Claude × HubSpot

Accessing a free library of pre-built workflows

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Everything you can access for free when HubSpot is connected to a Claude Pro or aboveaccount — from ad-hoc analysis in Claude Chat to automated workflows in Claude CoWork.

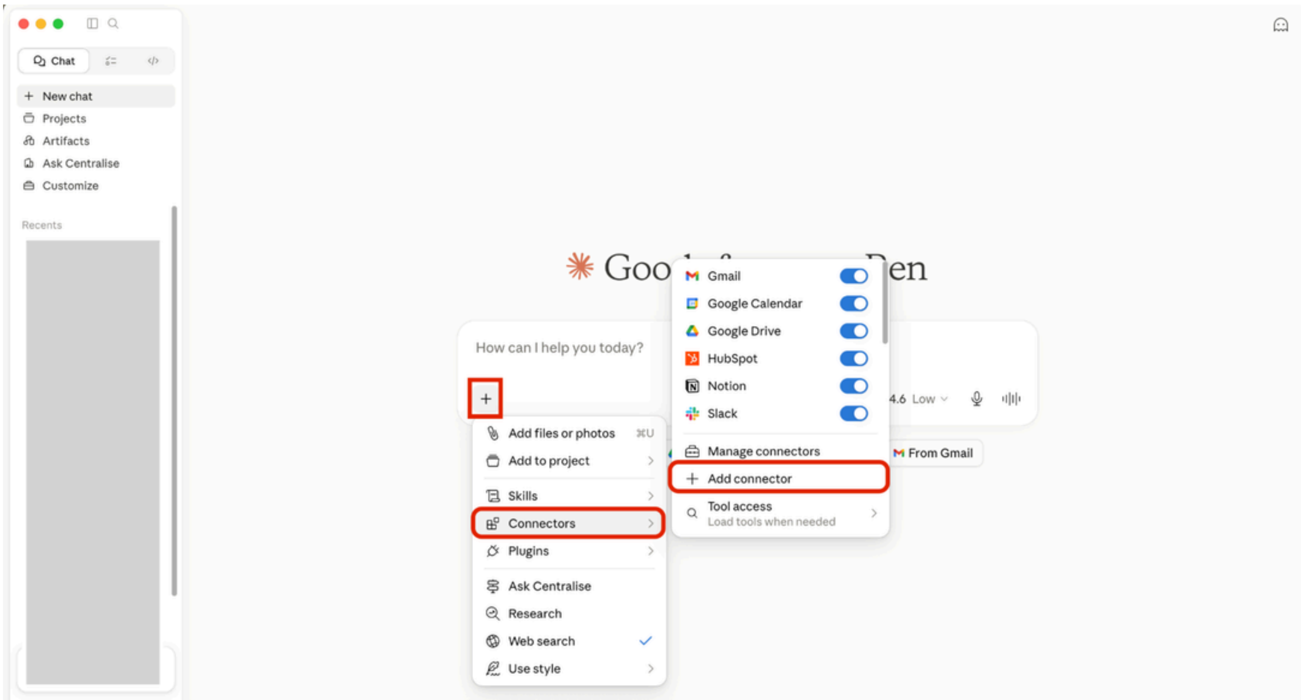
Contents: (click below to jump to that section)

Section 1: Using HubSpot with Claude Chat

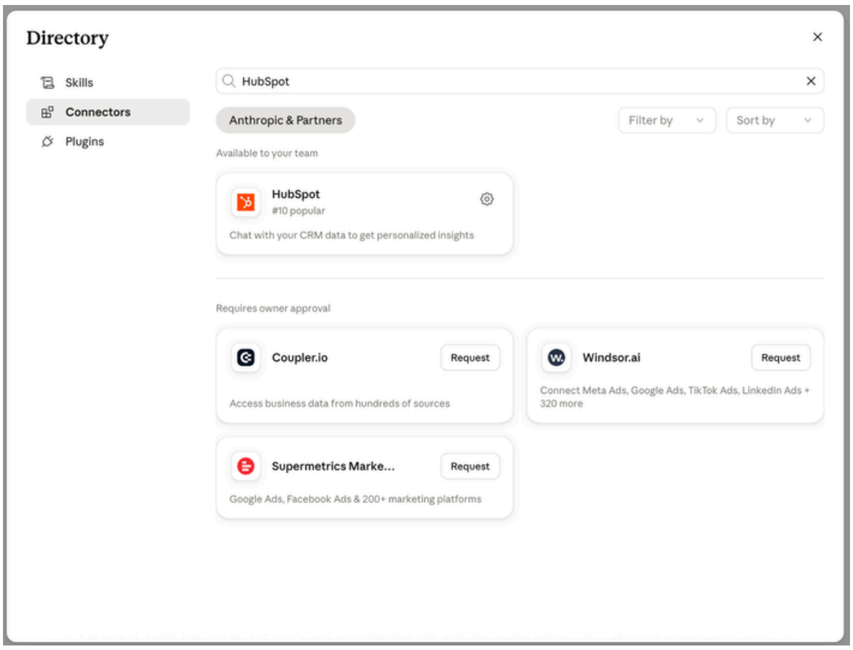
The HubSpot connector for Claude Chat lets you query, analyse, and update your HubSpot portal using plain-language prompts. Works on claude.ai web, mobile, and desktop.

1.1 Setting Up the Connector

1. Go to the ‘Add Connector’ feature below:



2. Search for HubSpot. This may require Admin approval.



3. Once connected, you will be prompted to login to your HubSpot portal

4. Set Write tools to "Needs Approval" — Claude will ask before making any changes
5. Start prompting — Claude can now read and (with your approval) update your portal

> ⚠ **Important**
> Bulk create/update actions are limited to 10 records at a time.
> Always start small before scaling any write operation.

1.2 Suggested basic prompts

Marketing

Contacts added this month
"Show me a list of all contacts added in the last 30 days and their original source."

Lifecycle stage overview
"Which lifecycle stage do the majority of our contacts currently sit in?"

MQL count
"How manycontacts are currently marked as a Marketing Qualified Lead?"

Recent campaigns
"List the last 5 email campaigns we sent and their open rates."

Form submission volume
"Which of our forms hashad the highest submission volume in the last 90 days?"

Sales

Open deals summary
"Give me a summaryofall open deals, including name, amount, stage, and close date."

Deals closing this month
"Which deals are closingthis month? Sort by value."

Deals by rep and stage
"Show me all dealsassigned to [rep name] that are currently in the Proposal stage."

Total pipeline value
"What's our totalpipeline value right now?"

No recent activity
"List all deals thathave had no activity in the last 14 days."

Service

Open tickets by priority
"List all open tickets assigned to me, sorted by priority."

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Ticket volume week-on-week
"How many tickets werecreated this week vs last week?"

High priority open tickets
"Show me all tickets marked as High priority that are still open."

Average close time
"What's the average time to close a ticket this month?"

Long-open tickets
"Show me all tickets that have been open for more than 7 days."

1.3 Snapshot Analysis Prompts

These prompts are designed to give a meaningful read on your current position — not just a data pull, but an actual picture of what's happening and what needs attention.

Tips for best results

Specify a time frame — 'last 30 days', 'this quarter', 'since 1st January' all sharpen results
Ask for a visual — add 'display as a bar chart / pie chart / table' to any prompt
Layer follow-up questions — once you have data, ask 'which should I prioritise?' or 'what's the likely cause?'
Keep Write tools set to 'Needs Approval' before using any create or update prompts

Marketing

Campaign health check — performance overview with underperformers flagged
"Give me a snapshot of our last 3 email campaigns—open rate, click rate, andunsubscribe rate for each. Highlight any that are underperforming against ouraverage and suggest onelikely reason why."

Lead source quality — volume vs conversion by source
"Show me a breakdown of new contacts created inthelast30 days by original source. Which source is producing the highest volume, and which is producing the highestdealconversion rate? Display as a bar chart."

Lifecycle stage bottleneck — where contacts are getting stuck
"Show me how many contacts are currently in each lifecyclestage.Identify where the largest drop-off is between stages, and flag any contacts who have been in the same stage formore than 60 days."

MQL pipeline pulse — track MQL-to-SQL conversion month on month
"How many contacts became MQLs this month vs last month? Of those, how many progressed to SQL? Show the conversion rate and flag any significant change."

Form & content performance — what's driving inbound engagement
"Which of our forms has had the highest submission volume in thelast 90 days? Which has the lowest? What's the top traffic source for the best-performing form?"

Sales

Pipeline snapshot — full pipeline health with activity gaps surfaced

> *"Give me a snapshot of the current open pipeline. Show total value, number of deals, and average deal size broken down by pipeline stage. Highlight any stage with more than 5 deals that haven't had activity in the last 14 days."*

> **Close date risk report — what's due and what's at risk of slipping**
> *"List all deals with a close date in the next 30 days, sorted by value. For each, show the last activity date and flag any where no activity has happened in the past 7 days. Displayas a table."*

> **Rep performance comparison — compare activity across the sales team**
> *"Compare deal activity across my sales team for the last 30 days — calls logged, emails sent, meetings booked, and deals moved to Closed Won. Show as a side-by-side table."*

> **Stalled deal audit — surface deals at risk of going cold**
> *"Show me all deals that haven't had any activity in the last 21 days. Group by owner and stage. Flag any deals over [£/$value] and summarise what the last recorded activity was."*

> **Win/loss snapshot — understand where you're winning, losing, and why**
> *"What's our Closed Won vs Closed Lost ratio this quarter versus last quarter? What's the average deal size for each outcome, and which pipeline stage do we lose from most frequently?"*

Service

> **Open ticket overview — full current-state picture of the support queue**
> *"Give me a snapshot of all open tickets right now. Show total count,breakdown by priority (critical/high/medium/low), breakdown by owner, and flag any ticketsthat have been open for more than 5 business days."*

> **SLA pressure audit — identify high-risk tickets before they breach**
> *"List all tickets currently marked as High or Critical priority. Foreach, show the creation date, current owner, and last activity date. Highlight any that are approaching or past expectedresolution time."*

> **Recurring issue detector — find patterns pointing to fixable root causes**
> *"Look at tickets created in the last 60 days. Are thereany subject linesor issue themes that appear more than 3 times? Group and summarise the top 5 recurring tickettypes."*

> **Team workload snapshot — see how load is distributed**
> *"Show the current open ticket count per support rep.Flag any rep with more than [X] open tickets and highlight the oldest ticket in their queue."*

> **Resolution trend — track whether the team is getting faster or slower**
> *"What's the average time to close a ticket this month vs last month?Has it improved or worsened? Break down by priority level."*

Section 2: Using HubSpot with Claude CoWork (Claude for Small Business)

2.1 What Is This & How To Access It

Claude for Small Business is a set of 15 pre-built workflows inside Claude Cowork — Anthropic's desktop automation platform. It runs on any paid Claude plan at no extra cost. The flows are built around the below tools, but can be used with each tool individually, too:

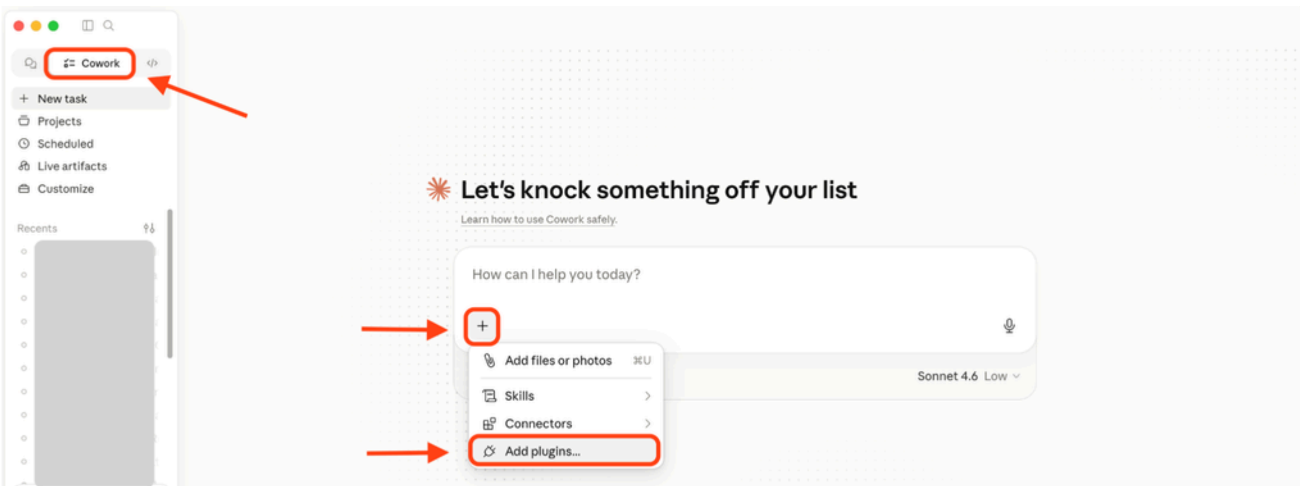
QuickBooks — finance, payroll, P&L, cash flow, tax prep
PayPal — settlements, invoicing, disputes, refunds
HubSpot — CRM, leads, deals, campaigns, tickets
Canva — social asset generation
DocuSign — contract routing and e-signature
Google Workspace — Gmail (email context), Google Calendar (scheduling)
Microsoft 365 — alternative to Google Workspace
Slack — notifications and messaging
Square — payment processing (alternative to PayPal)
Stripe — payment processing (alternative to PayPal)
Webflow — website/CMS (referenced in connector list)
Intercom — customer support tickets (referenced optionally alongside HubSpot in some skills)

The key difference from Claude Chat: these are structured, repeatable workflows triggered by a slash command. Claude does the work and pauses for your approval at each step — nothing executes without you.

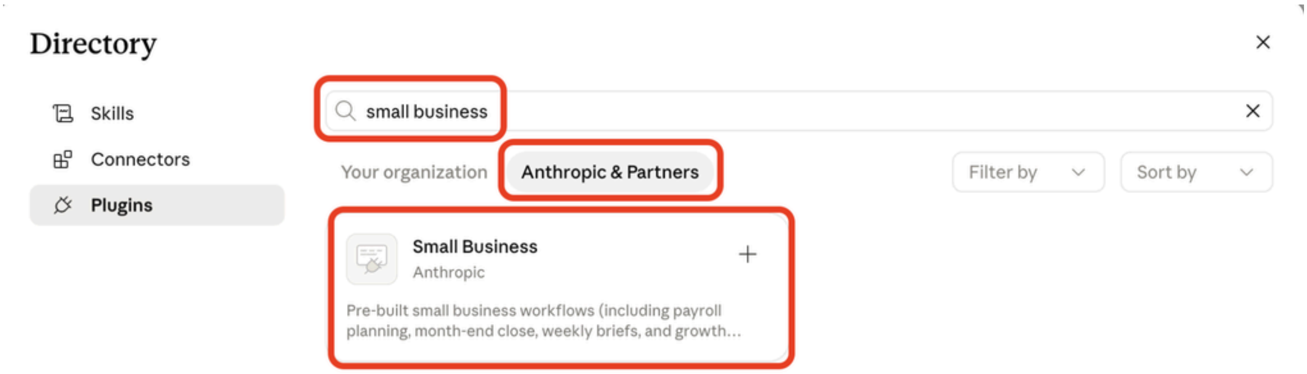
> **Claude Chat vs Claude CoWork**
> Claude Chat (claude.ai) — ad-hoc analyst. You ask a question, you get an answer.
> Claude CoWork — recurring operations assistant, taking action & pause for approval at each step.

How to access:

1. Inside Cowork, go to Add plugins…



2. Search for Small Business by Anthropc:



3. This will give you access to all the below workflows (and more). Just make sure all the above tools are connected if you want to pull from them.

2.2 HubSpot as the Primary Connector

These four workflows primarily in HubSpot. HubSpot is the main data source and the main output destination.

/lead-triage Score and rank your inbound leads

TRIGGER
/lead-triage

WHAT IT DOES
Pulls all HubSpot contacts with lifecycle stage Lead or MQL, scores each one across four dimensions — engagementsignals,company fit, urgency markers (keywords like 'ASAP', 'budget approved'), and recency — then ranks them andproduces a ready-to-use call list.

WHAT IT PRODUCES
– Ranked calllist(top 5 by default, up to 10) with a talking point paragraph and last activity summary per lead
– Draft follow-upemails for leads with unanswered inbound signals older than 3 days
– Proposed20-minute calendar slots for each lead (two options per lead, next two business days)

APPROVALGATES
– Draft emailsarepresented for review — Claude never sends
– Calendarslotsare proposed — Claude never books without confirmation
– Deal stagesandlifecycle stages are never changed automatically

/crm-cleanup Audit and fix HubSpot data quality

TRIGGER
/crm-cleanup

WHAT IT DOES
Runs a hygiene pass across your HubSpot portal — scanning for stale deals, duplicate contacts, and missing required fields. Presents all findings before touching anything.

WHAT IT PRODUCES

– Stale deal list: open deals with no activity in 14+ days — deal name, stage, last activity, contacts, amount, and a proposed action per deal
– Duplicate contact report: matched pairs shown side-by-side with a merge recommendation
– Missing fields table: open deals and associated contacts with required fields left blank

APPROVALGATES

– No changesmade until owner approves each finding individually
– Contacts arenever merged without explicit per-pair approval
– Records arenever deleted under any circumstances

/crm-maintenance Log activity without opening HubSpot

TRIGGER

"Log thiscallto the Acme deal" | "Update my CRM from this email" | "Is the [deal name] deal up to date?"

WHAT IT DOES

Keeps HubSpot current by reading your email threads and calendar events, identifying the right HubSpot contact and deal, andlogging the activity. Three paths: log an email, log a call/meeting, or audit and clean up a specific deal.

WHAT IT PRODUCES

– Email activitylogged to the correct HubSpot deal (subject, concise summary, timestamp)
– Call or meeting activity logged to the correct HubSpot deal (title, duration, notes)
– For deal cleanup: a side-by-side current vs. proposed changes table, applied only with approval
– New HubSpot contacts created where none exist (announced before writing)

APPROVALGATES

– Contact creation is announced before writing — you can catch duplicates
– Deal stagechanges require explicit approval even when evidence is clear
– New dealsare never created unprompted
– Records arenever deleted

/call-list Build a prioritised daily call list

TRIGGER

/call-list

WHAT IT DOES

Builds a prioritised daily call list from HubSpot pipeline data, cross-referenced with email thread history. Scores each lead onrecency, deal stage, inbound signals, and deal value. Produces ready-to-use call cards and lines up the follow-upwork.

WHAT IT PRODUCES

– Ranked call cards: contact, company, deal amount, stage, days since last contact, 2–3 talking points from email history,and a one-sentence call goal
– Proposed 20-minute calendar blocks for each call on the target date
– Draft follow-up emails for leads with unanswered emails older than 3 days

APPROVALGATES

– Calendarblocks are proposed and listed — Claude waits for confirmation before creating any events
– Follow-upemails are presented as drafts — Claude never sends

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– HubSpot deal stages are never updated automatically

2.3 HubSpot as a Supporting Connector

These workflows involve multiple tools. HubSpot plays a major role but works alongside other connectors.

/run-campaign End-to-end campaign — analysis ⟶ assets ⟶ HubSpot send

TRIGGER
/run-campaign

WHAT HUBSPOT CONTRIBUTES
- Pulls contacts matchingthe campaign target segment
- Scores the segment byengagement, company fit, and urgency
- Stages all social postsasSCHEDULED in HubSpot
- Produces a high-prioritycall list of top 5 leads to contact personally

WHAT IT DOES
End-to-end campaign workflow chaining three skills: sales analysis → asset generation → audience segmentation.Three explicit approval gates — nothing advances without you. Other connectors: QuickBooks, PayPal, Canva.

WHAT IT PRODUCES
- Revenuedipanalysis from QuickBooks/PayPal
- Approved30-daycontent brief
- Canva-designedsocial assets with captions
- HubSpotcampaignstaged and ready (SCHEDULED, never published automatically)
- Bulk sendlist+personal call list with talking points
- Calendartimeblocked for priority calls

APPROVALGATES
- Three explicitapproval gates — nothing advances between steps without confirmation
- All HubSpotpostsare staged as SCHEDULED — the owner controls go-live
- Emails aredraftedonly — never sent automatically

/canva-creator Execute a content brief — Canva designs + HubSpot staging

TRIGGER
"Make the content" | "Generate the posts" | "Turn this brief into a campaign"

WHAT HUBSPOT CONTRIBUTES
- Receives all social posts(Instagram, Facebook, X, LinkedIn) as SCHEDULED
- Creates the campaign inHubSpot Marketing and attaches each post
- Provides a direct link tothe HubSpot campaign view once staging is complete

WHAT IT DOES

Takes an approvedcontent brief and executes it end-to-end: posting calendar, Canva designs for social, captions, and staged sendsinHubSpot. Requires an approved brief as input. Other connectors: Canva.

WHAT IT PRODUCES

– Posting calendar with channel, theme, and asset type per row
– Canva-designed social assets (3 candidates per post for owner to choose from)
– Approvedcaptions per post
– Full emailcontent drafted as plain text for the owner to send from their own tool
– HubSpotcampaign staged and linked with a direct view URL

APPROVALGATES

– Owner approves the posting calendar before any Canva calls are made
– Owner picks one design per post from the candidates presented
– All HubSpot posts are staged as SCHEDULED — the owner controls go-live
– Nothing is published or sent automatically

/customer-pulse & /customer-pulse-check Aggregate customer feedback into themes and action lists

TRIGGER

/customer-pulse or /customer-pulse-check

WHAT HUBSPOT CONTRIBUTES

– Open and recently closed support tickets
– Conversation notes andfeedback records
– Contact history for customers with repeat issues

WHAT IT DOES

Aggregatescustomerfeedback signals from multiple sources, groups them into recurring themes, and produces an action list./customer-pulse delivers a themes report. /customer-pulse-check goes further — it identifies the top 3 fixableissuesand drafts a response template for each. Other connectors: PayPal, Gmail.

WHAT IT PRODUCES

– 3–5 recurringthemes with signal counts and 2–3 verbatim quotes each
– "Do these3things this week" action list tied to top themes
– Sourcespulledsummary (PayPal disputes, HubSpot tickets, Gmail threads, reviews)
– /customer-pulse-check also: top 3 fixable issues with root cause, operational fix, and drafted response templateperissue

APPROVALGATES

– Both skillsareread-only — no records are modified, closed, or replied to automatically
– Responsetemplates are presented as drafts — owner sends manually

/ticket-deflector Read a complaint, draft a reply, stage a refund

TRIGGER

"Answerthis customer" | "Draft a response to this complaint" | Forward a customer email directly

WHAT HUBSPOT CONTRIBUTES

– Pulls the customer contact record: lifecycle stage, notes, open deals, recent activity
– Provides full account history to inform response tone
– Logs the interaction as a note on the HubSpot contact timeline after send

WHAT IT DOES

Reads a forwardedcustomer email, looks up their order status and account history, drafts a tone-matched reply in the owner'svoice,and (if needed) stages a refund for approval. Turns a customer complaint into a drafted response in underaminute. Other connectors: PayPal, Gmail.

WHAT IT PRODUCES

– Customer context summary: new/returning status, lifetime value, prior complaint count, one-sentence issue summary
– Draft reply matched to tone (empathetic for high-LTV first-timers, firm for repeat issues)
– Refund confirmation prompt if warranted (amount, name, email, transaction ID shown)
– HubSpot timeline note logged after the reply is sent

APPROVALGATES

– Draft is always presented before sending — owner may edit freely
– PayPal refunds require a dedicated explicit confirmation prompt
– HubSpot contacts are never created during the response flow — offered afterward only
– Tickets and disputes are never closed without owner confirmation

2.4 HubSpot as a Monitoring Input

These workflows pull HubSpot pipeline and deal data as one input among several to produce a broader business briefing. HubSpot is not the primary focus but contributes meaningfully to the output. All five degrade gracefully — if HubSpot is not connected, the pipeline section is skipped and noted, but the rest of the brief still runs.

Skill	Trigger	What HubSpot contributes	Other connectors
/business-pulse	"How are we doing?"	Pipeline by stage, deals moved/closed, deals gone cold (7+ days no activity), new inbound leads	QuickBooks, PayPal/Square, Google Calendar, Gmail, Slack
/monday-brief	"Monday brief" /monday-brief	Deals moved this week, deals stalled 14+ days, new inbound leads count	QuickBooks, PayPal/Square, Google Calendar, Gmail
/friday-brief	"Friday brief" /friday-brief	Deal closes for the week fed into the revenue pulse and wins summary	PayPal/Square
/quarterly-review	/quarterly-review	New customers won, churned, average deal size, pipeline entering next quarter, revenue concentration flags (>20% one client)	QuickBooks, PayPal
/sales-brief	/sales-brief	Campaign activity cross-reference — explains whether a product's performance shift correlates with a HubSpot campaign	QuickBooks, PayPal

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Centralise is a HubSpot Elite Partner, ranked top 20 and one of the fastest-growing partners globally. We work with mid-market B2B teams whose revenue infrastructure has outgrown its foundations: forecasting that can't be trusted, CRM data that contradicts itself, automation that was built too fast to last.

We fix that. From audit and data foundations through to full HubSpot implementation and ongoing optimisation, our work is built around one outcome: a revenue engine your team can rely on.

250+ projects completed | ISO 27001:2022 certified, with zero nonconformities |

Is your data working against you?

Speak to one of our team.

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