



TLDR

TLDR: If you want your HubSpot data to answer your questions like one of your colleagues and accelerate time-to-money, combine Breeze AI with the newly announced MCP Server.

How it Works:

The New Flow of Sales Intelligence

(Using Claude)

1. **Ask Claude a sales or marketing question** or request an action to be completed in plain English.
2. **Claude interprets the question (or action requested)** and determines what HubSpot CRM data is needed.
3. **The MCP Server securely retrieves the data** from HubSpot or enables the HubSpot data record to be instantly updated.
4. **Claude analyzes the data and provides a response** within Claude while also showing any updates within HubSpot that may have been made to the HubSpot data record(s).



No more toggling tools.

No more stale data.

Introduction

What if your CRM could talk back—

intelligently, instantly, and with answers that save hours?

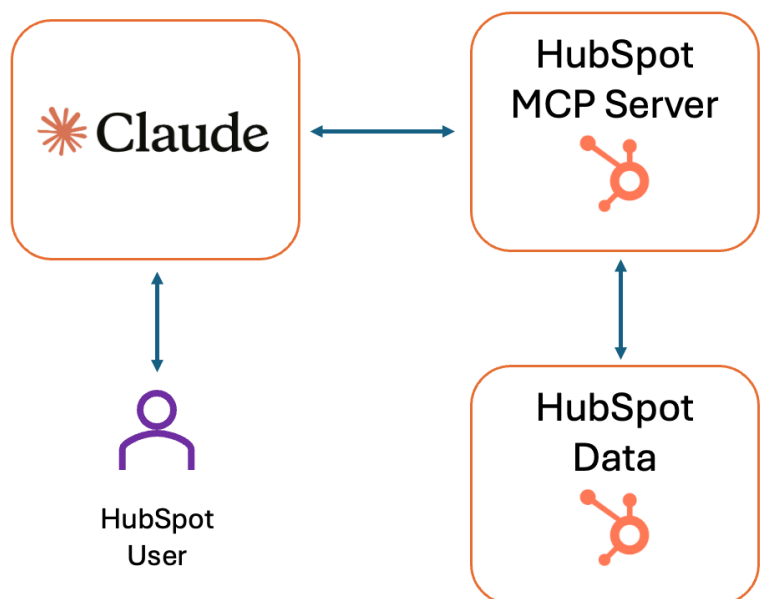
That future is now live in beta with HubSpot's Model Context Protocol (MCP) Server (**announced on May 6th**), and it's already transforming how everyday HubSpot users work. When combined with Breeze AI, HubSpot's intelligent productivity suite, the MCP Server opens the door to powerful, secure, and seamless conversations between your CRM data and large language models like Anthropic's Claude LLM.

Note: The initial beta version enables you to:

- **Leverage Claude** to update records or generate useful reports or
- **Leverage Cursor** to understand your actual data structure and/or edit code.

The MCP server will eventually enable you to utilize HubSpot data with many other MCP-connected AI tools.

Claude + MCP Server + HubSpot



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How the MCP Server Works

Your HubSpot Assistant Just Got Smarter (cont.)

3 Simple Sales Examples

1) Get Info Without Clicking Around

Old way: You're on a sales call, scrambling through tabs to find the latest note on a prospect.

New way with Claude + MCP + HubSpot: Just type or ask,

☞ "What's the most recent interaction with Apex Corp?"

And the AI instantly shows you the right note, meeting, or email—right from HubSpot. No digging. No clicks.

2) Update CRM Records in Plain English

Old way: You finish a meeting, then spend 10–15 minutes finding the contact, editing fields, and saving notes.

New way with Claude + MCP + HubSpot: Just say,

☞ "Update Jane Smith's email to [jane.smith@apex.com] and add that she's now VP of Operations."

And it's done for you—instantly and accurately while you view the updated record in HubSpot and Claude confirms the record has been updated.

3) Create Follow-Ups Without Breaking Your Workflow

Old way: You're trying to stay focused but have to pause your work to manually create follow-up tasks.

New way with Claude + MCP + Hubspot: Just say,

☞ "Remind me to send Jane the proposal on Thursday and follow up next Tuesday."

Your tasks show up in HubSpot, scheduled exactly as you asked—without leaving your screen.

A Sampling of Measurable Impact Across the Sales Org

Metric	Before MCP + Breeze AI	After
Sales forecast accuracy	± 25% deviation	± 5–10% deviation
Time to prep for pipeline reviews	2–4 hours/week	< 15 minutes
Rep response to stalled deals	Inconsistent	Proactive, AI-prompted
Win/loss pattern visibility	Quarterly postmortems	Real-time alerts

When all the efficiencies are tallied up, your ability to use the MCP Server with Breeze AI is poised to cut your total workflow time by as much as 50%.

Your Trusted Partner

AI is a strategic enabler—but adoption isn't plug-and-play. AI isn't about tech—it's about strategy.

Periti helps you **maximize your ROI - fast** -and is your trusted partner to unlock it.

✉ Let's Talk. If you're ready to transform your HubSpot investment into a growth engine, [Contact us.](#)

Benefits

- 86% of marketers say that using AI saves them one (or more) hours per day by streamlining creative tasks.
- 94% say that personalization boosts sales.



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