Advanced Workflow Examples and Best Practices

for Every HubSpot Team

HubSpot

Agenda

1. Why and when to automate
2. Automation best practices and avoiding common pitfalls
3. 5 minute Break for Questions
4. Practical advanced workflow examples and concepts
5. Q&A

Meet the Speakers

Kyle Jepson

Senior Inbound Sales Professor

HubSpot

Megan Legge

Product Manager

HubSpot

Matthew Shepherd

Senior Inbound Consultant

HubSpot

NEED HELP WITH AUTOMATION?

Connect with a Strategic Consultant

https://hubs.la/Q01sG9Z70

Setting the Scene on Advanced Workflows

You promised advanced workflows

COMPLEX ≠ ADVANCED

Concepts & What’s New

Why and When to Automate

Why Automate?

- Free up time by reducing repetitive administrative or manual tasks
- Reduce errors introduced by manual data management
- Scale processes without scaling effort and losing personalisation
- Carry out tasks even when you are offline
- Send and receive timely and relevant content and notifications

AUTOMATE

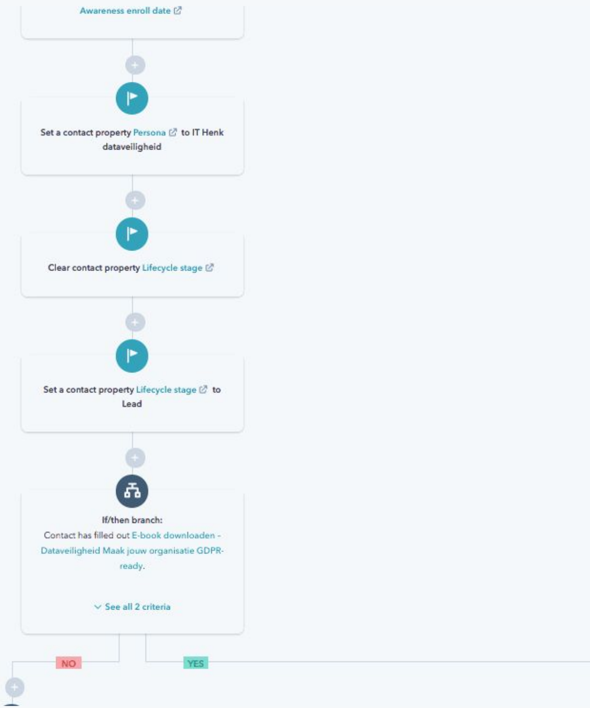
- Repetitive manual processes
- The execution and scaling of clearly documented content strategy, data management processes, and business processes
- Internal and external communications based on reliable data

DON'T AUTOMATE

- Processes that occur infrequently and that take less time than creating an automation
- Processes that rely on inconsistent data
- Processes that require significant or timely human intervention
- Existing inefficient or poorly documented processes
- Processes with no clear goal

Automation Best Practices

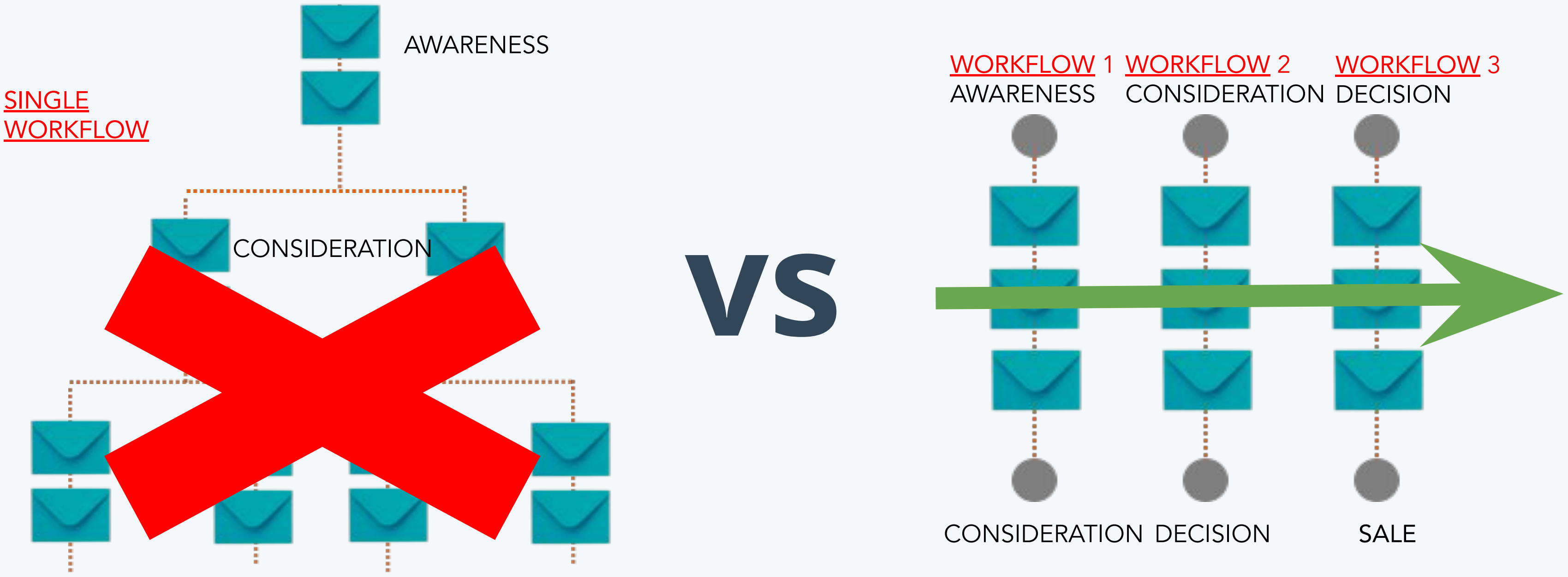
Is this an advanced workflow?



When creating workflows start with your outcome in mind.

What is the primary outcome this workflow should achieve?

So how do we manage complexity?



Consistent workflow and folder naming conventions will save you a lot of time and confusion

Workflow Naming Conventions

- Team/Region
- Internal vs external
- Action/Purpose of the workflow
    - DM: Data Management
    - LR: Lead Routing
    - SR: Service Routing
    - TC: Task Creation
    - LN: Lead Nurturing
- Buyer Persona
- Stage of the Buyer's Journey
- Date/Time Frame

I'm simply looking for the placeholder text to be customizable. Rather than saying "Name your Workflow" - it
here. As an example, ours is: **Country_Campaign Type_Campaign Description_Initials.** This would help the t

Thanks for sharing this model. There are a few other items you may want to consider especia
Region (NA, EMEA, APAC, etc)
Product/Service Category

And we try to follow the following file naming best pr

- All text in lowercase
- Use hyphens instead of spaces
- Don't use accents (we're in México :)) or any s

Without seeing what your business structure looks like, at a high level I would try to track the following in your naming convention:

- Date the asset is first used/or the campaign launches. For naming standardization I would recommend YYYYMM, YYMM, YYQ# (19Q1) becau
campaigns in order.
- Give the asset an identifier so you know what type of asset it is: EM for Email, LP for Landing Page, etc.
- If you have products or groupings within your product consider an identifier for that
- Consider an identifier for the stage
- Allow for a freeform description to

Type(s) | Name of Workflow

- SOAP | PO Submitted, Notify Slack
- LR | AT | Rotate MQLs and Assign Follow Up Auto Tasks based on MQL Type
- ARCHIVE - CN | LR | AT | Imported Registrations [amazon] Customer Nurturing, Assign

I also use an ARCHIVE identifier to clean things up without deleting workflows.

For example, a workflow email could be:

- *WF | Inbound Marketing | Consideration | What is Inbound Marketing.*

You can use "WF" for workflows, "FU" for followup emails, "LP" for landing pages, "TP" for Thank you pages, and so on...

What you decide on will be up to you and the rest of the organization, based on your needs. Maybe you use a naming convention that leverages some kind of date and action, like "Q3 Lead Gen - Nurturing Emails". Maybe the group wants to include what the workflow does in the title, and your workflows contain values like "Updates Company Property" or "Adds Record to List".

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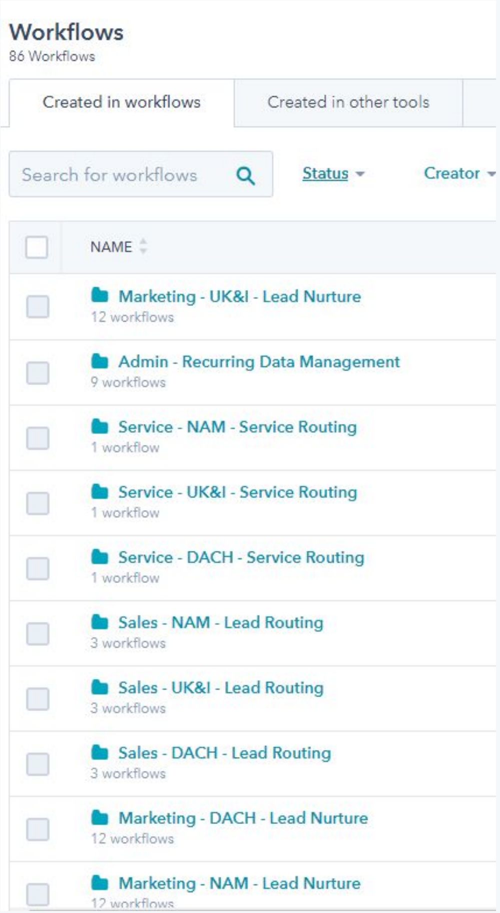
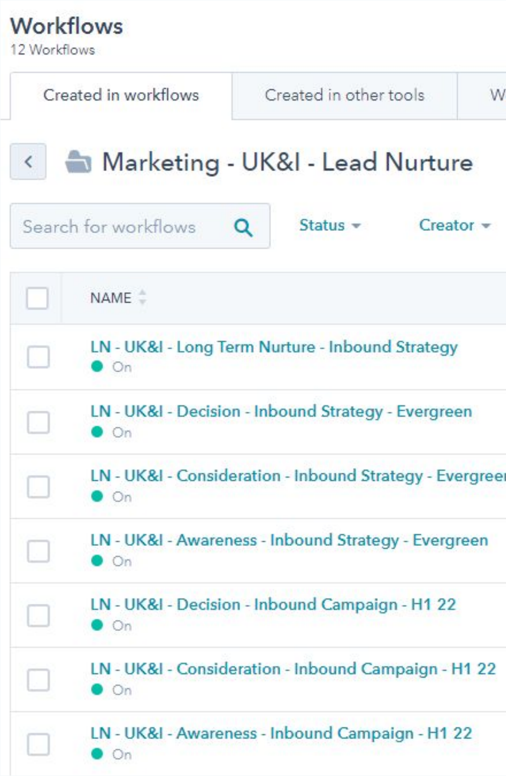
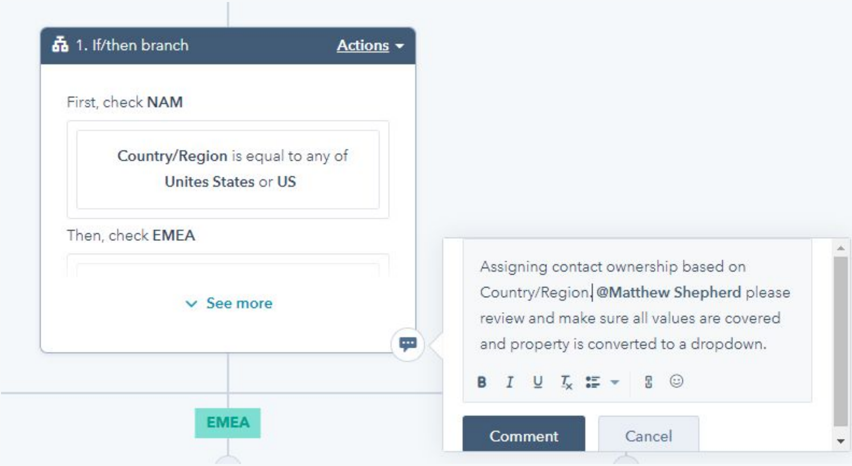
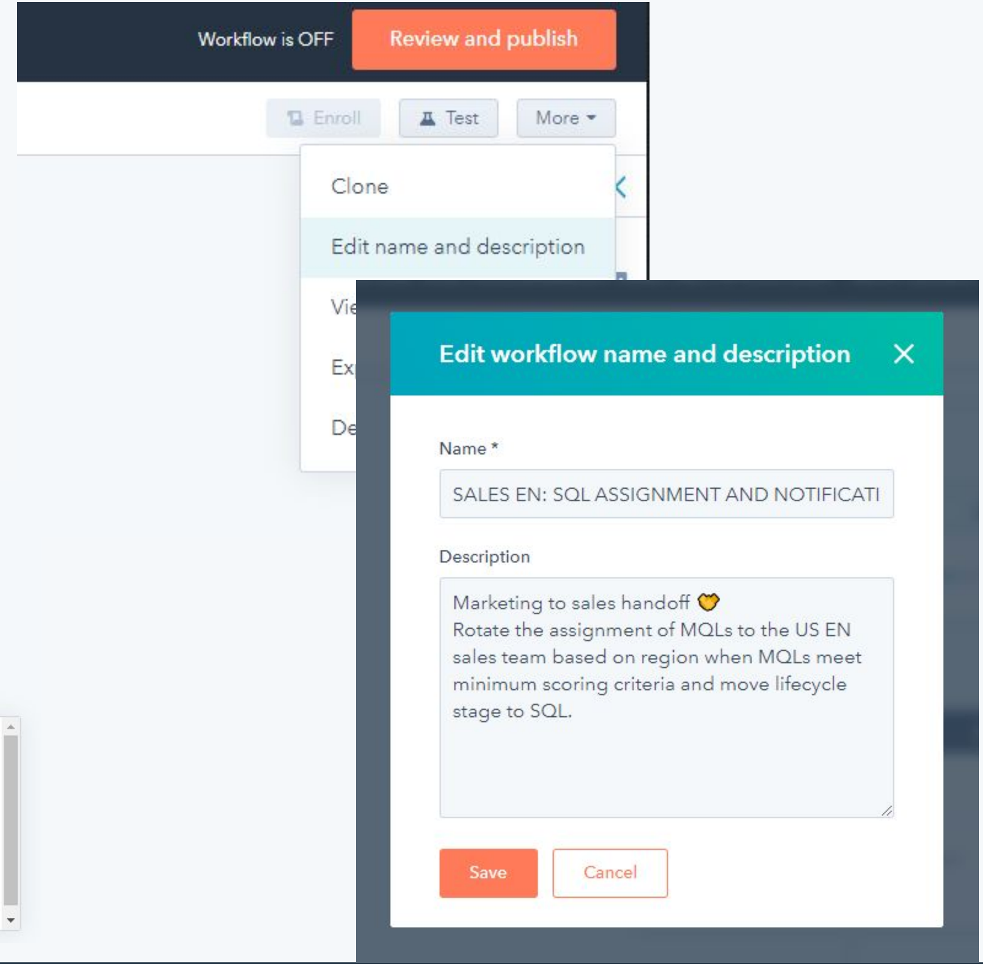




Workflow descriptions & comments

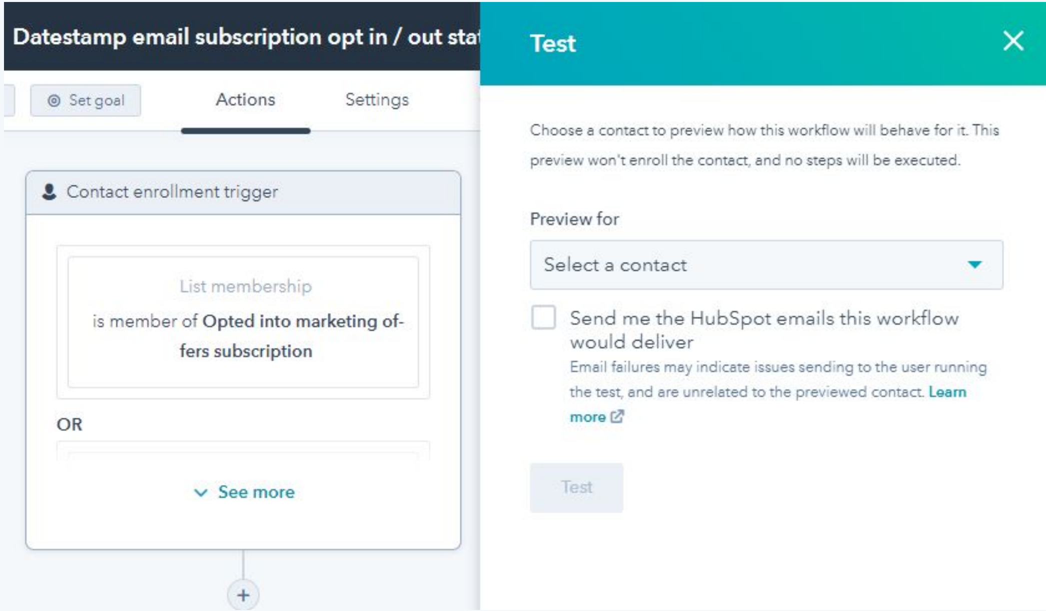
Use workflow descriptions and comments to further describe the purpose of your workflow and each action



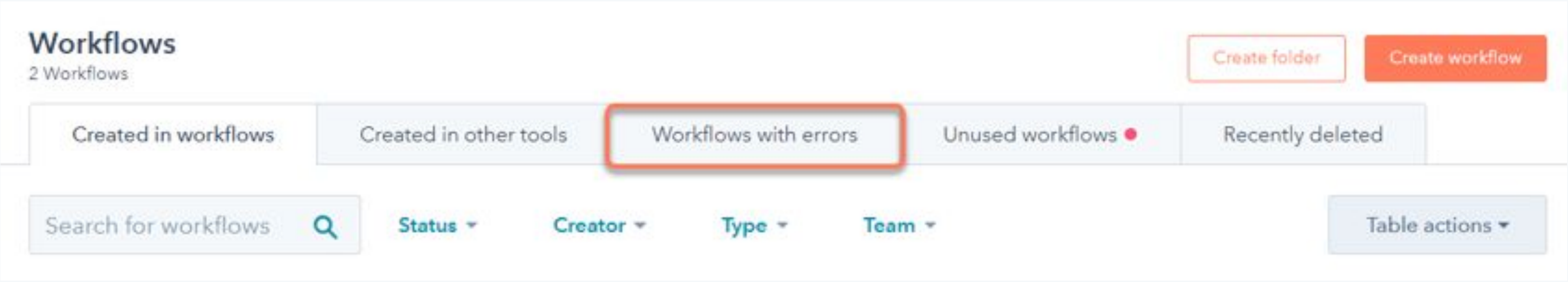


Before publishing your workflow...

Test, test and test again!

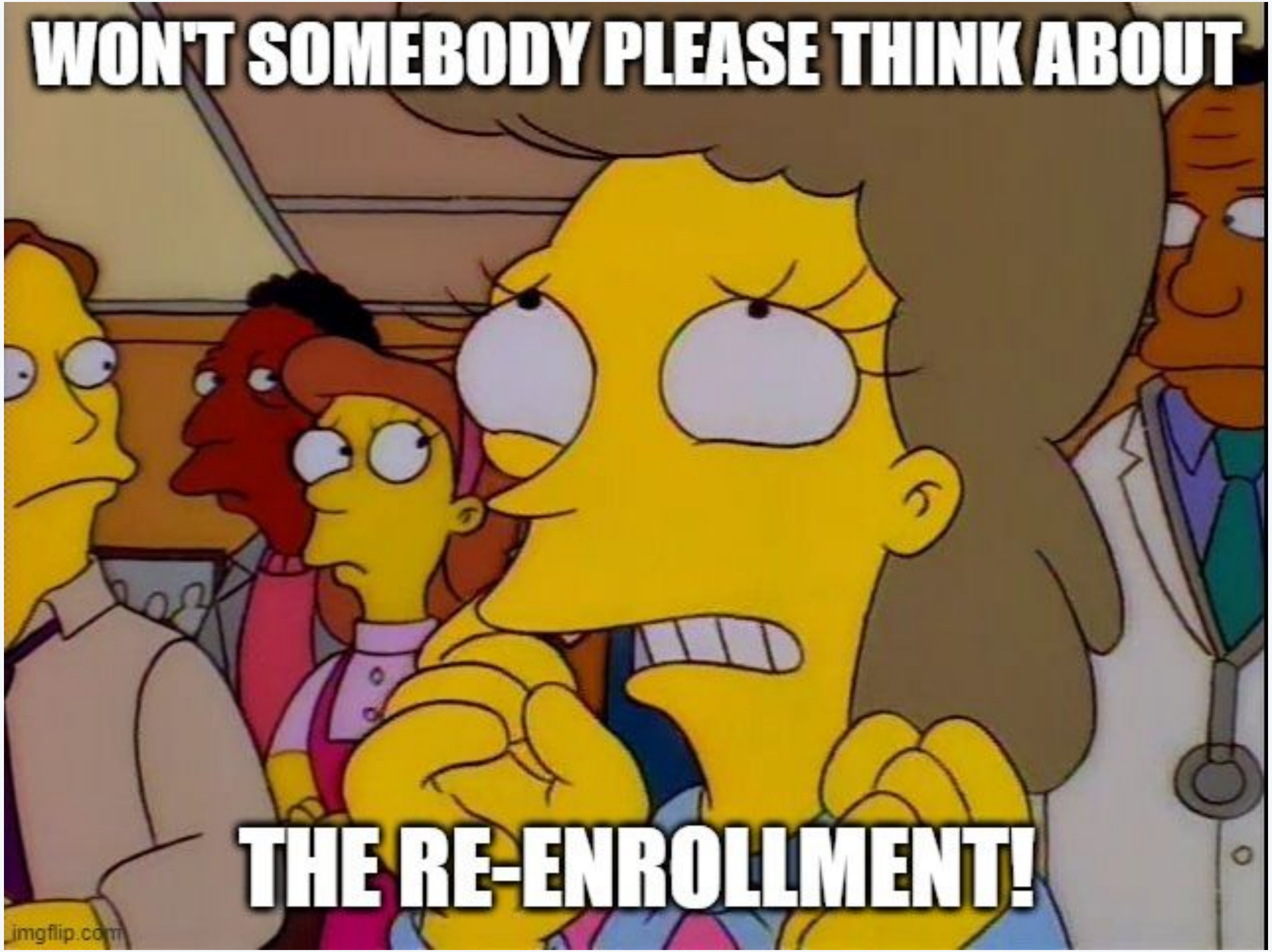


Monitor your workflows for errors



Emails not sent
Date action skipped
Copy property value failures

Avoiding Common Pitfalls

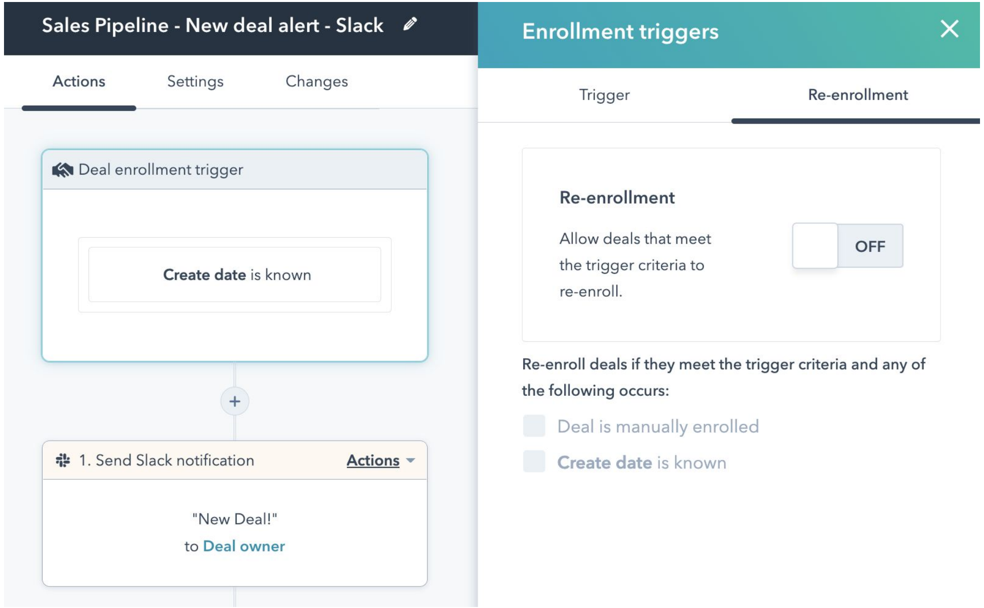

WON'T SOMEBODY PLEASE THINK ABOUT
THE RE-ENROLLMENT!
imgflip.com

Enrollment issues

01

Allow re-enrollment?

Once vs many times



Enrollment issues

01

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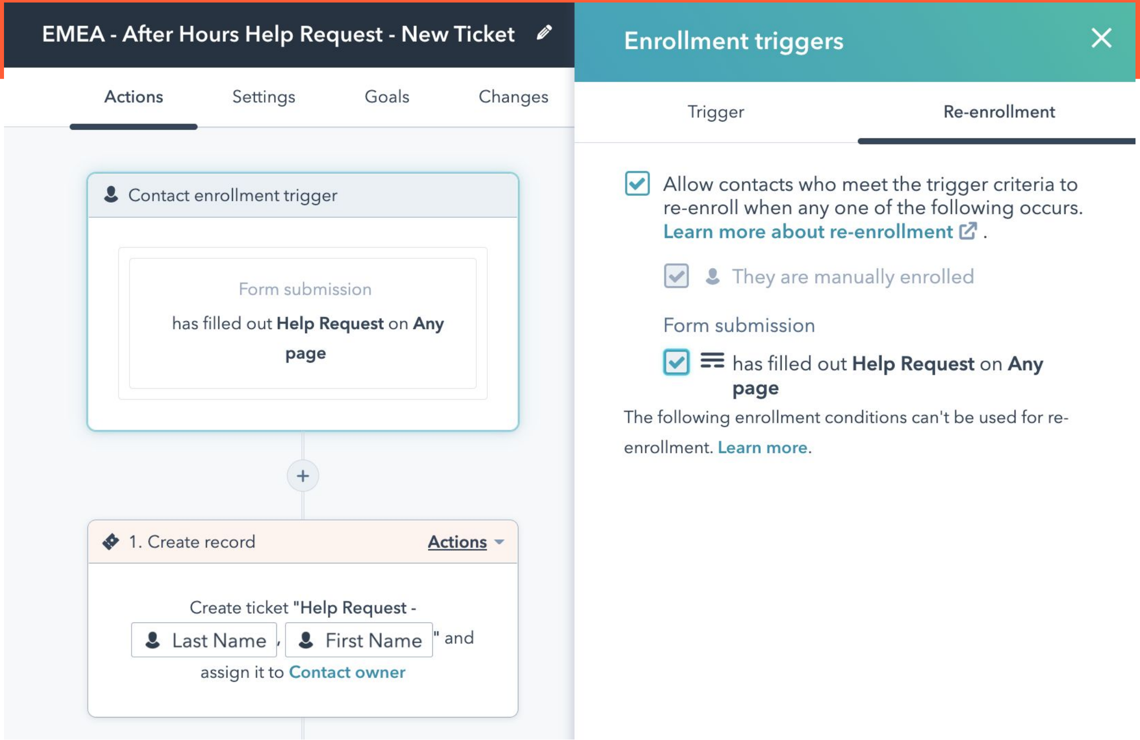
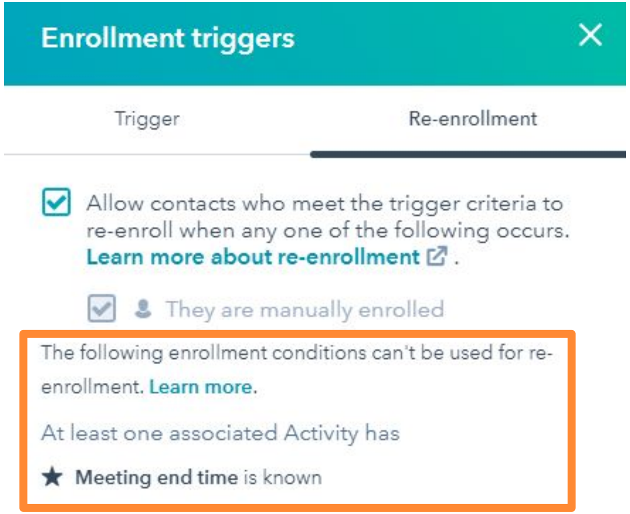


Enrollment issues

02

Re-enrollment not available

Some properties cannot be used for re-enrollment.



Enrollment issues

02

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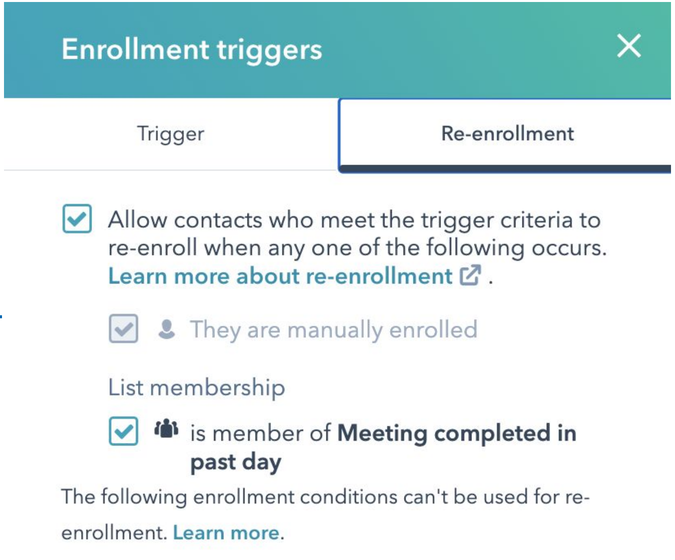
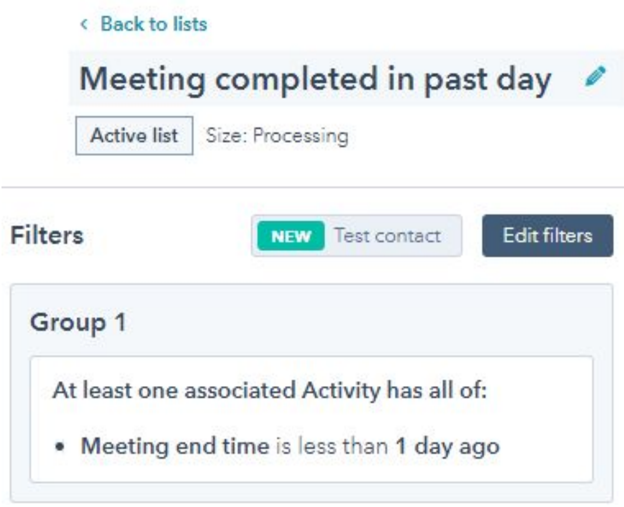


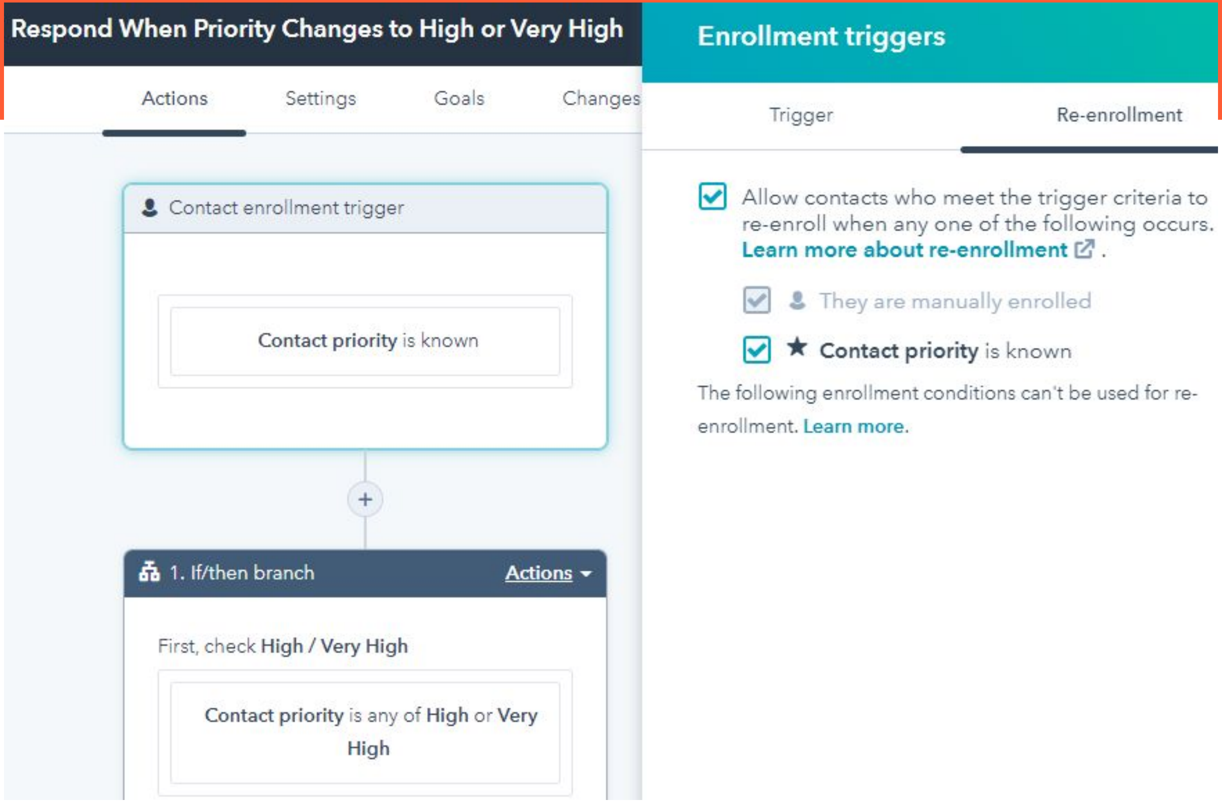


Enrollment issues

02

Re-enrollment not available

Pro tip: ‘Property x is known’



Beta alert 🚨

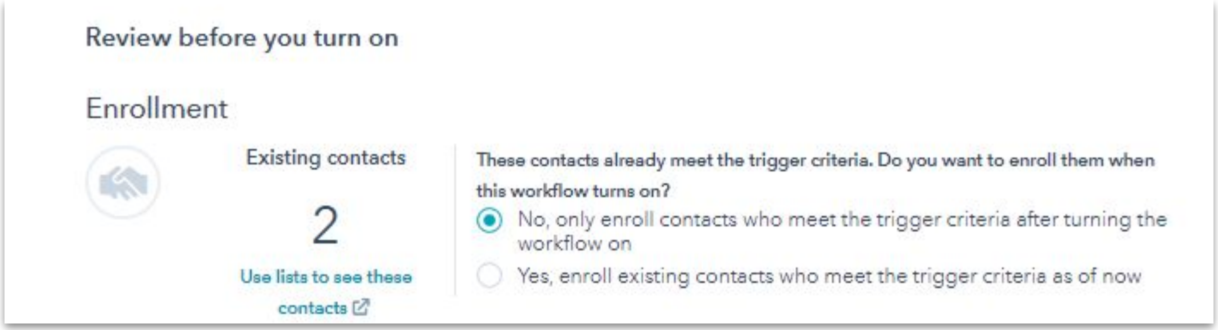
New Triggers experience:
opt in form

Enrollment issues

03

Enroll existing records?

Carefully consider when publishing your workflow or editing a trigger on a live workflow.



Consider Yes

- Update property values
- Re-rotate records

Consider No

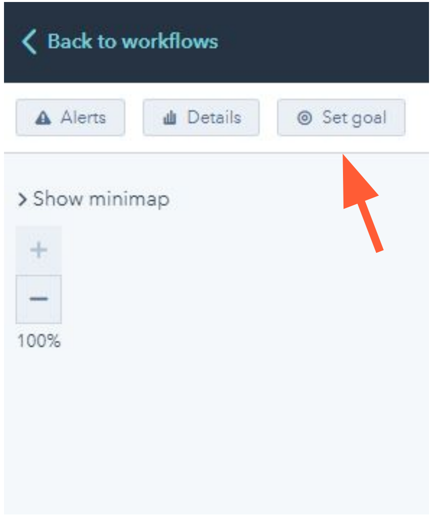
- Form follow-up email
- Task creation
- Internal notifications

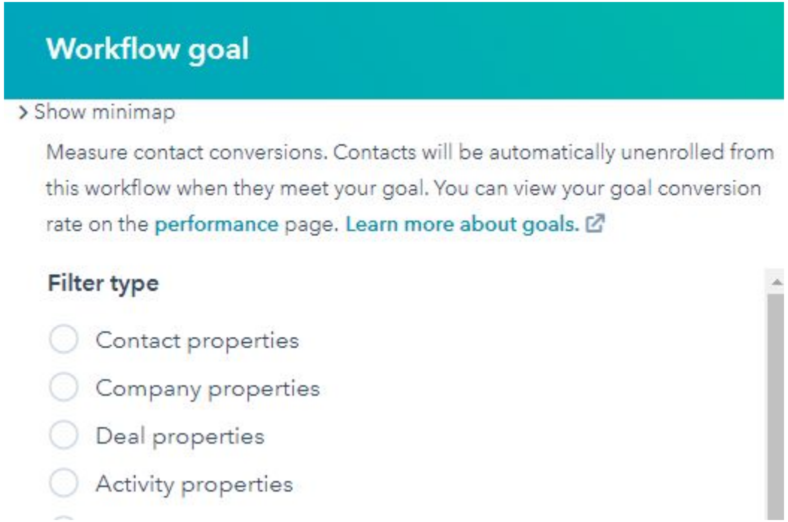
Enrollment issues

04

Goals

Measure your workflows' performance, but be aware of enrollment impact.





Timing issues

01

Delays

Give data time to populate, and confirm it's present.

02

Delay Until Event

Wait until a lead *does something*, such as visit a page.

03

Orchestration

- Suppression lists
  (Avoid enrollment in multiple nurturing workflows e.g. based on Buyer's Journey custom property or completion of previous workflow)
- The "enroll in workflow" action
  (string together a series of workflows in a specific order)

Data issues

01

Inconsistent data

Basing enrollment or actions on inconsistent data leads to inconsistent outcomes.

02

Copying property values

Make sure field types and values match across properties.

03

Email subscription and low engagement

Subscription type opt-in & graymail suppression.

Questions

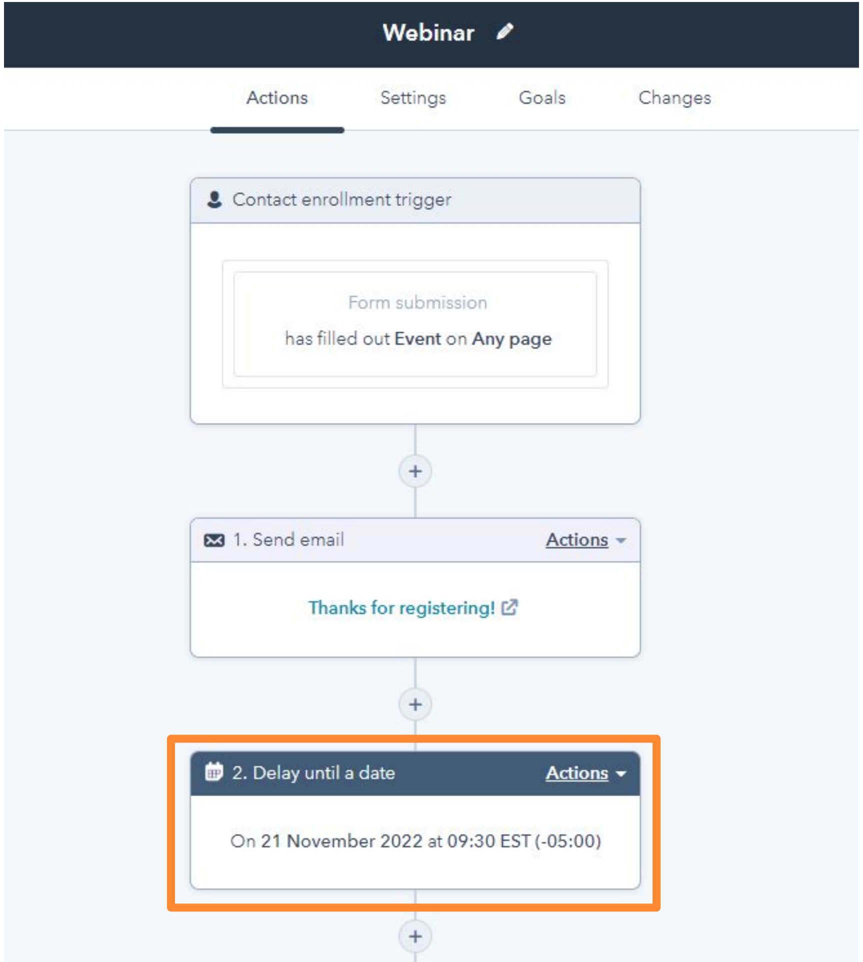
Automation Examples

Marketing Automations

Delay until a date: Webinar Nurturing

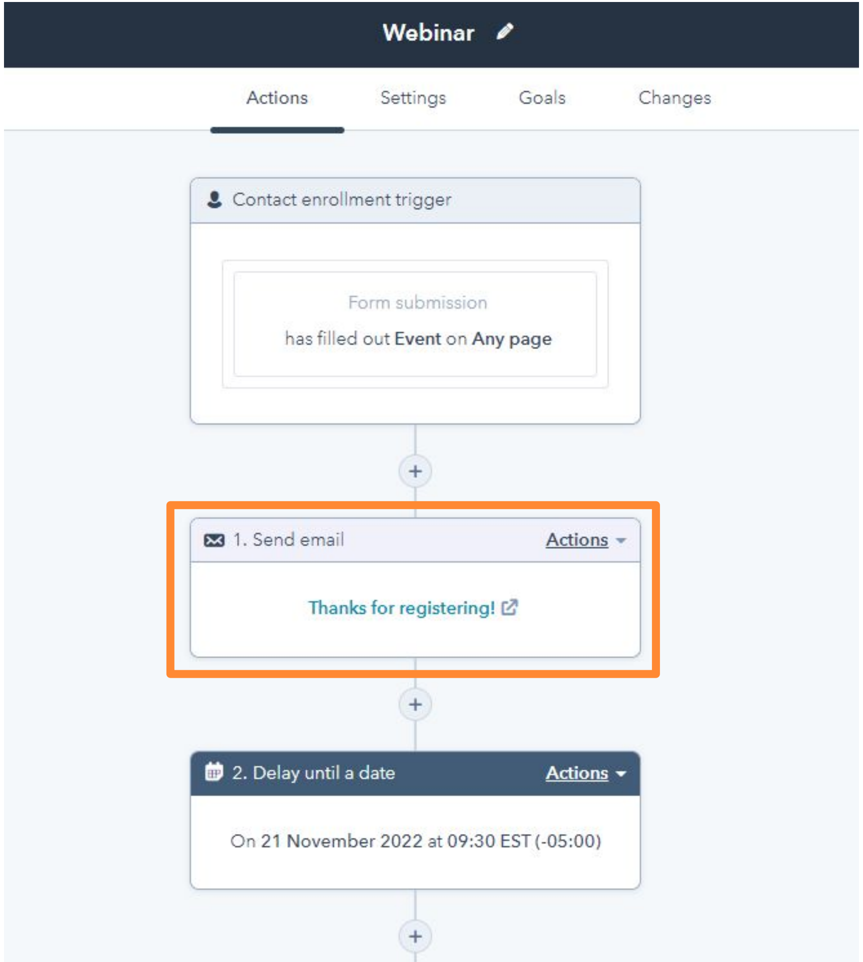
The NEW ‘Delay until a date’ action

- No longer need the special “date centered” workflow
- Available in all types of workflows (contacts, deals, companies, etc)
- Simpler logic
- One workflow to handle immediate vs date centered actions



Delay until a date: Webinar Nurturing

- Send an immediate registration email, then delay until the day of the webinar

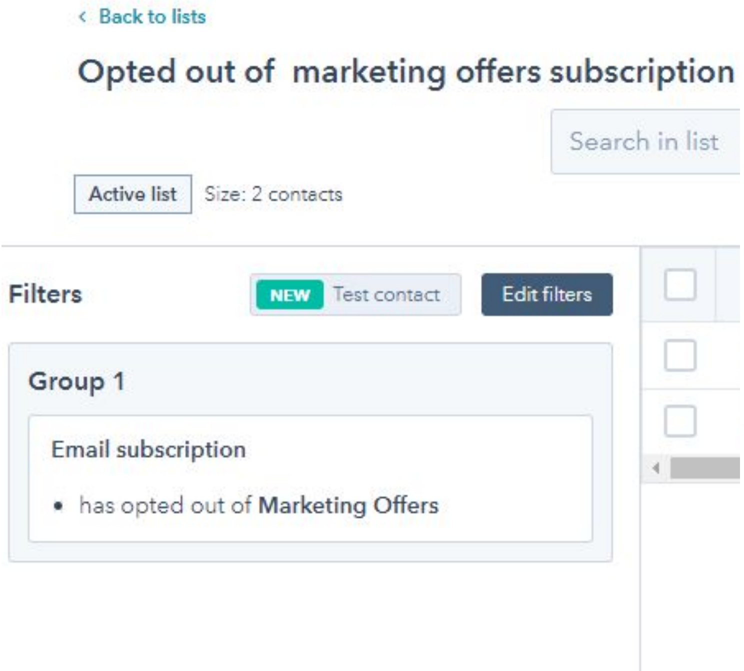


Delay until a date: Webinar Nurturing

- When the webinar is over, send a survey

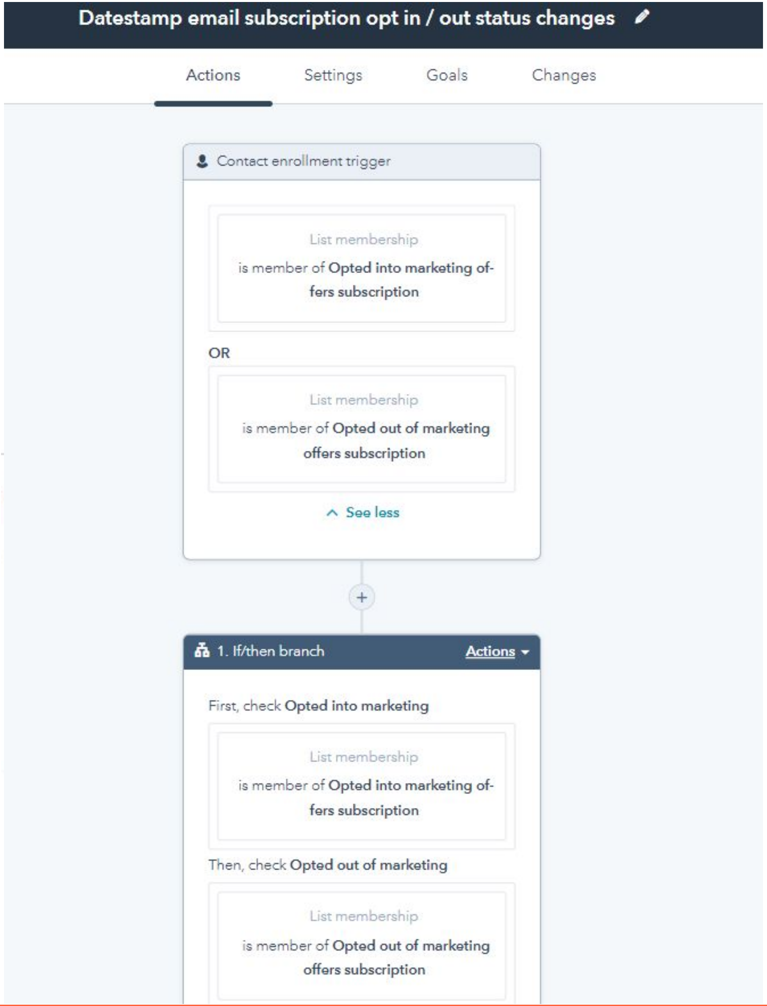
Datestamping: Report on Email Subscription Opt Outs and/or Opt Ins Over Time

- Create active contact lists based on email subscription opted out / opted in status



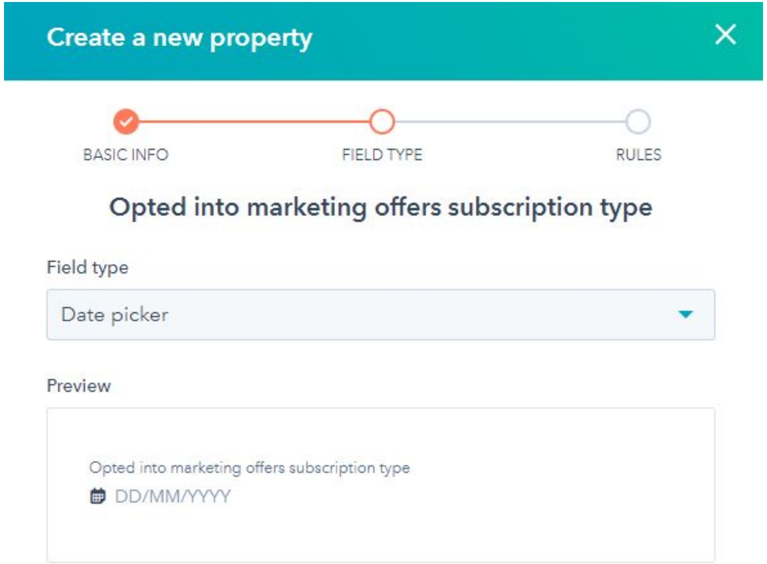
Datestamping: Report on Email Subscription Opt Outs and/or Opt Ins Over Time

- Trigger a workflow based on list membership
- Use an if/then branch for different scenarios



Datestamping: Report on Email Subscription Opt Outs and/or Opt Ins Over Time

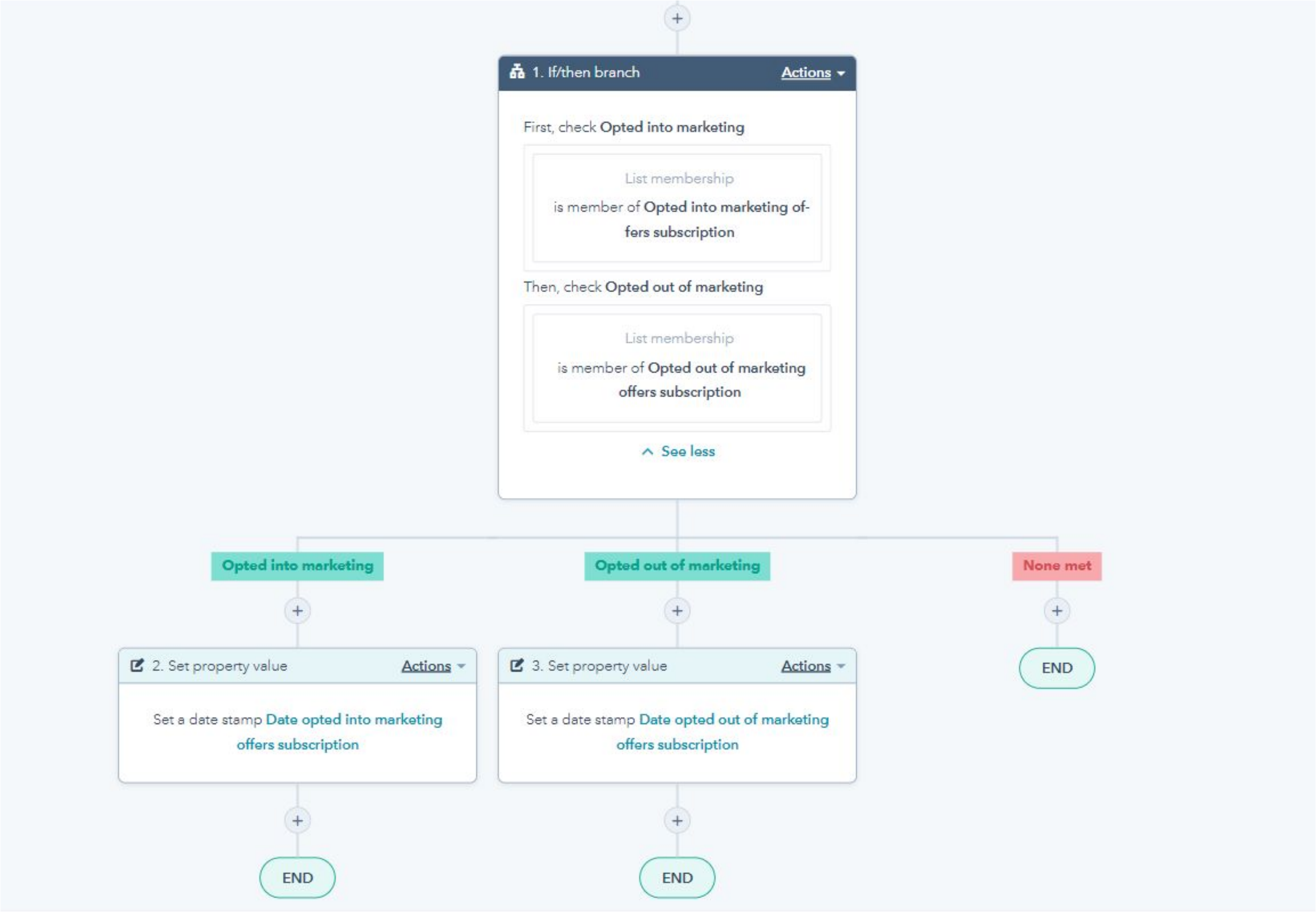
- Prepare custom date properties to store date of opt-in or opt-out for each subscription type



Datestamping: Report on Email Subscription Opt Outs and/or Opt Ins Over Time

- Set the relevant opt-in / opt-out date property to ‘date of step’

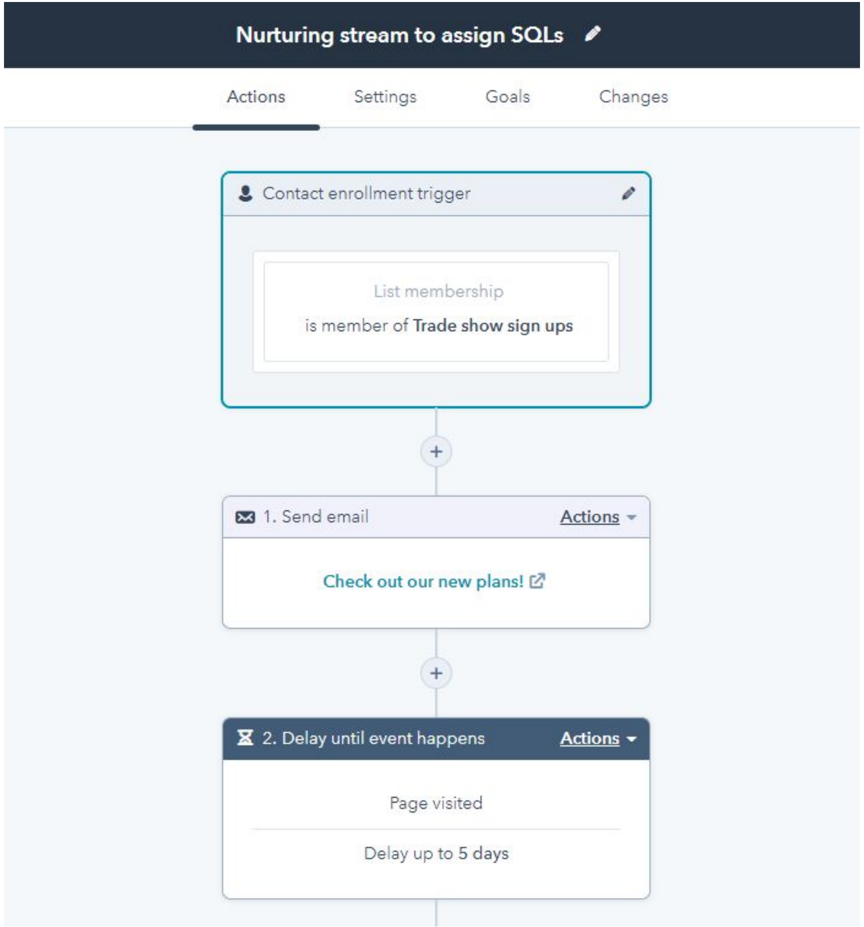
- Create custom reports using this date property to show opt-ins and opt-outs over time.



Sales Automations

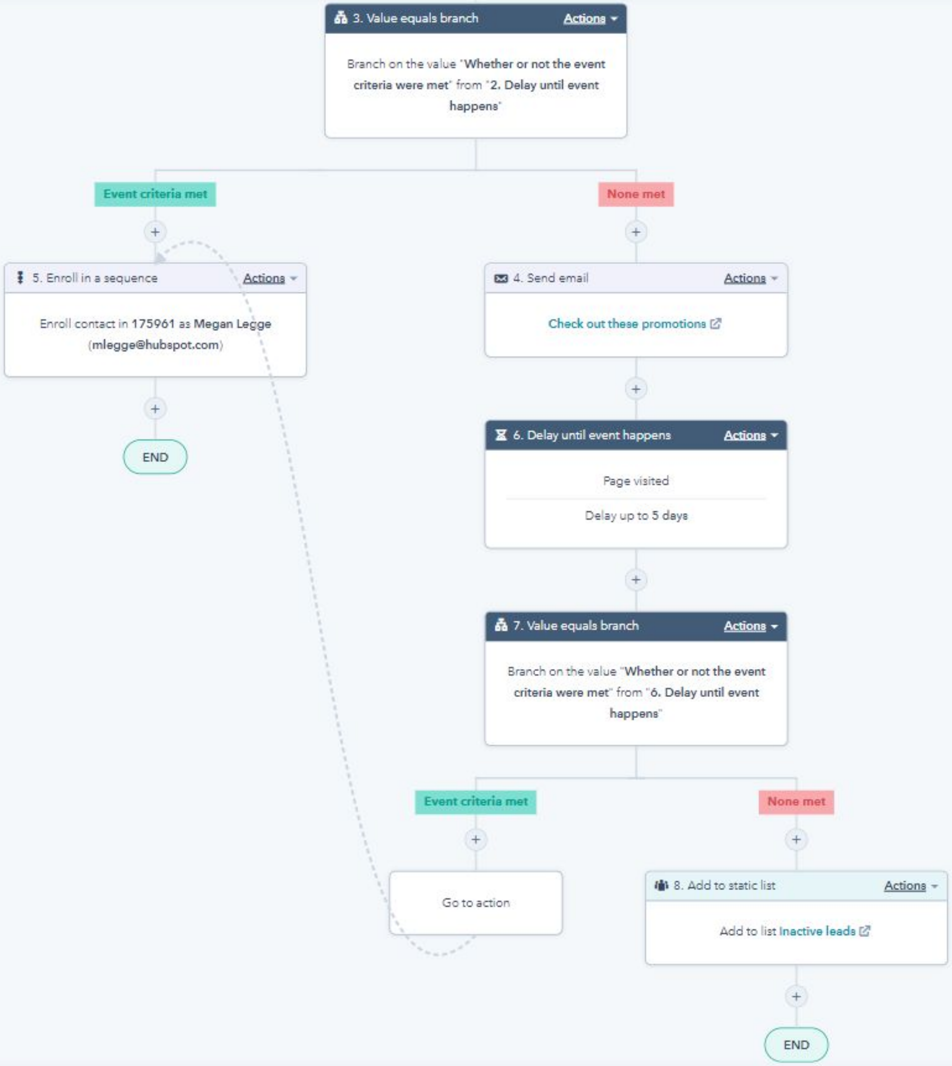
Delay Until Event: Nurture Leads to SQLs

- Enroll leads and begin nurturing
- ‘Delay until event happens’ action: page visit *or* 5 days



Delay Until Event: Nurture Leads to SQLs

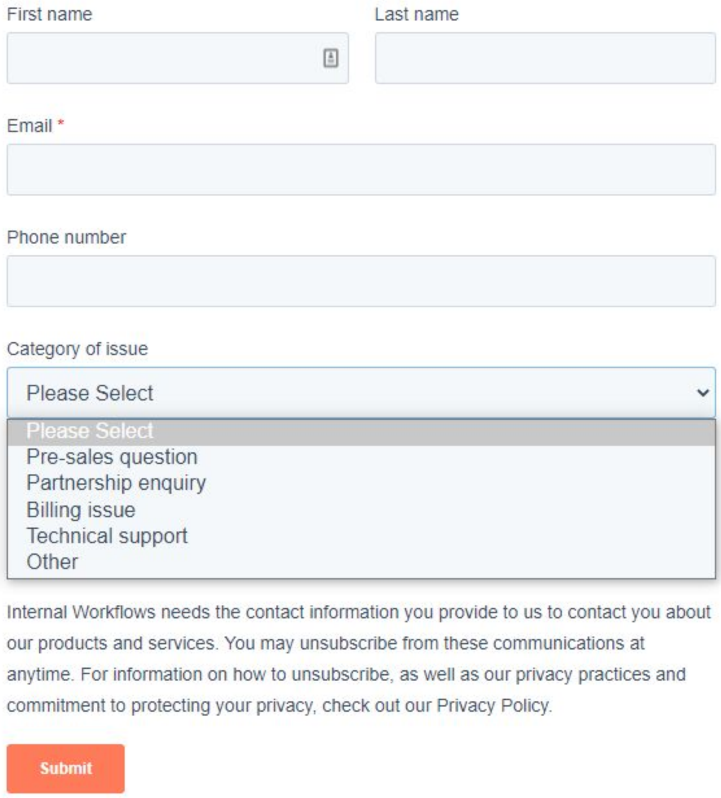
- Check: page visit *or* 5 days?
- If page visit > SQL
- If 5 days with no engagement nurture again, repeat logic
- Weed out inactive leads



Service Automations

Ticket Handling: Ticket Creation, Routing, and Rotating Ticket Ownership

- Create a regular form with a dropdown for routing


First name
Last name
Email *
Phone number
Category of issue
Please Select
Please Select
Pre-sales question
Partnership enquiry
Billing issue
Technical support
Other
Internal Workflows needs the contact information you provide to us to contact you about our products and services. You may unsubscribe from these communications at anytime. For information on how to unsubscribe, as well as our privacy practices and commitment to protecting your privacy, check out our Privacy Policy.
Submit

Ticket Handling: Ticket Creation, Routing, and Rotating Ticket Ownership

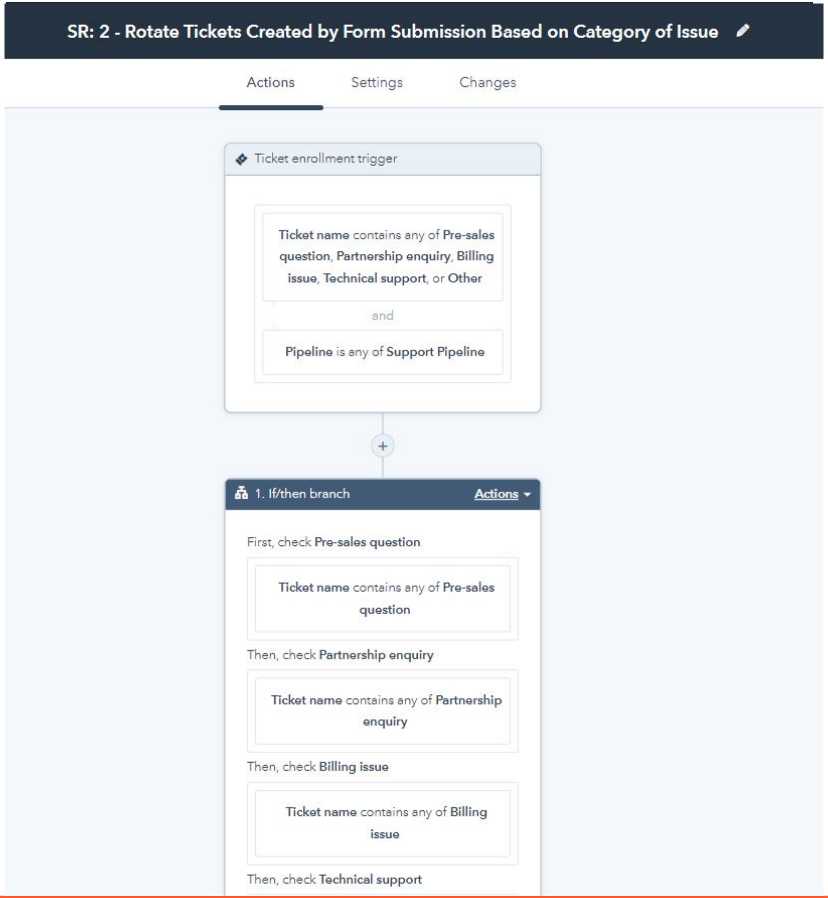
- Workflow 1 creates a ticket using our category of issue dropdown in the name

- No owner assigned at this point

Ticket Handling: Ticket Creation, Routing, and Rotating Ticket Ownership

- Workflow 2 checks for new ticket names containing our category of issue

- Routes and then rotates ticket using if/then branch (multiple branches)



Ticket Handling: Ticket Creation, Routing, and Rotating Ticket Ownership

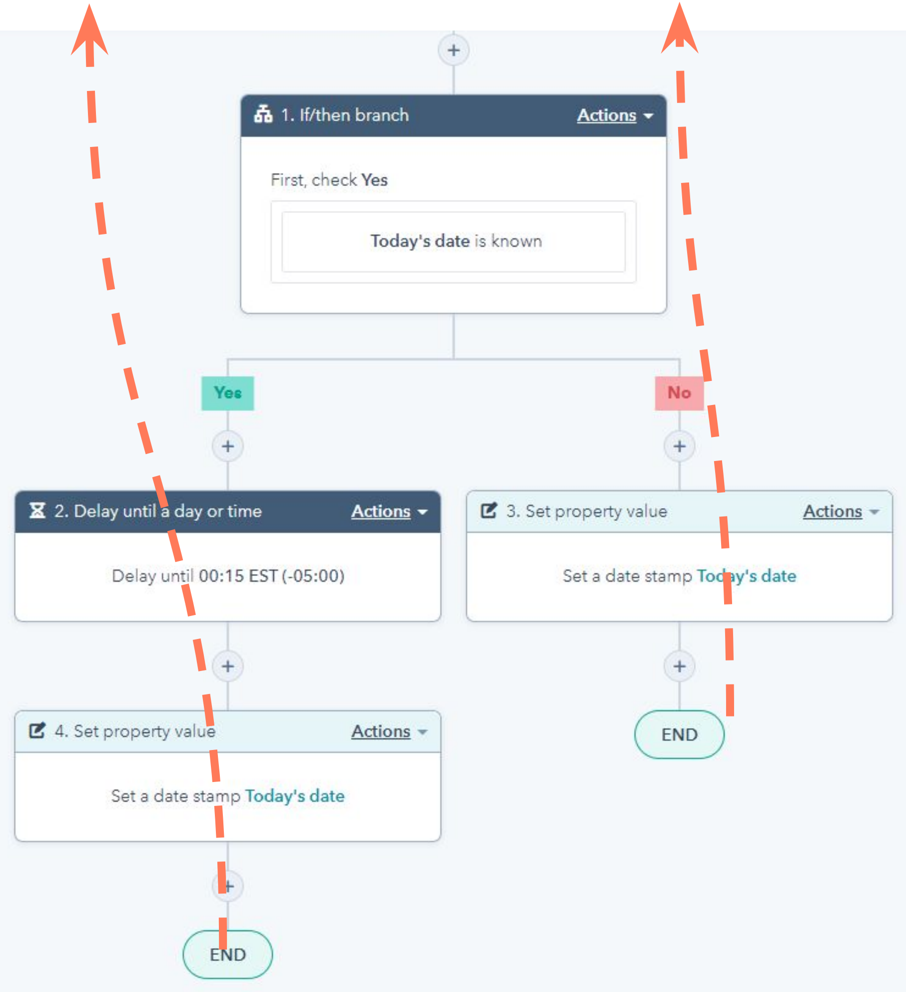
Operations Automations

Calculation: Calculating time between a date property and today (without Ops Hub Pro+)

- Want to figure out how much time has past between a date property and today?
- Create a custom date property in your record to store today's date.
- Create a workflow that enrolls & re-enrolls records if Today's date is known OR if Today's date is unknown.
- Use an if/then branch to check if we are setting Today's date for the first time.

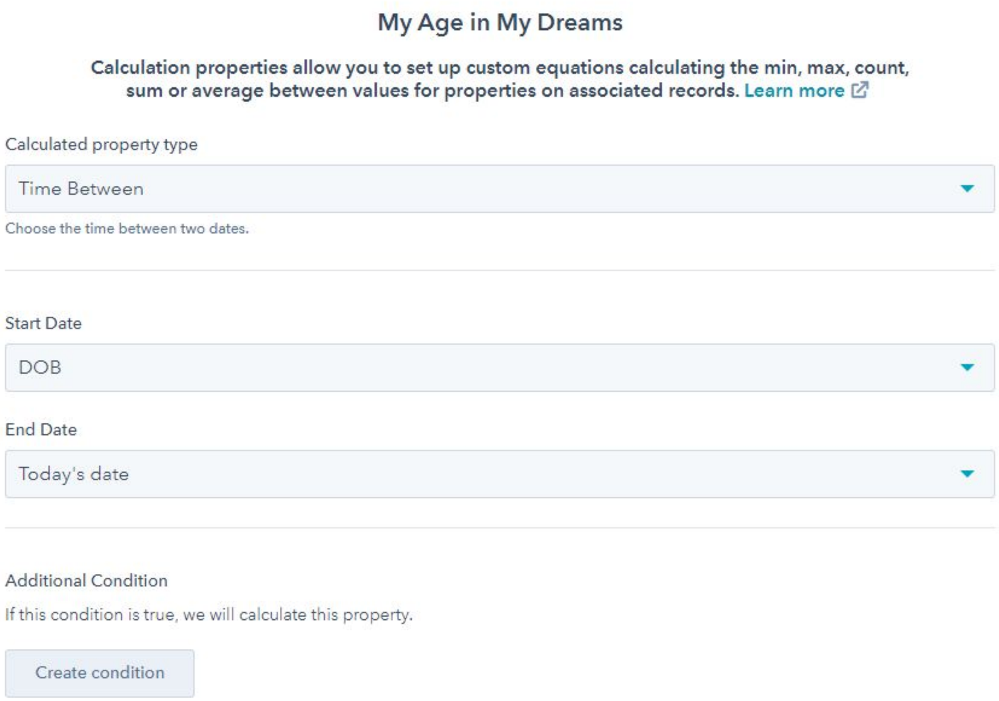
Calculation: Calculating time between a date property and today (without Ops Hub Pro+)

- If today's date is unknown we set Today's date to 'date of step'. Now our record will enroll again
- If today's date is known we delay until tomorrow
- Tomorrow we will set Today's date to the 'date of the step'
- As Today's date has been updated again the record will re-enroll



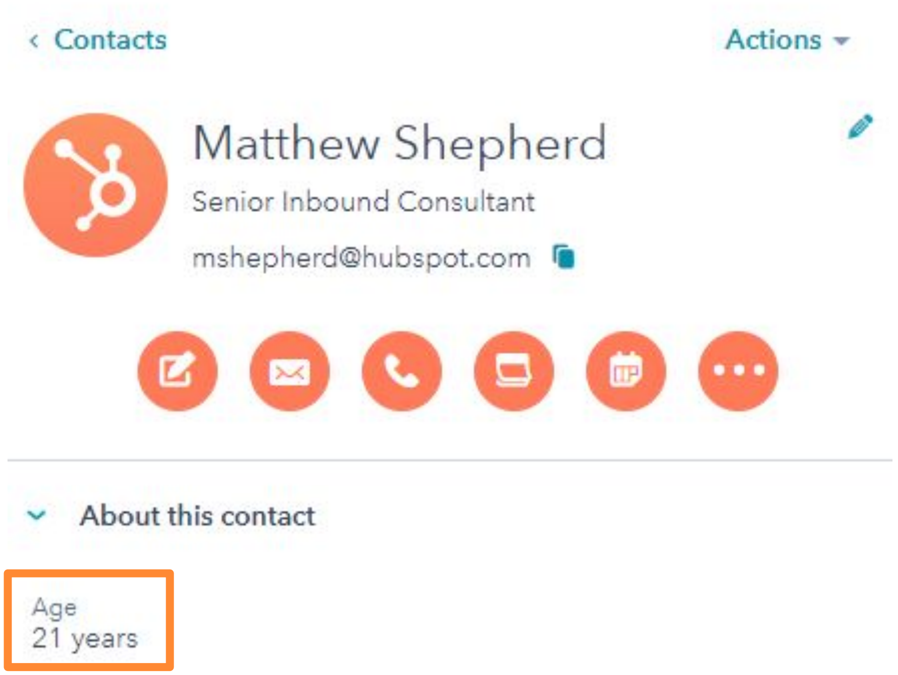
Calculation: Calculating time between a date property and today (without Ops Hub Pro+)

- Let’s say we are collecting contact date of birth in a custom ‘DOB’ date property and we want to calculate contact age
- Create a custom ‘Time Between’ calculation property
- Set DOB as Start and Today’s Date as End



Calculation: Calculating time between a date property and today (without Ops Hub Pro+)

- And bingo. I'm 21…again!

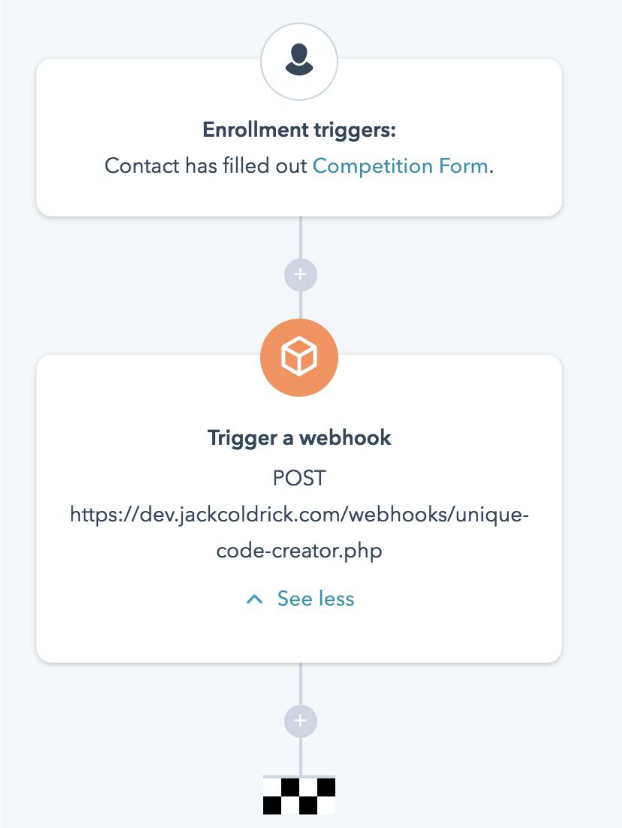


Bonus: Operations Automations

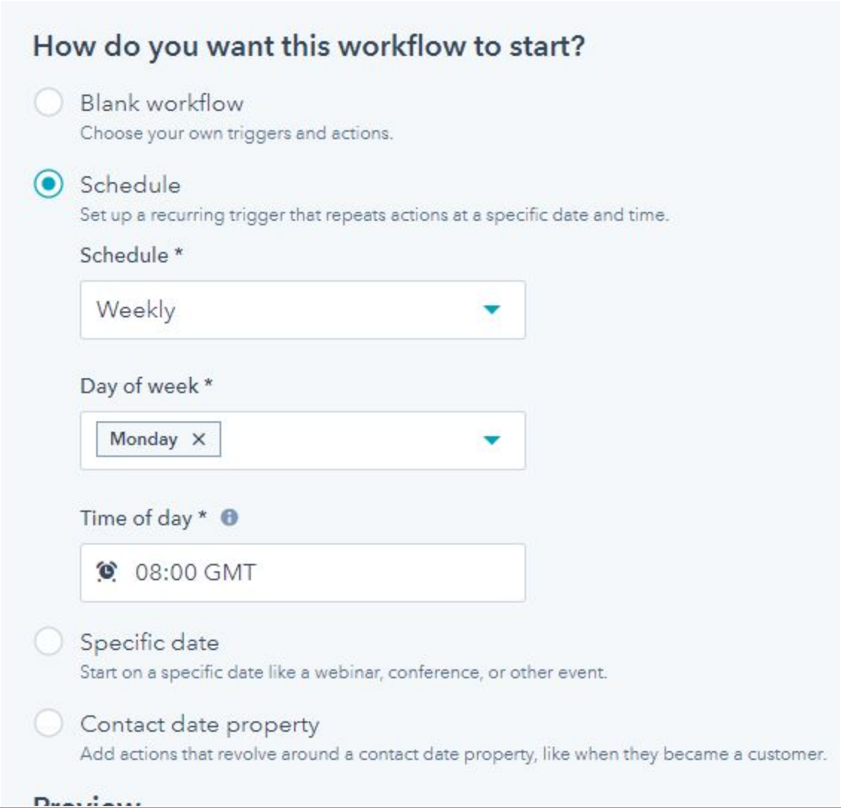
Webhooks

Allow you to send or retrieve information between HubSpot and other external tools directly from a workflow. Improves transparency across systems. Also helps maintain data integrity.

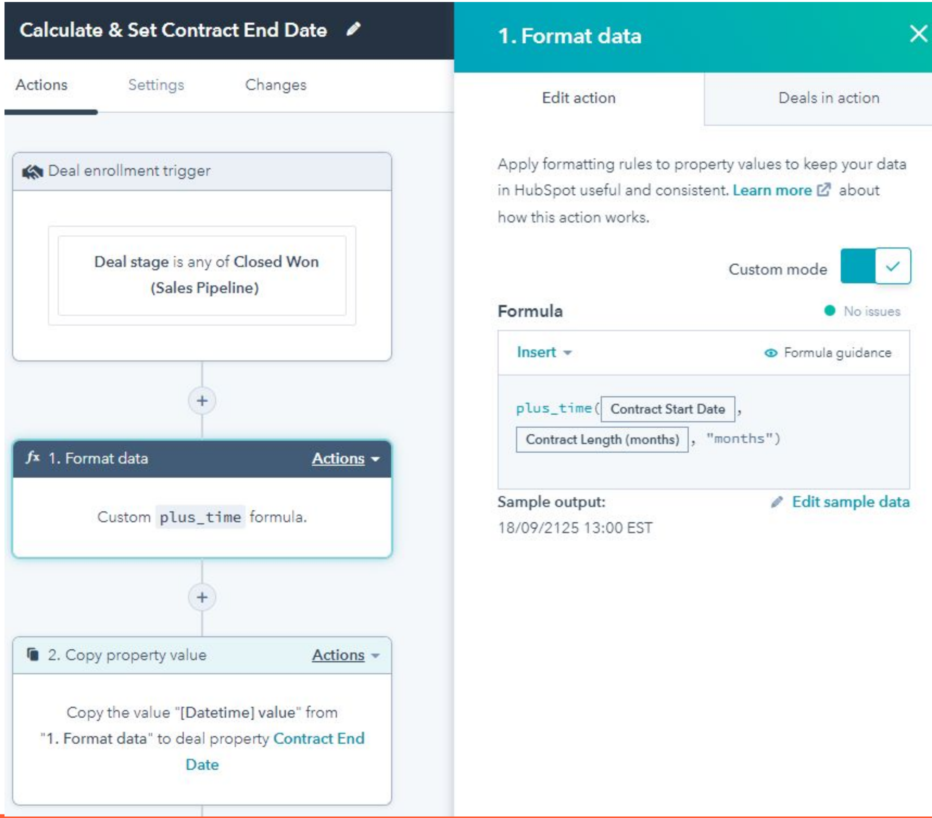
- Slack Channel
- Another CRM
- SMS Service
- External Database
- Custom Script



- Use scheduled triggers to recur workflows at custom intervals!



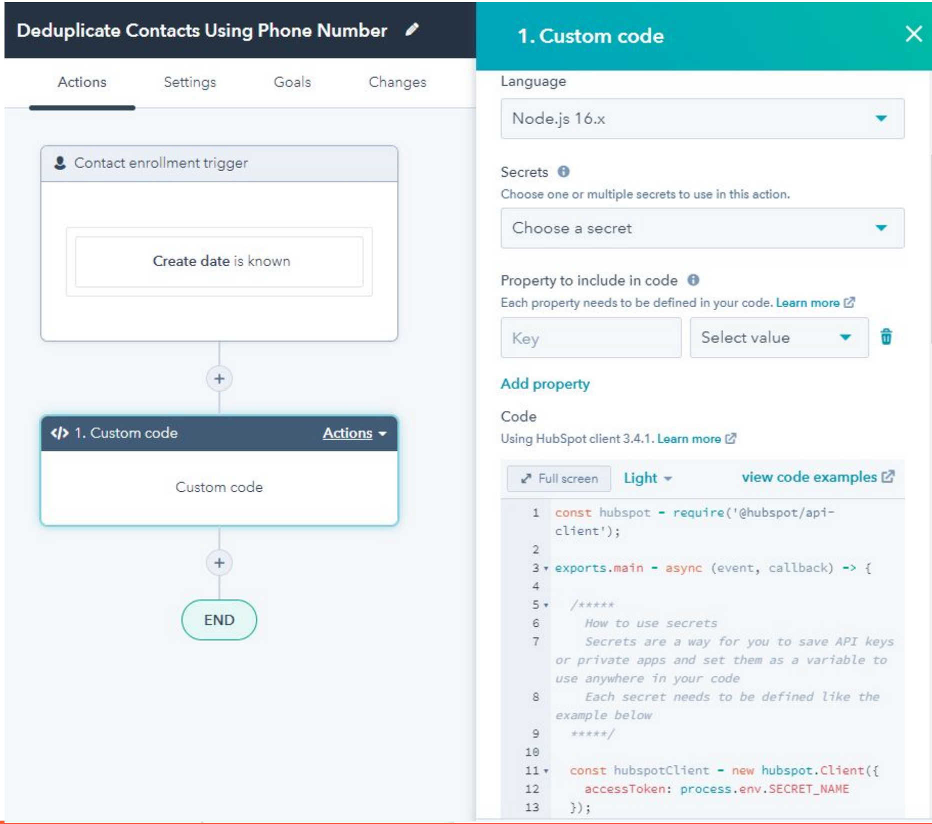
- [Format data actions](#) allow you to easily fix, format, and maintain your CRM data.



Scheduled triggers, Custom code actions, Programmable automation

Operations Hub™ Pro/Enterprise

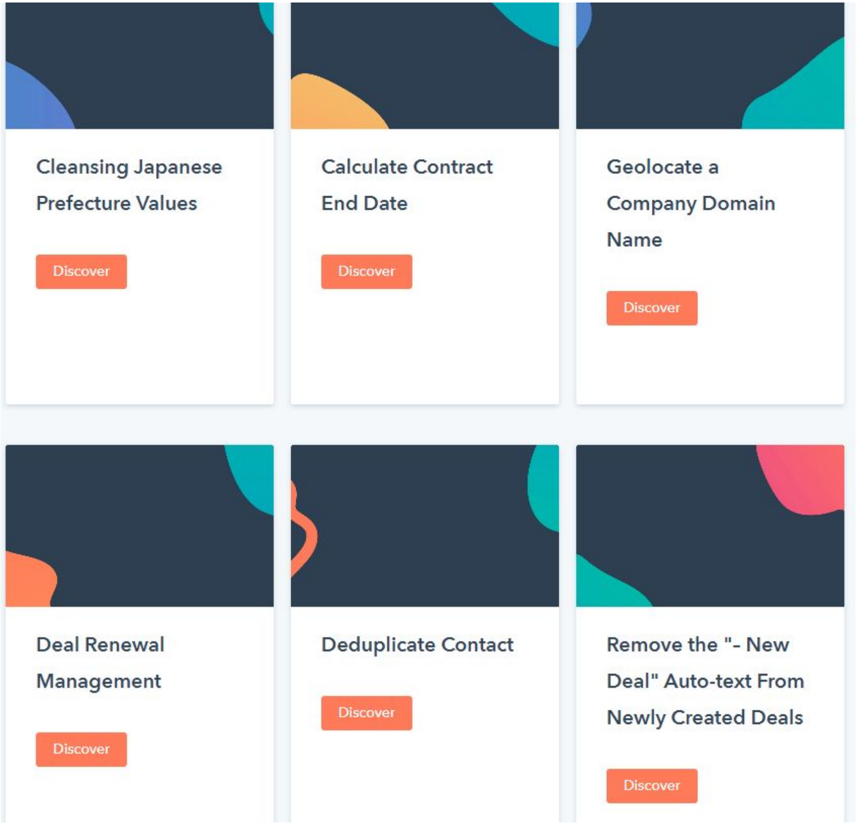
- Use [custom code workflows actions]() to execute JavaScript or Python and create your own custom processes using your own rules!
- Interact with the HubSpot API, external APIs, databases and more!



Programmable Automation Library provides examples and inspiration!

https://www.hubspot.com/programmable-automation-use-cases

https://developers.hubspot.com/docs/api/workflows/custom-code-actions



NEED HELP WITH AUTOMATION?

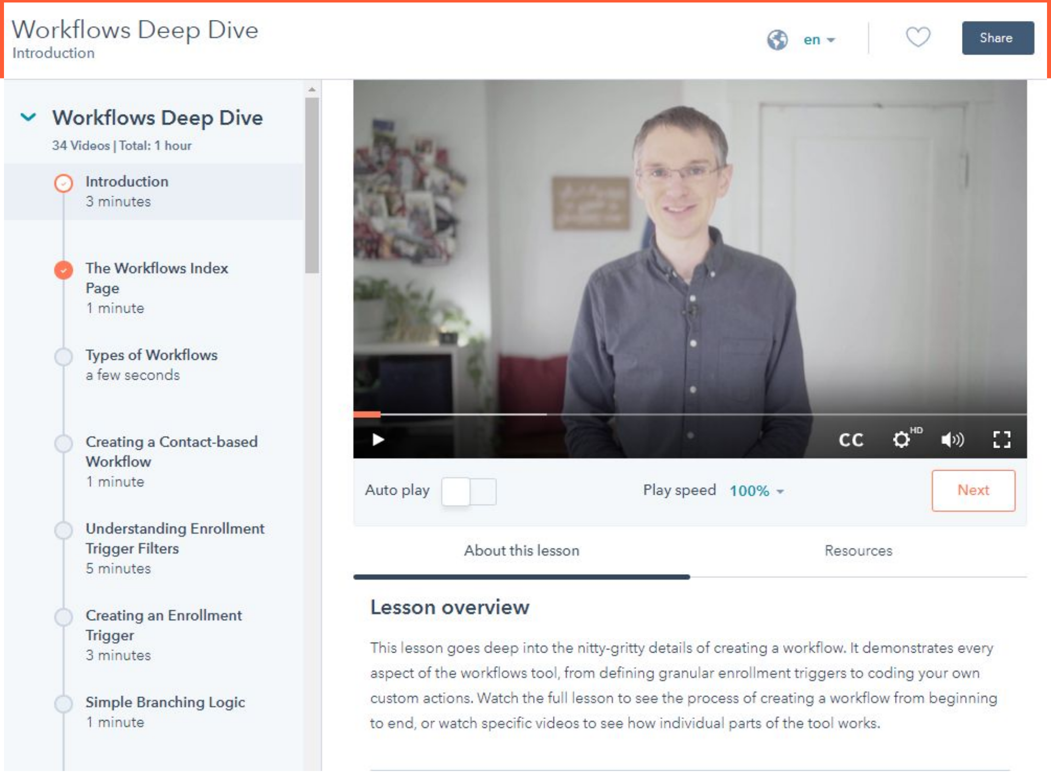
Connect with a Strategic Consultant

https://hubs.la/Q01sG9Z70

Resources

Workflows Deep Dive Academy Course

https://academy.hubspot.com/lessons/workflows-deep-dive



Questions

Q&A

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Thank you

HubSpot