WORK SHEET Don’t wait, automate. Workflows workbook

How to Build a Workflow in HubSpot

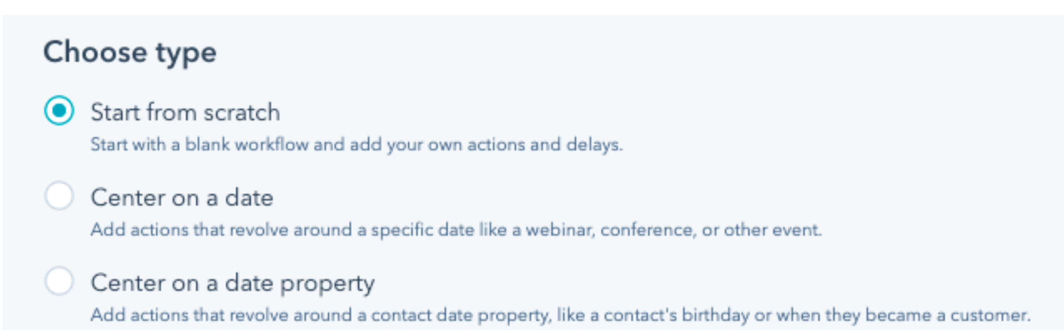
1. Choose Workflow Type

- Choose the **object type:**
  - **Contact**: Most common, choose when you want to enroll and take action on contacts or any of their associated records.
    Ex. list memberships, form submissions, marketing emails
  - **Company**: *city, industry, number of employees*
  - **Deal**: *associated product’s price, quantity, discount amount*
  - **Tickets**: *category, priority, create date*
  - **Quotes**: *quote owner, approval status*

- Choose **type:**
  - **Start from scratch:** Designed to trigger once a contact meets the enrollment triggers.
  - **Center on date**: Same enrollment triggers options as start from scratch; delays are relative to a particular date

    Example: Reminder email series sent leading up to an event
  - **Center on date property**: Select a date-type contact property to center the workflow around; delays are relative to the date value listed on the enrolled contact's record

    Example: Happy Birthday message sent to contact on their birth date
    Example: Send a renewal reminder 1 year after the date of subscription purchase



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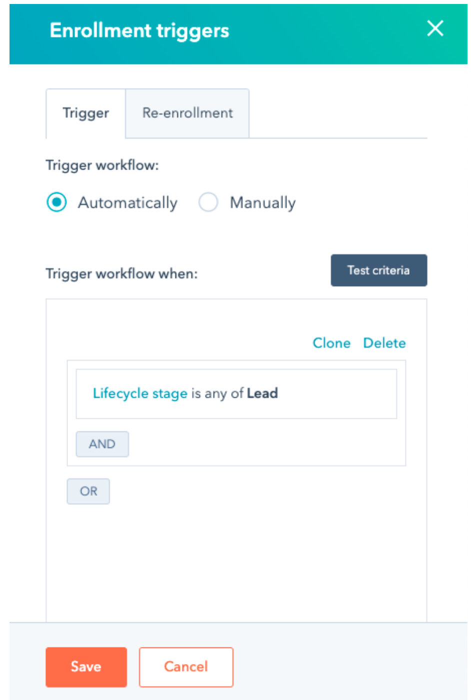
2. Set Enrollment Triggers



- Select if the workflow should be triggered **Automatically or Manually.**
    - If you select Manually, a contact record will only be enrolled in a workflow if a user in the portal manually enrolls the contact.

- Select **trigger criteria**
    - Refine by date and time if needed (form fills, page views, CTAs, marketing emails)
    - Single vs. multiple trigger criteria
        - “**and**” signifies that a contact must meet all criteria to be enrolled
        - “**or**” signifies that a contact only needs to meet one criterion or set of criteria to be enrolled
        - Multiple criteria can get messy, which is why we suggest using lists as triggers when possible.

- Choose **re-enrollment settings**
    - By default, contacts cannot be re-enrolled.
    - Allow re-enrollment:
        - To enable re-enrollment, click Change re-enrollment options.
        - Select the Allow contacts who meet the enrollment triggers to re-enroll when any one of the following occurs checkbox.
        - Select the trigger(s) you want to use for re-enrollment.
        - Click Done.

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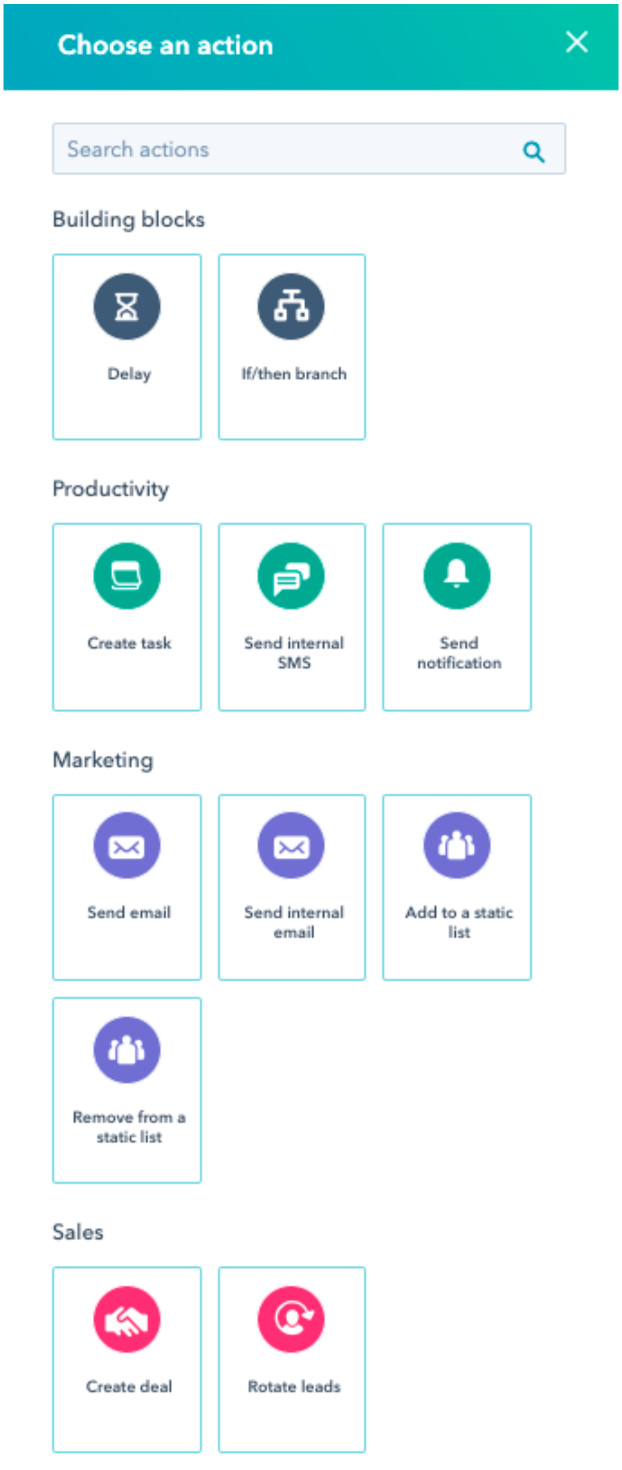
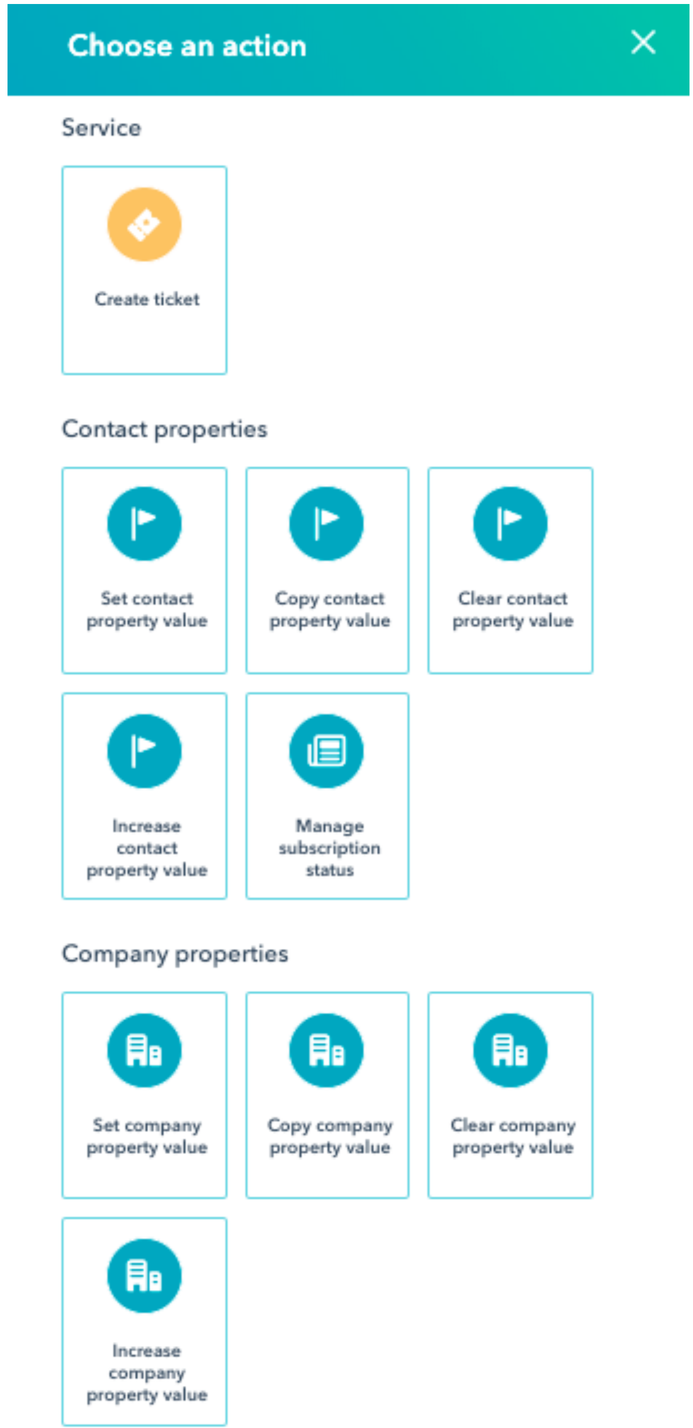
3. Add Actions

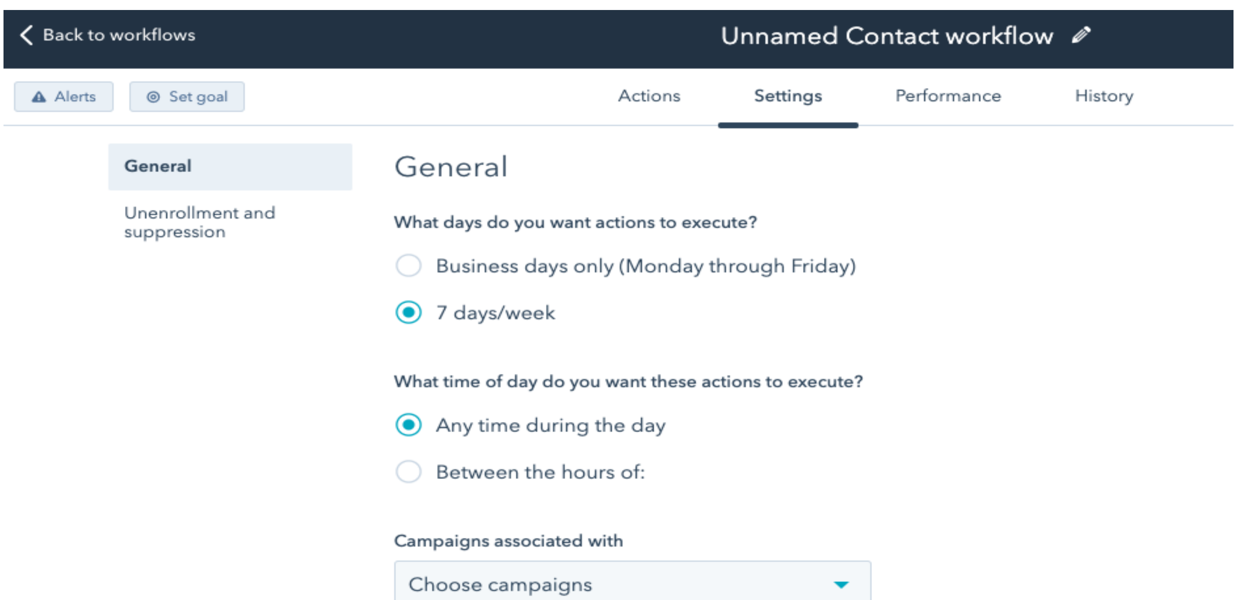
Click an action to get started.





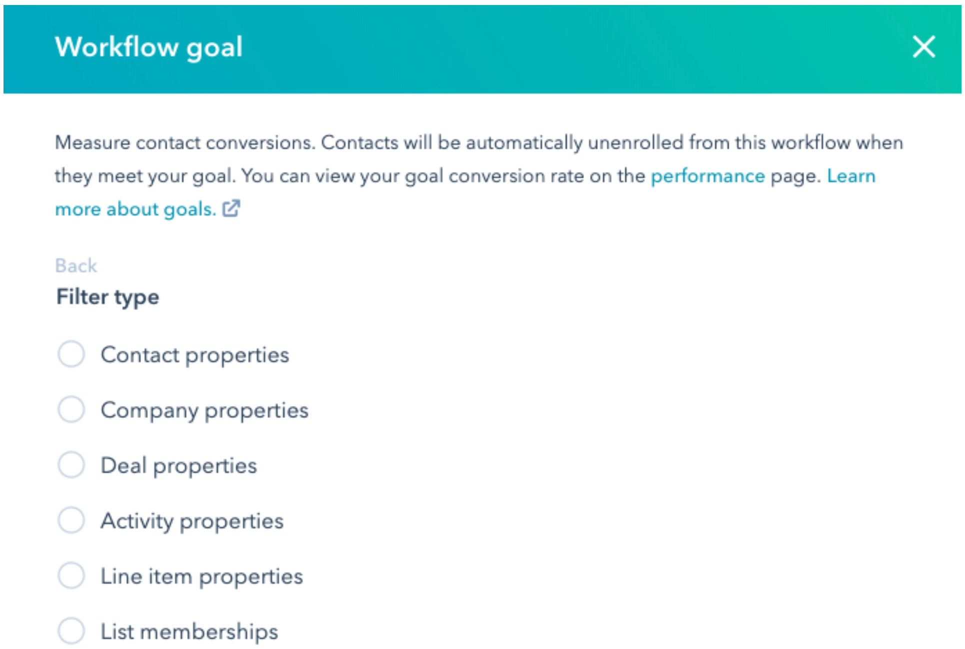
4. Edit the Settings

- Edit the **General** settings
    - **Days to execute**
      Example: Business days only or 7 days/week
    - **Time of day**
      Example: Any time during the day or Between the hours of x and y
    - **Associate with campaign**
- Edit the **Unenrollment and Suppressions** settings
    - Decide if you should remove contact from other workflows
    - Suppression List: Contacts on these lists will be removed from the workflow.
        - Examples: contacts who are already customers or current employees
        - When a contact joins a suppression list, or if they are already present in the suppression list when they are enrolled, they will not count towards the workflow's goal conversion rate.



5. Set the Workflow Goal

In the top left-hand corner, click **Set goal** then choose the filter type to set your goal.



Common workflow goals include:

- Moving contacts to a new lifecycle stage
  Example: the contact's Lifecycle stage changes to Customer
- Contacts taking action(s) that indicate engagement
  Example: the contact submits a specific form, clicks a specific call-to-action, etc.
- Contacts reaching a number of interactions with your marketing content
  Example: the contact reaches a certain number of page views, form submissions, email clicks, etc.

Other goal considerations:

- Single vs multiple criteria for goals
  - “**and**” signifies that a contact must meet all criteria to meet goal
  - “**or**” signifies that a contact only needs to meet one criterion to meet goal
- You don’t always need a goal.
  - A workflow goal is not a requirement. Sometimes the goal for a workflow is simply to have it run to completion.

Want to learn more? Check out the HubSpot Academy lesson “**Understanding Workflows in HubSpot**”.