

Video 1: The importance of workflows in your inbound strategy

Hi there, it's Anni from HubSpot Academy. We've all had those days when our to-do list seems endless— like the days when you forget to follow up with a prospect because you have to run to your next meeting or you miss out on an opportunity to close a lead because you get held up on a call.

Sometimes you don't get to everything on your list, and that's okay. But each time this happens, you lose potential customers.

Inbound is all about engaging with people at a personal level while delivering value. But that can seem like a lot of work, especially if you're already juggling multiple responsibilities.

At some point, you'll have to decide between the quantity of emails and the quality. But what if you didn't have to? That's where automation comes in.

Automation is the software that exists with the goal of automating actions and processes.

But how does this tie in with the inbound methodology? Automation plays a huge role in an effective inbound strategy because it allows you to get the right content in front of your leads at the right time.

Once automation is set up, it's constantly working to attract, engage, and delight your leads and customers— only making your flywheel spin faster.

The automation tool within HubSpot is called workflows: A workflow is a series of automated actions that you can trigger to occur based on a person's behavior or contact information.

Workflows can be used across all three Hubs: Marketing, Sales, and Service— to turn messy manual processes into automated actions.

You can provide a human and helpful experience to your leads and customers while giving your team time to invest in more urgent matters. Workflows add force to your flywheel by boosting productivity and helping you automate at scale.

Video 2: Creating a workflow in HubSpot: Start from scratch

When creating a workflow you have the choice to start from scratch. With this option, you'll need to pick an object type to get started.

In HubSpot, an object is a data category that has a set of properties. Use these properties when choosing enrollment triggers for your workflow.

There are 5 object types in HubSpot — contacts, companies, deals, tickets, and quotes.

Let's review the available filters and use cases.

First, you have "Contact-based" workflows which include many filter types including contact properties, imports, and page views. Contact properties include things such as lifecycle stage, job title, and contact owner. One instance where this filter may be useful is when you want to send an email to anyone with the job title of CEO.

You can use the imports filter to update data for contacts on a specific imported list. Use the page views filter to enroll contacts based on whether they have viewed a website page.

Then, there are “Company-based” workflows, which include filter types like company and activity. Company properties include data like the city the company is located in, the industry, and the number of employees.

For example, you can use this filter if you want to send a targeted email to businesses located in Miami, Florida or if you want to contact companies in the healthcare industry. You can also enroll companies in a workflow based on a specific activity associated with the company record. These activities include everything from meetings to tasks and calls that are logged to the record.

Next, there are “Deal-based” workflows, which include filter types like deals and products. If you want to enroll deals based on deal amount, stage, or pipeline, you can use deal properties. Use the product filter when you want to trigger actions based on associated product information, like quantity, price, and discount amount.

Then there are “Ticket-based” workflows. The only filter type here that we haven’t already reviewed are ticket properties, which include data like ticket category, priority, and create date.

Finally, there are “Quote-based” workflows. A new filter you see here is quote properties which includes data like quote owner and approval status. Use quote-based workflows to create a task for the quote owner when the quote’s status is marked as “rejected.” This sends the owner a reminder to review the rejected quote and make any edits before re-submitting it for approval.

Video 3: Creating a workflow in HubSpot: Using a template

When creating a workflow you have the option to start with a template. Templates are predesigned workflows that include a default set of enrollment triggers and actions. There are four templates included to help you get started with workflows.

The first template is “Set a lifecycle stage to MQL.” This is a contact-based workflow. You can use this template to set a contact’s lifecycle stage to any stage—not just MQL— with a simple edit. For example, maybe you uploaded a list of contacts from a trade show but forgot to set their lifecycle stage prior to the upload. You could use this template to set the lifecycle stage for all contacts on the trade show list from blank to equal “lead.”

Next is a company-based workflow. Use this template to sync specific data points from company to contact records. One instance where you may use this is if you want to make sure each contact’s address is listed as the company address, instead of a person’s home address.

Then, you can focus on high-value deals. This is a deal-based workflow. You can use this template if you want to remind a rep about a high amount deal they’re responsible for working.

Finally, you can escalate unanswered tickets. This is a ticket-based workflow. Use this template to remind reps to reach out to tickets that haven’t been responded to. For example, once a ticket has been open for two days, you can create a task for the rep on the ticket to follow up.

Video 4: Marketing hub workflow example: Lead Nurturing

Let’s look at a workflow that attracts customers and continues to engage them as they get closer to booking your services.

When a contact fills out a form to request pricing or service details, you can enroll them in a workflow that nurtures them to ultimately schedule a consultation call.

On the top-right of the workflow dashboard, select “Create workflow.” Since you’re enrolling contacts into this workflow, select “Contact-based.” Keep the type as “Start from scratch.” On the top-right of the screen, select “Create workflow.”

The first step is to set your enrollment trigger. At the middle of the page, select the “Set enrollment triggers” button.

You want to enroll contacts based on form submission, so you can select the filter type “Form submissions.” Once you identify the form, you have the option to select the page the form was submitted on. You can also select “Any page.” Click “Apply filter” and “Save.”

Now, it’s time to add actions. Select the plus sign, and a sidebar menu will appear on the right with available actions. Under “Marketing” you can click “Send email” and you’ll be prompted to select an email. Choose the first email, which will go out immediately after the contact submits the form, and hit “Save.”

Then, you can click the plus sign below the email to add another action. Under “Building blocks” select “Delay.” Enter the amount of days, hours, or minutes you’d like the delay to be. This gives your contacts time to view and engage with the email before the next action in your automation takes place.

Repeat these steps to choose additional emails and set delays where you’d like.

Then, go to the top-left of your page and click “Set goal.” A pop-up screen will appear, and you can select the action you want your contact to eventually take.

In this example, the goal is to have the contact schedule a consultation call. A scheduled meeting is treated as a form submission in HubSpot, so find and select “Form submissions.” Next, find and click on the appropriate form. Click “Apply filter” and “Save.”

Video 5: Sales hub workflow example: Creating deals

Sales workflows can be used to build a seamless deal creation process, which allows reps to keep track of all potential sales without having to worry about manual data entry. Not only does this save time, but it ensures a clean database for your team.

Let’s say a deal is created each time a lead schedules a consultation call. You can automate this process using workflows in HubSpot.

On the top-right of the workflow dashboard, select “Create workflow.” Since you’re enrolling contacts into this workflow select “Contact-based.” Keep the type as “Start from scratch.” On the top-right of the screen, select “Create workflow.”

The first step is to set your enrollment trigger. At the middle of the page, select the “Set enrollment triggers” button.

You want to enroll contacts based on a meeting scheduled. Scheduled meetings are treated like form submissions in HubSpot, so you can select the filter type “Form submissions.” Once you identify the form, you have the option to select the page the form was submitted on. You can also select “Any Page.” Then, click “Apply filter” and “Save.”

Now, it’s time to add actions. Select the plus sign, and a sidebar menu will appear on the right with available actions. First, you want to create a deal. Scroll down to under “Sales” and click “Create Deal.”

Under “Assign deal to” select “Contact’s existing owner.” The field “Which owner?” will auto-fill with “Contact owner.” Then, select the appropriate “Pipeline” and “Stage.”

On the top-right of the “Deal name” field, click “Contact token” and add the fields that will help your reps identify deals.

The “Close date” and “Amount” may be filled-in at a later time, so now we can click “Save.”

Deals will now be created automatically with a consistent naming convention determined in the workflow.

Video 6: Service hub workflow example: Escalating high-priority tickets

Let’s say a customer was unhappy with the service they received, or their initial problem was not resolved. The customer may open a ticket to get in touch with your business. The service rep who receives the ticket might mark this ticket as high priority.

You wouldn’t want this customer to wait— especially since they haven’t had the best experience. As a manager on the services team, you want to be notified of all high priority tickets so that you can personally reach out to the customer.

Let’s see what this would look like in HubSpot.

On the top-right of the workflow dashboard, select “Create workflow.” Since you’re enrolling tickets into this workflow, select “Ticket-based.” On the top-right of the screen, select “Create workflow.”

The first step is to set your enrollment trigger. At the middle of the page, select the “Set enrollment triggers” button. A menu with triggers will appear.

To enroll tickets that are marked as high priority, select “Ticket” under “Filter type.”

Then, you’ll be presented with a list of ticket properties. Use the search bar or scroll down and select “Priority.”

Select “is any of” and from the dropdown menu choose “High.” Apply the filter and click “Save.”

You want to create a task so that a manager can connect with the customer who opened the ticket. Click the plus sign to add an action.

Then, scroll down or search and select “Create task.” You’ll be taken to a menu where you can customize what information appears on the ticket. At the top of the menu under “Title” enter “High Priority.” On the top-right of the “Title” field, select “Ticket token.” Find and click “Ticket name.”

On the top-right of the “Notes” field, click “Ticket token” and find and click “Ticket owner.” This allows a manager to know who to connect with internally before reaching out to the customer.

Next, under “Assign task to” select “Specific user.” On the following line, select the manager you’d like to inform. Click “Save.”

Now the manager will receive notifications for any tickets marked as high priority.