

Advanced Workflow Examples and Best Practices

for Every HubSpot Team



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 \neq 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

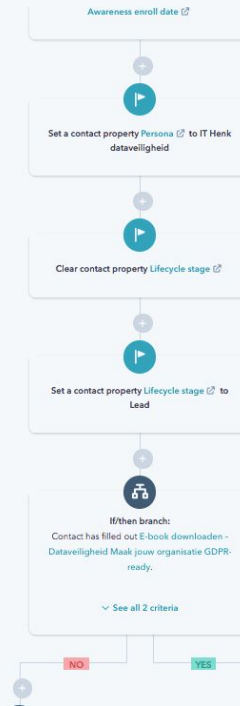
- Repetitive manual processes
- The execution and scaling of clearly documented content strategy, data management processes, and business processes
- Internal and external communications based on reliable data

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

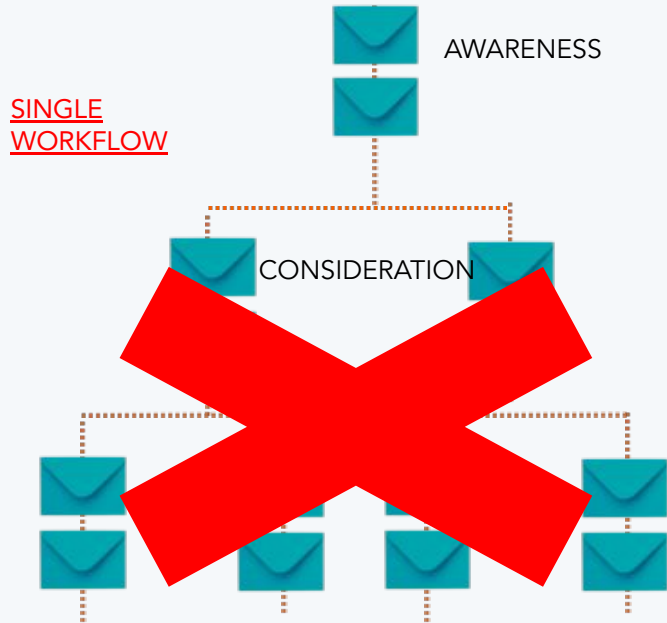
Is this an advanced workflow?



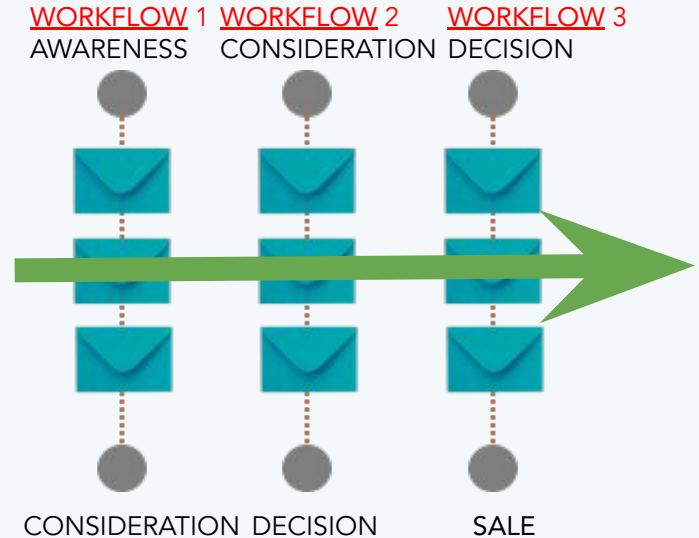
When creating workflows start
with your outcome in mind.

What is the primary outcome this
workflow should achieve?

So how do we manage complexity?



VS



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 especially
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) because 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".

Workflow Naming Conventions

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 - LN: Lead Nurturing
- Buyer Persona
- Stage of the Buyer's Journey
- Date/Time Frame

Workflows
86 Workflows

Created in workflows | Created in other tools

Search for workflows **Status** ▾ **Creator** ▾

<input type="checkbox"/>	NAME
<input type="checkbox"/>	Marketing - UK&I - Lead Nurture 12 workflows
<input type="checkbox"/>	Admin - Recurring Data Management 9 workflows
<input type="checkbox"/>	Service - NAM - Service Routing 1 workflow
<input type="checkbox"/>	Service - UK&I - Service Routing 1 workflow
<input type="checkbox"/>	Service - DACH - Service Routing 1 workflow
<input type="checkbox"/>	Sales - NAM - Lead Routing 3 workflows
<input type="checkbox"/>	Sales - UK&I - Lead Routing 3 workflows
<input type="checkbox"/>	Sales - DACH - Lead Routing 3 workflows
<input type="checkbox"/>	Marketing - DACH - Lead Nurture 12 workflows
<input type="checkbox"/>	Marketing - NAM - Lead Nurture 12 workflows

Workflows
12 Workflows

Created in workflows | Created in other tools | W

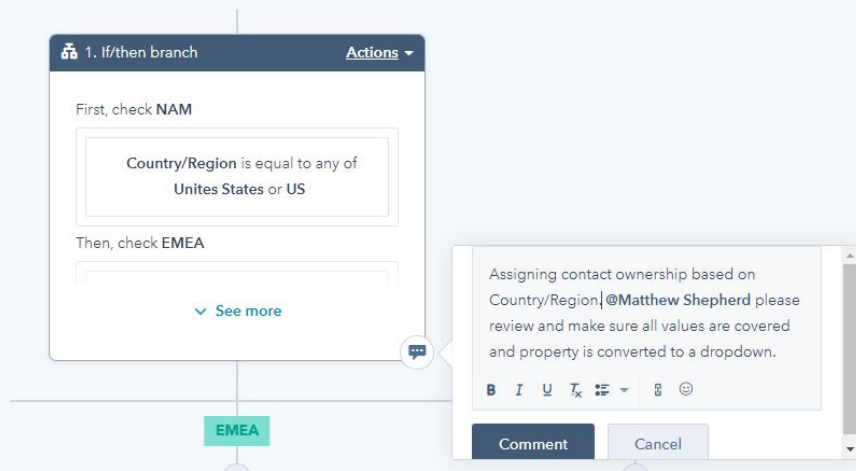
< **Marketing - UK&I - Lead Nurture**

Search for workflows **Status** ▾ **Creator** ▾

<input type="checkbox"/>	NAME
<input type="checkbox"/>	LN - UK&I - Long Term Nurture - Inbound Strategy ● On
<input type="checkbox"/>	LN - UK&I - Decision - Inbound Strategy - Evergreen ● On
<input type="checkbox"/>	LN - UK&I - Consideration - Inbound Strategy - Evergreen ● On
<input type="checkbox"/>	LN - UK&I - Awareness - Inbound Strategy - Evergreen ● On
<input type="checkbox"/>	LN - UK&I - Decision - Inbound Campaign - H1 22 ● On
<input type="checkbox"/>	LN - UK&I - Consideration - Inbound Campaign - H1 22 ● On
<input type="checkbox"/>	LN - UK&I - Awareness - Inbound Campaign - H1 22 ● On

Workflow descriptions & comments

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



The screenshot shows the "Edit workflow name and description" dialog box. At the top, it says "Workflow is OFF" and has a "Review and publish" button. Below are "Enroll", "Test", and "More" buttons. A dropdown menu is open, showing "Clone", "Edit name and description", "View", "Export", and "Delete". The dialog itself has a teal header with the title and a close button. It contains a "Name *" field with the text "SALES EN: SQL ASSIGNMENT AND NOTIFICATI" and a "Description" field with the text: "Marketing to sales handoff 🍷
Rotate the assignment of MQLs to the US EN sales team based on region when MQLs meet minimum scoring criteria and move lifecycle stage to SQL." At the bottom are "Save" and "Cancel" buttons.

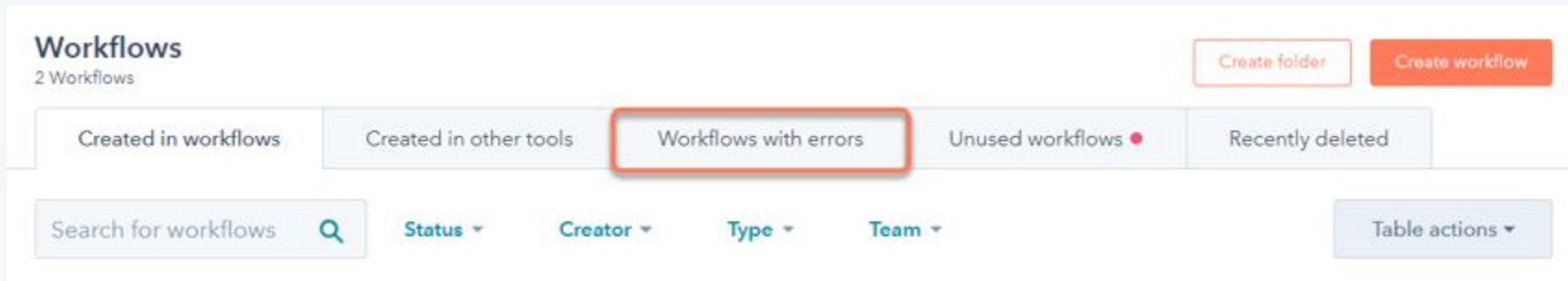
Before
publishing your
workflow...

Test, test and
test again!

The screenshot displays the HubSpot workflow editor interface. At the top, a dark header shows the workflow name: "Datestamp email subscription opt in / out status". Below this, there are tabs for "Set goal", "Actions", and "Settings". The main workspace shows a "Contact enrollment trigger" step. The trigger condition is "List membership is member of Opted into marketing offers subscription". Below this, there is an "OR" section with a search bar and a "See more" link. A plus sign at the bottom indicates where to add more steps.

Overlaid on the right is a "Test" modal. It contains the following text: "Choose a contact to preview how this workflow will behave for it. This preview won't enroll the contact, and no steps will be executed." Below this is a "Preview for" section with a dropdown menu labeled "Select a contact". There is an unchecked checkbox with the text "Send me the HubSpot emails this workflow would deliver" and a sub-note: "Email failures may indicate issues sending to the user running the test, and are unrelated to the previewed contact. [Learn more](#)". At the bottom of the modal is a "Test" button.

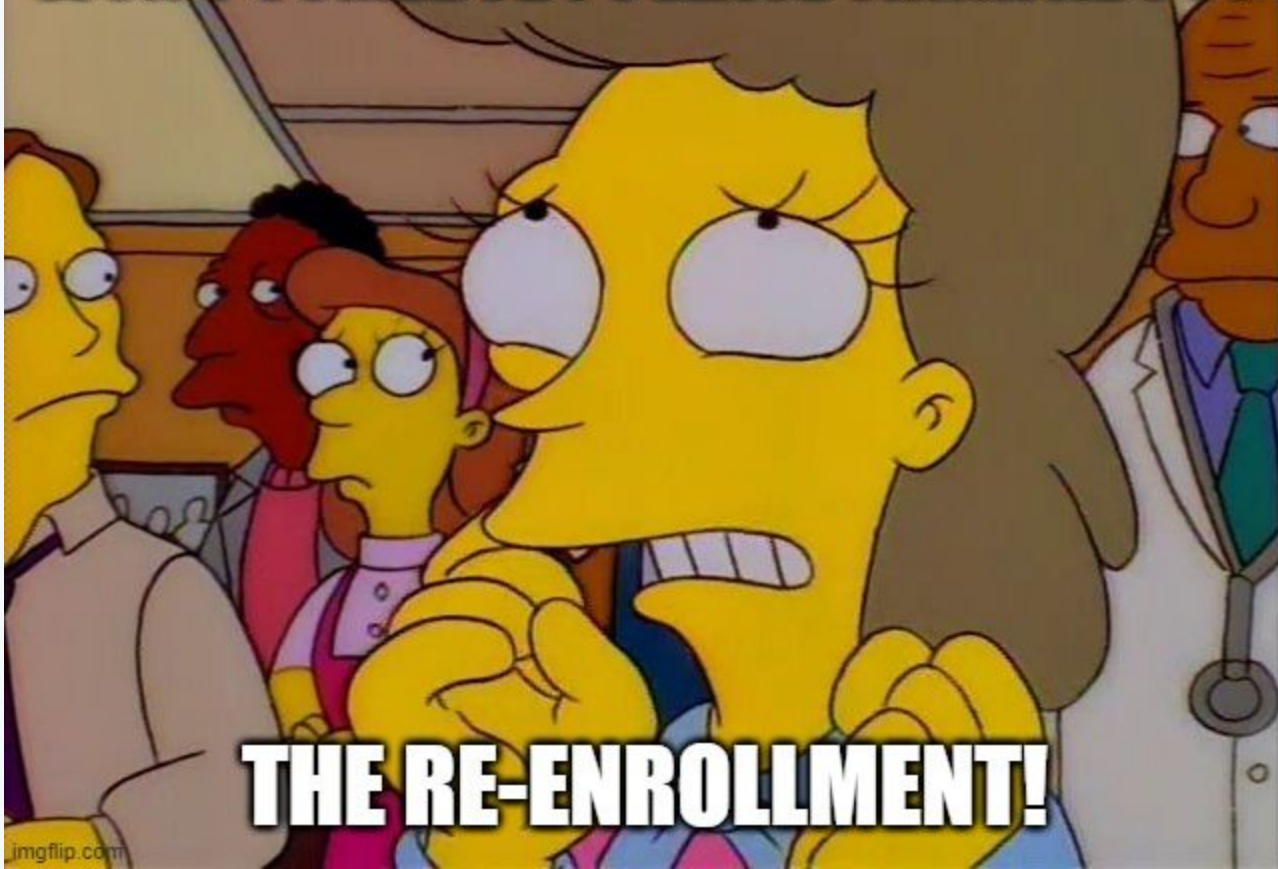
Monitor your workflows for errors



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

The screenshot displays a CRM workflow configuration interface. The main window is titled "Sales Pipeline - New deal alert - Slack" and has tabs for "Actions", "Settings", and "Changes". The workflow consists of two steps:

- Deal enrollment trigger**: A trigger box containing the condition "Create date is known".
- 1. Send Slack notification**: An action box with the message "New Deal!" to "Deal owner".

To the right, a settings panel titled "Enrollment triggers" is open, showing a "Re-enrollment" toggle set to "OFF". Below the toggle, it states: "Re-enroll deals if they meet the trigger criteria and any of the following occurs:"

- Deal is manually enrolled
- Create date is known

Enrollment issues

01

Allow re-enrollment?

Once vs many times

The screenshot displays a CRM workflow configuration for "EMEA - After Hours Help Request - New Ticket". The interface is divided into two main sections: "Enrollment triggers" and "Re-enrollment".

Enrollment triggers: A single trigger is configured: "Form submission has filled out **Help Request** on **Any page**".

Re-enrollment: This section is currently active and shows the following settings:

- Allow contacts who meet the trigger criteria to re-enroll when any one of the following occurs. [Learn more about re-enrollment](#).
- They are manually enrolled
- Form submission
- has filled out **Help Request** on **Any page**

A note below the re-enrollment settings states: "The following enrollment conditions can't be used for re-enrollment. [Learn more.](#)"

Actions: The workflow includes one action: "1. Create record". The action details are: "Create ticket '**Help Request -** Last Name, First Name' and assign it to **Contact owner**".

Enrollment issues

02


Re-enrollment not available

[Some properties cannot be used for re-enrollment.](#)

Enrollment triggers ×

Trigger	Re-enrollment
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Allow contacts who meet the trigger criteria to re-enroll when any one of the following occurs. [Learn more about re-enrollment](#) .

 They are manually enrolled

The following enrollment conditions can't be used for re-enrollment. [Learn more.](#)

At least one associated Activity has

- ★ Meeting end time is known



Enrollment issues

02

Re-enrollment not available

[Some properties cannot be used for re-enrollment.](#)

Enrollment triggers ✕

Trigger	Re-enrollment
<input checked="" type="checkbox"/> Allow contacts who meet the trigger criteria to re-enroll when any one of the following occurs. Learn more about re-enrollment .	
<input checked="" type="checkbox"/>  They are manually enrolled	
List membership	
<input checked="" type="checkbox"/>  is member of Meeting completed in past day	

The following enrollment conditions can't be used for re-enrollment. [Learn more.](#)

[← Back to lists](#)

Meeting completed in past day

Active list Size: Processing

Filters

NEW Test contact Edit filters

Group 1

At least one associated Activity has all of:

- **Meeting end time** is less than **1 day ago**

Enrollment issues

02

Re-enrollment not available

Pro tip: 'Property x is known'

The screenshot displays a configuration interface for enrollment triggers. The main title is "Respond When Priority Changes to High or Very High". Below this, there are tabs for "Actions", "Settings", "Goals", and "Changes". The "Trigger" tab is selected, showing a "Contact enrollment trigger" configuration. The trigger condition is "Contact priority is known". Below this, there is a plus sign indicating an "If/then branch" with the condition "Contact priority is any of High or Very High". To the right, the "Enrollment triggers" section is visible, with the "Re-enrollment" tab selected. It shows three checked options: "Allow contacts who meet the trigger criteria to re-enroll when any one of the following occurs.", "They are manually enrolled", and "Contact priority is known". A note states that the following enrollment conditions can't be used for re-enrollment: "Property x is known".

Respond When Priority Changes to High or Very High

Actions Settings Goals Changes

Enrollment triggers

Trigger Re-enrollment

Contact enrollment trigger

Contact priority is known

+

1. If/then branch Actions

First, check High / Very High

Contact priority is any of High or Very High

Allow contacts who meet the trigger criteria to re-enroll when any one of the following occurs. [Learn more about re-enrollment](#)

They are manually enrolled

★ Contact priority is known

The following enrollment conditions can't be used for re-enrollment. [Learn more.](#)

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.

Review before you turn on

Enrollment

 Existing contacts

2

[Use lists to see these contacts](#)

These contacts already meet the trigger criteria. Do you want to enroll them when this workflow turns on?

No, only enroll contacts who meet the trigger criteria after turning the workflow on

Yes, enroll existing contacts who meet the trigger criteria as of now

Consider Yes

- Update property values
- Re-rotate records

Consider No

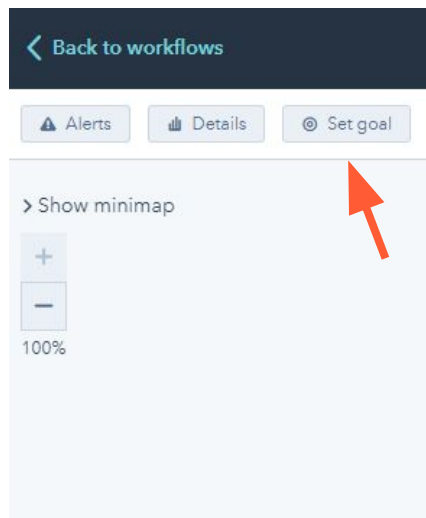
- Form follow-up email
- Task creation
- Internal notifications

Enrollment issues

04

Goals

Measure your workflows' performance, but be aware of [enrollment impact](#).



The screenshot shows a dark blue header with a back arrow and the text "Back to workflows". Below the header are three buttons: "Alerts" with a warning icon, "Details" with a bar chart icon, and "Set goal" with a target icon. A red arrow points to the "Set goal" button. Below the buttons is a light blue section with a "Show minimap" link and a vertical slider with a plus sign at the top, a minus sign at the bottom, and "100%" at the bottom.

Workflow goal

> Show minimap

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.](#)

Filter type

- Contact properties
- Company properties
- Deal properties
- Activity properties

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

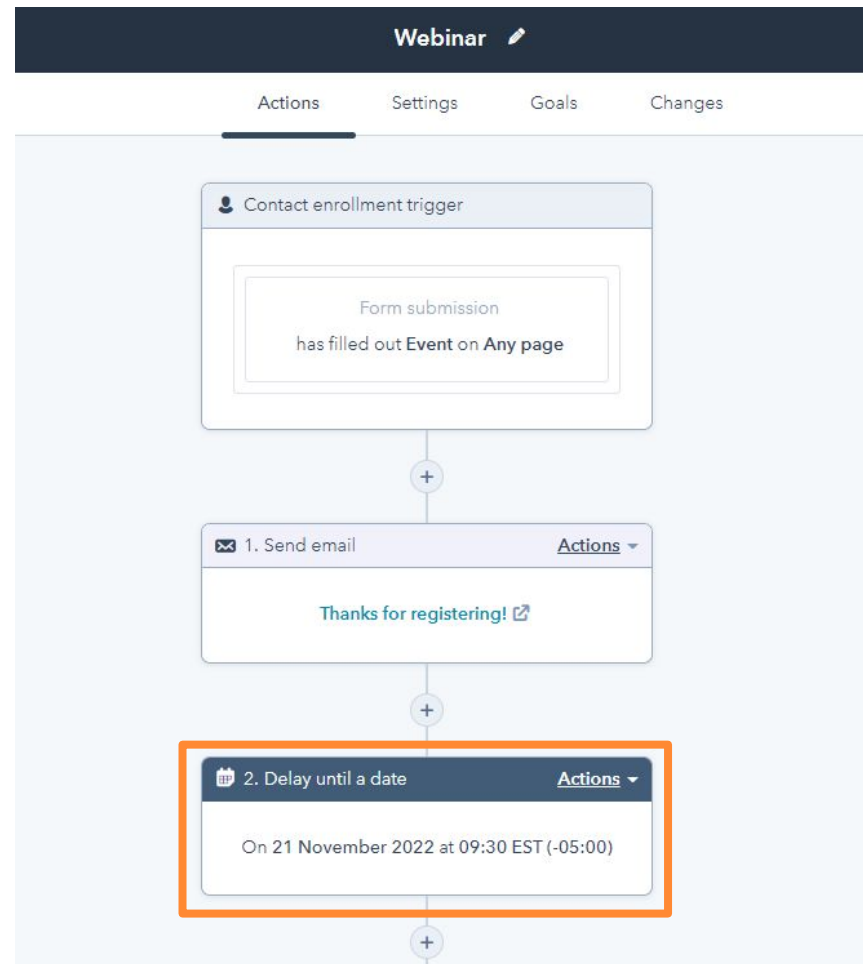
Automation Examples

Marketing Automations

Delay until a date: Webinar Nurturing

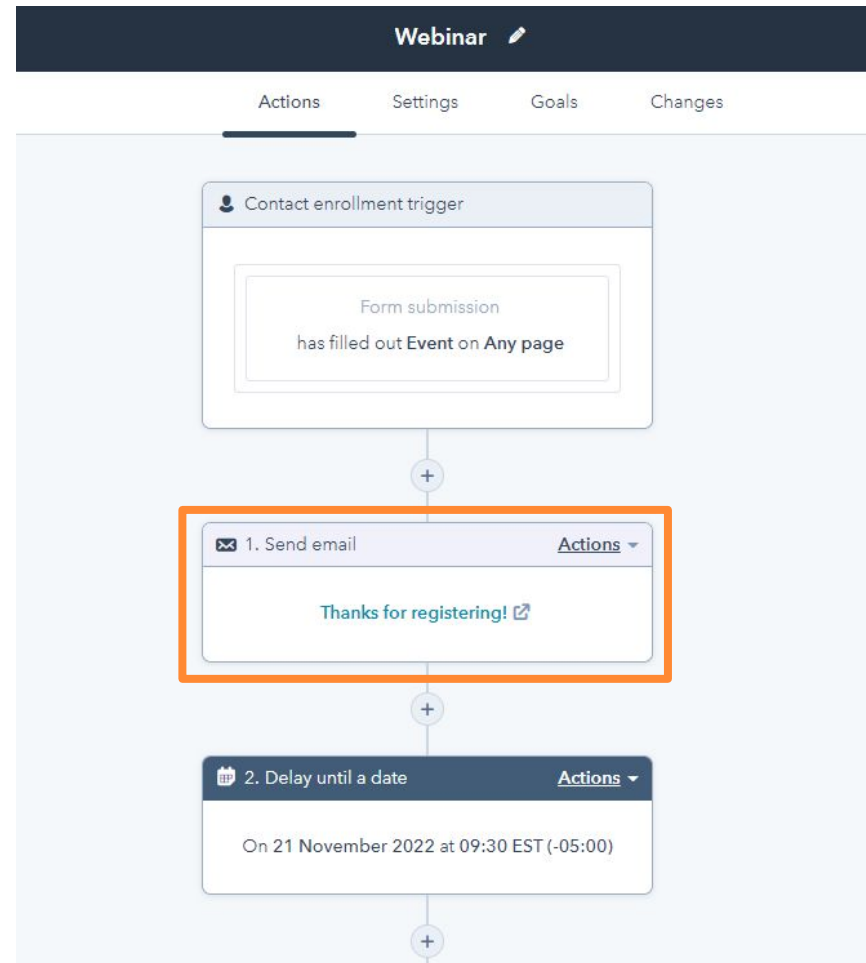
The NEW 'Delay until a date' action

- 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



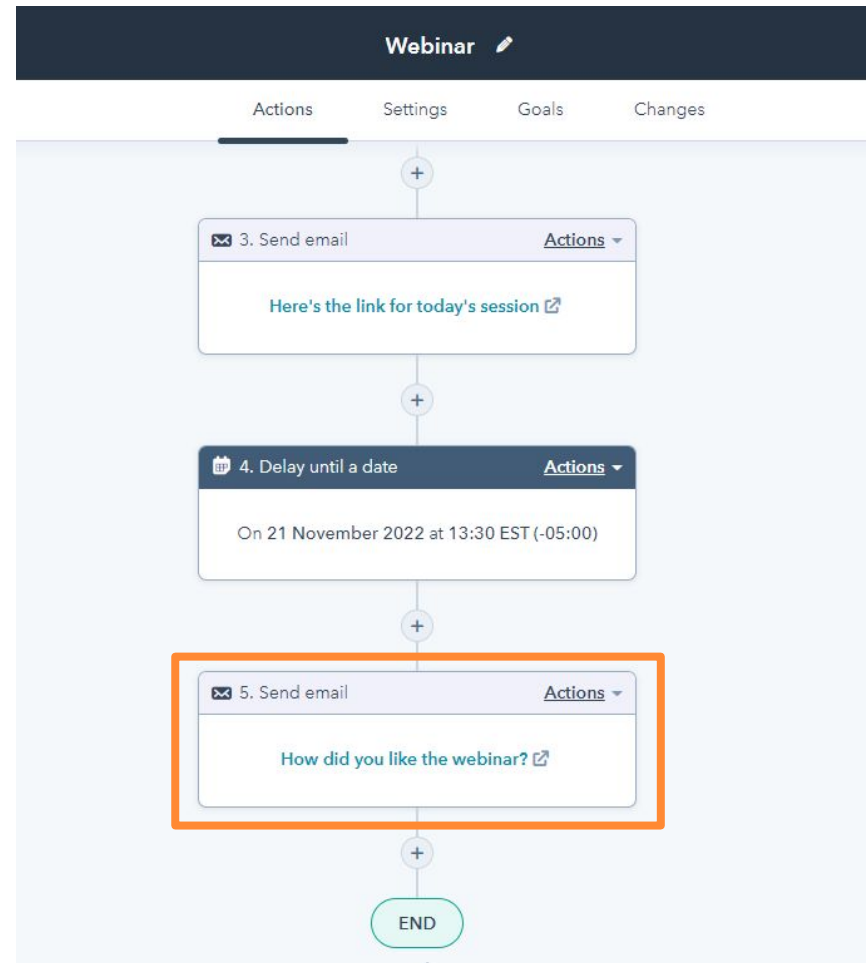
Delay until a date: Webinar Nurturing

- 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

< [Back to lists](#)

Opted out of marketing offers subscription

Search in list

Active list Size: 2 contacts

Filters NEW Test contact Edit filters

Group 1

Email subscription

- has opted out of Marketing Offers

The screenshot shows a HubSpot contact list interface. At the top, there is a link to 'Back to lists'. Below that is the title of the list, 'Opted out of marketing offers subscription', and a search box labeled 'Search in list'. A button labeled 'Active list' is shown next to the text 'Size: 2 contacts'. The main section is titled 'Filters' and contains a 'NEW Test contact' button and an 'Edit filters' button. Below the filters, there is a 'Group 1' section with a sub-section 'Email subscription' containing a single bullet point: 'has opted out of Marketing Offers'. On the right side of the interface, there is a vertical sidebar with three checkboxes and a scroll bar.

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

Datestamp email subscription opt in / out status changes ✎

Actions Settings Goals Changes

Contact enrollment trigger

List membership is member of Opted into marketing offers subscription

OR

List membership is member of Opted out of marketing offers subscription

^ See less

+

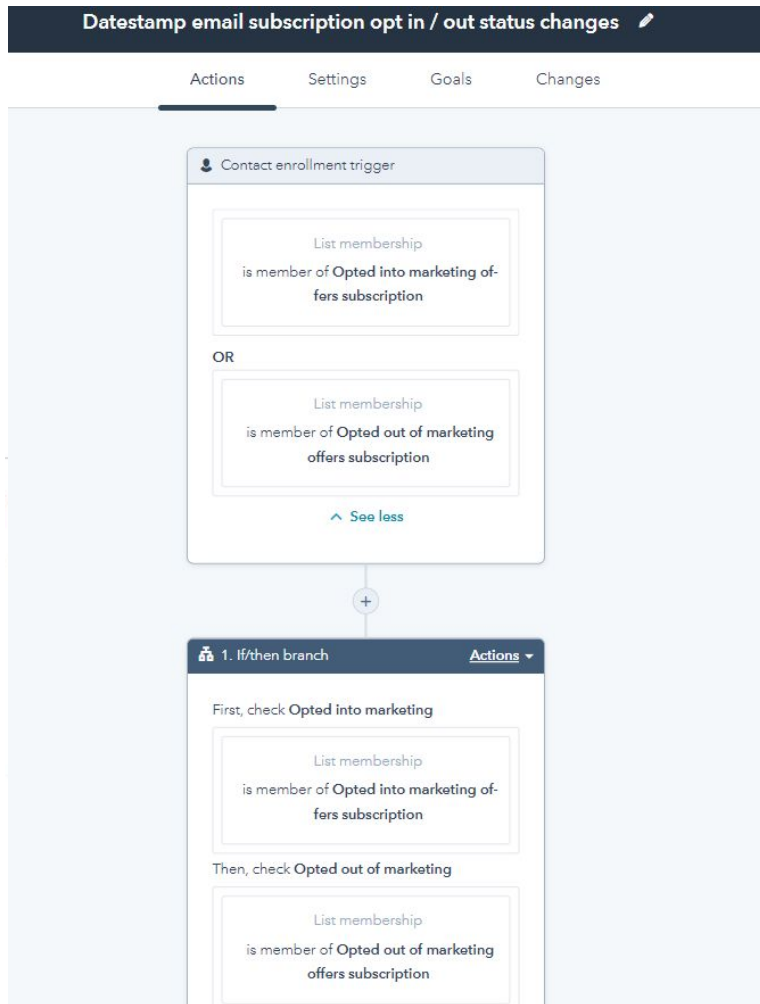
1. If/then branch Actions ▾

First, check Opted into marketing

List membership is member of Opted into marketing offers subscription

Then, check Opted out of marketing

List membership is member of Opted out of marketing offers subscription



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

Create a new property ✕

BASIC INFO **FIELD TYPE** RULES

Opted into marketing offers subscription type

Field type

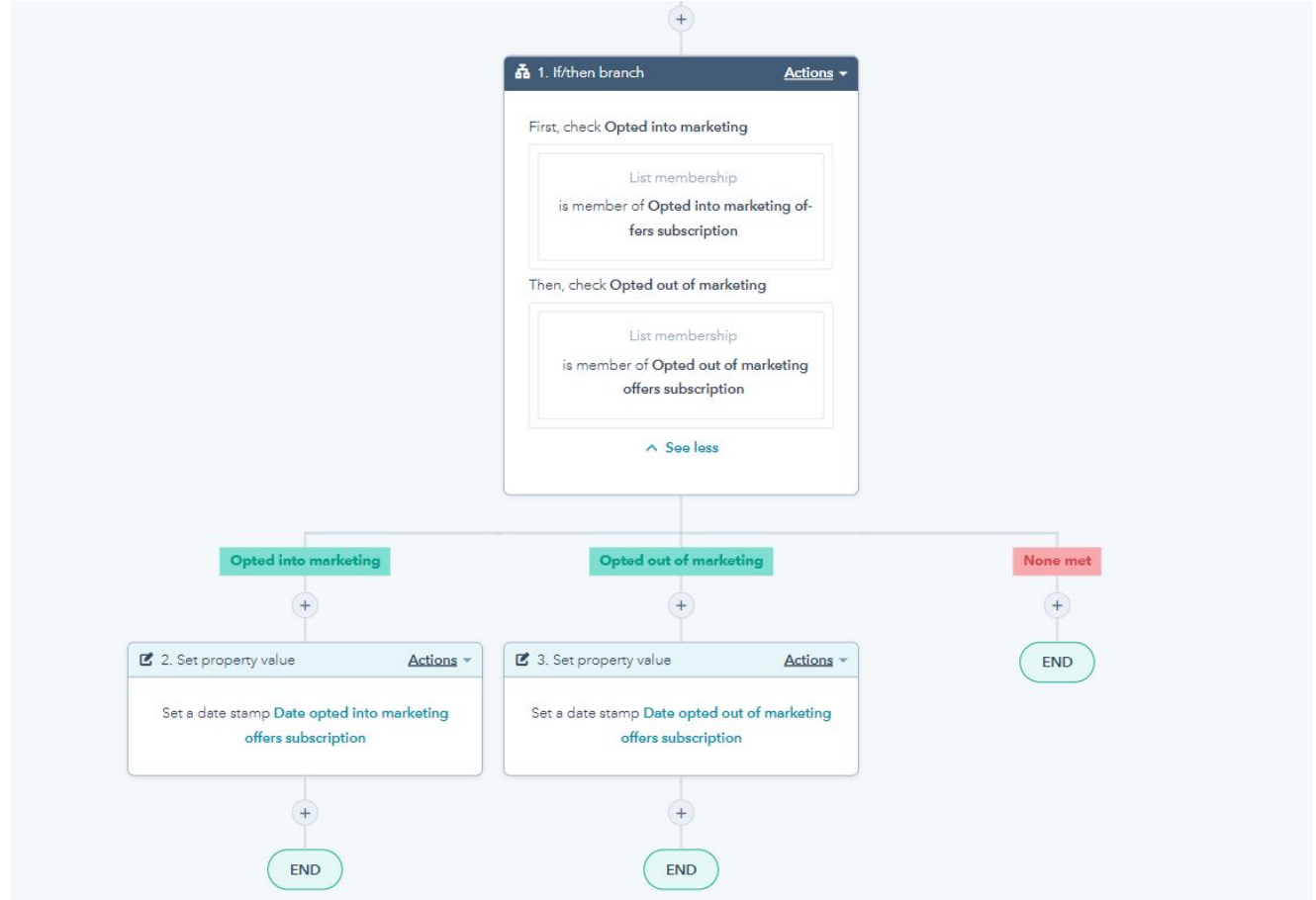
Date picker ▾

Preview

Opted into marketing offers subscription type
📅 DD/MM/YYYY

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

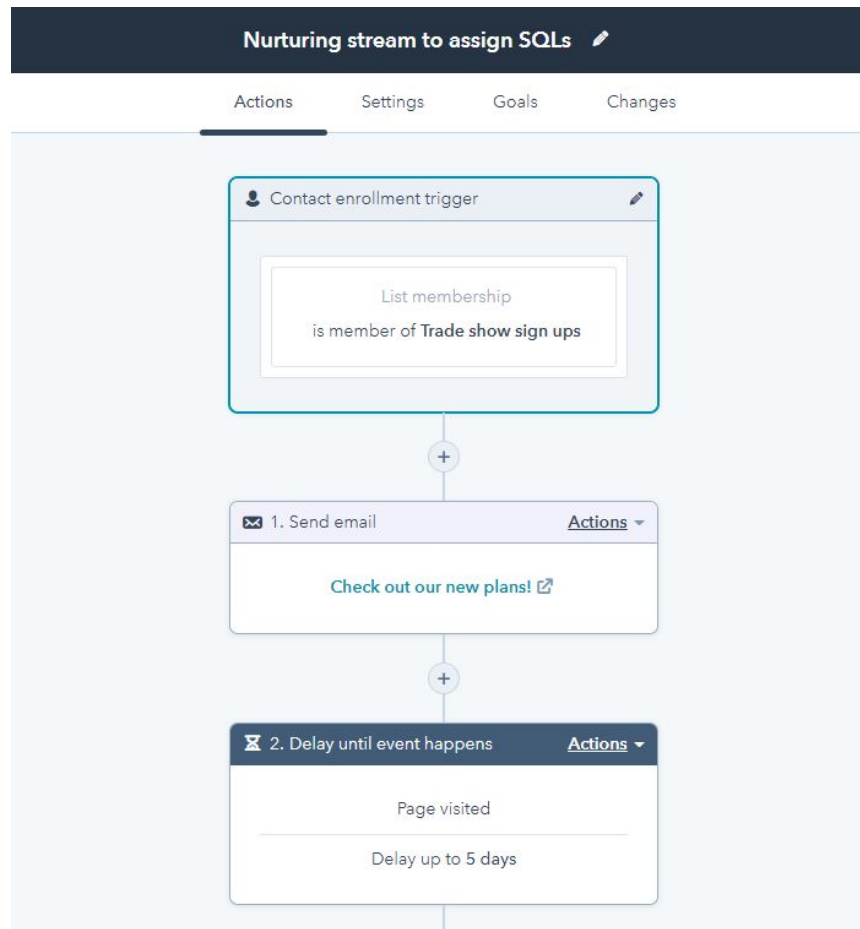
- Set the relevant opt-in / opt-out date property to 'date of step'
- Create custom reports using this date property to show opt-ins and opt-outs over time.



Sales Automations

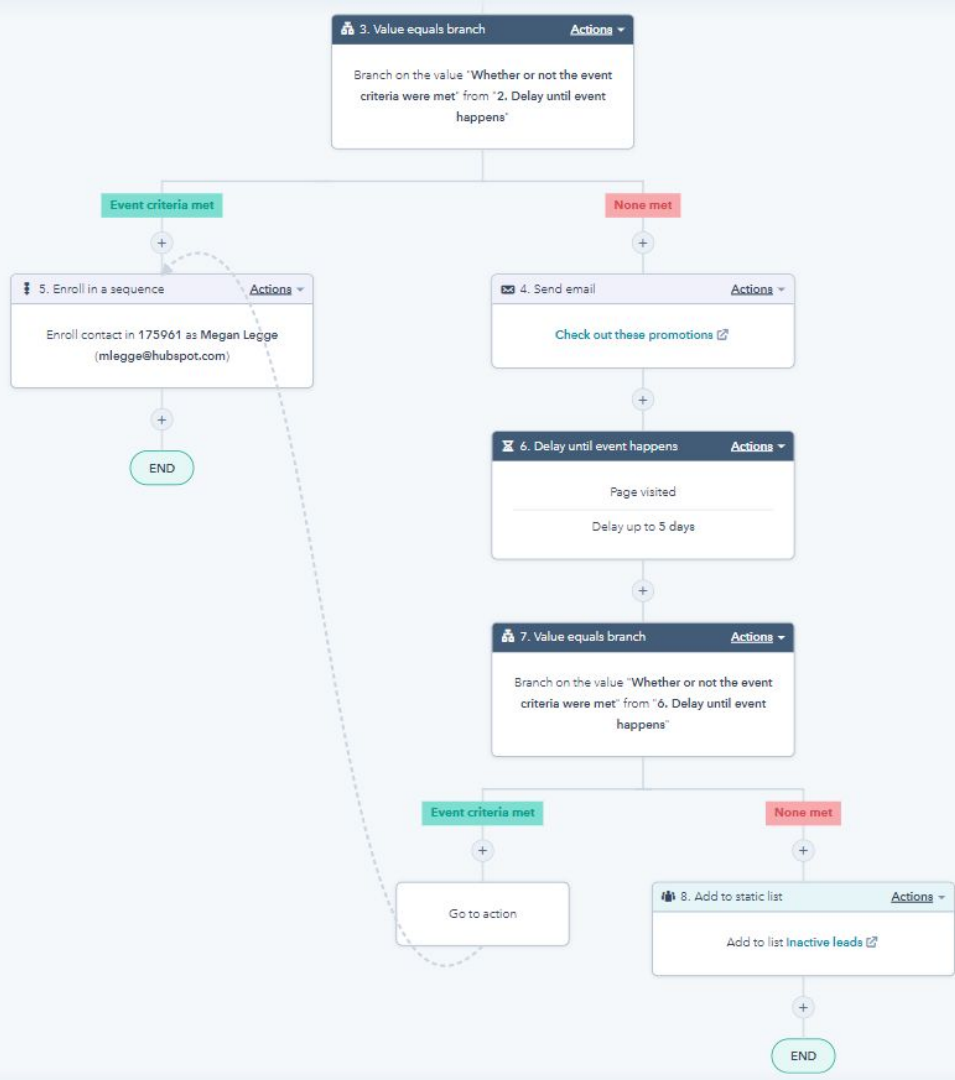
Delay Until Event: Nurture Leads to SQLs

- 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](#).

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](#))

The screenshot shows a HubSpot workflow configuration for "SR: 2 - Rotate Tickets Created by Form Submission Based on Category of Issue". The workflow is titled "Ticket enrollment trigger" and includes the following steps:

- Ticket enrollment trigger**
 - Condition 1: Ticket name contains any of Pre-sales question, Partnership enquiry, Billing issue, Technical support, or Other
 - Operator: and
 - Condition 2: Pipeline is any of Support Pipeline
- 1. If/then branch** (Actions)
 - First, check Pre-sales question
 - Condition: Ticket name contains any of Pre-sales question
 - Then, check Partnership enquiry
 - Condition: Ticket name contains any of Partnership enquiry
 - Then, check Billing issue
 - Condition: Ticket name contains any of Billing issue
 - Then, check Technical support

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



Operations Automations

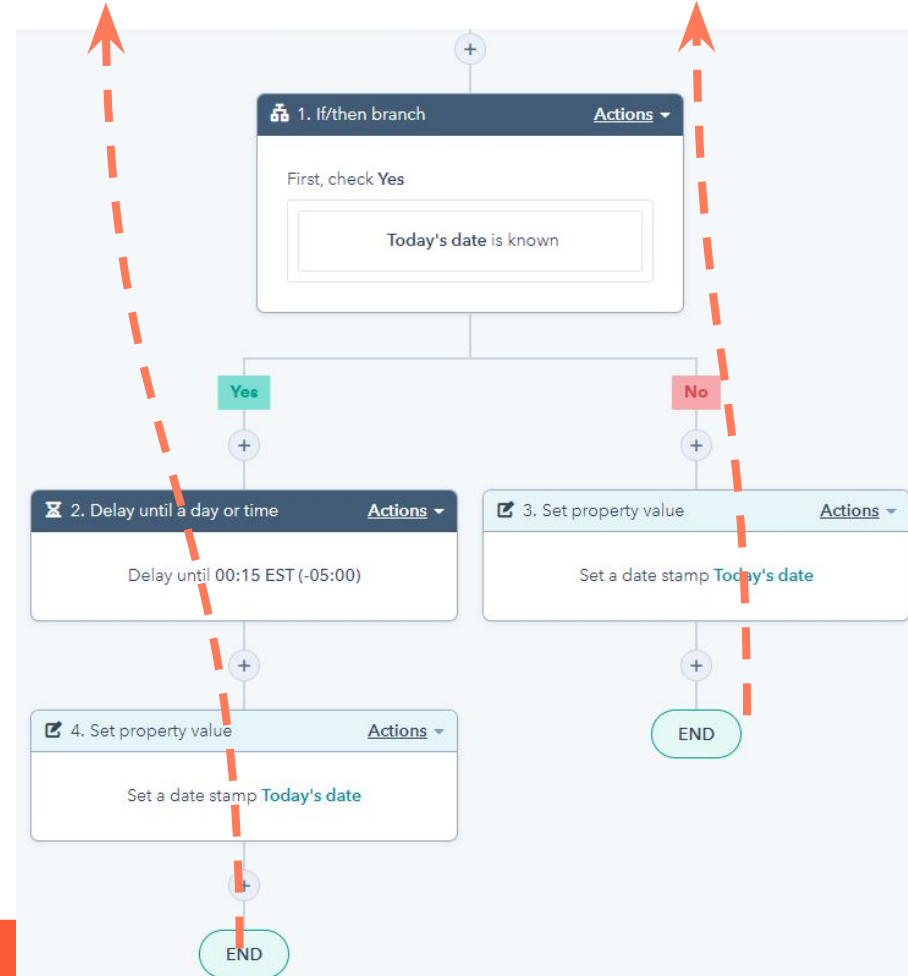
Calculation: Calculating time between a date property and today (without Ops Hub Pro+)

- 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

My Age in My Dreams

Calculation properties allow you to set up custom equations calculating the min, max, count, sum or average between values for properties on associated records. [Learn more](#)

Calculated property type

Time Between

Choose the time between two dates.

Start Date

DOB

End Date

Today's date

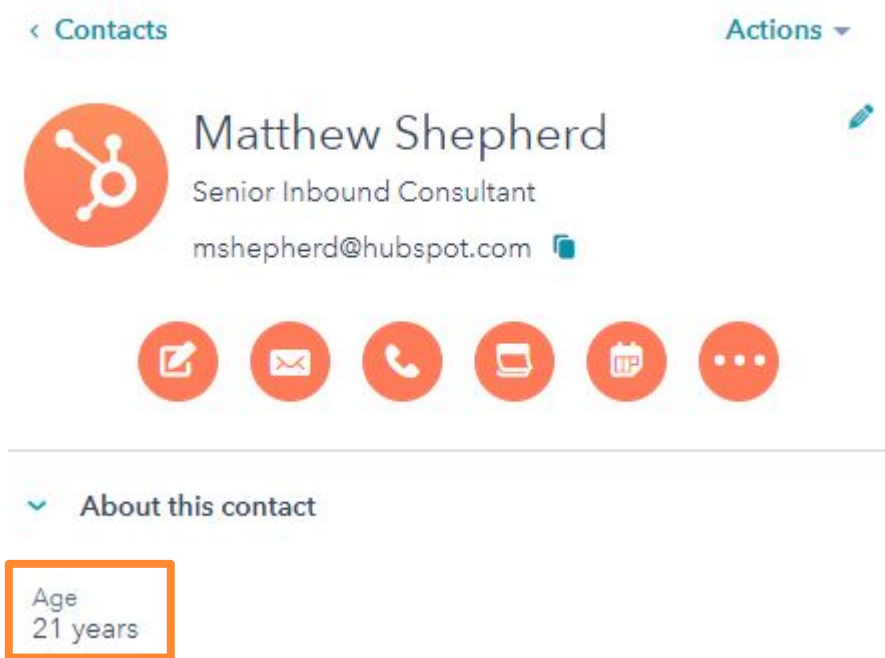
Additional Condition

If this condition is true, we will calculate this property.

Create condition



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


- And bingo. I'm 21...again!









The screenshot shows a HubSpot contact profile for Matthew Shepherd. The profile includes a navigation bar with '< Contacts' and 'Actions'. The contact's name is 'Matthew Shepherd', his title is 'Senior Inbound Consultant', and his email is 'mshepherd@hubspot.com'. Below the contact information are several action icons: a document with a pencil, an envelope, a telephone, a laptop, a calendar, and a three-dot menu. A section titled 'About this contact' is expanded, showing a property 'Age' with the value '21 years', which is highlighted by an orange box.

< Contacts Actions ▾

 **Matthew Shepherd** 

Senior Inbound Consultant
mshepherd@hubspot.com 

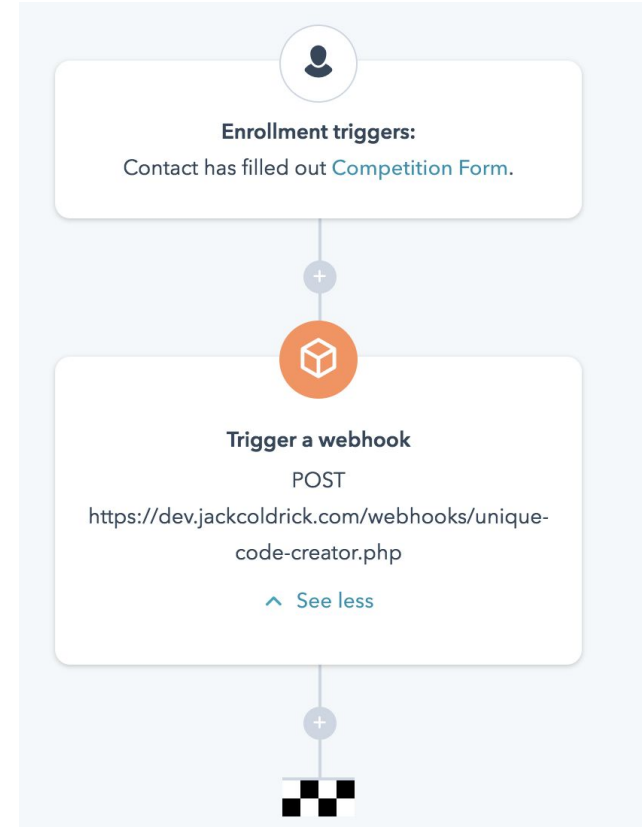
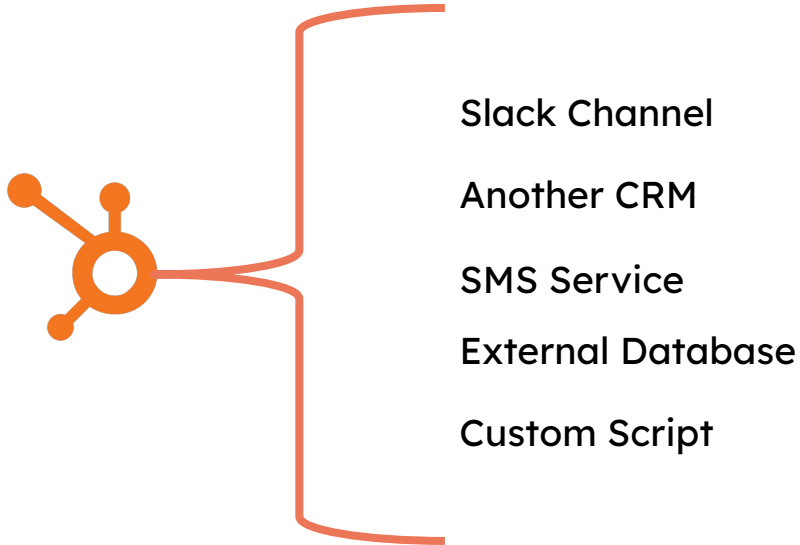
▾ About this contact

Age
21 years

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.





- Use [scheduled triggers](#) to recur workflows at custom intervals!

How do you want this workflow to start?

- Blank workflow
Choose your own triggers and actions.
- Schedule
Set up a recurring trigger that repeats actions at a specific date and time.
Schedule *

Day of week *

Time of day * ⓘ
- Specific date
Start on a specific date like a webinar, conference, or other event.
- Contact date property
Add actions that revolve around a contact date property, like when they became a customer.

Preview:



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

The screenshot displays a workflow titled "Calculate & Set Contract End Date" with three steps: "Deal enrollment trigger", "1. Format data", and "2. Copy property value". The "1. Format data" step is expanded to show its configuration.

Calculate & Set Contract End Date

Actions Settings Changes

Deal enrollment trigger

Deal stage is any of Closed Won (Sales Pipeline)

+ 1. Format data **Actions**

Custom plus_time formula.

+ 2. Copy property value **Actions**

Copy the value "[Datetime] value" from "1. Format data" to deal property **Contract End Date**

1. Format data

Edit action Deals in action

Apply formatting rules to property values to keep your data in HubSpot useful and consistent. [Learn more](#) about how this action works.

Custom mode

Formula No issues

Insert [Formula guidance](#)

```
plus_time( Contract Start Date ,  
Contract Length (months) , "months" )
```

Sample output: [Edit sample data](#)

18/09/2125 13:00 EST



- 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!

The screenshot displays the HubSpot Operations Hub interface for configuring a custom code workflow. The main workspace shows a workflow diagram with the following steps:

- Contact enrollment trigger**: A trigger step with a sub-step labeled "Create date is known".
- 1. Custom code**: A custom code action step.
- END**: The final step of the workflow.

The right-hand panel is titled "1. Custom code" and contains the following configuration options:

- Language**: A dropdown menu set to "Node.js 16.x".
- Secrets**: A section with a "Choose one or multiple secrets to use in this action." dropdown menu set to "Choose a secret".
- Property to include in code**: A section with a "Key" input field and a "Select value" dropdown menu.
- Add property**: A button to add new properties.
- Code**: A text area containing JavaScript code for using the HubSpot API client.

```
1 const hubspot = require('@hubspot/api-client');
2
3 exports.main = async (event, callback) => {
4
5   /*****
6    How to use secrets
7    Secrets are a way for you to save API keys
8    or private apps and set them as a variable to
9    use anywhere in your code
10   Each secret needs to be defined like the
11   example below
12   *****/
13   const hubspotClient = new hubspot.Client({
14     accessToken: process.env.SECRET_NAME
15   });
```



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>

<p>Cleansing Japanese Prefecture Values</p> <p>Discover</p>	<p>Calculate Contract End Date</p> <p>Discover</p>	<p>Geolocate a Company Domain Name</p> <p>Discover</p>
<p>Deal Renewal Management</p> <p>Discover</p>	<p>Deduplicate Contact</p> <p>Discover</p>	<p>Remove the "- New Deal" Auto-text From Newly Created Deals</p> <p>Discover</p>

NEED HELP WITH AUTOMATION?

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<https://hubs.la/Q01sG9Z70>





Resources

Workflows Deep Dive Academy Course

[https://academy.hubspot.com/
lessons/workflows-deep-dive](https://academy.hubspot.com/lessons/workflows-deep-dive)

Workflows Deep Dive


Introduction


en  

Workflows Deep Dive

34 Videos | Total: 1 hour

- Introduction 3 minutes
- The Workflows Index Page 1 minute
- Types of Workflows a few seconds
- Creating a Contact-based Workflow 1 minute
- Understanding Enrollment Trigger Filters 5 minutes
- Creating an Enrollment Trigger 3 minutes
- Simple Branching Logic 1 minute



Auto play Play speed 100% 

About this lesson Resources

Lesson overview

This lesson goes deep into the nitty-gritty details of creating a workflow. It demonstrates every aspect of the workflows tool, from defining granular enrollment triggers to coding your own custom actions. Watch the full lesson to see the process of creating a workflow from beginning to end, or watch specific videos to see how individual parts of the tool works.

Questions

Q&A



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Thank you

HubSpot