Using Highspot's MCP Server

Highspot's MCP server is currently in Beta, please reach out to your account team or alliances manager to onboard

Overview

Highspot offers a Model Context Protocol (MCP) server which allows AI assistants and other applications to access Highspot capabilities from beyond the Highspot platform. This server provides a way to interact with a Highspot domain through various AI platforms and tools that support MCP.

With this server, Highspot customers and partners can:

1. Find the right content or retrieve recommended content in Highspot
2. Create a pitch by selecting Highspot content
3. Answer seller questions instantly with grounded responses
4. Power deal-specific conversations by combining CRM + Highspot data

Example requests users could make from outside Highspot using MCP tools:

1. "Show me sales plays for banking"
2. "What are the next steps on the Acme renewal deal?"
3. "How do I compete against Technitouch?

Requirements

1. A compatible MCP client (Claude.ai (coming soon), or any application that has implemented an MCP client)

Available tools

Highspot's MCP server includes 7 tools:

Core Content Tools

1. search_content

- **What it does:** Finds relevant Highspot content (sales plays, decks, PDFs, docs).

- **When to use:** Discovery questions like “Show me sales plays for banking.”
- **What the user sees:** A list of documents with metadata

2. get_item_content

- **What it does:** Pulls the *full text or file* of an item.
- **When to use:** When deep analysis or summarization is needed (e.g., in “Deep Research”).
- **What the user sees:** Nothing directly — this happens behind the scenes if an agent needs to read/analyze the content.
- **Requires**: The item_id from returned via search_content or get_content_answer tools

3. get_content_answer

- **What it does:** Directly answers a question using Highspot content.
- **When to use:** Explanatory questions like “How should I compete against Product X in healthcare?”
- **What the user sees:** A synthesized answer with links to source documents.

4. get_content_recommendations

- **What it does:** Recommends relevant Highspot content for a given topic.
- **When to use:** Explanatory questions like ““Recommend content for a renewal conversation?”
- **What the user sees:** A list of documents with metadata.

Actions

5. generate_pitch

- **What it does:** Creates exactly one AI-generated pitch using specific Highspot content items.
- **When to use:** When a user wants to share content externally, e.g.,“Generate a pitch from these assets”
- **What the user sees:** A link to the pitch with the selected content added to it.

Deal Agent Tools

6. get_deal_answer

- **What it does:** Answers questions about a specific CRM opportunity by combining CRM data + Highspot engagement.
- **When to use:** Deal-specific queries like “What are the next steps on this XYZ deal?” or “What risks should I be aware of?”
- **What the user sees:** A clear answer grounded in both CRM and Highspot activity.
- **Requires**: The crm_opportunity_id and crm_org_id, both of which can be retrieved via the lookup_deal tool

7. Lookup_deal (helper tool)

- **What it does:** Finds the right deal record in CRM when only the account (optional) and/or opportunity name (required) are provided.
- **When to use:** When a user mentions a deal (“Acme renewal opportunity”) but doesn’t provide the CRM opportunity ID.
- **What the user sees:** Nothing directly, unless there is a short list of matching deals if multiple are found, so they can pick the right one.