

## 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*

Start from scratch
Templates

**Contact-based**

Start with a blank workflow that enrolls and is triggered off contacts

**Company-based**

Start with a blank workflow that enrolls and is triggered off companies

**Deal-based**

Start with a blank workflow that enrolls and is triggered off deals

**Ticket-based**

Start with a blank workflow that enrolls and is triggered off tickets

**Quote-based**

Start with a blank workflow that enrolls and is triggered off quotes

#### Choose type

- Start from scratch**  
 Start with a blank workflow and add your own actions and delays.
- Center on a date**  
 Add actions that revolve around a specific date like a webinar, conference, or other event.
- Center on a date property**  
 Add actions that revolve around a contact date property, like a contact's birthday or when they became a customer.

## 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.


The screenshot shows the 'Enrollment triggers' configuration window. At the top, there are two tabs: 'Trigger' and 'Re-enrollment'. Below the tabs, the 'Trigger workflow:' section has two radio buttons: 'Automatically' (selected) and 'Manually'. The 'Trigger workflow when:' section has a 'Test criteria' button. Below this, there is a list of criteria with a 'Clone' and 'Delete' button. The current criteria is 'Lifecycle stage is any of Lead'. Below the criteria list are 'AND' and 'OR' buttons. At the bottom, there are 'Save' and 'Cancel' buttons.

## 3. Add Actions


Click an action to get started.

Choose an action
✕

**Building blocks**




Delay




If/then branch


**Productivity**



Create task




Send internal SMS




Send notification


**Marketing**




Send email



Send internal email




Add to a static list




Remove from a static list

**Sales**




Create deal



Rotate leads


Choose an action
✕

**Service**




Create ticket


**Contact properties**




Set contact property value




Copy contact property value



Clear contact property value




Increase contact property value




Manage subscription status


**Company properties**




Set company property value



Copy company property value



Clear company property value



Increase company property value

## 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.

The screenshot shows the 'Settings' tab for an 'Unnamed Contact workflow'. The interface includes a navigation bar with 'Back to workflows', 'Alerts', 'Set goal', and tabs for 'Actions', 'Settings', 'Performance', and 'History'. The 'Settings' tab is active, showing a 'General' section with the following options:

- General**
- Unenrollment and suppression
- What days do you want actions to execute?
  - Business days only (Monday through Friday)
  - 7 days/week
- What time of day do you want these actions to execute?
  - Any time during the day
  - Between the hours of:
- Campaigns associated with
  - Choose campaigns

## 5. Set the Workflow Goal

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

Workflow goal ×

Measure contact conversions. Contacts will be automatically unenrolled from this workflow when they meet your goal. You can view your goal conversion rate on the [performance](#) page. [Learn more about goals.](#)

[Back](#)

**Filter type**

- Contact properties
- Company properties
- Deal properties
- Activity properties
- Line item properties
- List memberships

### 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"](#).