The Complete Guide to HubSpot Workflows

Build nurturing email series and accelerate growth with marketing automation
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Hubspot’s tight tool integration allows the user to automate all HubSpot’s lead management has to offer. Workflows provides a single, unified way to automate external and internal communications, segmentation, and administration. The goal is to automate and perform a series of common actions in a simple way.

This playbook is designed to facilitate the building of HubSpot Workflows. It’s a useful, practical, and informative resource for the hands-on marketer.
How to Create a HubSpot Workflow

First, set a measurable goal or common task and select a list of contacts in your database to be enrolled in the workflow. Next, open Workflows under the Contacts drop down, choose “New workflow” and select a workflow type. The basis of a workflow is actions. Last, chain together individual actions from the top down and test -- simplicity is best. Know your input to achieve the desired output.

Benefits of Using Workflows to Automate Lead Nurturing

Organizations excelling at lead nurturing generate 50% more sales-ready leads at 33% lower cost (Source: Forrester Wave™ Research). In addition, most consumers prefer to receive permission-based marketing communications through email.

How Workflows Automate Lead Nurturing

A single workflow can perform personalized communication at scale and frees the marketer to focus on campaign strategy, creation, and execution. Because workflows are based on triggering relevant and timely actions, based on context, they ensure targeting of the right message to the right person at the right time.

Resources

INBOUND 2016 Session
Automate your funnel: workflows that work from top to bottom

HubSpot Marketing Blog
13 Email Workflows You Should Be Using in Your Marketing Automation

HubSpot Knowledge Base
How to setup a workflow in HubSpot

HubSpot Knowledge Base
Workflows user guide
Targeted Delivery of Content

Effective lead nurturing is not about having the best copy. It’s about sequences, contingencies, and finding holes. What to send and when to send it will have a greater impact on business revenue than focusing on copy optimization. Identify bottlenecks in marketing and sales processes -- those are ideal places for automation.

Successful lead nurturing demands combining content, accurate data, consistent branding, personalization, and segmentation. Delivering the right content to the right people at the right time helps marketers meet business goals predictably and delights consumers.
The Right Content

Valued emails must offer helpful advice and resources specifically catered to the consumer’s interest and awareness. Research shows personalization can deliver five to eight times the ROI on marketing costs, and increase sales up to 10% (Source: McKinsey).

Consider the State of Awareness Spectrum by CopyHackers when planning an email series.
Deliver Relevant Emails

Show empathy, build trust, and be relevant and conversational in an email series. Send emails from a reliable and trustworthy source. The sender’s name and domain impacts the delivery and validity of the message. Use either a generic account (e.g. team@company-domain.com) or a real person (e.g. Ian Shields). Email content must be easily legible on all devices everywhere.

Lead nurturing consists of a tightly connected chain of emails containing useful, targeted content. There are two styles of nurturing emails: promotional and personal.

Promotional Emails

Contain a collection of louder visual elements: large visual images, animated GIFs, interactive elements, whitespace, and non-standard stylized fonts as well as a mix of call-to-action links: images, plain text, and buttons. Send promotional emails from either a generic account or a real person.

Personal Emails

Appears in subtle style looking like a plain text email from a colleague. The call-to-action is either plain text or image -- never a button. Personal emails are sent from a real perso
Create buyer personas, fictional representations of ideal customers, based on market research and validated commonalities. A persona list enables segmentation and content personalization.

HubSpot Smart List is a set of criteria rather than a set group of contacts. Contacts can dynamically enter these lists by meeting specified criteria.
Sample List Segmentation Criteria

1. Activity Triggers
2. Buying Stage
3. Company Size
4. Geography
5. Industry
6. Language
7. Persona

Smart lists, in combination with personalization tokens (contact and company details) in email sequences, tailor the message and increase revenue. When using recipient’s first name `{{contact.firstname}}`, always add at least one more personalization token or targeted copy (powered by Smart Lists).

Resources

- HubSpot Knowledge Base
  - How to create personas
- HubSpot Knowledge Base
  - How to create a list of your contacts
The Right Time

Consumers expect brands to listen and respond in real time. Event triggers are great ways to understand the consumer’s awareness. The wonderful thing about triggers, is triggers are wonderful things.
**Common Event Triggers:**
- Document download
- Event sign-up
- New customer
- New subscriber
- New trial
- Shopping cart abandonment

**Clever Event Triggers:**
- Activity milestones
- End of trial / contract
- Inactivity
- Lead score threshold
- Net Promoter Score (NPS)
- Relationship milestones (time based)
- Reminders

**Resources**
- Frank Kern
- Frank Kern Sales Funnels
Smart List Recipes

Identify the unifying behaviors or characteristics to refine a target audience and segment. Contact lists are the input of workflows and the driving force of personalized content.
Contact has filled out any form / specific form on Page Title.

**[Ideal Customer] Persona**
The contact property Persona is equal to *Ideal Customer*.

**[Hygiene] Competitors**
The contact property Email ends with competitor-domain.com.
– or –
The contact property Email contains competitor-domain.

**[Hygiene] Inactive > [#] days +**
The contact property Last email click date is more than [#] days ago.
– and –
Contact has not filled out any forms more than [#] days ago.
– and –
The contact property Create Date is more than [#] days ago.
– and –
(Salesforce optional) The contact property Last (SF) Activity Date is more than [#] days ago.

**[Hygiene] Low engagement = Greymail**
The contact property Emails Delivered is greater than or equal to 10.
– and –
The contact property First email open date is unknown.
– or –
The contact property Sends Since Last Engagement is greater than or equal to 15.

Resource
HubSpot Knowledge Base
How to create a list of your contacts
[Hygiene] Team Members
The contact property Email ends with any of @your-company-domain.com, @your-marketing-email-domain.com.
– or –
The company property Name contains Your Company Name.
– or –
The contact property Company Name contains Your Company Name.

[Hygiene] Role-based Emails
The contact property Email starts with any of noreply@, abuse@, news@, support@, marketing@, info@, sales@, information@, info, abuse, team@, careers@, hr@, test@, or roreply.

[Hygiene] Status = Bad
Contact property Status is equal to any Left Company, Bad Info, Out of Business.

[Hygiene] Email Opt Out
The contact property Opted out of all email is equal to Yes.
– or –
(Salesforce optional) The contact property Email Opt Out is equal to Yes.

[Ops] Exclude from Lead Nurturing
Contact is a member of [Hygiene] Team Members.
– or –
Contact is a member of [Hygiene] Competitors.
– or –
Contact is a member of [Ops] Customer Advisory Board (CAB)
– or –
The contact property Lifecycle Stage is NOT equal to any of Subscriber, Lead.
– or –
The contact property Email Opt Out is equal to Yes.

MQL = Lead Score > ###
The contact property HubSpot Score is greater than or equal to ###.

[Ops] Not Geo Target MQL (inclusive)
The contact property IP Country Code is NOT equal to any of *sales supported regions*
– or –
The contact property Country is NOT equal to any of *sales supported regions*

[Ops] Customer Advisory Board (CAB)
The contact property Email contains CAB members exact email addresses.

[Ops] Not Geo Target MQL (exclusive)
The contact property IP Country Code is equal to any of *not sales supported regions*
– or –
The contact property Country is equal to any of *not sales supported regions*
Types of Workflows

Hubspot provides three workflow types. Each serves a different goal and depends on the trigger type.
Resources

HubSpot Knowledge Base

How to choose the workflow type and enrollment criteria best suited for your goal.

Hints

There is no version control for HubSpot Workflows. Keep searchable records documenting the state of each workflow and previous iterations. I would suggest mapping your workflows with LucidChart.

Workflows do not allow for A/B testing emails. Rely on your paid campaigns to quickly A/B test copy, then use the best for workflow emails.

Standard

Triggered by a starting condition (e.g. joining a smart list, filling out a form, or manual enrollment).

This workflow is my go-to for:
- Document download
- Field standardization
- Inactivity
- Persona assignment
- Nurture email series

Fixed Date

Ideal for predictable, recurring events because action operation is relative to calendar date selected.

This workflow is ideal for:
- Webinars
- Marketing field events
- Limited-time promotions
- Holidays

Property Base

Ideal for time sensitive events because action operation is relative to a date type property.

This workflow is ideal for:
- Initial subscription date
- Activation date
- Expiration date
- Contact’s birthday
Map of a Workflow

Workflow design starts with defining the outcome, your goal, then the input. After those steps, document your workflow before building in HubSpot.
Map of a Workflow

Best Practices

Build simple, modular workflows because more complexity will cause more errors.

Establish a naming convention to filter and alphanumerically prioritize (#tofu, [opx], [hygiene], etc.) workflows. There is no folder structure to group workflows.

Resources

HubSpot Knowledge Base
A quick tour of Workflows

HubSpot Support Series
How to Avoid Common Missteps in Workflows
1. Goal

Determine a goal before mapping or naming a workflow. Aligning marketing processes and goals with sales will improve execution and drive revenue. If goals aren’t set, then analytics is nearly useless.

A goal is a workflow’s ultimate objective and allows tracking workflow success. Once an enrolled contact meets the criteria of a goal, they are unenrolled and removed from the workflow.

2. Description

Provide a clear, succinct description of the objective and include associated Salesforce campaign ID(s).

3. Enrollment Criteria

The starting condition for any workflow could be to manually or automatically enroll contacts. Criteria options might include: contact property, company property, deal property, list membership, form submission, email, page view, custom event, workflow status, and call-to-action.

Resource

HubSpot Knowledge Base
What is a workflow goal and why should I use one?
4. Actions

Actions inside a workflow are like dominoes. Start at the top and build a process chain. After an action completes, the next one begins automatically all the way to the end. Customize workflow actions to solve either basic or complex problems.
5. Settings

Be specific and focused as possible in determining the workflow behavior. Adjust setting options for the following:
- Retroactive enrollment criteria
- Re-enrollment (cannot use company properties)
- Action day and time of day
- Persona targets
- Campaign association (one-click clone of a HubSpot campaign is convenient)
- Enrollment and suppression

6. Performance

Metrics for overall workflow goal conversion rate are listed as well as each email optimization.

7. History

Shows contacts’ specific events: progress updates, successful actions, alerts, and errors in a time range.

8. Clone

One-click cloning of a workflow is convenient. However, HubSpot Workflows lack tool-specific variables (tokens). When a workflow is cloned, it creates an exact copy.

9. Testing

Always test before turning a workflow on. Create and select a test contact (e.g. george.costanza@seinfeld.com) to send through the workflow. All actions will occur instantly, skipping delays.

Best Practices

Add a delay before an if/then branch to ensure ample time has passed before evaluating the next path. After the “enroll contact in a workflow” action, add a sufficient time delay for the contact to complete the supporting workflow. Clear a contact/company property before the action “set contact/property value.” Start workflows with a delay if sending an email series.

Hint

Practice judicious use of exclusion lists because HubSpots Workflows are not mutually exclusive nor collectively exhaustive.

Resource

HubSpot Knowledge Base
How to choose your workflow actions
Workflow Recipes

Lead Nurturing Workflows: Automated email communication every marketer should know about.

Contact Database Health Workflows: Control the condition of the contact database with workflows.

Sales Enablement Workflows: Accelerate opportunities and get the right information to the right representative.

Internal Notification Workflows: Monitor workflows with alerts and reminders.
Goal
Marketing Qualified Lead

Workflow type
Standard

Settings
Business days only, 7 AM - 11 AM
Yes enrollment from Salesforce

Persona targeted is Buyer Personas

Campaign associated is HubSpot Campaign

Remove contacts from other workflows:
Other Topic of Interest and Awareness #tofu

When a contact no longer meets the enrollment conditions, Do not remove them from this workflow

Suppression list from workflow:
[Ops] Exclude from Lead Nurturing

**Topic of Interest and Low Awareness #TopoftheFunnel**

Answer the consumer’s problems first, show the path to change without expectation of return.

**Enrollment criteria** : Manual

**Send email** : trigger related topic of interest and align to state of awareness while adding value

**Delay** : the next action for 2 days

...Repeat the two actions 4 to 10 more times: send email and delay
Be Our Guest (Welcome to the Blog)

Show a new arrival the manicured path and facilitate their growth.

**Enrollment criteria**: Contact is a member of Blog Subscriber

**Send email**: You’re in and set expectations

**Delay**: the next action for 31 days

**Send email**: Subscriber’s pressing questions

**Delay**: the next action for 180 days

**if/then branch**: contact is member of [Hygiene] Low engagement = Greymail

**Delay**: the next action for 365 days

**Send email**: Celebrate one year

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**Goal**
Email engagement

**Workflow type**
Standard

**Settings**
Business days only, 7 AM - 11 AM

No enrollment from Salesforce

Persona targeted is N/A

Campaign associated is HubSpot Campaign

Do not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, Do not remove them from this workflow

Suppression list from workflow: [Hygiene] Competitors
Goal
Event registration

Workflow type
Fixed Date

Settings
Business days only, 7 AM - 11 AM
No enrollment from Salesforce
Persona targeted is Buyer Personas
Campaign associated is HubSpot Campaign
Do not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, Do not remove them from this workflow

Suppression list from workflow: N/A

Come Join the Lot of Us (Pre Event)
Send target contacts event invitations.

Enrollment criteria: Contact is a member of *Target segment list

This workflow is centered around the date MM/DD/YYYY

Perform the next action 14 days before MM/DD/YYYY at 7:00 AM

Send email: Invitation 1 ...Repeat the two actions 2 to 4 more times: delay, send email
**Goal**  
Engagement

**Workflow type**  
Fixed Date

**Settings**  
Business days only, 7 AM - 11 AM  
**No** enrollment from Salesforce  
Persona targeted is **Buyer Personas**  
Campaign associated is **HubSpot Campaign**  
**Do not** remove contacts from other workflows  
When a contact no longer meets the enrollment conditions, **Do not** remove them from this workflow

**Suppression list from workflow:** N/A

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**What Can I Say Except You’re Welcome (Post Event)**

Send event registrants ungated, relevant resources.

- **Enrollment criteria:** Contact is a member of Registered for {{event}}

- This workflow is centered around the date **MM/DD/YYYY**

- Perform the next action **2 days after** MM/DD/YYYY at **7:00 AM**

- **if/then branch:** contact **attended**

  - **NO**  
    - **Send email**  
      - Missed you, on-demand available, and set expectation

  - **YES**  
    - **Send email**  
      - Thanks for attending, on-demand available, and set expectation

**Enroll into workflow:** Topic of Interest and Low Awareness  
#TopoftheFunnel
You Put My Love on Top (Relationship Milestones)

Celebrate a contact’s milestones.

**Enrollment criteria**: Active Customer Account

**Send email**: Celebrate good times!

**Delay** the next action for 30 days

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**Goal**

Brand engagement

**Workflow type**

Standard

**Settings**

Business days only, 7 AM - 11 AM

**No** enrollment from Salesforce

Persona targeted is **Buyer Personas**

Campaign associated is **HubSpot Campaign**

**Do not** remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **Remove** them from this workflow

Suppression list from workflow: **N/A**
Hello from the Other Side (Opportunity Lost)

Use opportunity lost data to send a qualified prospect relevant emails.

**Enrollment criteria**: Contact is a member of **Opportunity lost segment**

**Send email**: related topic of interest and add value

**Delay** the next action for **31 days**

...Repeat the two actions 4 to 10 more times: send email and delay

---

**Goal**
Brand engagement

**Workflow type**
Standard

**Settings**
Business days only, 9 AM - 2 PM
Yes enrollment from Salesforce

Persona targeted is **Buyer Personas**

Campaign associated is **HubSpot Campaign**

Remove contacts from other workflows: Other Topic of Interest and Awareness #tofu

When a contact no longer meets the enrollment conditions, Do not remove them from this workflow

Suppression list from workflow: [Ops] Exclude from Lead Nurturing
Wake the Dead (Subscriber Reengagement)

Show inactive contacts the value of the brand relationship.

**Enrollment criteria:** [Hygiene] Inactive > 180+ days AND Not a Team Member AND Lifecycle Stage is Subscriber or Lead

**Send email:** win-back

**Delay** the next action for 31 days

**if/then branch:** contact clicked link in win-back

**Delay** the next action for 30 days

**if/then branch:** contact clicked link in win-back OR preference update

**Delay** the next action for 3 days

**if/then branch:** contact clicked link in win-back OR preference update OR re-permission

**Set contact property** Email Opt Out to Yes
Goal
Quantify personas in database

Workflow type
Standard

Settings
Re-enrollment criteria by contact properties change (you cannot re-enroll based on company properties)
7 days/week, anytime during the day
No enrollment from Salesforce
Persona targeted is Buyer Personas
Campaign associated is N/A
Do Not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, Yes remove them from this workflow

Suppression list from workflow: N/A

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Come Together (Persona Assignment)

Find and assign buyer personas.

**Enrollment criteria**: Demographic inclusion AND Firmographic inclusion AND Demographic exclusion AND Firmographic exclusion

**Buyer Persona**: Set contact property Buyer Persona to Yes

**Delay** the next action for 31 days

...Repeat the two actions 4 to 10 more times: send email and delay
Goal
Exclude contacts with faulty information

Workflow type
Standard

Settings
7 days/week, anytime during the day

No enrollment from Salesforce

Persona targeted is N/A

Campaign associated is N/A

Remove contacts from other workflows

When a contact no longer meets the enrollment conditions, Do Not keep them in this workflow

Suppression list from workflow:
[Hygiene] Team Members,
LS - SQL, LS - Opportunity,
LS - Customers

I’m Bad (If Bad then Opt Out of Email)
Keep track of contacts with faulty information.

Enrollment criteria: Contact is a member of [Hygiene] Status = Bad OR [Hygiene] Role-based Emails

Set contact property HubSpot Owner to *Michael in marketing

Delay the next action for 7 days

Email Opt Out: Set contact property to Yes
**Goal**
Accelerate sales pipeline

**Workflow type**
Standard

**Settings**
7 days/week, anytime during the day

**No** enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

**Do Not** remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **keep** them in this workflow

Suppression list from workflow: 
[Hygiene] Team Members,
[Hygiene] Competitors

---

**New marketing qualified lead follow-up**

Generate appointments for the sales team.

**Enrollment criteria**: Demo Request OR Contact Request OR Pricing Request AND New Marketing Qualified Lead

**Enroll into workflow**: IP state/Region Code copy to State/Region

**Delay** the next action for **5 minutes**

**if/then branch**: HubSpot owner is known

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Goal
Accelerate sales pipeline

Workflow type
Standard

Settings
7 days/week, anytime during the day
No enrollment from Salesforce
Persona targeted is N/A
Campaign associated is N/A
Do Not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, keep them in this workflow

Suppression list from workflow: [Hygiene] Team Members, [Hygiene] Competitors

...continued from previous page

**if/then branch**: HubSpot owner is known

**NO**
- Enroll into workflow
  - New MQL owner assignment / round robin

**YES**
- Send email
  - Contact self-select apt. from rep.

- Set a Salesforce Campaign
  - Online MQL to responded

- Delay
  - the next action for 5 minutes

- Send email
  - contact self-select apt. from rep.

Done
**Goal**
Accelerate new sales pipeline

**Workflow type**
Standard

**Settings**
7 days/week, anytime during the day

**No** enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

**Do Not** remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **keep** them in this workflow

**Suppression list from workflow:**
[Hygiene] Team Members,
[Hygiene] Competitors,
[Ops] Customer Advisory Board (CAB)

---

**New marketing qualified lead assignment**

Assign new MQL to sales representative.

**Enrollment criteria**: *Territory Smart List AND HubSpot owner is unknown*

Set contact property **HubSpot Owner** to *Sale representative*
Workflow Alerts and Errors

Get real-time warning of workflow errors.

**Enrollment criteria**: Contact has never completed *one select workflow* AND contact has been enrolled in *one select workflow*

**Send email**: internal email to *HubSpot admin*

---

**Goal**
Real-time alert of workflow problems

**Workflow type**
Standard

**Settings**

7 days/week, anytime during the day

No enrollment from Salesforce

Persona targeted is N/A

Campaign associated is N/A

Do Not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, Yes remove them from this workflow
Goal
Scheduled regular maintenance

Workflow type
Fixed Date

Settings
7 days/week, anytime during the day
No enrollment from Salesforce
Persona targeted is N/A
Campaign associated is N/A
Do Not remove contact from other workflows
When a contact no longer meets the enrollment conditions, do not remove them from this workflow
Suppression list from workflow is N/A

Workflow Timer
Set a reminder for workflow maintenance.

Enrollment criteria : Manual

This workflow is centered around the date MM/DD/YYYY

Perform the next action 30/60/90 days after MM/DD/YYYY at 9:00 AM

Send email : to HubSpot admin
+ List of workflow names and links
+ Instructions to reset reminder workflow date
Video Feedback (Team Members First 90 days)

Send new team members video feedback survey.

**Enrollment criteria**: [Hygiene] Team Members AND Employment Start Date is after *Launch date*

This workflow is centered on the property *Employment Start Date*

Perform the next action **7 days after** Employment Start Date at **11:00 AM**

(Optional) **Set contact property** subscribe to blog to **Yes**

**Send email**: First 7 days - video feedback with HireVue app

Perform the next action **30 days after** Employment Start Date at **10:30 AM**

**Send email**: First 30 days - video feedback with HireVue app

...repeat for **60 days** and **90 days after** Employment Start Date

---

**Goal**
Team member engagement

**Workflow type**
Property Based

**Settings**

**Business days only, 10 AM - 2 PM**

**No** enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

**Do Not** remove contact from other workflows

When a contact no longer meets the enrollment conditions, **yes** remove them from this workflow

Suppression list from workflow is **N/A**
Connect Hubspot with Other Web Apps

- **Integrate HubSpot with Salesforce**
  Keep your sales team informed with data syncs from HubSpot.

- **Integrate HubSpot with Slack**
  Zapier will easily move information between your web apps automatically.

- **Integrate HubSpot with Eventbrite**
  Easily track event registrations and attendance.
Bylines

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