

Question to Ask:		Answer:	Then Create:
1	"What is the important action that a contact can take? What segment of your audience do you want to nurture?"		Starting Condition (the smart list that adds people to the Workflow)
2	Based on this, "How do you identify them as part of that segment? How do you know when they have (or have not) completed that action?"		These are the properties you need to create in order to build the list of this segment. <i>(This may mean you need to use the API to send information into HubSpot, if it lives somewhere else).</i>
3	"After having gone through the Workflow, where do you want them to be? What is the purpose of sending them more content and continuing to engage with them?"		Goal List (smart list you are trying to get people added to with your Workflow steps, when added, they will be removed from the Workflow)
4	"What do we need to send them to help build a relationship with these contacts so they feel comfortable and see value in continuing to engage with you?"		List out the content that will be included in your steps.
5	At each step, 1. "How much time will it take for a contact to digest this information before I send them something more?" 2. "At this point, are they ready to meet the goal of the Workflow?"	-----	1. Make note of the timing for your Workflow steps  2. If not, what else can you send them?

6	<p>After sending the email with the goal or when nearing the end of the Workflow (if time-sensitive), "What do I want to do with contacts who aren't yet ready?"</p>		<p>2 options: send more info or let them be.</p>
7	<p>Depending on your workflow, there may be additional steps you want to add – like changing properties, sending internal messages, and so on.</p>		<p>What else do you need to add to your steps?</p>