

Title: Setting Up Workflows in HubSpot

Content Type: Blog Post

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Do any of the following sound like you?

- You generate leads but don't follow up unless they are close to buying.
- Sales says leads are not qualified.
- All emails go to your entire contact list every time.
- You gather information but don't use it to segment or target your marketing.
- You are trying to nurture leads manually.

Then, according to [HubSpot](#), you are more than ready for Workflows.

Workflow is a HubSpot marketing automation tool that does more than send out timed emails. It can be used to produce a variety of actions based on lead behavior and history. You can select automated actions based on triggers that you specify to help move the lead through the funnel until ready for sales contact or simply to keep the contact records up to date. And this can be done for multiple, segmented lists with different criteria.

Here's how to use the [HubSpot Workflows Tool](#).

Step 1: Select Starting Condition

This is the condition or criteria that must be met by the lead in order for a workflow to be triggered.

Options:

- Form submission
- Triggering a *smart list* (more about this later)
- No starting condition

By Form Submission

If the condition of "Form submission" is true, the workflow specified for that form can begin. This is helpful for automating email follow-up for specific downloads.

[SCREEN SHOT: Form submission workflow]

By Smart List

A *smart list* is a list that can be dynamically updated according to a customized, preset filter. Each list member is put through a set of filters, customized for that list, to determine exactly how to treat a specific lead based on any information from your database.

HubSpot's [Smart List Tool](#) gives you a variety of options for updating each lead and placing it into a personalized follow-up pathway.

[SCREEN SHOT: Smart list workflow]

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No Starting Condition

HubSpot also gives you the option to update the lists manually. This is useful for uploading contacts from specific marketing events such as a webinar or conference.

[SCREEN SHOT: No Starting Condition]

Step 2: Set Up Triggers

HubSpot offers the following actions to trigger workflows:

- Setting contact property value
- Sending automatic email
- Adding/removing contact to/from list
- Sending email notification

Setting Contact Property Value

Use this to create a workflow for automatically updating contact records. A contact property value is connected to each field within a contact record.

Example

A field is labeled "demo requested." The contact property value is the entry in that field (yes or no). Use this action to update all contacts with the "demo requested" property value of "yes" to a lifecycle stage of "marketing qualified lead."

Sending Automatic Email

Emails created in HubSpot can be saved for automation purposes. As you set up the workflow you can select from among emails already available and set up a series for lead nurturing to be sent in the order and timing you require. The workflow can have as many steps and periods of time as you want.

Example

A lead visits a product page 10 times in the past 15 days and has input his email and name into a form. Email automation can be used to send custom emails after 2 days, 1 week, and 1 month to follow up to encourage the lead through the sales funnel.

Add to or Remove Contact from List

This action can add or remove contacts as needed to and from the various lists in the system. The action can be triggered by any of the conditions mentioned above to segment audiences and remove unsubscribes.

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Example

You want to add contacts from a webinar series to a single list. The form submissions for all the webinars can be the condition for adding the contact to a list labeled “Webinar Series.”

Sending Email Notifications

This is a good way to notify someone at a specific email address when a lead meets a particular condition, such as requesting a demo or downloading pricing information. A notification is sent to a sales representative so opportunities won't be missed.

Example

An industry influencer, determined by her social media following, enters the system through a download. The system notifies your social media manager to follow up.

Step 3: Set Up Time Delays

The workflow tool provides the opportunity to set the timing of actions, such as the timing of email discussed above. For immediate actions the time delay set the time delay to zero. Timing periods can be specified by days, hours, or minutes customized for each contact or workflow.

Step 4: Select Preferred Settings

HubSpot workflows provide a plethora of preferences so you can set up the workflow for highest effectiveness. Examples include executing workflow actions on business days only or during a specific time frame.

Workflows can take a lot of marketing busywork out of your hands, letting you get on with the business of marketing. They also keep opportunities from being lost and help shepherd your leads through the sales funnel in a cost and time effective way.