



The Ultimate Prompt Library for HubSpot + ChatGPT

Unlock CRM Insights with Natural Language – No Code, Just Results

Overview

This prompt library is your go-to resource to start using HubSpot's **Deep Research Connector** with ChatGPT right away.

No technical setup, no filters or dashboards - just ask and act.

Use it as a:

- ✓ Sales Playbook
 - ✓ Marketing Intelligence Guide
 - ✓ Customer Success Tracker
 - ✓ RevOps Audit Companion
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How to Use This Library

Use natural language - just like you're talking to a teammate.

Mix, match, and modify based on your CRM structure (e.g., custom fields, teams).

Add follow-ups like "break it down by owner" or "include CRM record links."

Works best when your HubSpot data is clean and complete.



Prompts by Role

Sales

Prioritize deals, uncover blockers, and follow up faster.

Objective	Prompt
Prioritize big opportunities	“Which deals over \$50K are expected to close this quarter and haven’t been touched in 10+ days?”
Identify stuck deals	“List all deals in 'Contract Sent' stage with no recent activity in the past 14 days.”
Personalize outreach	“Generate follow-up emails for deals closing this month with no call logged in the past week.”
Analyze pipeline by rep	“Break down current pipeline by deal stage and owner.”
Focus on quick wins	“Which deals have high close probability and are closing in the next 14 days?”
Stage bottlenecks	“Which deals have been stuck in the same stage for over 30 days?”
Sales performance	“Break down deal revenue by rep for the past 30 days.”
Inactive deals	“List all pipeline deals with no logged activity in the past 2 weeks.”
Win/loss breakdown	“List all lost deals in the past 60 days by reason and deal value.”
Regional trends	“Summarize pipeline by region and deal size for this quarter.”
Closing probability	“Which deals are most likely to close this quarter based on deal stage and activity?”



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Marketing

Maximize campaign ROI and sharpen audience targeting.

Objective	Prompt
Campaign ROI	"Which campaigns generated the most SQLs in the past 90 days?"
Persona conversion	"What are our top-performing personas by MQL-to-SQL conversion rate this quarter?"
Lifecycle segmentation	"List contacts in the 'Lead' lifecycle stage with high email engagement in the last 30 days."
Channel analysis	"Compare lead volume from paid vs. organic channels for Q2."
Content performance	"Which blog posts or offers led to the most new MQLs this month?"
Lead scoring insights	"What's the average lead score by persona in our CRM?"
Funnel health	"How many contacts converted from MQL to SQL in June?"
Email engagement	"List contacts who opened 3+ emails in the last 30 days and are in the 'Lead' stage."
Form conversion	"What's the conversion rate of our last 3 lead-gen forms?"
Event follow-up	"List attendees of [Event Name] who haven't been contacted post-event."
Channel breakdown	"Break down new contacts by channel and lifecycle stage for this month."



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Customer Success

Retain customers, spot risks, and drive renewals.

Objective	Prompt
Renewal risk	"Which customers are due for renewal in the next 30 days and haven't had a meeting in 60 days?"
Support engagement	"List high-value accounts with 3+ open tickets or no success calls logged in 45 days."
Churn signals	"Identify customers with declining engagement and unresolved tickets in the past month."
QBR prep	"Summarize account activity, support history, and last interaction for [Account Name]."
Health scoring	"Which accounts have a high ticket-to-meeting ratio and low NPS scores?"
Engagement drop	"Which accounts had a meeting in the last 90 days but none in the last 30?"
Onboarding progress	"Which new customers are missing key onboarding steps?"
Feedback loop	"Which customers gave negative feedback but haven't been contacted since?"
Advocacy potential	"List customers with high NPS scores and no referral or review activity."
Support trends	"Summarize support ticket volume by customer over the last 3 months."
Upsell opportunities	"Which customers increased product usage in the last 30 days?"



RevOps & Admin

Maintain CRM integrity, forecast smarter, and streamline reporting.

Objective	Prompt
Data completeness	"What percentage of deals are missing a close date or deal owner?"
Velocity tracking	"What's the average time deals spend in each stage over the last 60 days?"
Forecast accuracy	"Compare projected close dates vs. actual close dates for closed deals in Q2."
User adoption	"Which reps haven't logged a call or note in the past 14 days?"
Object audit	"List custom properties on the Deal object that are rarely or never used."
CRM audit	"Which deal records are missing a close date or deal stage?"
Ticket load	"List all open tickets assigned to reps by ticket priority."
Property usage	"Which custom properties on the Contact object have not been used in the past year?"
Automation gaps	"Which workflows have the most skipped enrollments or errors?"
Revenue leakage	"Are there closed-won deals missing associated company or contact records?"
Forecasting	"What's the expected pipeline revenue by stage and region for the current quarter?"



Bonus: Prompt Modifiers

Enhance your results with these smart additions:

- **Add timeframe:** "...in the last 30 days"
- **Ask for links:** "...and include CRM record links"
- **Filter by owner/team:** "...owned by [Rep Name]"
- **Break it down:** "...broken down by region/industry/stage"
- **Request summaries:** "Summarize top insights from..."
- **Generate outputs:** "Write follow-up emails for..."

Pro Tips for Prompting

- **Be precise:** Use filters like close date, value, lifecycle stage
- **Use follow-ups:** Ask, refine, iterate naturally
- **Include CRM record links:** For context and next steps
- **Cross-check:** Validate before taking action
- **Keep data clean:** The better your CRM, the better your answers