

WEBINAR

Look beyond the demo

HubSpot Customer Agent: lessons from real-world deployments

An hour to switch on.
Months to get right.

Chatflows: rules, free

Customer Agent: generative, credits

Reply recommendations: AI drafts for reps, no credits

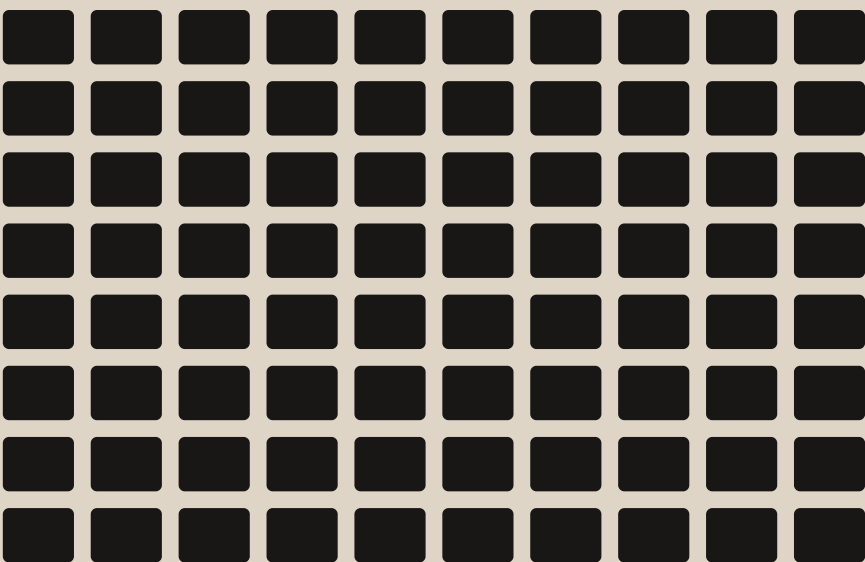
Mature setups use all three

**HubSpot has
different chat
bots**

More pages did not mean better answers.

~4,000 URLs in the sitemap

First crawl: 3,000+ pages, and a slow agent



Crawling fails quietly.

01	Bot protection	The site's bot protection blocked HubSpot's crawler without a word. No error, just thin knowledge. Allowlist the crawler by its user agent; its IP ranges change.
02	noindex pages	Never crawled, however important. Upload them by hand.
03	Other platforms	Different platforms may need different crawls and different permissions. For example, support FAQs and main site pages.
04	Scope, not domain	Point it at specific FAQ sections, not a whole documentation site. Easier approval, less bloat.
05	Sync rhythm	Knowledge base articles resync on edit; everything else weekly. Sources sit in tabs by type, so a crawl can look missing. Treat scope changes as planned changes.

Sources HubSpot Knowledge Base, Customer Agent documentation, October 2026

THE BIG LESSON

**Guidelines are
suggestions. Actions are
commitments.**

WHAT WORKED

A custom action as a tripwire.

VISITOR

Triggers written as intents, no inputs, a GET to a static file that returns the meeting link. Offer the call. Do not qualify. Do not attempt the pricing answer.

Filter the noise before the agent speaks.



Roughly. Figures from one large site's contact form, pre-build analysis.

What this means: A free Chatflow pre-screen menu routes applicants and vendors away before the agent engages. Better leads, cleaner data and it should cost fewer credits.

Sources Client contact-form analysis, August 2026 (anonymised, approximate)

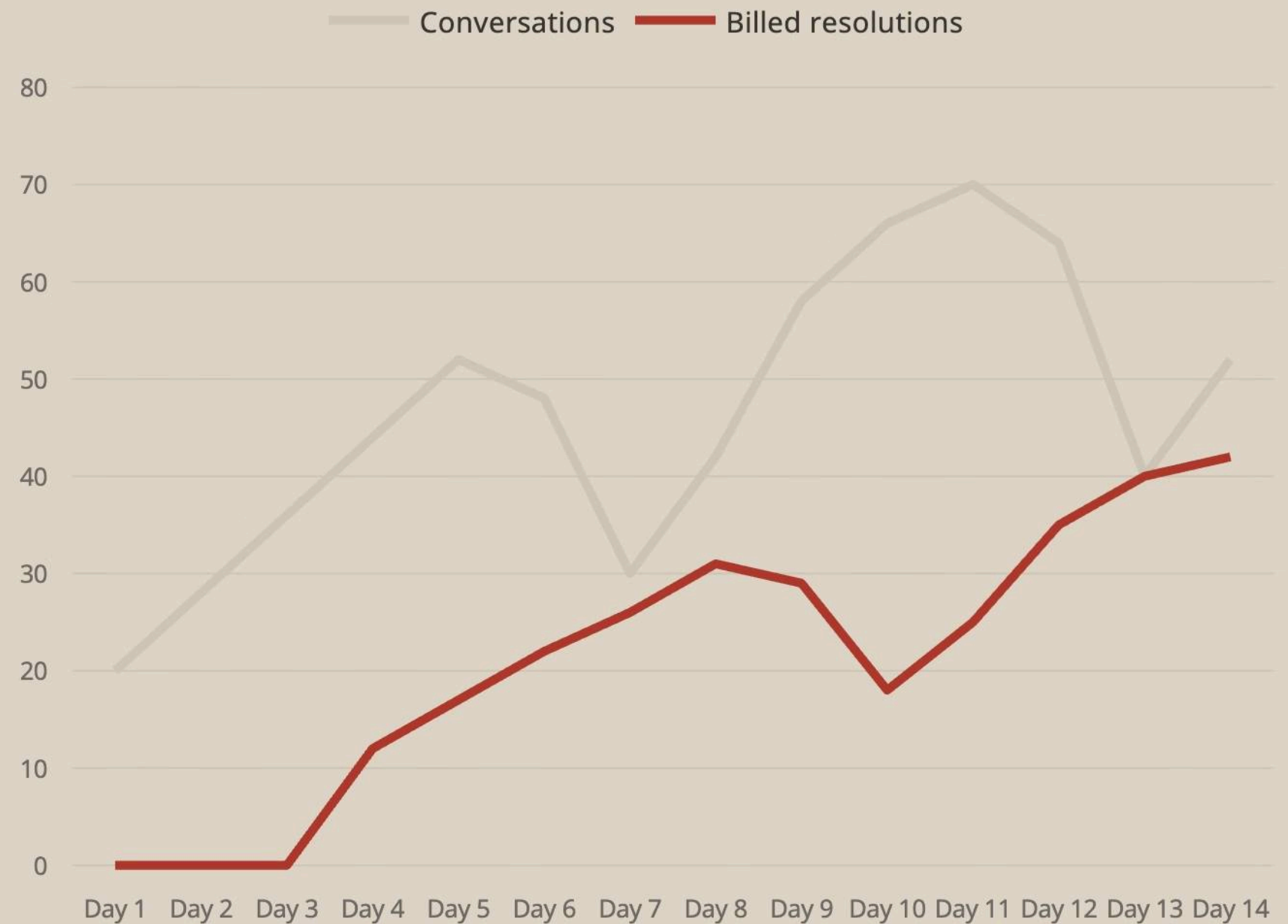
The clock starts when you click.

01	14 days	The trial runs 14 days. An earlier offer ran to 28 and some early adopters got it. Do not assume you will. Get it in writing from HubSpot.
02	Start Free Access	The clock starts when someone clicks that button, not when you deploy. Do not click until you are ready to tune hard.
03	Plan a sprint	Weekly transcript and knowledge-gap review, coaching the agent, widening the throttle step by step.
04	Cap and watch	Set the credit cap before you click. Monitor it knowing billing runs three days behind.

Sources HubSpot Customer Agent trial terms, October 2026; confirm with your HubSpot account team

You pay per resolution, not per message.

A resolution: the agent cites a source or performs an action, no human handoff within 72 hours. A visitor who takes the link and leaves is billable.



Illustrative, not client data: 300 conversations a week, 60 percent resolve, billed on a 72-hour delay.

Test mode costs nothing. Use it hard.

01

Free to test

Preview mode consumes no credits. The response trace shows why it answered: knowledge, action or fallback.

02

Regression tests

About 60 questions: services, qualification, booking, pre-screen, red lines, handoff. Pass or fail. Go-live bar: zero red-line failures.

03

Twenty phrasings

Throw 20 variants at any must-work behaviour. One pass proves nothing.

04

?test_chat=true

A targeting rule on a query parameter puts the agent on the live site for anyone with the link and nobody else. Real pages, real knowledge, no public exposure.

05

Separate the two

Targeting and billing are separate. Test mode for volume, the gated live deployment for stakeholders.

Sources HubSpot Customer Agent documentation, October 2026

No "first 1,000 visitors" control

Credit caps are not view caps

Timed windows

Targeting rules

An A/B tool holdout

Tips for initial deployment

Treat it like software.

Because it is.

01

Version control

Instructions, guardrails, handoff rules and action definitions live in a repo. Every change is a commit with a reason. HubSpot keeps no history for these fields.

02

Regression tests

The question bank is a prompt library. Run it after every change, and again before go-live. Red lines block the release.

03

Bug tracker

A form anyone in the business can use: what was asked, what it said, what it should have said. Weekly triage feeds the transcript review.

04

Release cadence

Change, test, deploy, on a rhythm, with a changelog. The weekly intake is the sprint boundary.

Sources Articulate delivery practice, 2026

PEOPLE

It touches more owners than you think.

Each one is a separate conversation and a separate approval. Map them on day one.

Ten decisions before you click Start Free Access.

1 hr

to switch it on

1+

deliberate sources

0

red-line failures

14

days on the clock

Decide these first. Everything after the click costs credits or time.

- 01

Which chatbot
chatflow, agent or both
- 02

Which sources
and which paths to exclude
- 03

Who owns each source
and who refreshes it
- 04

The must-work behaviour
built as an action
- 05

What a resolution costs
and where the cap sits
- 06

Trial length
in writing, from HubSpot
- 07

Where the prompts live
repo, tests, bug tracker
- 08

How you throttle
launch traffic
- 09

Who approves
web, docs, support, legal, sales
- 10

What you defer
live chat, languages, segments

Sources Articulate Customer Agent go-live checklist, October 2026

ONE MORE THING

Chatbots aren’t the only option.

Marlinspike: our own library of 500+ reviewed pieces, curated and indexed, with a search surface on top. Not a chatbot.

I'm someone ~ at a B2B tech ~ company. I want to do better marketing ~.

Show me everything ~ about anything.

Q Find it

II [Or just describe what you're after](#)

5 pieces, best first

Sort

Best match

⚙ Summarise these

WEBINAR

October 2026

The amuse-bouche: how to craft a hero banner that makes people hungry for more

Webinar transcript on designing website hero banners that quickly communicate what a B2B company does, for marketing leaders and teams. Recording, transcript and deck.

Best if you're about to redesign your homepage and want a practical scorecard for judging your hero banner.

Watch →

BLOG

October 2026

How to use AI to make your marketing budget go further

A practical argument for redesigning marketing workflows around AI, with a checklist, for marketing leaders on flat budgets.

Best if your team is already using AI and you need to know whether it is actually making your budget go further.

Read →

**The demo takes an hour. A
working AI chatbot takes
the next month.**

Want the checklist?

Email matthew@articulatemarketing.com for the ten-decision checklist and the regression-bank template.

Or book a Customer Agent readiness call.

👉 Book your Customer Agent readiness call: articulatemarketing.com/meet

Thank you!