Conversation Intelligence

HubSpot

Record, transcribe, and analyze information from Sales and Services conversations to unlock insights that transform your team and delight your customers at scale.

AI-Powered Insights

Deepen customer relationships with AI-powered insights so that your entire team has clarity on your customer's voice at scale, without relying on gut feelings.

Streamlined Coaching

Perfect team performance by efficiently understanding why outcomes occurred and providing specific feedback to reps for their development.

All-On-One Collaboration

Collaborate across teams with a 360-degree view of customer interactions, and execute personalized campaigns with ease.

Product Details

Available on Free+

Calling Improvements

Automatic Recording

Automatically record calls placed via HubSpot's native calling and other channels.

Call Index

See an index of all your team's calls in a single place.

Available on Sales Hub Enterprise + Service Hub Enterprise

Call Transcription

Capture effortless, accurate, searchable transcripts of calls placed through HubSpot or an integrated provider like Zoom Enterprise.

Call Coaching

Listen to recordings, see useful metrics, collaborate through comments on individual calls.

Call Analysis & Reporting

Search for keywords and phrases across your team's entire history of calls. Build detailed reports tracking call metrics, keywords, and more.

Up to 1500 hours of transcription per portal per month (pooled limit). Additional capacity available in 400-hour blocks for $250 USD. Multiple blocks can be purchased. Blocks renew each month and can be purchased touchlessly or via quote.

Multilingual transcription is available in HubSpot's eight supported languages. We will identify the language based on the global portal and user language settings. We will not be able to detect a language if it is not in the portal or user language settings.

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AI-Powered Insights	Streamlined Coaching	All-On-One Collaboration
Deepen customer relationships with AI-powered insights so that your entire team has clarity to your customer's voice at scale, without relying on gut feelings.	Perfect team performance by efficiently understanding why outcomes occurred and providing specific feedback to reps for their development.	Collaborate across teams with a 360-degree view of customer interactions, and execute personalized campaigns with ease.

Product Details

Conversation Intelligence

Available on Sales Hub Enterprise and Service Hub Enterprise

Feature	Description	Tier	Paid Seat Required?
Call Transcription	Effortless, accurate, searchable transcripts of calls placed through HubSpot (or an integrated provider like Zoom Enterprise).	Enterprise	Yes
Call Coaching	Listen to recordings, see useful metrics, collaborate through comments on individual calls.	Enterprise	No
Call Analysis & Reporting	Search for keywords and phrases across your team's entire history of calls. Build detailed reports tracking call metrics, keywords mentioned, and more.	Enterprise	No

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Calling Improvements

Automatic Call Recording	Automatically record calls placed via HubSpot.	Free+	Yes
Call Index	See an index of all of your team's calls in a single place.	Free+	Yes

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Getting Started

Assess Good Fit Customers

- Already recording calls today
- Using a compatible third-party calling provider, such as Zoom Enterprise (see others here)
- Able to gain consent to record calls

Set up Conversation Intelligence

This Knowledge Base article outlines the steps to set up calling and turn on Conversation Intelligence in your portal.

Keep in mind that call recording laws vary by country. See this page for general guidance, but consult further with your legal team to ensure you have everything covered.

Creating a CI Strategy

Review

Set up filters

Consider what types of calls or topics you want to listen to on a regular basis. Filter by markers such as:

- Your team (manager)
- Relevant topic mentions
- Rep note mentions

Search

Search within an individual call or search across all recorded calls.

Start your search at the database level, then dive into the call results to find numerous examples.

Report

Track keywords

Determine what types of words or mentions trigger action by your business, and create keywords so that each mention becomes an event.

Suggested keyword triggers: competitor keywords, topics that repeatedly affect deals (e.g. "discount" or "deadline"), and keywords for ideal rep talk tracks.

Monitor trends

Create reports that answer questions such as:

- How much is the mention of particular topics affecting the average deal size?
- When our reps mention discounting, are smaller deals the outcome?

Coach

Create and share transcription notes

Leave notes at an exact point in a call and easily share the call with colleagues. Tag in team members to promote best practices and spread insights.

Provide specific feedback to reps – not just “this was good” but specific callouts of what they did well and why.

Schedule call reviews

Set up regular listening sessions with individual team members, and hold team-wide call reviews to share learnings.

Perform team call reviews asynchronously by having everyone listen on their own time and leave notes on a call.

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