



AI for the Rest of Us: Practical B2B Marketing & Lead Management

Todd Laire for B2B Marketing Expo
LAIRE | A Digital Growth Agency



LAIRE

Todd Laire

Co-Founder and CEO of LAIRE, a digital marketing and revenue growth agency with notable experience in marketing, sales, and lead generation in multiple industries. Todd is driven by results and equips LAIRE clients to do the same, by providing them with the tools they need for internal alignment, sales enablement, and revenue growth.

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Laire Family

- Based in Charleston, SC
- Laura, married 20 years
- Tristan, 18 y/o
- Skylah, 15 y/o
- Levi (rescued pitbull mix), 5 y/o

We love boating, going to the beach, traveling (just got back from Spain, France and Italy!) exploring new restaurants, and hitting concerts.



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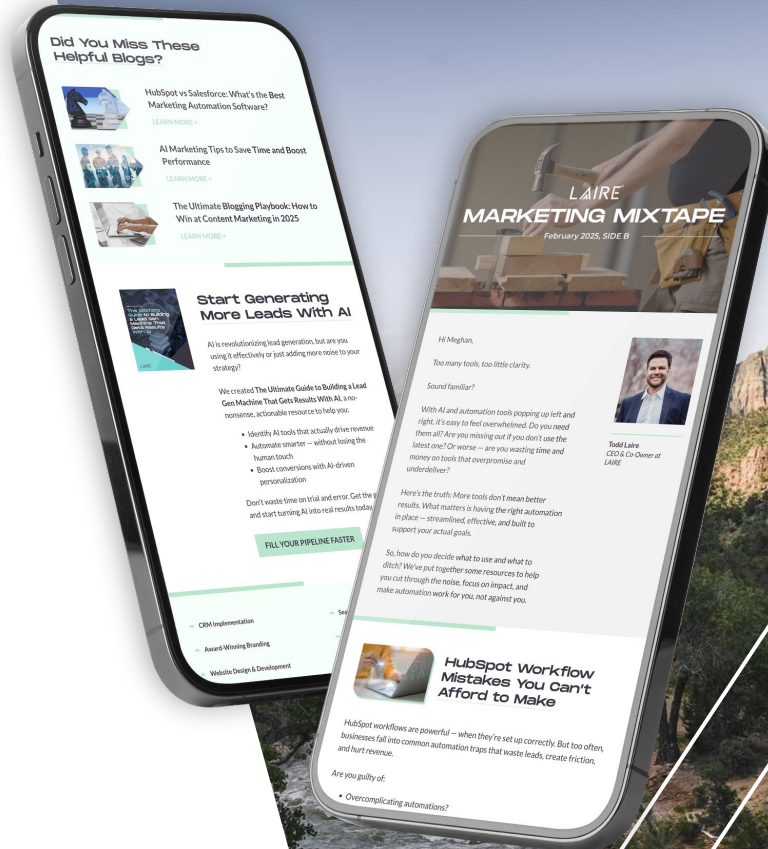
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AI for the Rest of Us: Practical B2B Marketing & Lead Management

- 01 The SMB Challenge
- 02 Meet Your New Agents
- 03 Live Spotlight
- 04 Action Plan
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The SMB Challenge

Why manual lead management
is failing in 2026



"Leaky Bucket"

| Situation | Breakdown | Better Lead Management |
|---------------------------------|-----------------------------|---|
| Meeting scheduled | ✗ Meeting no-show | ✓ Automatically confirming the meeting |
| Between scheduled conversations | ✗ Communication drops off | ✓ Drip campaign presence to stay consistent |
| Poor CRM Data | ✗ Lead gets lost in the mix | ✓ Timely outreach with task reminders |
| Review preparation | ✗ Last-minute scrambling | ✓ AI-generated summaries to prep SDR |
| Post-review follow-up | ✗ Inconsistent recap | ✓ Timely, relevant outreach |

State of Lead Generation in 2026



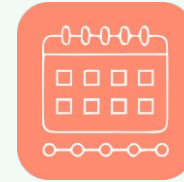
Responding to signal-based behaviors vs. "spray and pray" lead generation



Rise of dark funnel research, AI Chat, and self-guided buying

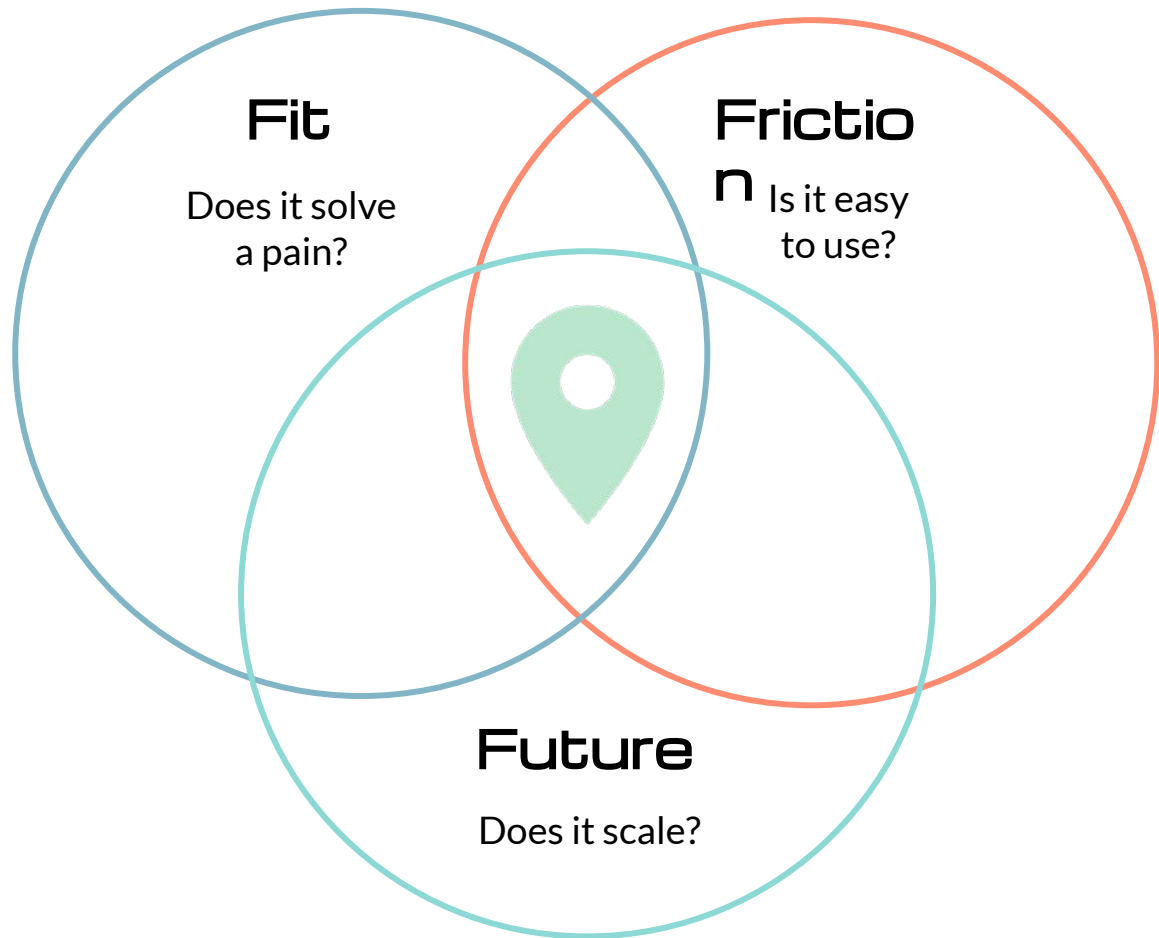


Higher client expectations for personalization



Longer Sales Cycles and larger buying committees

The 3-Step AI Selection Framework



Today's most disruptive companies are
winning on **customer experience**.

CRM is at the center of it all.



Why HubSpot

The HubSpot Platform helps all companies:



Grow and improve custom lead generation



Follow through when potential customers engage with your website



Track engagement



Optimize your landing pages



Improve conversion rates



Meet Your New "Agents"

Introducing HubSpot Breeze



Lead Management on Autopilot

1. Meet Breeze Intelligence

Why it's useful:

- ✓ When a lead comes into your CRM, HubSpot Breeze Intelligence instantly pulls the company's revenue, recent news, and job title

- ✓ Flags signal-based buying behaviors by identifying companies that are browsing your site's key pages before a lead "raises a hand" or submits a form, so you can reach out or serve an ad before they become a lead.

Imaging going from knowing you had 1,200 new visitors this month to learning you had 33 target accounts among them looking at your pricing page in the last 7 days that haven't "raised a hand" to fill out a form or talked to a prompt.

Lead Management on Autopilot

2. Meet the Prospecting & Customer Agents

Why it's useful:

- ✓ Prospecting Agent: It tracks lead signals, creates email copy, and follows up with sequences.
-
- ✓ Customer Agent: It acts as a lead qualifier, not just support. Use these agents instead of hiring a new BDR to generate pipeline.

Now you can automate lead qualification, and book meetings instantly with 24/7 AI agents that scale your sales and service operations.

Lead Management on Autopilot

3. Meet the Breeze Assistant

Why it's useful:

- ✓ You can ask it to "Summarize this deal" or "Create a follow-up task for next Tuesday," and it does it instantly. It lives in your sidebar.

- ✓ Because it has access to your entire CRM and context specific to your business, you can ask it, "Who are the key decision-makers for the Acme Corp deal?" and it will pull the info from your notes and emails.

Now you can have Breeze Copilot draft emails, social posts, and reports while you are working on other parts of the business.



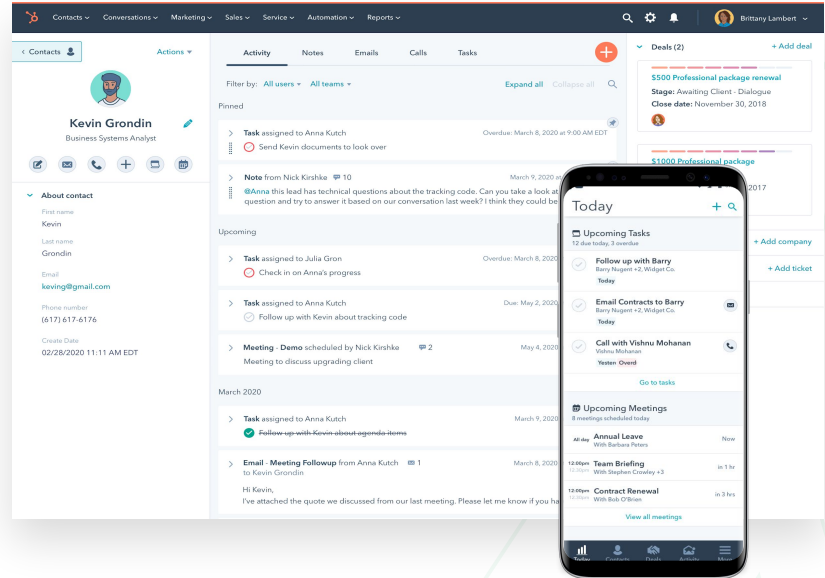
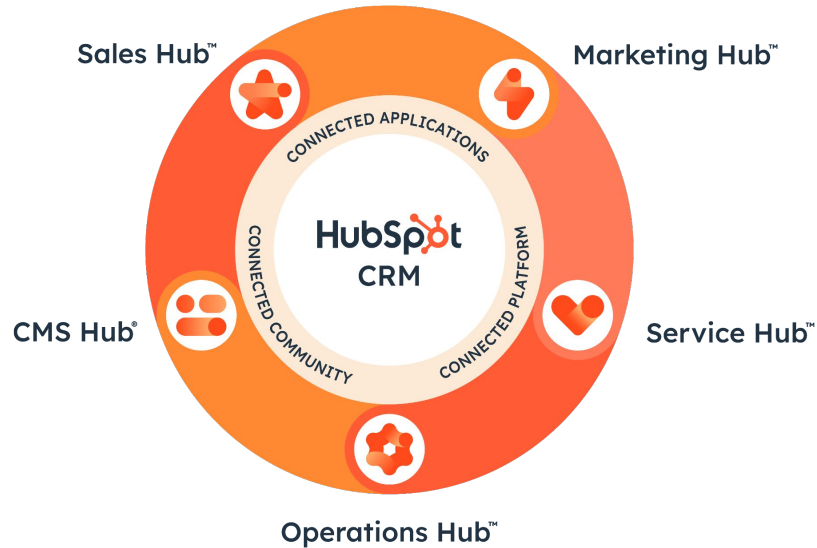
Live Spotlight

How HubSpot Breeze Agents Work



Get to Know HubSpot Breeze Agents

The Breeze Advantage



HubSpot Buyer Intent

See Top Page Views From Prospects

The screenshot displays the HubSpot Buyer Intent interface. On the left is a dark sidebar with navigation options: Bookmarks, CRM, Marketing (selected), Content, Sales, Commerce, Service, Data Management, Automation, Reporting, Breeze, Development, and Partner. The main content area is titled 'Buyer Intent' and includes tabs for Overview, Visitors (selected), and Research. Below the tabs is a description: 'Identify companies visiting your website, filter by fit, intent, and engagement.' There are sections for 'Filters' and 'Saved views'. The 'Filters' section includes: 'Traffic source' (Any source), 'Visitor country' (United States), and 'Domain' (All Domains). On the right, a teal header shows '3D Cloud Intent' with a close button. Below this is a profile card for '3D Cloud' with the URL '3dcloud.com'. A table titled 'Top page views' is displayed, with a search bar and filters for 'If Visits' and 'Time frame'. The table lists page views for the 'Last 30 days'.

| Last 30 days | Visits | Last visit |
|-----------------------------------|--------|--------------|
| lairedigital.com/hubspot-lifeline | 5 | Feb 18, 2026 |
| lairedigital.com/ | 3 | Feb 18, 2026 |
| lairedigital.com/pricing | 3 | Feb 18, 2026 |
| lairedigital.com/hubspot-process | 1 | Feb 03, 2026 |
| lairedigital.com/sales-enablement | 1 | Feb 03, 2026 |

HubSpot Prospecting Agent

Select Companies Viewing Key Pages

Manually enroll companies

Select companies

Select contacts

Confirm guardrails




Step 2 of 3

Select up to 25 contacts you want to enroll to the agent + AI

We only show contacts who are eligible to be assigned to the agent in this list. [View eligibility criteria](#)

Search **Contact owner** ▾ **Last activity date** ▾ **Segment (List) membership** ▾ Show only target personas

0 contacts selected

| <input type="checkbox"/> | CONTACT NAME ↕ | JOB TITLE ↕ | COMPANY NAME ↕ | CONTACT OWNER ↕ | LAST ACTIVITY ↕ |
|--------------------------|--|----------------------|--|--|--------------------------|
| <input type="checkbox"/> |  Ellen Drizin | Market Research Lead |  3D Cloud |  Todd Laire | Feb 19, 2026 9:40 AM EST |

HubSpot Prospecting Agent

Select Contacts & Enroll Into Sales Activities

Manually enroll companies

Select companies

Select contacts

Confirm guardrails

Step 3 of 3

Confirm prospecting agent guardrails +AI

Show preview

These are the guardrails and behavior settings your prospecting agent will follow when sending emails. [Agent setup](#)

Agent guardrails

Selling profile

Sam (Default)

Outreach type

Adaptive

RECOMMENDED



The agent will send emails on behalf of the contact owner.

- The fallback email will be sbarth@lairedigital.com.



The agent may include these calls to action in outreach emails:

- The sender's default meeting link



The agent will ask to **review outreach emails before sending**.



The agent will send emails in a **professional tone**.

- Emails will send weekdays 9:00 AM-5:00 PM based on each contact's timezone. If unavailable, the agent will use **America/New York**.



The agent will stop outreach when a contact **replies to an email** or **books a meeting**.

< Back

Cancel

Uses HubSpot Credits

Your credits reset on Mar 15, 2026. [Learn more](#)

+ Start enrolling

HubSpot Breeze Assistant

AI Summaries for Sales Prep

The screenshot displays the HubSpot Breeze Assistant interface. The main content area shows a list of activities for the company Brock Built, filtered by 'Filter activity (15/26)'. The activities include:

- Meeting - Brock Built Homes // LAIRE Weekly ... Feb 25, 2026 at 12:30 PM EST
- Meeting - Brock Built | HubSpot Weekly Sync hos... Mar 2, 2026 at 3:00 PM EST
- Email - Accepted: Brock Built | HubSpot Weekly ... Feb 23, 2026 at 4:44 PM EST to Sam Barth
- Email - Accepted: Brock Built | HubSpot Weekly ... Feb 23, 2026 at 4:44 PM EST to Sam Barth
- Logged call by Sam Barth Feb 23, 2026 at 3:00 PM EST

The right sidebar shows the AI-generated summary titled 'Breeze record summary' with a '+ AI' icon. The summary text is:

Generated Feb 25, 2026

Recent activities show ongoing efforts to optimize sales and marketing processes. On March 2, 2026, a meeting focused on coordinating sales team communication and lead management strategies 1. Multiple recent meetings, including on February 25, 23, and 18, addressed refining lead stages, automating workflows, and planning upcoming campaigns such as St. Patrick's Day promotions and website updates 2 3 4 5. Additionally, discussions on cleaning up contact lists, re-engagement campaigns, and simplifying terminology for lead tracking are underway to improve overall efficiency 6 7 8 9 10.

10 Sources

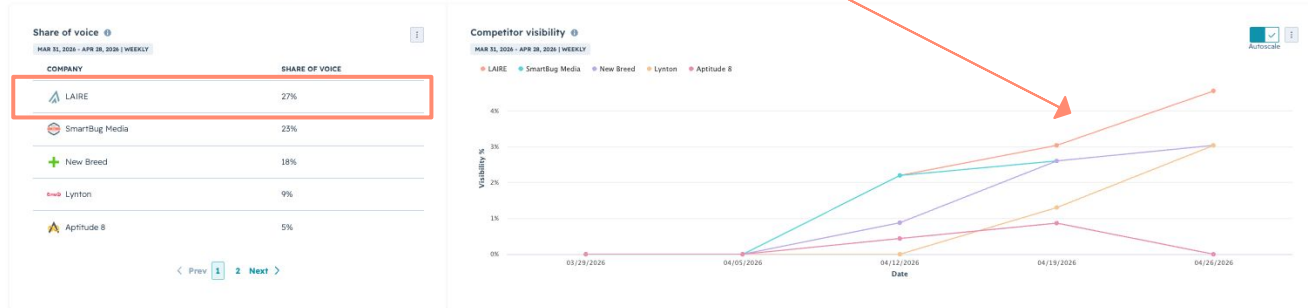
Ask a question

AEO Tracking & Recommendations

Track AI Prompts, Review Visibility Recs, & Compare to Competition

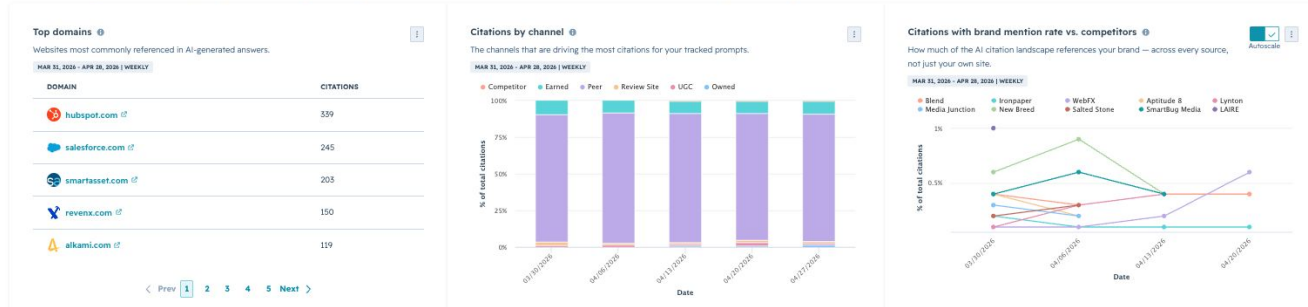
Competitor landscape

See how you track compared to your top competitors. [Learn more](#)



Citation analysis

The websites AI engines reference when generating answers. Tracking which sites get cited most, and whether your brand is mentioned in them, is key to understanding and improving your visibility. [Learn more](#)





▶ Action Plan

3 things to do on Monday morning



Your Monday Morning Checklist

- DO:**
- ✓ Audit your “leaky bucket”. Go into your CRM and build a list of Leads with no activity in the last 14 days. If that list is greater than 10, you need an agent.

 - ✓ Turn on Buyer Intent to see which companies are “window shopping” on your site right now.

 - ✓ Pilot ONE agent. Don’t try all of them at once. Pick the Content Agent to remix one existing case study into 5 social posts, OR the Prospecting Agent to follow up with those “window shoppers.”



Resources

Support for your marketing journey



Resource

34 AI PROMPTS TO SIMPLIFY YOUR MARKETING EFFORTS

- Learn why AI prompts are critical to streamlining your marketing tasks
- Get prompt ideas for strategy, website optimization, content marketing, SEO, social media, paid media, and email marketing
- See quick tips to keep in mind when using AI prompts

[Download Guide](#) →

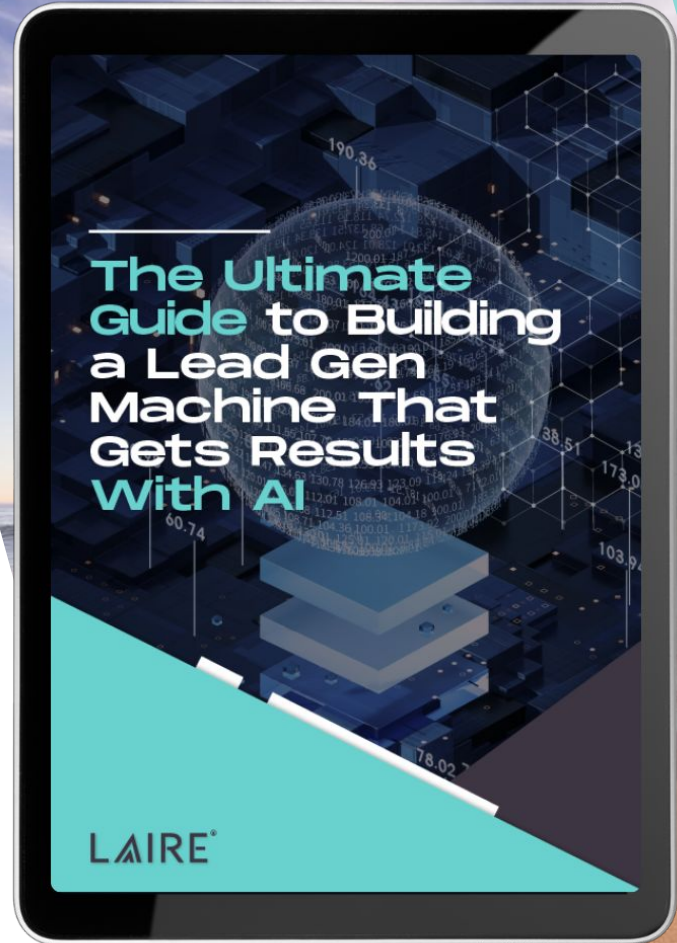


Resource

THE ULTIMATE GUIDE TO LEAD GEN WITH AI

- Develop an efficient lead gen machine on your site that works ceaselessly for your business
- Useful AI prompts for KPIs and content creation
- Transforming your CRM with AI support
- Creating templated email segments

[Download Guide →](#)



TECHNOLOGY & TOOLS

We Drive Revenue With Expert Digital Marketing in HubSpot

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- Lead Generating UI/UX Website Design
- Email Marketing Automation
- Contact Segmentation and Lead Scoring
- CRM Setup and Management
- Analytics, Optimization, and Reporting
- Social Media Management
- Lead Conversion Funnels
- HubSpot Website Development



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Leads dried up?
Website not
converting?**

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<https://www.lairedigital.com/talk-to-todd>





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