

Sample report · Acme Ops is a fictional company; all data is invented.

After-Show Report: Acme Ops, Q4 Product Live

What a webinar export becomes: follow-ups by lifecycle stage for sales, a ranked backlog with quotes for product, and drafted answers for your expert. This is the full report, with every section a client receives.

WEBINAR	PLATFORM	DATE
Q4 Product Live: phishing triage, the SIEM feed and what's next	Zoom Webinars · 60 min · 2 speakers	Thursday 8 October 2026, 16:00–17:00 CET
PREPARED	DATA QUALITY	
Thursday 15 October 2026	A · n = 142 questions · 789 attendees	

Acme Ops is invented: cyber risk software for mid-size companies: security awareness training, phishing simulations, threat detection and vulnerability management, 180 employees, on HubSpot Marketing Hub Professional. People appear as invented first names with an initial.

Acme Ops · Q4 Product Live · Data quality: A · n = 142 questions

Sample report · fictional data

01 · EXECUTIVE SUMMARY

A native SIEM connector is the top ask, and six people with open deals asked questions.

789 attended 56% of 1,412 registered	142 questions 18 per 100 attendees	61% answered live 87 of 142	104 people asked 13% of attendees	41 min average watch time of 60 · median 47
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n = 1,412 registrants, 789 attendees, 142 questions · Source: Zoom Webinars attendee and Q&A reports. 12 Acme Ops employees excluded from every figure.

Five findings

- A native SIEM connector is the top ask.** 14 people asked to send reported phishing and user-risk scores straight to their SIEM (6 customers, 3 SQL, 5 leads), up from 9 in September. With $n \geq 10$ it's a pattern, not an anecdote. [Next Act, item I-001](#)
- Six people with open deals asked questions.** A task for each owner is drafted, with the question and a suggested answer. Northwind Retail sent 4 attendees, asked 5 questions and clicked "Book a demo". [Call Sheet](#)
- 55 questions went unanswered live.** They merge into 19 distinct questions: 11 drafted answers wait for your expert, and 8 (pricing, launch dates, legal) are left to you. [Answers to approve](#)
- Five people asked for something that already exists.** Developers can already get secure-coding labs instead of the general

Three recommendations

- Take I-001 (SIEM connector) and I-002 (control mapping) to the next planning session, with the quotes and who asked.
- Owners call the six open-deal askers this week, Northwind Retail first.
- Before the next webinar: switch off anonymous questions in Zoom and publish the secure-coding path article.

In their words

"Every morning I copy the reported-phishing list into our SIEM by hand."

Q-0044 · Customer · 200–999 employees

phishing course. That's onboarding content, not roadmap.

[Item I-005](#)

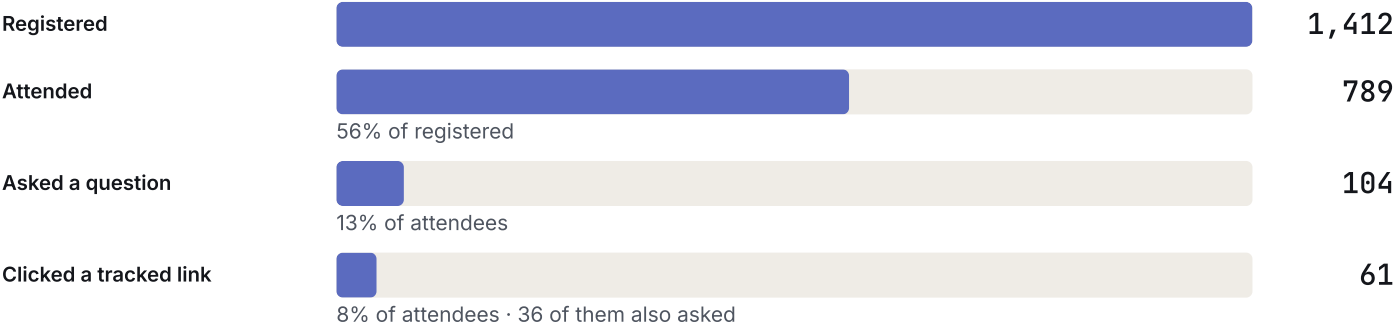
5. **EU data residency is the top objection.** 3 of the 9 objections, all from accounts with 200–999 employees, one of them with an open deal. Sales needs a written answer before the next webinar.
[Spotlight](#)

02 · ATTENDANCE AND ENGAGEMENT

More than half of registrants came, and the demo held them.

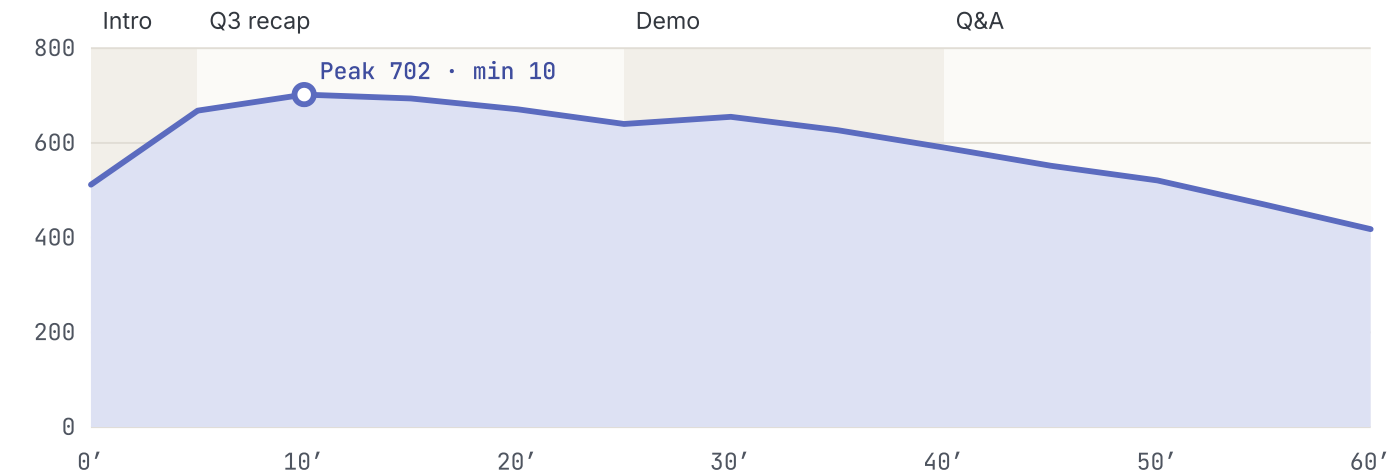
56% of registrants attended. Viewers peaked at minute 10 and 418 were still there at the end of the Q&A (60% of the peak). Questions built through the demo and peaked in the first minutes of the Q&A.

From registration to action n = 1,412 registrants

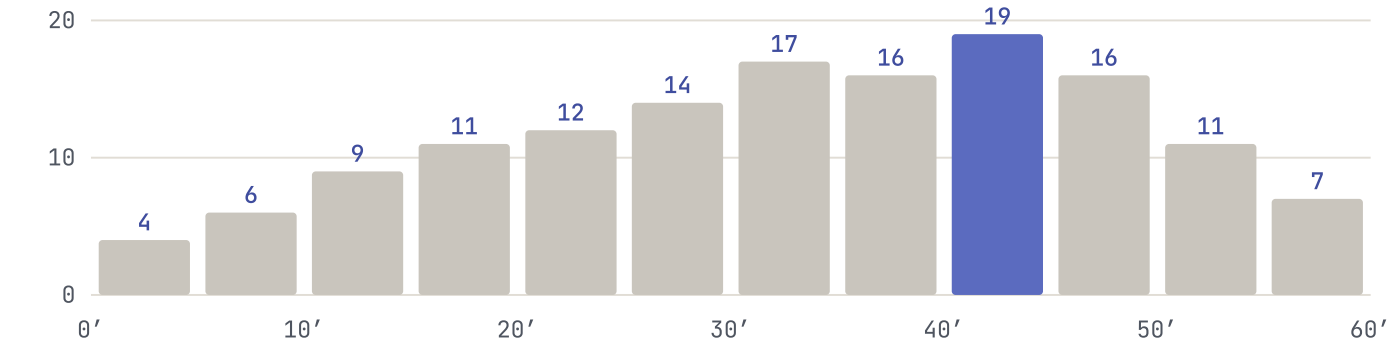


— Stages are not strictly nested: 25 people clicked a link without asking anything, and they get their own Call Sheet cell.

Concurrent viewers, minute by minute n = 789 attendees · Source: Zoom attendee report (join and leave times)



Questions per 5 minutes n = 142



— So what: viewers dipped at minute 25 and came back for the demo (640 → 655), the only rise after the first ten minutes, and questions peaked right after it. Next time, open the Q&A inside the demo instead of after it.

Engagement per block					Tracked links posted in the chat		
n = 142 questions · 71 clicks					61 people · 71 clicks · Source: HubSpot tracked URLs		
Block	Avg Viewers	Questions	Per 10 min	Link clicks	Link	Posted	People
Welcome 0'–5' · Luis M. (moderator)	590	4	8.0	0	Join the SIEM connector beta waitlist	16:31	38
					Book a demo	16:42	19
What shipped in Q3 5'–25' · Ana R., Head of Product	675	38	19.0	0	Docs: control mapping for ISO 27001 and NIS2	16:47	14
Live demo: reported phishing, triage and the SIEM feed 25'–40' · Tom B., Solutions Engineer	628	47	31.3	38			
Live Q&A 40'–60' · Ana R. and Tom B.	510	53	26.5	33			

Attendance and questions by lifecycle stage						
n = 1,412 registrants · HubSpot lifecycle stage on 8 Oct						
Stage	Registered	Attended		Rate	Asked	% of attendees
Customer	318	212		67%	38	17.9%
Open opportunity	23	18		78%	6	33.3%
SQL	62	41		66%	9	22.0%
MQL	171	96		56%	22	22.9%
Lead / subscriber	693	358		52%	23	6.4%
No marketing consent	145	64		44%	6	9.4%
Total	1,412	789		56%	104	13.2%

— So what: open opportunities came in the highest proportion (78%) and asked the most per head. Contacts without marketing consent came least, and get no commercial follow-up.

Attendees by company size

n = 789 · from the email domain and HubSpot company

1–49 employees		118	15%
50–199		241	31%
200–999		287	36%
1,000+		97	12%
Unknown (personal email)		46	6%

Attendees by role n = 789 · HubSpot job title, grouped

IT and security managers		281	36%
Security engineers and SOC analysts		152	19%
GRC, risk and compliance		118	15%
CISO and executive		71	9%
IT operations		64	8%
Other		58	7%
Unknown		45	6%

Most upvoted questions			
Zoom upvotes			
ID	QUESTION	UPVOTES	STATUS
Q-0031	"Can reported phishing and user-risk scores go straight into our SIEM, not as a CSV once a day?" SQL with an open deal · 200–999 employees	23	Answered live · 00:44
Q-0058	"Can I export training and simulation results mapped to ISO 27001 and NIS2 controls?" MQL · 200–999 employees	17	Answered live · 00:47
Q-0071	"Half of what users report is newsletters. Can those be filtered before they reach my analysts?" Customer · 200–999 employees	14	Unanswered → draft D-02
Q-0063	"Does SCIM remove a leaver from training and simulations the same day they leave?" Open opportunity · 200–999 employees	12	Answered in writing
Q-0089	"When someone reports a phish, can you pull the same email from every inbox, or is that still manual?" MQL · 50–199 employees	9	Unanswered → draft D-04

03 · CUES · EARLY ACCESS

23 moments when an owner could have stepped in while the account was still watching.

Cues are live sales alerts: the account owner gets a message in Slack while the account is still in the session. They need the event to run on Keepstage Live, which sees questions and clicks as they happen. This webinar ran on Zoom Webinars, so nothing was sent during the show. Below are the alerts Cues would have posted, replayed from the timestamps in the export.

16:07

Target accounts watching (digest)

4 target accounts are watching: Northwind Retail (4), Halcyon Freight (6), Fernhill (2), Corva Health (5).

To

#event-leads

Suggested action

Owners stay on; the moderator watches for their questions.

16:33

Open deal · high-intent click

Priya S. (open deal) asked about sending reported phishing to the SIEM and clicked Book a demo. Still watching.

To

Luis M., deal owner

Suggested action

Answer in the Q&A that the SIEM connector beta waitlist is open; call Northwind Retail tomorrow.

16:38

Pricing intent

J. Ortega · Fernhill (MQL, target account) asked whether SCIM is included in the Standard plan.

To

Sara K., owner

Suggested action

Don't quote prices in the chat; offer a call with the plan comparison.

16:44

Competitor mention · existing customer

M. Lund · Brightline (customer, renewal in 60 days) asked how the content library compares with Competitor A.

To

Dan P., CSM (customer route on for this webinar)

Suggested action

CSM check-in this week, with the secure-coding path and the SIEM connector beta.

16:49

Flagged by the moderator

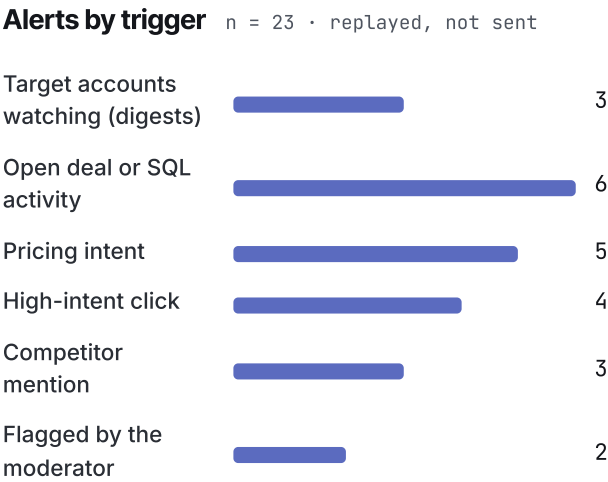
K. Adeyemi · Halcyon Freight (lead) asked about piloting simulations in one region with 600 warehouse staff.

To

#event-leads

Suggested action

Assign an owner and propose a pilot call.



Rules: at most one immediate alert per contact and trigger; target-account digests every 10 minutes; more than 30 alerts in an hour switch to a digest. Companies come from the email domain and your target-account list, never from IP addresses. Alerts carry the minimum: name, company, topic.

Example · Acme Ops (fictional data) · Names are invented and shortened.

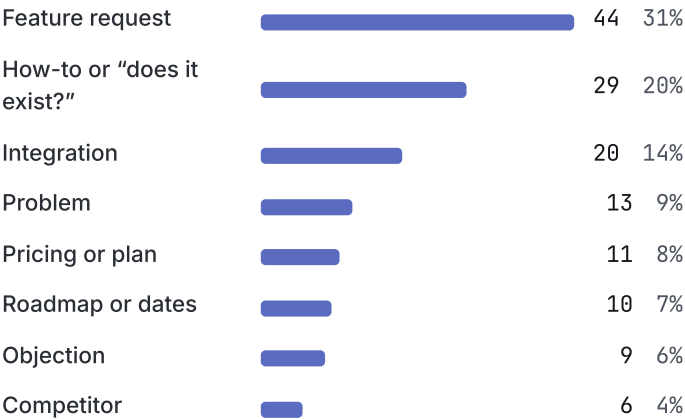
04 · SPOTLIGHT · WHAT YOUR MARKET ASKED

SIEM and SOAR integrations drew the most questions; phishing simulations drew the warmest.

Each question is classified by intent and topic, and duplicates are merged. SIEM and SOAR integrations (23) and phishing simulations (22) lead the topics; phishing simulations has the highest share of positive questions. The tone is about the question text, never about the person.

What people asked for

n = 142 questions, by intent · 211 messages, 69 were greetings, thanks or off-topic



Topics, with the tone of the questions

n = 142 · negative 24 · neutral 87 · positive 31

TOPIC		QUESTIONS	NEGATIVE	NEUTRAL
SIEM and SOAR integrations		23	5	14
Phishing simulations		22	2	12
Training content and skills		21	4	11
Threat detection		19	3	12
Board and compliance reporting		15	1	11
Identity, SSO and SCIM		14	3	9
Vulnerability management		10	3	5
Frameworks and audits		9	2	6
Data handling and residency		5	1	4
Other		4	0	3

Negative Neutral Positive

Objections

n = 9 · normalised

OBJECTION	QUESTIONS	WHO	SUGGESTED RESPONSE
User data and reported emails have to stay in the EU	3	2 MQL · 1 open deal · all 200–999 employees	Security to confirm the hosting region in writing; sales links the trust page and the DPA.

Competitor mentions

n = 6

NAMED	QUESTIONS	COMPARED ON
Competitor A	3	A security awareness suite: size of the content library, industry benchmarks
Competitor B	2	An email security gateway with built-in training: reported-phish triage
An in-house tool	1	A yearly slide-deck course and a manual phishing test

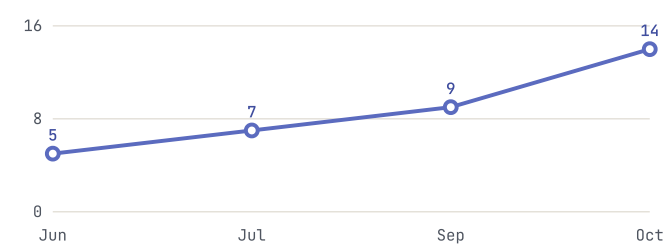
Competitor names are replaced in this sample. A real report shows the names your audience used, next to their questions.

OBJECTION	QUESTIONS	WHO	SUGGESTED RESPONSE
Phishing simulations will annoy staff and flood the helpdesk	2	2 leads · 50–199 employees	Send the guide for a staged first campaign and the helpdesk FAQ.
Contractors shouldn't cost a full licence	2	1 SQL · 1 MQL	Pricing topic: the owner answers on a call, not by email.
Our works council has to approve phishing simulations	2	2 customers · 1,000+ employees	Send the data-processing summary and the simulation policy template, and offer a session for the works council.

Buying signals		
29 people with at least one		
SIGNAL	PEOPLE	WHO
Clicked “Book a demo”	19	4 SQL · 7 MQL · 5 leads · 3 customers
Asked a pricing or plan question	9	11 questions · 2 open deals · 2 SQL
Asked about a pilot, rollout or go-live date	6	1 open deal · 2 SQL · 3 leads
Asked about a security questionnaire or works-council approval	3	1 open deal · 2 MQL

People asking for the SIEM connector

item I-001 · last four webinars · stable item id



Top accounts by engagement								
company from the email domain · 46 personal-email attendees not included								
#	ACCOUNT	ATTENDEES	QUESTIONS	CLICKS	AVG MIN	WHAT THEY CARED ABOUT	OWNER	SCORE
1	Northwind Retail Open deal · SQL	4	5	3	54	SIEM connector, clicked Book a demo	Luis M.	91
2	Halcyon Freight Lead · target account	6	3	2	49	Pilot in one region	Unassigned	84
3	Fernhill MQL · target account	2	3	1	51	Control mapping, SCIM on the Standard plan	Sara K.	77
4	Brightline Customer · renewal in 60 days	3	2	0	44	Compared with Competitor A	Dan P. (CSM)	72
5	Corva Health MQL	5	1	2	38	EU data residency	Sara K.	66
6	Pinecrest Utilities Customer	3	2	1	47	False positives in reported phishing	Dan P. (CSM)	61
7	Oakridge Facilities SQL	2	2	1	52	Auto-quarantine of reported phishing	Luis M.	58
8	Tidewater Logistics Lead	4	0	1	31	Watched most of it, no questions	Unassigned	52

— Score = event score (0–100) from transparent weights: attendance minutes, questions, high-intent clicks and target-account status. It ranks this list; it never changes a lifecycle stage.

Compared with your previous webinars				
same taxonomy, stable item ids				
WEBINAR	ATTENDEES	QUESTIONS	PER 100	ASKED FOR THE SIEM CONNECTOR
June Spring release	612	88	14.4	5
July Vulnerability prioritisation preview	655	97	14.8	7
September Phishing simulations: what's new	702	113	16.1	9
October Q4 Product Live	789	142	18.0	14

— So what: the SIEM connector grew from 5 to 14 people in four webinars (1.6× September), while questions per 100 attendees rose from 14.4 to 18.0.

05 · NEXT ACT · PRODUCT ROADMAP FROM AUDIENCE QUESTIONS

Twelve items, and the first three come with open deals attached.

75 of the 142 questions map to 12 product items. The other 67 are how-to questions answered live, pricing and dates: they go to the Call Sheet and the answers, not the backlog. Each item links to its source questions, so any number can be traced to the original question.

I-001 · priority 82 · Planned

Native SIEM connector for reported phishing and user risk

14 people · 19 questions · 6 customers · 3 SQL · 5 leads

“Can reported phishing and user-risk scores go straight into our SIEM, not as a CSV once a day?”

Q-0031 · SQL with an open deal · 200–999 employees

“Every morning I copy the reported-phishing list into our SIEM by hand.”

Q-0044 · Customer · 200–999 employees

“Will the SIEM connector also trigger our SOAR playbooks?”

Q-0102 · Lead · 50–199 employees

Suggested owner: PM, Integrations

I-002 · priority 64 · Planned

Training evidence mapped to ISO 27001, NIST and NIS2 controls

9 people · 9 questions · 4 customers · 1 open deal · 2 SQL · 2 MQL

“Can I export training and simulation results mapped to ISO 27001 and NIS2 controls?”

Q-0058 · MQL · 200–999 employees

“Our auditor wants evidence per control, not a completion percentage.”

Q-0077 · Customer · 1,000+ employees

Suggested owner: PM, Compliance

I-003 · priority 55 · Planned

Same-day deprovisioning through SCIM

7 people · 9 questions · 2 customers · 2 open deals · 1 SQL · 2 MQL

“Does SCIM remove a leaver from training and simulations the same day they leave?”

Q-0063 · Open opportunity · 200–999 employees

Suggested owner: PM, Platform and security

Next Act backlog										
12 items from 75 of 142 questions · ranked by priority										
#	ITEM	PEOPLE	QUESTIONS	WHO ASKED	OPEN DEALS	STATUS	JUN → OCT	PRIORITY	SUGGESTED OWNER	QUOTE
01	Native SIEM connector for reported phishing and user risk I-001 · Feature request · SIEM and SOAR integrations	14 pattern	19	6 customers · 3 SQL · 5 leads	1	Planned	5 → 7 → 9 → 14	82	PM, Integrations	“Can reported phishing and user-risk scores go straight into our SIEM, not as a CSV once a day?” Q-0031
02	Training evidence mapped to ISO 27001, NIST and NIS2 controls I-002 · Feature request · Frameworks and audits	9 signal	9	4 customers · 1 open deal · 2 SQL · 2 MQL	1	Planned	3 → 4 → 6 → 9	64	PM, Compliance	“Can I export training and simulation results mapped to ISO 27001 and NIS2 controls?” Q-0058
03	Same-day deprovisioning through SCIM I-003 · Feature request · Identity, SSO and SCIM	7 signal	9	2 customers · 2 open deals · 1 SQL · 2 MQL	2	Planned	4 → 5 → 5 → 7	55	PM, Platform and security	“Does SCIM remove a leaver from training and simulations the same day they leave?” Q-0063

#	ITEM	PEOPLE	QUESTIONS WHO ASKED	OPEN DEALS	STATUS	JUN → OCT	PRIORITY	SUGGESTED OWNER	QUOTE
04	Auto-quarantine of reported phishing across inboxes I-004 · Integration · Threat detection	6 signal	8	1 customer · 1 SQL · 2 MQL · 2 leads	New	0 → 2 → 3 → 6	49	PM, Detection	"When someone reports a phish, can you pull the same email from every inbox, or is that still manual?" Q-0089
05	Secure-coding path for developers I-005 · How-to · Training content and skills	5 signal	5	3 customers · 2 leads	Exists	1 → 2 → 4 → 5	41	Customer education	"Can developers get secure-coding labs instead of the general phishing course?" Q-0095
06	Fewer false positives in reported-phishing triage I-006 · Problem · Threat detection	5 signal	6	2 customers · 1 MQL · 2 leads	New	2 → 2 → 3 → 5	38	PM, Detection	"Half of what users report is newsletters. Can those be filtered before they reach my analysts?" Q-0071
07	Risk dashboards scoped per country or business unit I-007 · Feature request · Board and compliance reporting	4 anecdotal	4	2 customers · 1 SQL · 1 MQL	New	0 → 1 → 2 → 4	27	PM, Reporting	"Can each country's IT lead see only their own users' risk scores?" Q-0083
08	Critical-vulnerability alerts per team channel I-008 · Integration · Vulnerability management	4 anecdotal	4	1 customer · 3 MQL	New	1 → 1 → 2 → 4	25	PM, Integrations	"Can critical vulnerabilities go to each team's own Slack or Teams channel, with the asset owner tagged?" Q-0112
09	Quarterly board report template I-009 · Feature request · Board and compliance reporting	3 anecdotal	3	2 customers · 1 lead	Planned	2 → 3 → 3 → 3	19	PM, Reporting	Summary only: no single question says it best
10	EU data residency I-010 · Objection · Data handling and residency	3 anecdotal	3	1 open deal · 1 MQL	New	0 → 0 → 1 → 3	17	Security, with sales	"Where are our users' data and reported emails stored? Our regulator expects them to stay in the EU." Q-0120
11	Higher API rate limits I-011 · Integration · SIEM and SOAR integrations	3 anecdotal	3	1 customer · 2 SQL	New	0 → 1 → 1 → 3	14	PM, Integrations	Summary only: no single question says it best
12	Import our own training modules (SCORM) I-012 · Feature request · Training content and skills	2 anecdotal	2	2 leads	New	0 → 0 → 0 → 2	11	PM, Training content	Summary only: no single question says it best

How we score

priority = reach × segment weight × urgency × confidence, scaled to 0–100. Reach counts people, not mentions, with a log correction so one loud account can't dominate.

Segment weights: customer 1.0 · open deal 1.0 · SQL 0.8 · MQL 0.6 · lead 0.4 · unknown 0.3.
Urgency: blocking 1.0 · important 0.7 · curiosity 0.4. Confidence: reviewed by a person 1.0. All weights are yours to change.

Evidence labels: fewer than 5 people = anecdotal · 5–9 = signal · 10 or more = pattern.

"They don't know it exists"

5 people asked for **Secure-coding path for developers**, which already exists. That isn't a roadmap item: it's a help article, an onboarding email and a line in the next webinar. The people who asked are in a HubSpot list (ks_requested_items contains I-005), so you can tell them directly.

Before the readout, your PM writes down their own top 5, then marks each item as known, new and actionable, or not relevant. The board goes to your PM's tool as a CSV; HubSpot only stores who asked what.

06 · CALL SHEET · FOLLOW-UPS BY LIFECYCLE STAGE

Owners get 28 tasks, not a spreadsheet.
Everything else waits, switched off, for your review.

Every registrant sits in one cell: their lifecycle stage in HubSpot crossed with what they did in the webinar. Each cell gets one action. Open deals never get an automatic email: their owner gets a task with the question and a suggested answer. Keepstage never sends anything; your HubSpot does, once you switch it on.

The Call Sheet matrix: lifecycle stage × what they did					
n = 1,412 registrants · each person sits in one cell					
STAGE	ASKED, UNANSWERED	ASKED, ANSWERED	CLICKED, DIDN'T ASK	ATTENDED, SILENT	NO-SHOW
Customer 318 registered	15 Answer email · CS ticket if a problem	23 Recap with the minute	9 CSM task: expansion	165 "What's new for you"	106 Replay for customers
Open opportunity 23 registered	3 Owner task + deal note	3 Owner task + deal note	0 Urgent owner task	12 Deal note	5 Deal note
SQL 62 registered	4 Owner task · email after 48 h	5 Owner task · email after 48 h	4 Urgent owner task + meeting link	28 Owner email template	21 Owner email template
MQL 171 registered	8 Answer email + walkthrough	14 Answer email + walkthrough	7 Walkthrough invite + SDR task	67 Replay + top 3 moments	75 Replay + top 3 moments
Lead / subscriber 693 registered	8 Answer + article	15 Answer + article	5 Walkthrough invite	330 Article from the session	335 Replay + next webinar
No marketing consent 145 registered	3 Answer only	3 Answer only	0 Nothing sent	58 Nothing sent	81 Nothing sent

Consent check, per registrant n = 1,412 · from HubSpot subscription types on 8 Oct and the registration notice



- **Green** 1,237 answer to their own question, customer communications or marketing opt-in
- **Amber** 36 sales tasks for deals and SQLs already in conversation, no automatic email
- **Red** 139 no basis for a commercial follow-up: nothing is sent

Acme Ops' registration notice on 8 Oct said: "We use the questions you ask and the sessions you attend to improve our product and to tailor follow-ups." That covers aggregate product analysis and follow-ups to opted-in contacts. This check is orientative; your lawyer confirms it.

Segments, messages and what lands in HubSpot							
19 segments · 18 active lists · 9 email templates · 5 workflows, all switched off · every list is named "[After-Show] Q4 Product Live · ..."							
SEGMENT	CONTACTS	ACTION	MESSAGE	ANGLE	TEMPLATE	HUBSPOT LIST	WORKFLOW
Customer Asked, unanswered	15	Email with the approved answer; 3 product problems open a support ticket	"You asked about ... — here's the answer."		T1 Answer to your question	... · Customer · Asked, unanswered	WF1 Answer to your question OFF
Customer Asked, answered live	23	Email with the minute in the recording and the help article	"Your question, answered at minute ..."		T2 Answered live	... · Customer · Asked, answered live	WF2 Answered-live recap OFF
Customer Clicked, didn't ask	9	Task for the CSM: expansion conversation	—		—	... · Customer · Clicked, didn't ask	Owner task after your OK
Customer Attended, silent	165	"What's new for you": the three changes that matter to security teams already on Acme Ops	"Three things from Thursday that change your phishing triage."		T3 What's new for customers	... · Customer · Attended, silent	WF3 Recap and replay OFF

SEGMENT	CONTACTS	ACTION	MESSAGE	ANGLE	TEMPLATE	HUBSPOT LIST	WORKFLOW	CONSENT
Customer No-show	106	Replay with chapters for customers	"The 12 minutes worth watching."		T4 Replay for customers	... · Customer · No-show	WF3 Recap and replay OFF	Green Customer communications subscription
Open opportunity Asked	6	Task for the deal owner with the question and a suggested answer, plus a deal note. No automatic email	—	—	—	... · Open opportunity · Asked	Owner task after your OK	Amber Sales task for a deal in conversation
Open opportunity Attended or no-show	17	Deal note only ("attended, 47 min" or "registered, didn't attend")	—	—	—	... · Open opportunity · Attended or no-show	Deal note	Amber Sales task for a deal in conversation
SQL Asked	9	Owner task; the answer goes by email only if the owner hasn't acted in 48 h	"Following up on your question from Thursday."		T5 Owner follow-up	... · SQL · Asked	WF4 SQL fallback after 48 h OFF	Green Marketing opt-in
SQL Clicked, didn't ask	4	Urgent owner task with the owner's meeting link	—	—	—	... · SQL · Clicked, didn't ask	Owner task after your OK	Amber Sales task
SQL Attended silent or no-show	49	Owner email from a template, with the replay and one resource	"The part of the session about the SIEM feed."		T5 Owner follow-up	... · SQL · Attended silent or no-show	Sent by the owner	Green Marketing opt-in
MQL Asked	22	Email with the answer and a walkthrough invitation	"Your question, and a 20-min walkthrough if useful."		T1 Answer to your question	... · MQL · Asked	WF1 Answer to your question OFF	Green Marketing opt-in
MQL Clicked, didn't ask	7	Walkthrough invitation by email and a task for the SDR	"You looked at the demo: want a walkthrough?"		T6 Walkthrough invitation	... · MQL · Clicked, didn't ask	WF5 High-intent walkthrough OFF	Green Marketing opt-in
MQL Attended silent or no-show	142	Replay and the top 3 moments	"The 3 moments people asked about most."		T7 Replay and top 3 moments	... · MQL · Attended silent or no-show	WF3 Recap and replay OFF	Green Marketing opt-in
Lead / subscriber Asked	23	Email with the answer and one article on the topic	"Your question, answered."		T1 Answer to your question	... · Lead / subscriber · Asked	WF1 Answer to your question OFF	Green Marketing opt-in
Lead / subscriber Clicked, didn't ask	5	Walkthrough invitation by email	"You looked at the demo: want a walkthrough?"		T6 Walkthrough invitation	... · Lead / subscriber · Clicked, didn't ask	WF5 High-intent walkthrough OFF	Green Marketing opt-in
Lead / subscriber Attended silent	330	Nurture: an article written from the session	"What 142 questions told us about triaging reported phishing."		T8 Article from the session	... · Lead / subscriber · Attended silent	WF3 Recap and replay OFF	Green Marketing opt-in
Lead / subscriber No-show	335	Replay and an invitation to the next webinar	"You missed it. Here's the replay, and the next date."		T9 Next webinar invitation	... · Lead / subscriber · No-show	WF3 Recap and replay OFF	Green Marketing opt-in
No marketing consent Asked	6	The answer to their own question, nothing else	"You asked about ... — here's the answer."		T1 Answer to your question	... · No marketing consent · Asked	WF1 Answer to your question OFF	Green Answer only
No marketing consent Attended silent or no-show	139	Nothing is sent. Counted here so you know who was left out	—	—	—	—	—	Red No basis for a commercial follow-up

HubSpot dry run: what will be written

Contacts updated	1,412
Contacts with a question written	104
Properties (ks_)	15
Active lists	18
Email templates (drafts)	9
Workflows	5 · all OFF
Owner tasks	28 for 7 owners · after your OK
Deal notes	23
Support tickets	3 customer problems
Excluded	12 Acme Ops employees · 139 without consent · 9 anonymous questions

Never touched: lifecycle stage, lead status, contact owner, deal stages and consents. On HubSpot Starter you get the properties, lists and templates, and send by hand.

Properties on each contact

ks_last_event	Q4 Product Live · 2026-10-08
ks_attendance	attended / no-show
ks_minutes_watched	from the Zoom attendee report
ks_top_block	block they stayed longest in
ks_question_text	their question, verbatim
ks_question_intent	feature request, how-to, pricing...
ks_question_topic	SIEM, phishing simulations, SCIM...
ks_question_status	answered live / drafted / left to expert
ks_answer_text	only after your expert approves
ks_answer_url	minute in the recording or help article
ks_event_score	transparent weights, shown below
ks_followup_segment	the Call Sheet cell
ks_requested_items	Next Act item ids, e.g. I-001
ks_source_platform	zoom_webinars
ks_data_quality	A

Example · Acme Ops (fictional data) · List, template and workflow names as they would appear in HubSpot.

07 · ANSWERS TO APPROVE

11 drafted answers for your expert, and 8 questions we leave to you.

55 questions went unanswered live; merged, they are 19 distinct questions. Each draft is written from your recording and help center, cites its source and is kept under 80 words. Nothing is written to `ks_answer_text` or sent until your expert approves it. Pricing, launch dates, promises and legal topics never get a draft.

How these were made: software drafts each answer from the recording and the help center; a person at Keepstage checks every draft and its source; your expert approves, edits or rejects it.

D-01 · Q-0095

Draft · waiting for your expert

"Can developers get secure-coding labs instead of the general phishing course?"

5 people · 3 customers, 2 leads

Yes. Assign the Secure coding path to a group in Training → Paths: developers get hands-on labs on injection, authentication and secrets handling instead of the general course, and their results show in the same reports.

Sources

Help center: "Training paths by role" · Recording 00:36:10

Confidence

High

Approve

Edit

Reject

D-02 · Q-0071

Draft · waiting for your expert

"Half of what users report is newsletters. Can those be filtered before they reach my analysts?"

3 people · 2 customers, 1 lead

Partly. In Settings → Reported emails, turn on bulk-mail rules: messages from known newsletter and marketing senders are tagged "bulk" and closed with a thank-you to the reporter, so your analysts see the rest. We've passed your use case to the product team.

Sources

Help center: "Triage rules for reported emails" · Recording 00:29:40

Confidence

Medium

Check

Mentions the product team: check the wording

Approve

Edit

Reject

D-03 · Q-0083

Draft · waiting for your expert

"Can each country's IT lead see only their own users' risk scores?"

2 people · 1 SQL, 1 customer

Yes. Give each IT lead the Regional admin role and limit it to their country's user group: they see risk scores, training and simulation results for those users only.

Sources

Help center: "Roles and permissions"

Confidence

Medium

Approve

Edit

Reject

D-04 · Q-0089

Draft · waiting for your expert

"When someone reports a phish, can you pull the same email from every inbox, or is that still manual?"

4 people · 2 MQL, 1 SQL, 1 lead

Today an analyst removes a reported email from every inbox with one action in the triage view, after reviewing it. Automatic removal without that review isn't available.

Sources

Help center: "Removing a reported email from all inboxes" · Recording 00:51:05

Confidence

High

Check

Don't add a date: item I-004 is on the backlog

Approve

Edit

Reject

D-05 · Q-0118

Draft · waiting for your expert

"How do I keep the security team out of phishing simulations without removing them from reports?"

2 people · 2 customers

Add the security team to an exclusion group in Simulations → Audiences. They won't receive simulated phishing, but they stay in training assignments and in every report.

Sources Help center: "Excluding users from simulations"

Confidence High

Approve

Edit

Reject

Showing 5 of 11 drafts. In a real delivery they arrive in an Answers-to-approve sheet, sorted by confidence, one row per question.

Left to your expert: no draft written

Pricing (4)

- "Is SCIM included in the Standard plan?" Q-0066
- "Do contractors and shared mailboxes count as licensed users?" Q-0091
- "Is there a discount for schools or non-profits?" Q-0108
- "What does the Enterprise plan add on top of Standard?" Q-0127

Launch dates (3)

- "When does the SIEM connector leave beta?" Q-0057
- "Will the SIEM connector also trigger our SOAR playbooks?" Q-0102
- "When will auto-quarantine of reported phishing be available?" Q-0130

Legal and security (1)

- "Where are our users' data and reported emails stored? Our regulator expects them to stay in the EU." Q-0120

08 · METHOD AND DATA QUALITY

Data quality A: a full After-Show, with nine questions we couldn't follow up.



Full After-Show. Every attributed question is matched to a person, their lifecycle stage, owner and open deal.

Grades: A full After-Show · B roadmap complete, follow-ups by attendance only · C aggregate insights only.

What we received, and what it made possible		
SOURCE	CONTAINS	ENABLES
Zoom attendee report	Registrants, join and leave times	Attendance by stage, minutes watched, the viewers curve
Zoom Q&A report	Question, asker email, time, status, upvotes	Next Act, Call Sheet, answers
Chat file	Messages with time	Greetings vs questions, link context
Recording	Video file	Minutes for answers given live, sources for drafts
HubSpot, read-only	Lifecycle stage, owner, open deals, subscription types	The Call Sheet rows and the consent check
Registration notice	Privacy text as it was on 8 Oct	What each follow-up can be based on

What we couldn't do

- 9 questions were asked anonymously: they count in Next Act but get no personal follow-up.
- 46 attendees used a personal email address: no company, so they're not in the account view.
- 1 message was excluded because it contained personal details about someone else.
- Clicks exist only for the 3 tracked links posted in the chat; other links weren't measured.
- Zoom poll results weren't in the export, so polls aren't in this report.

Next time, in Zoom Webinars

- ☐ Switch off anonymous questions in Zoom's Q&A settings.
- ☐ Post links as HubSpot tracked URLs.
- ☐ Export the poll report with the other files.
- ☐ Keep the registration notice: it already covers product analysis and tailored follow-ups.

Privacy, before any software reads a question

- Each person becomes a pseudonymous id (a keyed hash of the email, with a key unique to Acme Ops). Names and emails stay in a separate table that only the HubSpot write step reads.
- Emails, phone numbers and links are removed from question text on our side before classification.
- Quotes carry a segment, never a name: "Customer · 200–999 employees".
- Acme Ops is the controller; Keepstage is the processor under a DPA signed before any data arrives. Source files are deleted at the end of the agreed retention period, with a written deletion statement.

How the numbers and quotes are checked

- Software groups duplicate questions and suggests intent, topic and tone. A person reviewed all 142 classifications and every merge, and changed 13.
- Every figure comes from a saved query over the export, and each number in the text is checked against it before delivery.
- A quote appears only if it matches the original question exactly. Summaries are labelled as summaries.
- Every chart and table states its n and its source.

Not in this report, on purpose

- No company identification from IP addresses.
- No enrichment of individual people, and nothing taken from LinkedIn.
- No emotion or personality analysis of attendees: tone is about the question text.
- No data from any other Keepstage client.
- No revenue attribution: the report shows signals and tasks, not closed deals.
- No emails sent by Keepstage, ever.

With Keepstage Live, every question has an author, and Cues reach owners during the show.

09 · NEXT STEPS

What Acme Ops does this week, in HubSpot and outside it.

- 01** YOUR PRODUCT EXPERT
Approves, edits or rejects the 11 drafts, and writes the 8 answers left to them.
Approved answers are written to ks_answer_text
- 02** YOUR HUBSPOT ADMIN
Reads the dry-run preview and replies OK.
Properties, 18 lists and 9 templates are written; 28 owner tasks are created
- 03** SALES OWNERS
Work the 6 open-deal tasks first, Northwind Retail first, then the 13 SQL tasks.
Deal notes already carry the question
- 04** MARKETING
Reviews the templates and switches the workflows on one at a time, WF1 first.
Nothing sends until a workflow is on
- 05** CUSTOMER SUCCESS
Publishes the secure-coding path article and checks in with Brightline.
Tell the 5 people who asked (list for I-005)
- 06** PRODUCT
Writes their own top 5, compares it with Next Act, and imports the CSV into their tool.
I-001 and I-002 to the next planning session
- 07** EVERYONE
Joins the 30-min readout on Tuesday 20 October.
Marketing, product and sales in one call

Prepared by Keepstage After-Show · Sample report · Acme Ops is a fictional company; all data is invented.