WORK SHEET

Brainstorming your Workflow Logic

****Please save this workbook to the desktop on your computer.
This way your progress will be saved correctly as you complete each section.****

To be successful with your workflows, start with a clear picture of what you're trying to accomplish. What do you want your contacts to be accomplishing and what content will help them get there? Your workflows help you build relationships with your contacts and nurture them through their lifecycle with you. This exercise is designed to get you thinking about your workflow logic, content, and goals and start putting it into action.

"A workflow is a series of automated actions that you can trigger to occur based on a person's behaviors or contact information."

Step 1: Define Your Goal

Identifying the goal of your workflow will help you answer the question, "What is the important action that a contact can take in this workflow?" A workflow goal helps you track the success of your workflow and helps create a direction for the actions inside of your workflow.

Design your goal by defining when your contacts have achieved a specific action (or goal). Often, the goal is for contacts to move to a new lifecycle Stage or you can set your goal criteria based on the actions that would qualify a contact for a new lifecycle Stage: contact has filled out a Demo or Consultation form, contact has clicked on a pricing call-to-action, etc.

Possible actions and types of offers include:

- Form submissions (demo, consultation, contact sales, trial, or any other offers that indicate product interest)
- Page views (case studies, pricing page, demo, consultation, contact sales, trial)
- Clicks (clicks on calls-to-action, such as "view pricing," "view video tour," "explore case studies," "request demo," "start free trial," "add to cart," "contact us," "get an assessment," etc).
- Custom events

Now it's time to define your workflow goal.

1. Think critically about what you want your contacts to accomplish in your workflow. Do you have a clear sense of what you want them to take action on? How will you know if your workflow is successful or not?
2. Use the above examples and thinking about your own nurturing goals and define your workflow goal.

Workflow Goal:

*Getting stuck? Check out more examples in this article **here**.*

Step 2: Define the segment for your Workflow

Now that you have a clear goal in mind, it's important to define who will be added to your workflow. To help you send the right content to the right contacts at the right time you will segment the contacts who are eligible to be enrolled in your workflow using 'enrollment triggers'. Enrollment triggers are rules that determine when a contact should enter a workflow.

This can be anything from when a contact property is set to a visit of a specific webpage. It is up to you to decide when someone is ready to be nurtured in your workflow. With your goal in mind you will define the segment by answering the question, "What contacts do I want to be completing this action?"

If your goal is to have them contact sales by the end of the workflow, what beginning action are they taking on the path to contacting sales? Figure out which properties and behaviors are strong indicators of the likelihood of a lead to complete your goal.

Some examples are:

- Segment by Topic of Offers Downloaded
- Segment by Lifecycle Stage
- Segment by Contact Properties
- Segment by Page Views

Now it's time to define your segment:

1. What actions are going to start that process to completing your goal?
2. Write down your segment for enrolling contacts into your workflow.
3. Think critical about your goal and the ideal contacts who should be completing.

Enrollment Segment:

Step 3: Selecting the Content

Now that you have the goal and your segment of contacts, it's time to move on to the question, "What do you 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?"

This is where your content comes in.

Using a separate piece of paper, write down the different types of content you have that support your goal. This is called a **content audit**.

4. Here are some examples of content you could be using:
   - Popular blog articles
   - Relevant whitepapers or ebooks
   - Archived webinars or videos on industry news and topics
   - Content from the resources page of your website
   - Industry-related news articles (even if they're not your own)

Select 3-5 pieces of content that you could email to your segment in your workflow.

Content:

Step 4: Creating the Steps

Now that you have the content for the steps of your workflow, you can start pulling everything together. When creating the steps in your workflow you will be answering two questions: " How much time will it take for a contact to digest this information before I send them something more?" AND "At this point, are they ready to meet the goal of the workflow?"

1. Using a separate sheet of paper, outline your content in the order you will send it.
2. Mark the time delay between each content send.
    - Pro-Tip: When sending content allow at least a day for someone to interact with your email and absorb the content before moving them to the next step
3. If they are not taking the desired actions, decide what additional content can you send them.

Step 5: Defining the "End" of your Workflow

After sending the email with the goal or when nearing the end of the Workflow (if it's time-sensitive), you'll need to decide on what to do with the contacts that don't meet the goal. Answering the question, "What do you do with contacts who aren't ready yet?"

There are two options for these contacts:

1. Send them more information.
2. Let them be and circle back with them on a future re-engagement campaign.

Step 6: Add any additional internal actions

Depending on your workflow, there may be additional steps you want to add – like changing properties, sending internal messages, and so on. Note this additional actions that you might want to add to your workflow to help promote internal communication and consistency between your marketing and sales teams.

Want to explore how to build this out in HubSpot? Check out this article **here**.