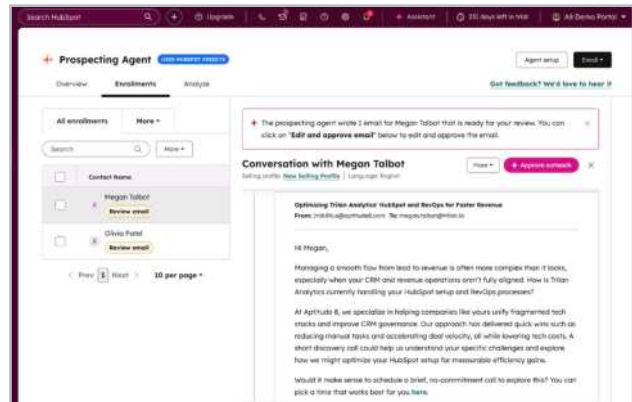
- First, apply HubSpot's native AI Lead Scoring to the contacts who now have the AI-generated ICP score.
- From there, the AI Lead Scoring will harness engagement signals, behavioral data & historical patterns to dynamically rank + score prospects.
- This scoring will continuously update prioritization as prospects interact with your brand, or their context changes.
- This combination of scores becomes the trigger criteria for which prospects are sent to the Prospecting Agent or the next stage of the outbound motion.



## STEP THREE

### Prepare Outreach for Sales

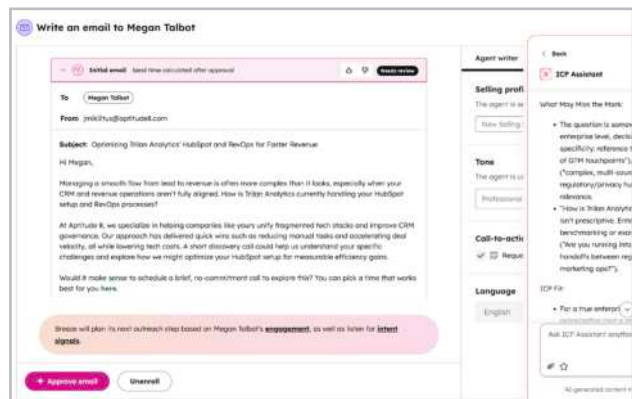
- Navigate to Breeze Studio and set up a Prospecting Agent configured with access to relevant CRM objects and engagement data.
- Utilize a workflow or manually enroll prospects who meet your defined criteria into the Prospecting Agent.
- Once enrolled, the agent generates prospecting emails and talk tracks that reflect company context, persona relevance, and current engagement signals for review.



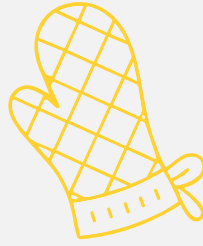
## STEP FOUR

### Validate Outreach Against ICP Criteria

- Navigate to Breeze Studio and create an ICP Assistant designed to validate outbound messaging before it's approved or sent.
- Configure the assistant with your defined ICP criteria so it can assess AI-generated drafts against role, company profile, and buying context.
- Utilize the ICP Assistant anywhere in the CRM where outreach is being drafted or reviewed, ensuring messaging aligns to the specific stakeholder and opportunity before it goes out.



# Coordinated Marketing to Sales Handoff



## How AI turns engagement data into sales-ready leads

This recipe removes friction between marketing and sales. Leads are routed by fit and ownership, attribution reflects true demand sources, and reps receive full context before engaging. The result is faster response times, fewer misrouted leads, more accurate reporting, and stronger lead-to-opportunity conversion.

### Ingredients

- Data Agent (Routing + Attribution Logic)
- HubSpot AI Lead Scoring
- Enrichment Tools
- AI-Generated Handoff Briefs
- Content Recommendation Logic
- Deal Loss Agent

### Prep Time

30 Minutes

### Cook Time

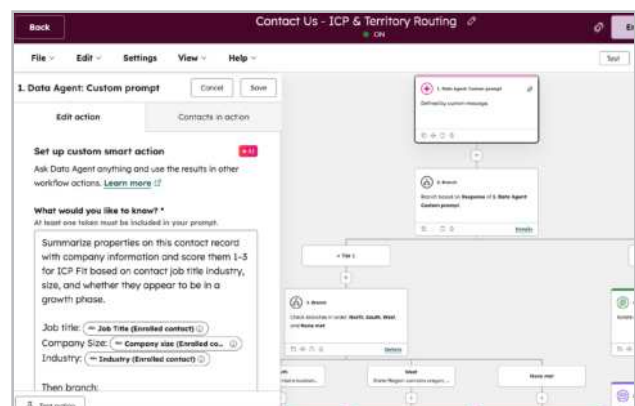
5-7 Hours

## Directions

### STEP ONE

#### Route Leads by Fit & Ownership

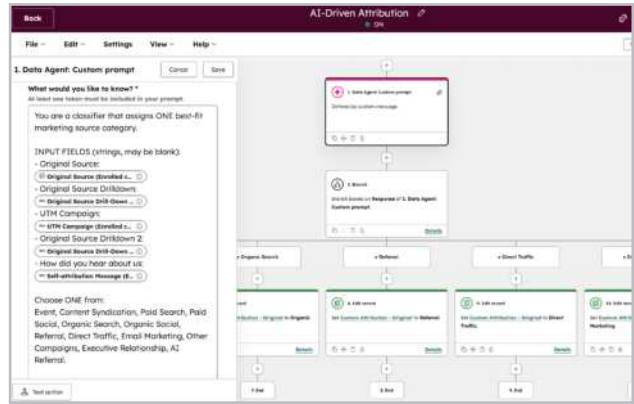
- Create a workflow that triggers off of a form submission so you can properly route incoming leads to the right sales team based on fit and territory.
- Add a Data Agent action and prompt the agent to summarize relevant contact and company properties to output an ICP Fit tier (1-3).
- Add branching logic that evaluates the AI-generated output and routes the lead accordingly, layering in additional rules like region or team ownership to ensure the contact is properly assigned.



## STEP TWO

### Standardize Attribution Across Sources

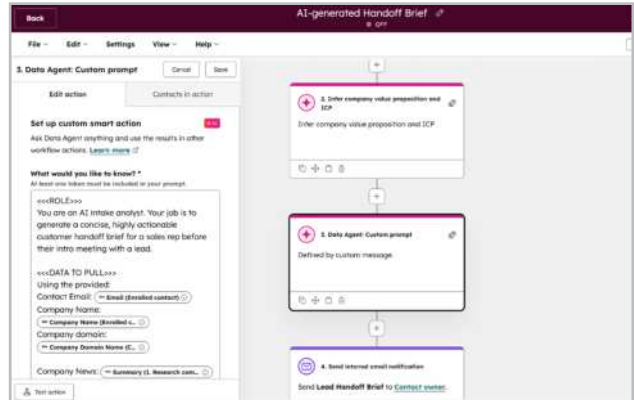
- Create a workflow that triggers when a new contact is created or when key attribution properties are updated, so you can standardize marketing source classification automatically.
- Add a Data Agent action that evaluates many source properties together and assigns ONE best-fit marketing source category based on your defined priorities.
- Add branching logic to set a standardized Custom Attribution property based on the AI output, ensuring consistent, reliable reporting across all leads.



## STEP THREE

### Deliver AI-Powered Handoff Briefs

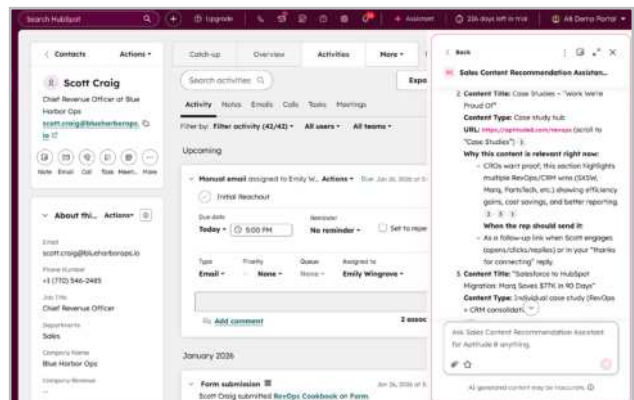
- Create a workflow that triggers when a lead is assigned or marked ready for sales handoff, so reps receive context before their first meeting.
- Add a Data Agent action that compiles recent marketing engagement, firmographic details, intent signals, and any additional external data into a concise, sales-ready handoff brief.
- Add an action to automatically deliver the AI-generated brief to the contact owner, and associate it as a note on the record, ensuring reps are prepared with clear, actionable context.



## STEP FOUR

### Recommend Relevant Sales Content

- Navigate to Breeze Studio and create a custom assistant designed to recommend the next best piece of sales content.
- Configure the assistant to evaluate lead context, engagement history, and deal stage, and provide access to your content library so it can recommend the most relevant asset to send next.
- Deploy the assistant in the CRM so reps receive intent-based recommendations, helping them follow up with timely, relevant materials that naturally advance the conversation.



# Structured Sales to Service Handoff

## How AI preserves context as accounts move from sales to service

This recipe preserves deal context as accounts transition from sales to service, reducing information loss, accelerating onboarding, and helping teams stay aligned from day one.

## Directions

### STEP ONE

#### Generate A Complete Deal Summary

- Start by navigating to the Customer Handoff Agent and configuring it with the necessary CRM access, tools, and instructions so it can generate a role-specific handoff brief based on Company Name and New Owner Role.
- Run the Customer Handoff Agent to analyze all associated CRM records you've granted it access to, including sales conversations, deal notes, activities, and engagement history related to the company.
- Review the generated handoff brief and save it as a note on the company record to serve as the structured source of truth for onboarding.

#### Ingredients

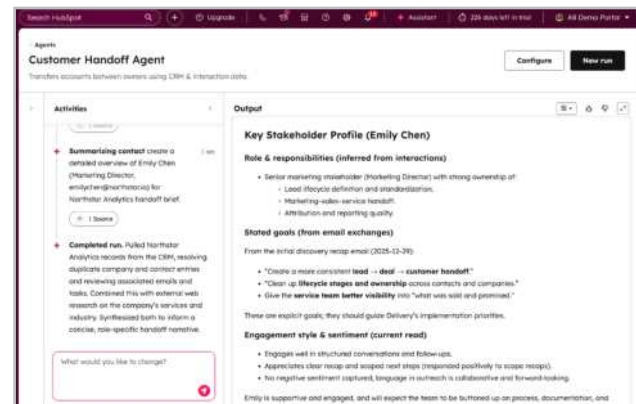
- Agents: Customer Handoff, AI Data, HubSpot Data & Customer Health
- Custom Assistant

#### Prep Time

< 30 Minutes

#### Cook Time

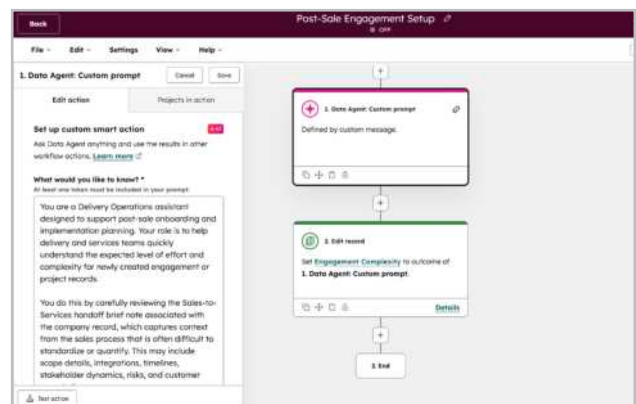
6–8 Hours



### STEP TWO

#### Create Structured Engagement Records

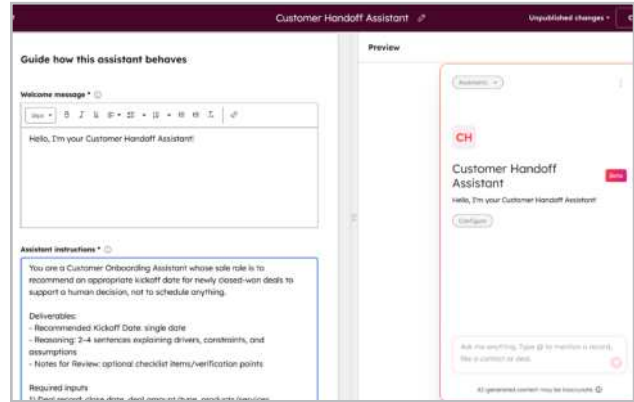
- Create a workflow with the trigger criteria of "when a deal reaches Closed Won" (or meets defined readiness criteria) ensuring only fully prepared accounts move forward.
- Add an action to create a project record associated with the company.
- Deploy a Data Agent to pull key details from the deal record and the associated note with the handoff brief to populate project properties, reducing manual setup and ensuring alignment with what was sold.



## STEP THREE

### Recommend Kick-Off Timing by Team

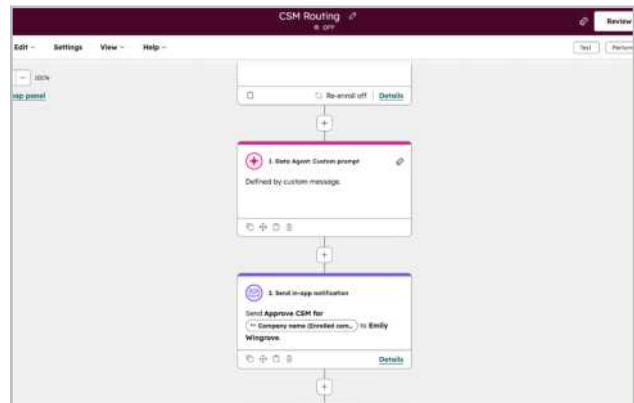
- Navigate to Breeze Studio to create a new, custom assistant for Customer Handoffs/Onboarding.
- Configure the custom assistant by providing clear instructions + required inputs, including deal details, customer timeline notes, assigned owner, team availability, etc., so it can recommend a realistic kickoff date without automating scheduling.
- Use the assistant's recommended date + reasoning as decision support, but allow for human judgment to confirm the date before finalizing and setting the kickoff date on the project record.



## STEP FOUR

### Assign Accounts to the Right CSM

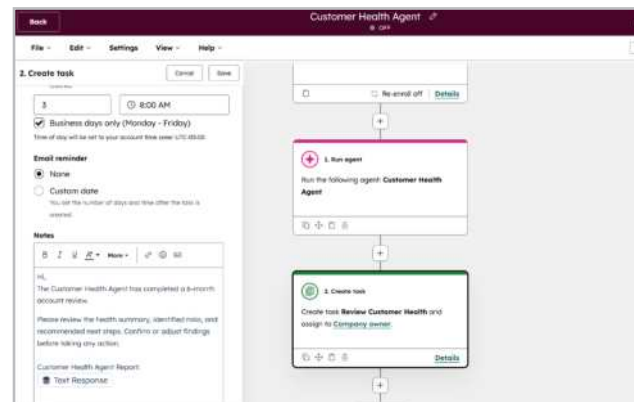
- Create a workflow triggered when a deal is Closed Won and a service team has been assigned.
- Configure a Data Agent to evaluate segment, region, product complexity, expertise, and current workload, then return a recommended CSM or CX Manager based on the project and scope.
- Send the suggested assignment to your Service leader to confirm or update. This allows your team to maintain human-led oversight while also leveraging AI-driven recommendations.



## STEP FIVE

### Monitor Customer Health Proactively

- Build a workflow that enrolls customers at key lifecycle milestones or after defined periods of inactivity, and enable re-enrollment on a schedule to ensure ongoing evaluation.
- Add an action to deploy the Customer Health Agent to analyze CRM data, engagement history, onboarding progress, usage signals, and recent activity to evaluate health, identify risks, and recommend next steps.
- Add an action to generate a task assigned to the CX lead or CSM to review the health report and determine next steps.



# Streamlined Customer Onboarding

## How AI accelerates time to value during onboarding

This recipe creates a structured yet flexible onboarding motion. Customers receive communication that reflects their product, use case, and onboarding stage, and service teams operate from shared context instead of rebuilding it. This means faster activation, stronger early adoption, fewer onboarding gaps, and smoother long-term customer success.



### Ingredients

- Data Agent
- Customer Handoff Agent
- Call Recap Agent
- Customer Health Agent
- Chat Support Agent
- HubSpot Workflows & Automation

### Prep Time

1 Hour

### Cook Time

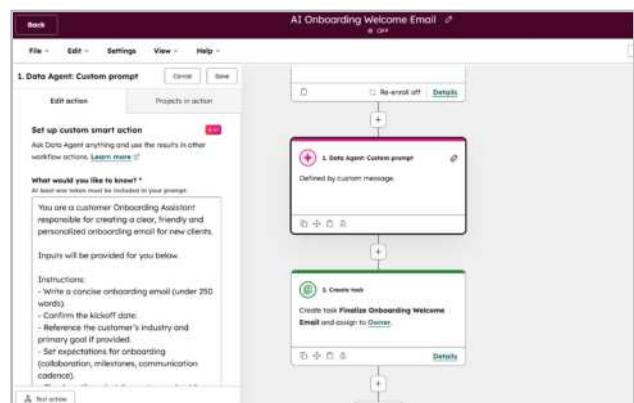
5-7 Hours

## Directions

### STEP ONE

#### Personalize Onboarding Communication

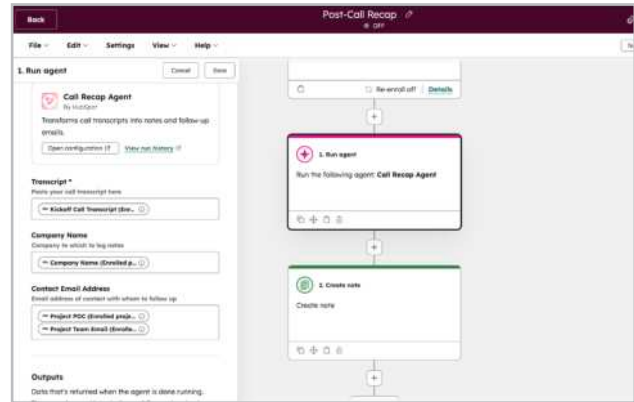
- Create a project-based workflow that is triggered when the project status is "Ready for Kickoff."
- Add and configure a data agent to pull from details on the project record to create a tailored welcome message.
- Add an action to generate and assign a task to the project owner, contact owner, or designated lead to review, edit if needed, and send the email to the client, keeping humans in the loop for tone, accuracy, and timing.



## STEP TWO

### Utilize Call Recap Agent for Notes

- Create a workflow triggered after the kickoff call is completed and the transcript is available.
- Deploy the Call Recap Agent to generate a structured summary that includes a meeting summary, key takeaways, and clearly defined action items based on the kickoff conversation.
- Utilize Call Recap Agent's native follow-up options to send recap to the Project POC and team members.
- Add a Create a Note Action to add a note on the project record.



## STEP THREE

### Capture Onboarding Feedback Early

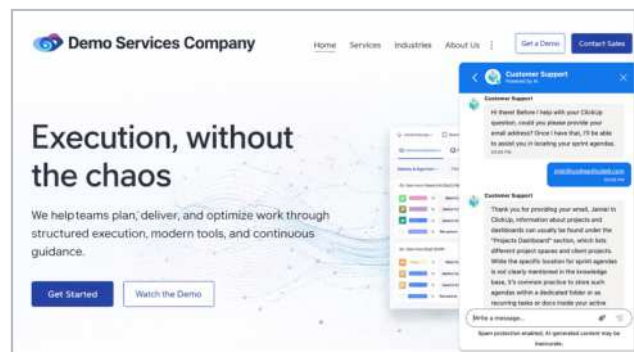
- Create a Company-based workflow triggered by onboarding survey form submission.
- Add a Customer Health Data Agent action that runs on submission, analyzing responses for sentiment, friction indicators, and risk signals, and generating a summarized onboarding health report.
- Use the agent's output to take important steps like automatically logging a note on the company record and notifying the assigned CSM, ensuring immediate visibility into onboarding health and any potential risks.



## STEP FOUR

### Automate Onboarding Support via Chat

- Configure a chat support agent armed with access to relevant knowledge base articles, resources, and defined escalation rules so it can assist visitors to the website.
- Enable the agent to respond to common questions in real time, surfacing relevant documentation when the request falls within its defined scope.
- Route the conversation to the appropriate CSM or CX lead when the question requires deeper context, exception handling, or human judgment.



# Proactive Customer Satisfaction & Engagement



How AI drives timely, relevant engagement across the customer lifecycle

When implemented correctly, this workflow creates a structured engagement motion grounded in customer behavior, not calendar-based outreach. Teams stay relevant without added manual effort, identify risk earlier, surface growth signals faster, and strengthen relationships through timely, informed engagement.

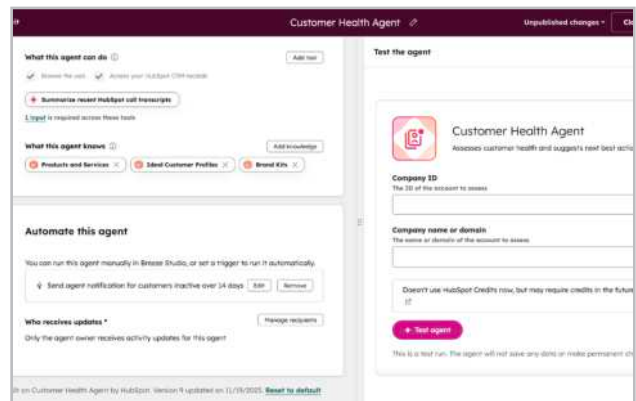
|   |   |
|---|---|
| <b>Ingredients</b> <ul style="list-style-type: none"><li>• Customer Health Agent</li><li>• Smart Columns</li><li>• Buyer Intent (Breeze AI)</li><li>• Automated Summaries &amp; Notifications</li><li>• Review Readiness Analysis</li></ul> | <b>Prep Time</b><br>1 Hour<br><b>Cook Time</b><br>5-7 Hours |
|---|---|

## Directions

### STEP ONE

#### Monitor Customer Health Automatically

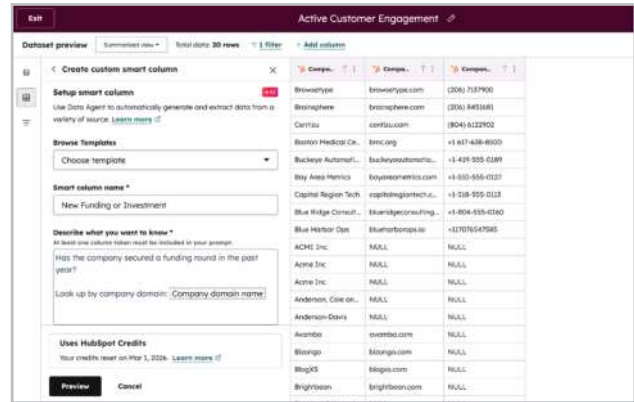
- Navigate to Breeze Studio to set up and configure the Customer Health Agent in Breeze Studio with access to relevant CRM data and instructions to generate a concise, role-specific health summary based on company activity and assigned owner.
- In the 'Automate this Agent' section of the configuration, be sure to automate this agent so that it runs based on specified criteria, like inactivity after a certain number of days.
- Deliver the generated health brief to the appropriate owner so they can evaluate risk and determine next steps.



## STEP TWO

### Personalize CSM Touchpoints with Ongoing Research

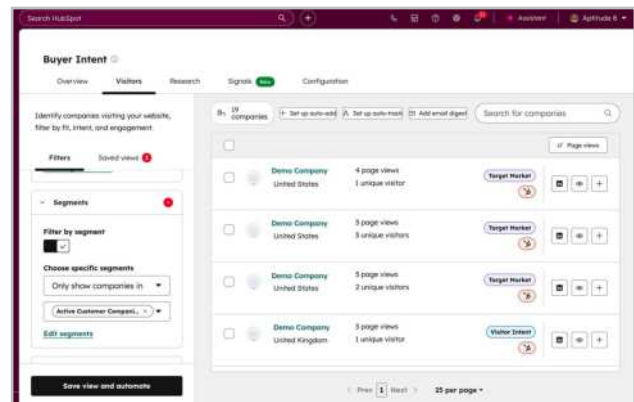
- Navigate to Data Studio and build a dataset of active customers you want to monitor for meaningful milestones or changes.
- Create a Smart Column powered by a Data Agent that searches the web for defined signals like funding announcements, promotions, expansions, or office openings.
- Use those detected signals to trigger a workflow that can utilize another data agent to generate tailored email copy or highly targeted promotions so teams can acknowledge important moments without manual tracking.



## STEP THREE

### Find Advocates Through Call Intelligence

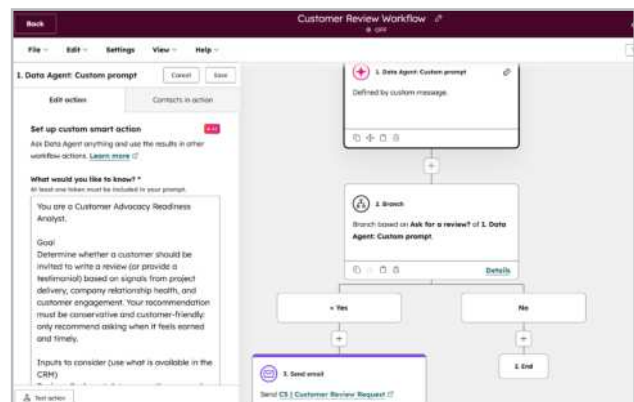
- Create a Smart Property powered by a Data Agent that scans call transcripts for positive sentiment and advocacy signals (e.g., “great results,” “happy to refer,” “would give a testimonial”).
- Configure the agent to update the property automatically as advocacy signals appear, reflecting real time customer sentiment.
- Use this Advocacy Signal property in workflows + readiness checks so review requests trigger based on real customer enthusiasm, not assumptions.



## STEP FOUR

### Trigger Timely Review Requests

- Create a workflow that is triggered off defined success criteria, such as project completion, strong customer health status, and no open support issues.
- Add and configure a Data Agent to act as a Customer Readiness Advocacy Agent, arming it with project delivery status, customer health, and recent engagement signals to evaluate whether the account is ready for a review request.
- Use branch logic based on the Data Agent's output to automatically send a review request only when advocacy readiness criteria have been met.



# Efficient Customer Support

## How AI helps teams resolve issues faster without losing context

This recipe reduces time spent reproducing issues so teams can focus on resolving them. Resolution speed improves, high risk issues are routed more accurately, repetitive work is automated, and support visibility improves while preserving full customer context from first contact to resolution.

### Ingredients

- Customer Agent
- Ticket Automation
- Ticket Summarization Agent
- Data Agent (Ticket Classification)
- Knowledge Base Assistant
- Routing Workflows

### Prep Time

1 Hour

### Cook Time

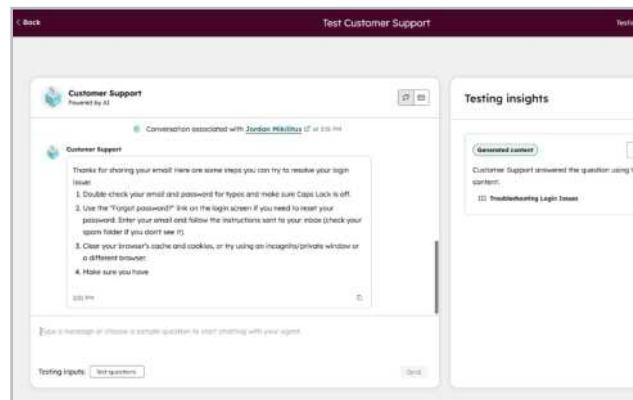
8–10 Hours

## Directions

### STEP ONE

#### Respond Automatically to Common Issues

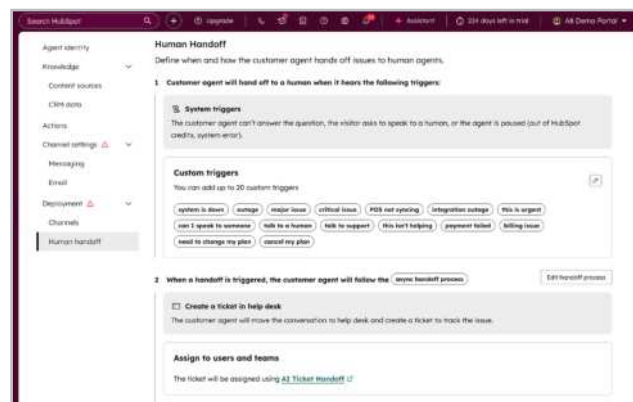
- Navigate to Breeze Studio to begin configuring the Customer Agent, defining its identity, tone, and connected knowledge sources like website content, knowledge base articles, and relevant CRM data.
- Set up the actions the agent can take, such as sending invoices, providing order updates, or creating tickets, so routine requests can be resolved automatically without rep involvement.



### STEP TWO

#### Create Tickets When Needed

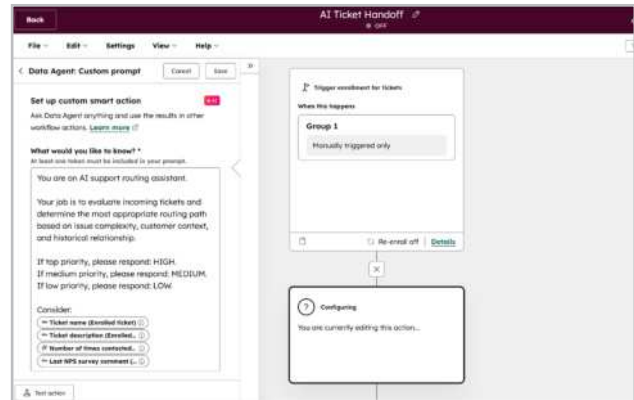
- Within the Customer Agent, navigate to Deployment → Human Handoff to control when conversations should transition to a rep.
- Configure custom handoff triggers, such as specific phrases (“can I speak to someone”), to determine when escalation is required.
- Under Handoff Process, define what happens next by routing to the appropriate team or owner, creating or updating a ticket, and passing full conversation context so the human can step in seamlessly.



## STEP THREE

### Summarize Tickets with Full Context

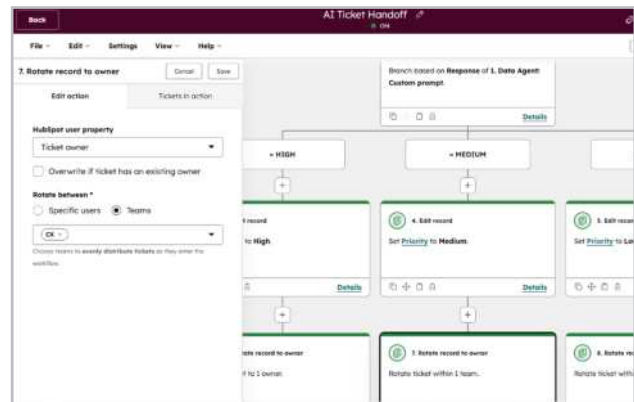
- Create a workflow that is triggered when a new ticket enters a specific pipeline.
- Deploy a Data Agent to evaluate tickets and other relevant context such as ticket volume over time, ARR or MRR, customer health, lifecycle stage, and product usage and create a detailed summary for the customer service rep.
- Add this detailed summary to the ticket summary property on the ticket record.



## STEP FOUR

### Route Tickets by Priority

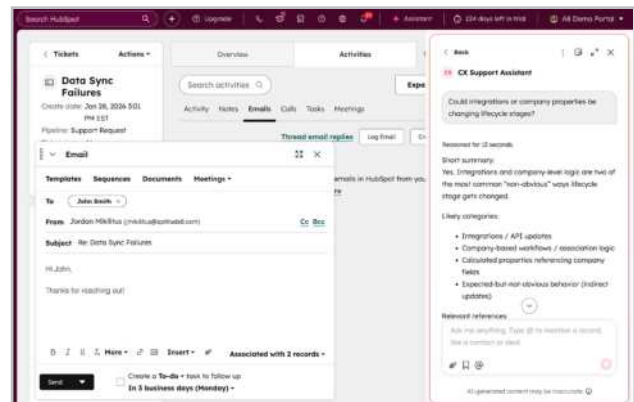
- In the same workflow as above or in an additional workflow, deploy a data agent to read the detailed summary and output some classification information you will use to route the ticket.
- Use branch logic based on the Data Agent's response to automatically set the ticket priority and trigger the appropriate routing path.
- Rotate or assign the ticket to the correct team or owner using workload distribution rules, ensuring high-priority issues reach the right support resources immediately.



## STEP FIVE

### Surface Internal Knowledge Instantly

- Navigate to Data Studio and configure an Internal CX Support Assistant that reps can access in workspaces within HubSpot.
- Arm the assistant with knowledge base articles, internal SOPs, troubleshooting steps, and standard resolution frameworks so it can surface the most relevant guidance in real time.
- Use the information it generates to quickly craft accurate, context-aware responses without jumping between tabs, reducing resolution time and improving consistency.



# Signal-Based Customer Expansion

## How AI identifies and routes expansion opportunities at the right time

This recipe creates a signal-driven expansion motion grounded in usage and account context instead of guesswork. Teams gain visibility into readiness, prioritize the right accounts, and route opportunities with clarity. The result is better timing, higher expansion conversion rates, and stronger coordination between sales and customer success.



### Ingredients

- Product Usage Data Integration
- Data Agent
- Enrichment Tools
- Expansion Readiness Scoring
- Routing Logic & Workflows

### Prep Time

2–3 Hours

### Cook Time

4–6 Hours

## Directions

### STEP ONE

#### Combine Usage & Account Signals

- Navigate to Data Studio and create a new Dataset pulling in active customer companies, then add product usage rows such as seats purchased, seats used, login frequency, feature adoption, and recent activity trends.
- Add a Smart Column to enrich accounts with external growth indicators (recent funding, acquisitions, hiring velocity, team expansion, or press announcements) to identify companies that likely have budget and momentum for upsell.

The screenshot shows the 'Upsell Demo' interface. On the left, a 'Create custom smart column' dialog is open, with the following content:

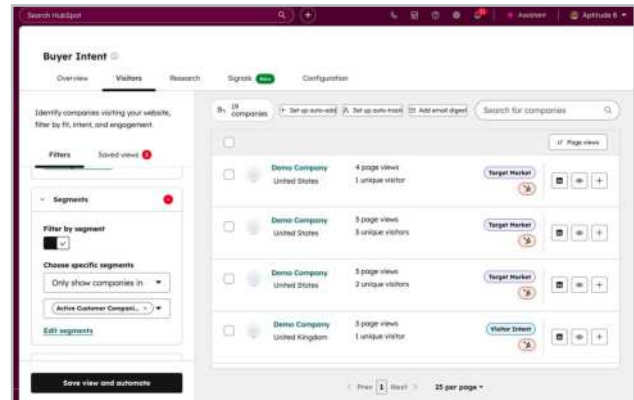
- Setup smart column:** Use Data Agent to automatically generate and extract data from a variety of sources. [Learn more](#)
- Browse Templates:** New Funding or Investment
- Smart column name:** New Funding or Investment
- Describe what you want to know:** In-text use column labels must be included in user prompts. Look up: Company name via their domain; Company domain name. Can you find any evidence that the company secured a funding round recently?
- Uses HubSpot Credits:** Your credits reset on Mar 1, 2025. [Learn more](#)

On the right, a 'Dataset preview' table is visible with columns for Company Name, Risk, and Enterprise. The table contains 20 rows of data, including companies like Silverline Capital, Boston Data Labs, MarketTrail Custom, and others.

## STEP TWO

### Proactively Identify Customer Needs

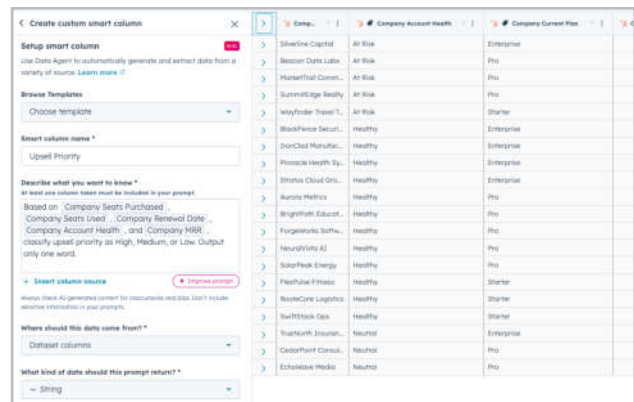
- Navigate to Marketing > Buyer Intent feature in HubSpot.
- Configure and define intent criteria based on meaningful behavioral patterns (e.g., repeated page visits within a defined timeframe).
- Utilize automations within the Buyer Intent Feature to automatically add companies to your CRM, segments, and/or workflows, and track intent signals.



## STEP THREE

### Score Expansion Readiness Clearly

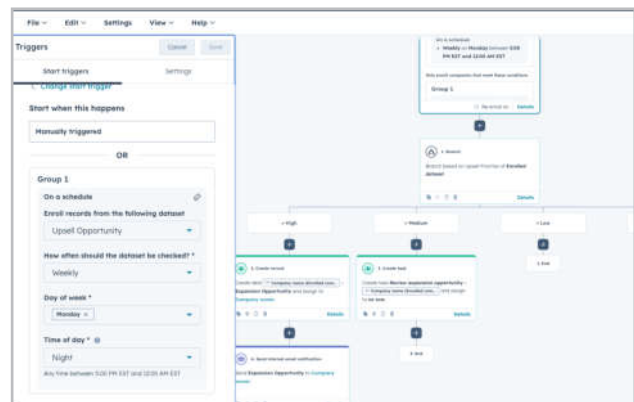
- To the existing Dataset, add another Smart Column to evaluate product usage (seats purchased vs used), renewal timing, account health, MRR, and the external growth signals captured in your column from step 1 (recent funding, acquisitions, hiring spikes, company momentum).
- Have the prompt output a single readiness score (High/Medium/Low) that reflects true expansion potential, and use this property to segment accounts, prioritize rep outreach, or trigger targeted upsell workflows.



## STEP FOUR

### Route Opportunities to the Right Owner

- Create a Company-based workflow triggered from the Dataset you created in steps 1 and 2 that enrolls records on a schedule.
- Add branch logic to route High-readiness to the assigned AE, and route mid-tier opportunities to the appropriate CSM based on lifecycle stage and ownership rules.
- For the High-readiness branch, add an action to create a new Deal and assign it to the correct AE; for Mid-tier accounts, add an action to create a task for the CSM so expansion can be evaluated by a human before a deal is created.



# Research-Based Event Audiences



## Using AI to determine event strategy

AI-powered event targeting harnesses HubSpot's ability to combine event attendance signals with account context and research data. Attendance indicators, ICP fit, account ownership, and recent activity are evaluated to determine relevance and priority. Using HubSpot's AI, you can identify which accounts are most likely to benefit from engagement around an event.

### Ingredients

- HubSpot Datasets
- Smart Columns
- Company Research Agent
- Data Agent
- Event Signal Detection Logic
- Workflow Automation

### Prep Time

30–60 Minutes

### Cook Time

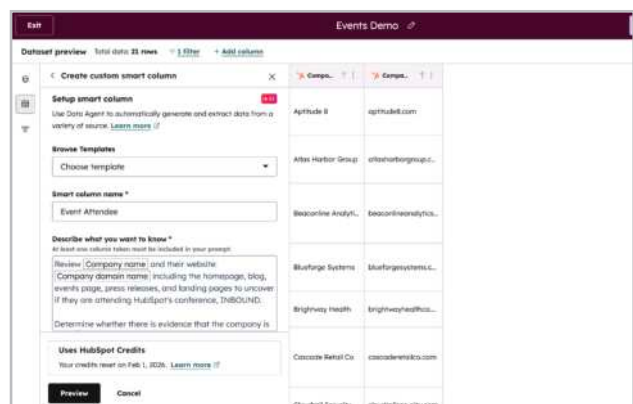
2–4 Hours

## Directions

### STEP ONE

#### Identify & Enrich Event-Relevant Accounts

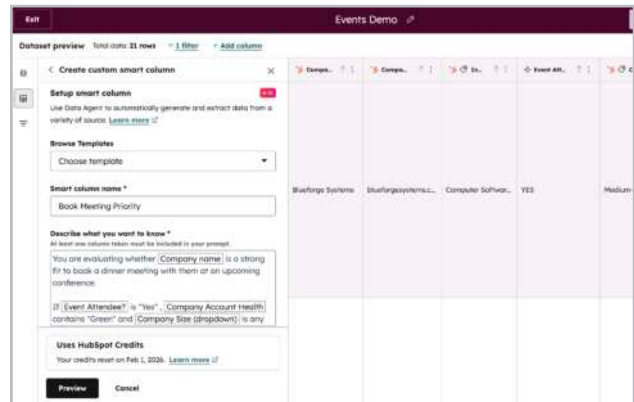
- Navigate to Data Studio and create a Dataset pulling in a list of prospects and target accounts that already exist in your CRM, filtering by ICP criteria such as industry, company size, lifecycle stage, or territory.
- Add a Smart Column to do a company website search for indicators of attendance (booth numbers, “See you at Example Event,” speaking sessions, meeting booking pages).



## STEP TWO

### Prioritize Event Outreach by Opportunity Value

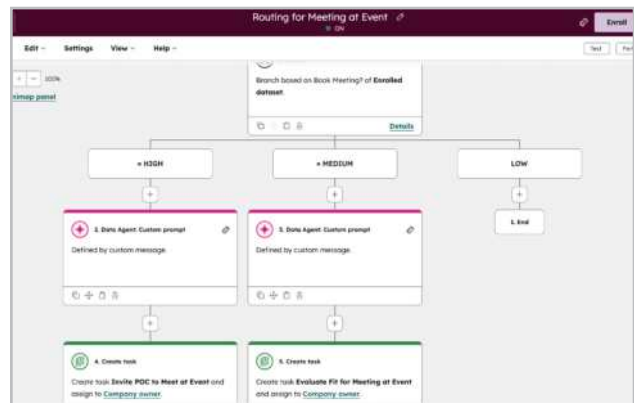
- Add a new Smart Column in your Event Dataset.
- Configure the prompt to assess event participation alongside CRM signals, including ICP fit, lifecycle stage, recent engagement activity, account ownership, and overall account health.
- Instruct the agent to return a single priority tier (High/Medium/Low) based on combined opportunity strength, ensuring prioritization remains objective.



## STEP THREE

### Activate Event-Based Outreach Workflows

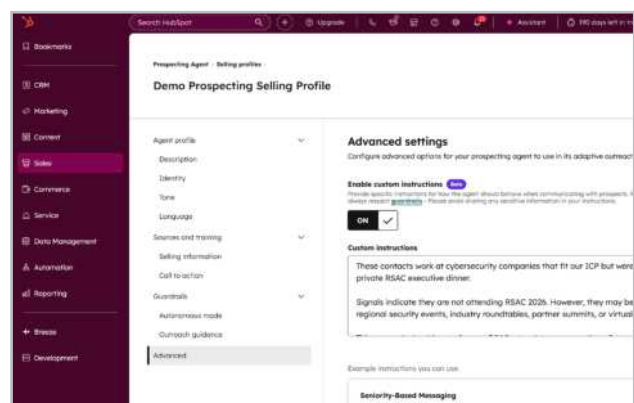
- Create a Company-based workflow triggered from your Event Dataset, enrolling records on a schedule and branching based on the Event Opportunity Priority tier (High/Medium/Low).
- For High-priority accounts, deploy a Data Agent action to generate a concise outreach summary and personalized meeting invite draft, then automatically create a task assigned to the Company Owner to initiate outreach.
- For Medium-priority accounts, deploy a Data Agent action to generate a concise summary and create a review task for the Company Owner to evaluate fit before outreach.



## STEP FOUR

### Use Agents for Low Intent Prospects

- Configure a Prospecting Agent selling profile, providing clear context on your ICP, industry pain points, and how your team supports similar orgs.
- Instruct the Agent to draft concise, personalized emails that reference the event, align messaging to pain points, and maintain a professional tone.
- Using the same workflow from Step 3, add an action to enroll the low priority prospects into the prospecting agent.





Learn More – [apptitude8.com](https://www.apptitude8.com)

