The Complete Guide to HubSpot Workflows

Build nurturing email series and accelerate growth with marketing automation

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The Playbook

Hubspot's tight tool integration allows the user to automate all HubSpot's lead management has to offer. Workflows provides a single, unified way to automate external and internal communications, segmentation, and administration. The goal is to automate and perform a series of common actions in a simple way.

This playbook is designed to facilitate the building of HubSpot Workflows. It's a useful, practical, and informative resource for the hands-on marketer.

How to Create a HubSpot Workflow

First, set a measurable goal or common task and select a list of contacts in your database to be enrolled in the workflow. Next, open Workflows under the Contacts drop down, choose "New workflow" and select a workflow type. The basis of a workflow is actions. Last, chain together individual actions from the top down and test -- simplicity is best. Know your input to achieve the desired output.

Benefits of Using Workflows to Automate Lead Nurturing

Organizations excelling at lead nurturing generate 50% more sales-ready leads at 33% lower cost (Source: Forrester Wave™ Research). In addition, most consumers prefer to receive permission-based marketing communications through email.

How Workflows Automate Lead Nurturing

A single workflow can perform personalized communication at scale and frees the marketer to focus on campaign strategy, creation, and execution. Because workflows are based on triggering relevant and timely actions, based on context, they ensure targeting of the right message to the right person at the right time.

Resources

INBOUND 2016 Session
Automate your funnel: workflows that work from top to bottom

HubSpot Marketing Blog
13 Email Workflows You Should Be Using in Your Marketing Automation

HubSpot Knowledge Base
How to setup a workflow in HubSpot

HubSpot Knowledge Base
 Workflows user guide

Targeted Delivery of Content

Effective lead nurturing is not about having the best copy. It's about sequences, contingencies, and finding holes. What to send and when to send it will have a greater impact on business revenue than focusing on copy optimization. Identify bottlenecks in marketing and sales processes -- those are ideal places for automation.

Successful lead nurturing demands combining content, accurate data, consistent branding, personalization, and segmentation. Delivering the right content to the right people at the right time helps marketers meet business goals predictably and delights consumers.

The Right Content

Valued emails must offer helpful advice and resources specifically catered to the consumer's interest and awareness. Research shows personalization can deliver five to eight times the ROI on marketing costs, and increase sales up to 10% (Source: McKinsey).

Consider the State of Awareness Spectrum by **CopyHackers** when planning an email series.

HOW MUCH DO YOU HAVE TO SAY?

Offer a healthy amount of explanation and storytelling

Reflect their need while heavily massaging your value proposition

Combine more assurances, scarcity and incentives with pain-relief

Help visitors get to their point quickly - stay out of the way

LOW AWARENESS

HIGH AWARENESS

Little sense of having pain, and no sense of your solution

Starting to feel their own pain

Seeking solutions

Starting to connect their pain with your solution

Fully believe your solution solves their pain

Deliver Relevant Emails

Show empathy, build trust, and be relevant and conversational in an email series. Send emails from a reliable and trustworthy source. The sender's name and domain impacts the delivery and validity of the message.
Use either a generic account (e.g. team@company-domain.com) or a real person (e.g. Ian Shields). Email content must be easily legible on all devices everywhere.

Lead nurturing consists of a tightly connected chain of emails containing useful, targeted content. There are two styles of nurturing emails: promotional and personal.

Promotional Emails

Contain a collection of louder visual elements: large visual images, animated GIFs, interactive elements, whitespace, and non-standard stylized fonts as well as a mix of call-to-action links: images, plain text, and buttons. Send promotional emails from either a generic account or a real person.

Personal Emails

Appears in subtle style looking like a plain text email from a colleague. The call-to-action is either plain text or image -- never a button. Personal emails are sent from a real perso

The Right People

Create buyer personas, fictional representations of ideal customers, based on market research and validated commonalities. A persona list enables segmentation and content personalization.

HubSpot Smart List is a set of criteria rather than a set group of contacts. Contacts can dynamically enter these lists by meeting specified criteria.

Sample List Segmentation Criteria

1. Activity Triggers
2. Buying Stage
3. Company Size
4. Geography
5. Industry
6. Language
7. Persona

Smart lists, in combination with personalization tokens (contact and company details) in email sequences, tailor the message and increase revenue. When using recipient's first name {{contact.firstname}}, always add at least one more personalization token or targeted copy (powered by Smart Lists).

Resources

[HubSpot Knowledge Base](#)
How to create personas

[HubSpot Knowledge Base](#)
How to create a list of your contacts

The Right Time

Consumers expect brands to listen and respond in real time. Event triggers are great ways to understand the consumer's awareness. The wonderful thing about triggers, is triggers are wonderful things.

Common Event Triggers:

Document download

Event sign-up

New customer

New subscriber

New trial

Shopping cart abandonment

Clever Event Triggers:

Activity milestones

End of trial / contract

Inactivity

Lead score threshold

Net Promoter Score (NPS)

Relationship milestones
(time based)

Reminders

Resources

Frank Kern

Frank Kern Sales Funnels

Smart List Recipes

Identify the unifying behaviors or characteristics to refine a target audience and segment. Contact lists are the input of workflows and the driving force of personalized content.

DL: {{form submitted for document}}

Contact has filled out **any form / specific form** on **Page Title**.

[Ideal Customer] Persona

The contact property **Persona** is equal to ***Ideal Customer***

[Hygiene] Competitors

The contact property **Email** ends with **competitor-domain.com.**
– or –
The contact property **Email** contains **competitor-domain.**

[Hygiene] Inactive > [#] days +

The contact property **Last email click date** is more than **[#] days ago**.
– and –
Contact has not filled out **any forms** more than **[#] days** ago.
– and –
The contact property **Create Date** is more than **[#] days** ago.
– and –
(*Salesforce optional*) The contact property **Last (SF) Activity Date** is more than **[#] days** ago.

[Hygiene] Low engagement = Greymail

The contact property **Emails Delivered** is greater than or equal to **10**.
– and –
The contact property **First email open date** is **unknown**.
 – or –
The contact property **Sends Since Last Engagement** is greater than or equal to **15**.

Resource

[Hygiene] Team Members

The contact property **Email** ends with any of **@your-company-domain.com, @your-marketing-email-domain.com**.
 – or –
The company property **Name** contains **Your Company Name**.
 – or –
The contact property **Company Name** contains **Your Company Name**.

[Hygiene] Role-based Emails

The contact property **Email** starts with any of **noreply@, abuse@, news@, support@, marketing@, info@, sales@, information@, info, abuse, team@, careers@, hr@, test@,** or **roreply**.

[Hygiene] Status = Bad

Contact property **Status** is equal to any **Left Company, Bad Info, Out of Business.**

[Hygiene] Email Opt Out

The contact property **Opted out of all email** is equal to **Yes**.
 – or –
(*Salesforce optional*) The contact property **Email Opt Out** is equal to **Yes**.

[Ops] Customer Advisory Board (CAB)

The contact property **Email** contains **CAB members exact email addresses**.

[Ops] Exclude from Lead Nurturing

Contact is a member of **[Hygiene] Team Members**.
 – or –
Contact is a member of **[Hygiene] Competitors**.
 – or –
Contact is a member of **[Ops] Customer Advisory Board (CAB)**
 – or –
The contact property **Lifecycle Stage** is NOT equal to any of **Subscriber, Lead**.
 – or –
The contact property **Email Opt Out** is equal to **Yes**.

MQL = Lead Score >

The contact property **HubSpot Score** is greater than or equal to **###**.

[Ops] Not Geo Target MQL (inclusive)

The contact property **IP Country Code** is NOT equal to any of ***sales supported regions***
 – or –
The contact property **Country** is NOT equal to any of ***sales supported regions***

[Ops] Not Geo Target MQL (exclusive)

The contact property **IP Country Code** is equal to any of ***not sales supported regions***
 – or –
The contact property Country is equal to any of ***not sales supported regions***

Types of Workflows

Hubspot provides three workflow types. Each serves a different goal and depends on the trigger type.

Standard

Triggered by a starting condition (e.g. joining a smart list, filling out a form, or manual enrollment).

This workflow is my go-to for:

Document download

Field standardization

Inactivity

Persona assignment

Nurture email series

Fixed Date

Ideal for predictable, recurring events because action operation is relative to calendar date selected.

This workflow is ideal for:

Webinars

Marketing field events

Limited-time promotions

Holidays

Property Base

Ideal for time sensitive events because action operation is relative to a date type property.

This workflow is ideal for:

Initial subscription date

Activation date

Expiration date

Contact's birthday

Hints

There is no version control for HubSpot Workflows. Keep searchable records documenting the state of each workflow and previous iterations. I would suggest maping your workflows with LucidChart.

Workflows do not allow for A/B testing emails. Rely on your paid campaigns to quickly A/B test copy, then use the best for workflow emails.
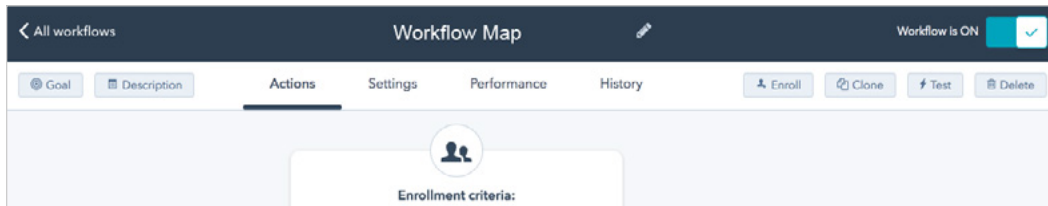
Resources

HubSpot Knowledge Base
How to choose the workflow type and enrollment criteria best suited for your goal.
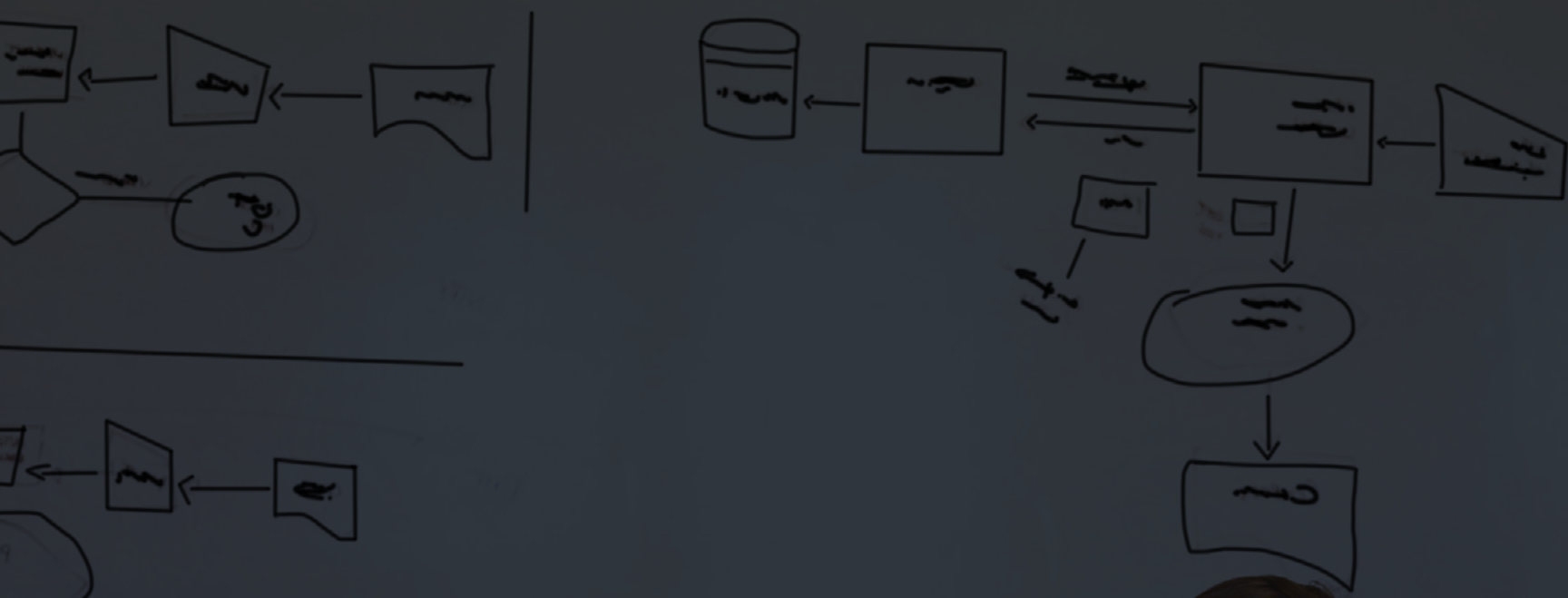
Map of a Workflow

Workflow design starts with defining the outcome, your goal, then the input.
After those steps, document your workflow before building in HubSpot.

Map of a Workflow

Best Practices

Build simple, modular workflows because more complexity will cause more errors.

Establish a naming convention to filter and alphanumeric prioritize (#tofu, [opx], [hygiene], etc.) workflows. There is no folder structure to group workflows.

Resources

HubSpot Knowledge Base
A quick tour of Workflows

HubSpot Support Series
How to Avoid Common Missteps in Workflows

1. Goal

Determine a goal before mapping or naming a workflow. Aligning marketing processes and goals with sales will improve execution and drive revenue. If goals aren't set, then analytics is nearly useless.

A goal is a workflow's ultimate objective and allows tracking workflow success. Once an enrolled contact meets the criteria of a goal, they are unenrolled and removed from the workflow.

2. Description

Provide a clear, succinct description of the objective and include associated Salesforce campaign ID(s).

3. Enrollment Criteria

The starting condition for any workflow could be to manually or automatically enroll contacts. Criteria options might include: contact property, company property, deal property, list membership, form submission, email, page view, custom event, workflow status, and call-to-action.

Resource

4. Actions

Actions inside a workflow are like dominoes. Start at the top and build a process chain. After an action completes, the next one begins automatically all the way to the end. Customize workflow actions to solve either basic or complex problems.

Send email	Send internal email	Send an internal SMS	Copy company	Trigger a webhook	Clear a contact property
Add delay	Add if/then branch	Set contact property value	Clear a company property	Enroll contact in a workflow	Set a Salesforce campaign
Set a company property value	Add to a static list	Remove from static list	Set a Salesforce task	Increment numeric contact property	Increment numeric company property
Copy contact property value	Create a task	Create a deal	Rotate leads		

5. Settings

Be specific and focused as possible in determining the workflow behavior.
Adjust setting options for the following:
- – Retroactive enrollment criteria
- – Re-enrollment (cannot use company properties)
- – Action day and time of day
- – Persona targets
- – Campaign association (one-click clone of a HubSpot campaign is convenient)
- – Enrollment and suppression

6. Performance

Metrics for overall workflow goal conversion rate are listed as well as each email optimization.

7. History

Shows contacts' specific events: progress updates, successful actions, alerts, and errors in a time range.

8. Clone

One-click cloning of a workflow is convenient. However, HubSpot Workflows lack tool-specific variables (tokens). When a workflow is cloned, it creates an exact copy.

9. Testing

Always test before turning a workflow on. Create and select a test contact (e.g. george.costanza@seinfeld.com) to send through the workflow.
All actions will occur instantly, skipping delays.

Best Practices

Add a delay before an if/then branch to ensure ample time has passed before evaluating the next path. After the "enroll contact in a workflow" action, add a sufficient time delay for the contact to complete the supporting workflow. Clear a contact/company property before the action "set contact/property value." Start workflows with a delay if sending an email series.

Hint

Practice judicious use of exclusion lists because HubSpots Workflows are not mutually exclusive nor collectively exhaustive.

Resource

HubSpot Knowledge Base
How to choose your workflow actions

Workflow Recipes

Lead Nurturing Workflows: Automated email communication every marketer should know about.

Contact Database Health Workflows: Control the condition of the contact database with workflows.

Sales Enablement Workflows: Accelerate opportunities and get the right information to the right representative.

Internal Notification Workflows: Monitor workflows with alerts and reminders.

Goal

Marketing Qualified Lead

Workflow type

Standard

Settings

Business days only, 7 AM - 11 AM

Yes enrollment from Salesforce

Persona targeted is **Buyer Personas**

Campaign associated is **HubSpot Campaign**

Remove contacts from other workflows:
Other Topic of Interest and Awareness #tofu

When a contact no longer meets the
enrollment conditions, **Do not** remove
them from this workflow

Suppression list from workflow:
[Ops] Exclude from Lead Nurturing

Topic of Interest and Low Awareness #TopoftheFunnel

Answer the consumer's problems first, show the path to change without
expectation of return.

Enrollment criteria : Manual

Send email : trigger related topic of interest and align
to state of awareness while adding value

Delay : the next action for **2 days**
...Repeat the two actions 4 to 10 more times:
send email and **delay**

Goal

Email engagement

Workflow type

Standard

Settings

Business days only, 7 AM - 11 AM

No enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **HubSpot Campaign**

Do not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **Do not** remove them from this workflow

Suppression list from workflow:
[Hygiene] Competitors

Be Our Guest (Welcome to the Blog)

Show a new arrival the manicured path and facilitate their growth.

Enrollment criteria : Contact is a member of **Blog Subscriber**

Send email : You're in and set expectations

Delay : the next action for **31 days**

Send email : Subscriber's pressing questions

Delay : the next action for **180 days**

if/then branch : contact is member of **[Hygiene] Low engagement = Greymail**

NO
Send email
Subscriber survey and gift card

YES

Delay : the next action for **365 days**

Send email : Celebrate one year

Goal

Event registration

Workflow type

Fixed Date

Settings

Business days only, 7 AM - 11 AM

No enrollment from Salesforce

Persona targeted is **Buyer Personas**

Campaign associated is **HubSpot Campaign**

Do not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **Do not** remove them from this workflow

Suppression list from workflow: **N/A**

Come Join the Lot of Us (Pre Event)

Send target contacts event invitations.

Enrollment criteria : Contact is a member of ***Target segment list**

This workflow is centered around the date **MM/DD/YYYY**

Perform the next action **14 days before** **MM/DD/YYYY** at **7:00 AM**

Send email : **Invitation 1** ...Repeat the two actions 2 to 4 more times: **delay, send email**

Goal
Engagement

Workflow type
Fixed Date

Settings

Business days only, 7 AM - 11 AM

No enrollment from Salesforce

Persona targeted is **Buyer Personas**

Campaign associated is **HubSpot Campaign**

Do not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **Do not** remove them from this workflow

Suppression list from workflow: **N/A**

What Can I Say Except You're Welcome (Post Event)

Send event registrants ungated, relevant resources.

Enrollment criteria : Contact is a member of **Registered for {{event}}**

This workflow is centered around the date **MM/DD/YYYY**

Perform the next action **2 days after** **MM/DD/YYYY** at **7:00 AM**

if/then branch : contact **attended**

NO

Send email
Missed you, on-demand available, and set expectation

YES

Send email
Thanks for attending, on-demand available, and set expectation

Enroll into workflow : Topic of Interest and Low Awareness #TopoftheFunnel

Goal

Brand engagement

Workflow type

Standard

Settings

Business days only, 7 AM - 11 AM

No enrollment from Salesforce

Persona targeted is **Buyer Personas**

Campaign associated is **HubSpot Campaign**

Do not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **Remove** them from this workflow

Suppression list from workflow: **N/A**

You Put My Love on Top (Relationship Milestones)

Celebrate a contact's milestones.

Enrollment criteria : Active Customer Account

Send email : Celebrate good times!

Delay the next action for **30 days**

Goal
Brand engagement

Workflow type
Standard

Settings

Business days only, 9 AM - 2 PM

Yes enrollment from Salesforce

Persona targeted is **Buyer Personas**

Campaign associated is **HubSpot Campaign**

Remove contacts from other workflows:
Other Topic of Interest and Awareness #tofu

When a contact no longer meets the
enrollment conditions, **Do not** remove
them from this workflow

Suppression list from workflow:
[Ops] Exclude from Lead Nurturing

Hello from the Other Side (Opportunity Lost)

Use opportunity lost data to send a qualified prospect relevant emails.

Enrollment criteria : Contact is a member of **Opportunity lost segment**

Send email : related topic of interest and add value

Delay the next action for **31 days**
...Repeat the two actions 4 to 10 more times: **send email** and **delay**

Goal

Subscriber reengagement

Workflow type

Standard

Settings

Re-enrollment criteria list member

Business days only, 7 AM - 1 PM

No enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is
 subscriber reengagement

Remove contact from other workflows

When a contact no longer meets the
enrollment conditions, **Yes** remove
them from this workflow

Suppression list from workflow:
[Ops] Exclude from Lead Nurturing

Wake the Dead (Subscriber Reengagement)

Show inactive contacts the value of the brand relationship.

Enrollment criteria : **[Hygiene] Inactive > 180+ days** AND Not a
Team Member AND **Lifecycle Stage** is Subscriber or Lead

Send email : win-back

Delay the next action for **31 days**

if/then branch : contact clicked link
in **win-back**

NO — **Send email** Preference update
YES

Delay the next action for **30 days**

if/then branch : contact clicked link
in **win-back** OR **preference update**

NO — **Send email** re-permission
YES

Delay the next action for **3 days**

if/then branch : contact clicked link
in **win-back** OR **preference update**
OR **re-permission**

NO — **Set contact property** Email Opt Out to **Yes**
YES

Goal
Quantify personas in database

Workflow type
Standard

Settings

Re-enrollment criteria by contact properties change (you cannot re-enroll based on company properties)

7 days/week, anytime during the day

No enrollment from Salesforce

Persona targeted is **Buyer Personas**

Campaign associated is **N/A**

Do Not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **Yes** remove them from this workflow

Suppression list from workflow: **N/A**

Come Together (Persona Assignment)

Find and assign buyer personas.

Enrollment criteria : Demographic inclusion **AND** Firmographic inclusion **AND** Demographic exclusion **AND** Firmographic exclusion

Buyer Persona : **Set contact property** Buyer **Persona** to Yes

Delay the next action for **31 days**
...Repeat the two actions 4 to 10 more times: **send email** and **delay**

Goal
Exclude contacts with faulty information

Workflow type
Standard

Settings

7 days/week, anytime during the day

No enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

Remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **Do Not** keep them in this workflow

Suppression list from workflow:
**[Hygiene] Team Members,
LS - SQL, LS - Opportunity,
LS - Customers**

I'm Bad (If Bad then Opt Out of Email)

Keep track of contacts with faulty information.

Enrollment criteria : Contact is a member of
[Hygiene] Status = Bad OR **[Hygiene] Role-based Emails**

Set contact property **HubSpot Owner** to *Michael in marketing

Delay the next action for **7 days**

Email Opt Out : Set contact property to **Yes**

Goal
Accelerate sales pipeline

Workflow type
Standard

Settings

7 days/week, anytime during the day

No enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

Do Not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **keep** them in this workflow

Suppression list from workflow:
**[Hygiene] Team Members,
[Hygiene] Competitors**

New marketing qualified lead follow-up

Generate appointments for the sales team.

Enrollment criteria : Demo Request **OR** Contact Request **OR** Pricing Request **AND** New Marketing Qualified Lead

Enroll into workflow : IP state/Region Code copy to State/Region

Delay the next action for **5 minutes**

if/then branch : HubSpot owner is **known**

Goal

Accelerate sales pipeline

Workflow type

Standard

Settings

7 days/week, anytime during the day

No enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

Do Not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **keep** them in this workflow

Suppression list from workflow:
**[Hygiene] Team Members,
[Hygiene] Competitors**

if/then branch : HubSpot owner is **known**

NO

Enroll into workflow
New MQL owner
assignment / round robin

Set a Salesforce Campaign
Online MQL to **responded**

Delay
the next action for **5 minutes**

Send email
contact self-select apt. from rep.

YES

Send email
Contact self-select apt. from rep.

Set a Salesforce Campaign
Online MQL to **responded**

Done

Goal
Accelerate new sales pipeline

Workflow type
Standard

Settings

7 days/week, anytime during the day

No enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

Do Not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **keep** them in this workflow

Suppression list from workflow:
[Hygiene] Team Members,
[Hygiene] Competitors,
[Ops] Customer Advisory Board (CAB)

New marketing qualified lead assignment

Assign new MQL to sales representative.

Enrollment criteria : *Territory Smart List **AND** HubSpot owner is **unknown**

Set contact property **HubSpot Owner** to *Sale representative

Goal
Real-time alert of workflow problems

Workflow type
Standard

Settings

7 days/week, anytime during the day

No enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

Do Not remove contacts from other workflows

When a contact no longer meets the enrollment conditions, **Yes** remove them from this workflow

Workflow Alerts and Errors

Get real-time warning of workflow errors.

Enrollment criteria : Contact has never completed ***one select workflow*** AND contact has been enrolled in ***one select workflow***

Send email : internal email to ***HubSpot admin**

Goal

Scheduled regular maintenance

Workflow type

Fixed Date

Settings

7 days/week, anytime during the day

No enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

Do Not remove contact from other workflows

When a contact no longer meets the enrollment conditions, **do not** remove them from this workflow

Suppression list from workflow is **N/A**

Workflow Timer

Set a reminder for workflow maintenance.

Enrollment criteria : Manual

This workflow is centered around the date **MM/DD/YYYY**

Perform the next action **30/60/90 days after MM/DD/YYYY** at **9:00 AM**

Send email : to **HubSpot admin**
+ List of workflow names and links
+ Instructions to reset reminder workflow date

Goal
Team member engagement

Workflow type
Property Based

Settings

Business days only, 10 AM - 2 PM

No enrollment from Salesforce

Persona targeted is **N/A**

Campaign associated is **N/A**

Do Not remove contact from other workflows

When a contact no longer meets the enrollment conditions, **yes** remove them from this workflow

Suppression list from workflow is **N/A**

Video Feedback (Team Members First 90 days)

Send new team members video feedback survey.

Enrollment criteria : [Hygiene] Team Members **AND** Employment Start Date is after ***Launch date***

This workflow is centered on the property **Employment Start Date**

Perform the next action **7 days after** Employment Start Date at **11:00 AM**

(optional) **Set contact property** subscribe to blog to **Yes**

Send email : **First 7 days** - video feedback with HireVue app

Perform the next action **30 days after** Employment Start Date at **10:30 AM**

Send email : **First 30 days** - video feedback with HireVue app ...repeat for **60 days** and **90 days after** Employment Start Date

Connect Hubspot with Other Web Apps

Integrate HubSpot with Salesforce
Keep your sales team informed with data syncs from HubSpot.

Integrate HubSpot with Slack
Zapier will easily move information between your web apps automatically.

Integrate HubSpot with Eventbrite
Easily track event registrations and attendance.

Bylines

Author : Ian Shields

Ian Shields has been a B2B marketing technologist for the past seven years and currently works at HireVue. He delivered energetic, informative and practical talks for the **Salt Lake City HubSpot User Group**.

Connect with Ian on [in] and [twitter]

Editor : Kay Shields

Contributors to workflow methodology and examples:

Joe Hafner : /in/joehafner
David Malmborg : /in/davidmalmborg
Jono Andrews : /in/jono-andrews
Darin Berntson : /in/igobydoc

Designer : John Haymore   [in] [instagram] [icon]