Workflow Cheat Sheet

Become Familiar with Workflows

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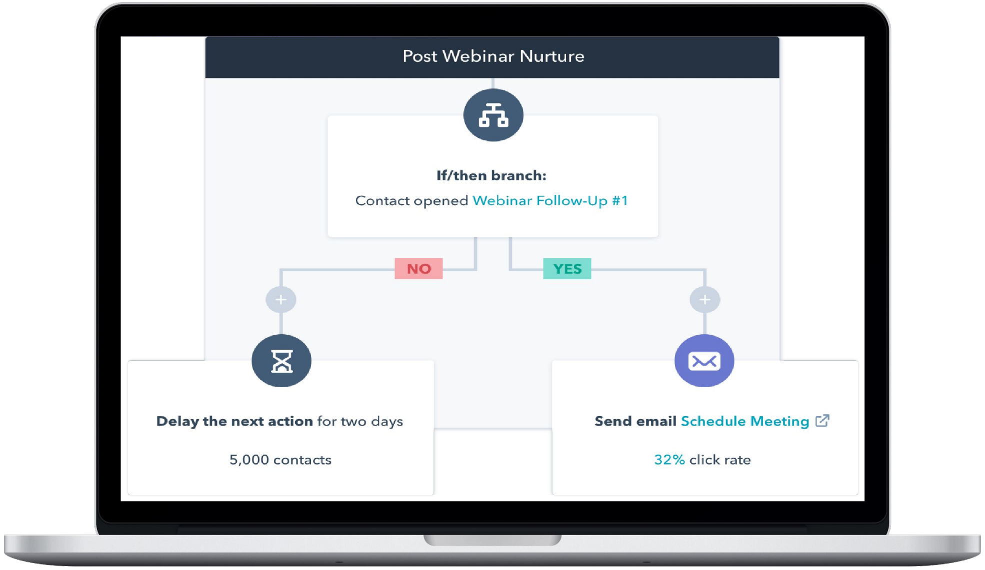

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What is a *Workflow*?

A HubSpot workflow is an automation tool that executes a series of actions, like sending emails or updating properties, triggered by user-defined criteria.

Simple use cases:	*Complex use cases:*
• **Lead Nurturing**: Sending a series of targeted emails to move leads through the sales funnel. • **Email Follow-ups**: Triggering follow-up emails after a contact views a web page or downloads content. • **Internal Notifications**: Alerting team members via Slack, SMS, or email about important customer actions. • **Task Creation**: Generating tasks for sales reps to call leads or follow up on specific actions.	• **Multi-Stage Lead Nurturing**: Series of workflows that guide a lead through different stages of the buyer's journey, with each stage triggering specific actions like sending educational content, scheduling calls, or updating lead scores. • **Sales Pipeline Automation**: Move deals through various stages in the sales pipeline based on actions taken by leads, such as email engagement, website visits, or form submissions. • **Complex Lead Routing**: Assign leads to sales reps based on multiple criteria, such as geographic location, company size, and industry, ensuring leads are handled by the most appropriate team member.

Please note: Using the Workflow tool requires either Marketing, Sales, Service, or Operations Hub Professional or Enterprise level subscription.

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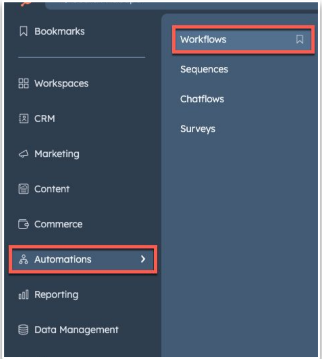
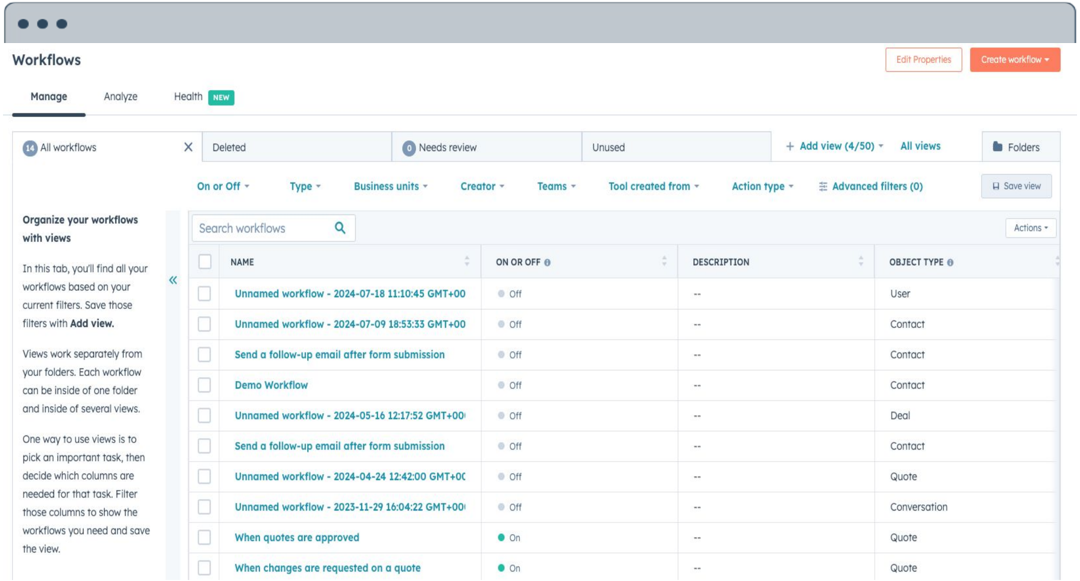
Navigation

Automations > Workflows





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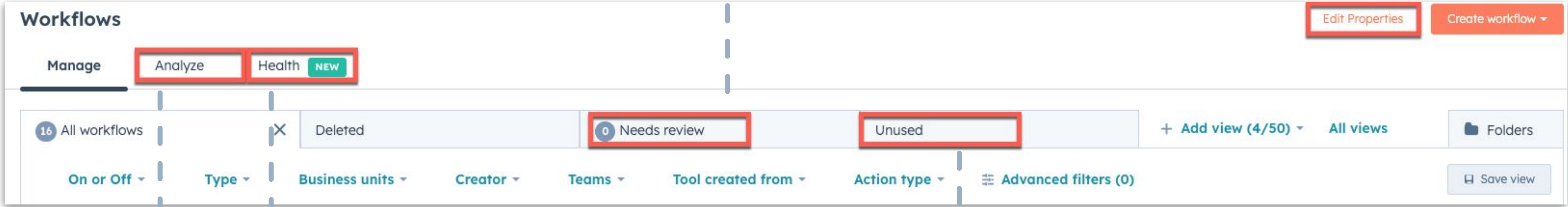
Workflow Index

View workflows that need reviewed for errors or have previously been reviewed for errors.

Create custom properties and determine which property values must be filled when a workflow is created.



Access the health page to gauge your workflows' status. Utilize the reports to dissect workflow efficiency, spotlighting problematic or dormant workflows.

View turned off workflows or workflows that haven't executed any actions in the last 90 days.

Examine enrollment data and explore additional areas for enhancing automation. This can speed up the process of identifying opportunities to apply or refine automation strategies.

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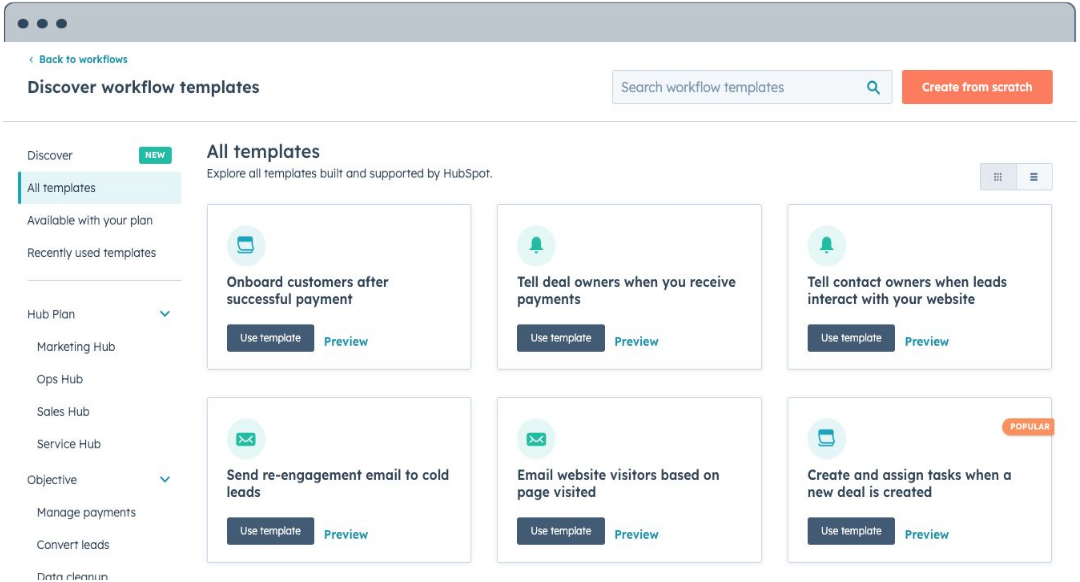
Objects & Types

Objects
Default available [object]-based workflows: • Contacts • Companies • Deals • Conversations • Subscriptions • Payments • Goals • Users
Subscription specific [object]-based workflows: • Quotes (Sales Hub Professional or Enterprise) • Tickets (Service Hub Professional or Enterprise) • Custom objects (Enterprise only) • Feedback submissions (Service Hub Professional or Enterprise) • Leads (Sales Hub Professional or Enterprise)

Types	
From Scratch	Start with a blank workflow
From Template	Use a template built by HubSpot.

Templates

Choosing a workflow template that resonates with your objectives can significantly enhance your automation strategies. These templates are not just about convenience; they're a gateway to discovering a variety of automation possibilities that could transform the way you work.



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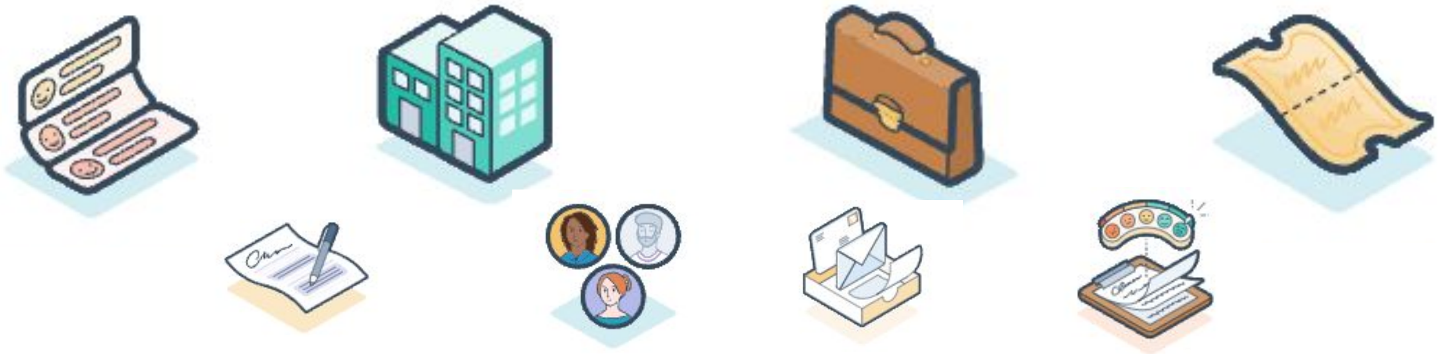
Editor

Automations > Workflows > Create Workflow > From Scratch

Choose your *Object*



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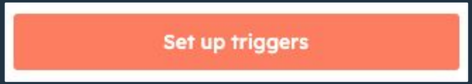
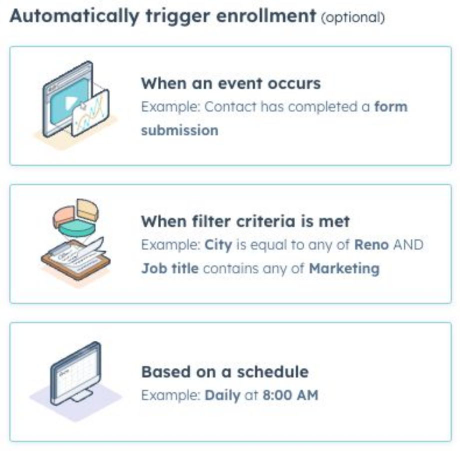
Enrollment Criteria

Configure triggers for workflow enrollment to initiate automatic record inclusion once specific conditions are met or an event is completed.



Types	Examples
When an event occurs - objects will enroll when an event has happened.	• Contact visits a specific page • Companies property value changed • Call is ended with a contact
When filter criteria is met - objects will enroll when a criteria is true.	• Contact property is xyz value • Company record is not a member of a list • Deal amount is less than or equal to xyz value
Based on a schedule - objects will enroll based on on a specified calendar date or by using a date property.	• **[Object] date property:** Enroll a deal > once > 1 day after Close Date at 7pm. • **Calendar date:** Enroll contacts on a list for a future date at specified time to launch a drip campaign.



Please note: When configuring based on a schedule enrollment criteria, options for frequency of the trigger will depend on subscription.

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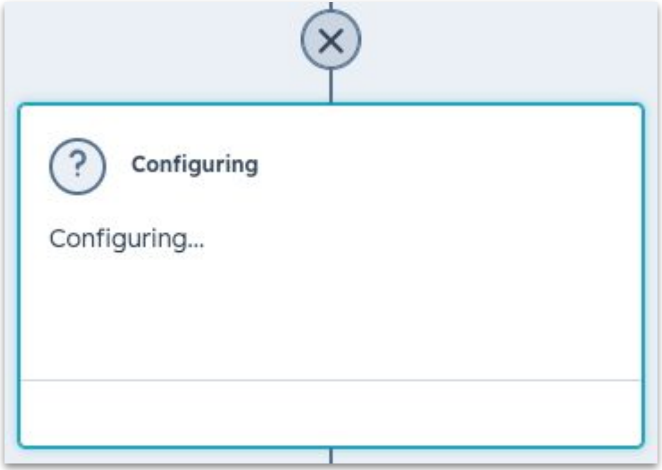
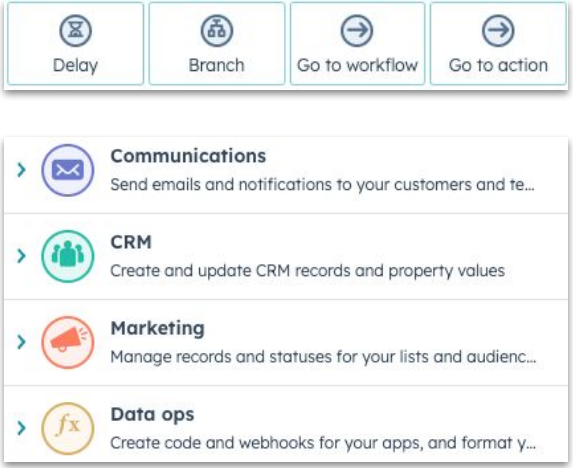
Actions

Select the actions that your workflow will carry out on the enrolled records. These actions could include sending emails, generating new records, set property values, and more.





Please note: Availability of certain actions may vary with each object-based workflow type.

Delays

Workflow delays in HubSpot are used to space out actions within a workflow, allowing you to time your next actions.

Types	Examples
Calendar date - mm/dd/yyyy at HH:MM	Delay enrolled records until 9/29/25 at 9am.
Date property - [object] date property at HH:MM	Delay enrolled contact record until 2 days after Last Contacted property at 12pm.
Event occurrence - [object] date property	Delay enrolled deal record until Deal Stage is any of Closed Won for 30 days.
Set amount of time - days, minutes, seconds	Delay enrolled ticket record for 4 days.
Days of week - Monday - Sunday at HH:MM	Delay enrolled contact record until Wednesday at 3pm.
Time of day - HH:MM	Delay enrolled company until 5pm.

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Branches

Implement branching logic within your HubSpot workflow to guide records along distinct paths determined by predefined conditions.

Types	Examples
One property or action output	Branch based on the deal stage property of enrolled deals; create a separate branch for each stage.
AND/OR logic	Branch based on enrolled companies list membership and company owner is any of xyz user.
Random distribution by percentage	Branch 50/50 on enrolled contacts.

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Go to Workflow & Go to Action

Go to Workflow

Send the enrolled records from the current workflow to a different workflow.

Please note: an enrolled record can only go to a workflow that matches the object type (e.g., deal records can only go to another deal-based workflow).

Go to Action

Allows you to consolidate if/then branches by connecting them.

Please note: this action can only be added within branches. You can only select actions in a different branch. This is done to prevent loops.

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Communications

Actions

Enroll in a sequence - enroll contacts into a sequence
(Sales Hub and Service Hub Enterprise only)

Send Email - send an automated marketing email to enrolled contacts or associated contacts to the enrolled record.
(Marketing Hub and Service Hub Professional and Enterprise only)

Send in-app notification - send an in-app notification to specific users or teams.

Send an internal email notification - send an internal email notification to specific users or teams.

Send internal marketing emails - send an automated email to specific email addresses or a contact property that stores an email address.
(Marketing Hub Professional and Enterprise only)

Send WhatsApp message - send WhatsApp messages to contacts with a valid WhatsApp phone number.
(Marketing Hub and Service Hub Professional and Enterprise only)

Unenroll from sequence - unenroll contacts from a sequence they are currently enrolled in.
(Sales Hub and Service Hub Enterprise only)

Assign conversation owner in a workflow - in conversation-based workflows, change the inbox and owner for a conversation.
(Services Hub and Operations Hub Professional or Enterprise only)

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CRM

Action

Clear property value - clear a value in a property for the enrolled record, or a property in an associated record.

Copy company property value - copy a company property value from the primary associated company of the enrolled contact.

Copy property value - copy a property's value on the enrolled record for a target property on the same record or an associated object records property.

Create record - create new records:

- Contacts
- Companies
- Deals
- Tickets **(Service Hub Professional and Enterprise only)**
- Leads **(Sales Hub Professional and Enterprise only)**
- Custom objects **(Enterprise only)**

Create Salesforce task - create a Salesforce task; the contact owner or integration user will then receive a task in Salesforce associated with the enrolled contact.

Create task - create new tasks

Delete contact - delete enrolled contacts; contacts can be restored manually within 90 days of deletion.

Increase or Decrease property value - increase or decrease the value in a *number* type property of the enrolled record.

Manage communication subscription - set the subscription status of enrolled contacts and provide the legal basis for communicating with the contact.

Rotate record to owner - assign enrolled records to users or teams equally.
(Sales Hub and Service Hub Professional and Enterprise only)
Please note: Users must have a paid seat.

Set property value - set a property's value on the enrolled record or an associated object records property.

Set Salesforce campaign - set a Salesforce campaign for the enrolled contact.

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Marketing

Action
Add to ads audience - add enrolled contacts to a new or existing ads audience. **(Marketing Hub Professional and Enterprise)**
Add to static list - add enrolled contacts or companies to a static list.
Remove from ads audience - remove enrolled contacts from an ads audience. **(Marketing Hub Professional and Enterprise)** **Please note:** you can only choose from audiences that were created from a workflow.
Remove from static list - remove enrolled contacts or companies from a static list. **(Marketing Hub Professional and Enterprise)**

Set marketing contact status - set the marketing contact status of enrolled contacts.

Please note: contacts can be set as marketing at any time, but will only update to non-marketing on the first of the following month or on your renewal date.

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Data Ops

Action

Custom code - write and execute JavaScript in your workflow.
(Operations Hub Professional and Enterprise only)

Format data - fix, format, and maintain CRM data.

- Add a number
- Add an amount of time
- Calculate nth root of a number
- Capitalize first letter
- Change all characters to lowercase
- Change all characters to uppercase
- Change to title case
- Cut a character or several characters
- Divide a number
- Escape and URL encode
- Format date and time
- Get absolute value of a number
- Multiply by a number
- Remove HTML tags
- Replace characters
- Round a number
- Subtract an amount of time
- Test if a number is divisible
- Trim leading and trailing whitespace

(Operations Hub Professional and Enterprise only)

Send a webhook - send or retrieve information between HubSpot and other external tools.

- POST request
- GET request

(Operations Hub and Professional and Enterprise only)

Organization

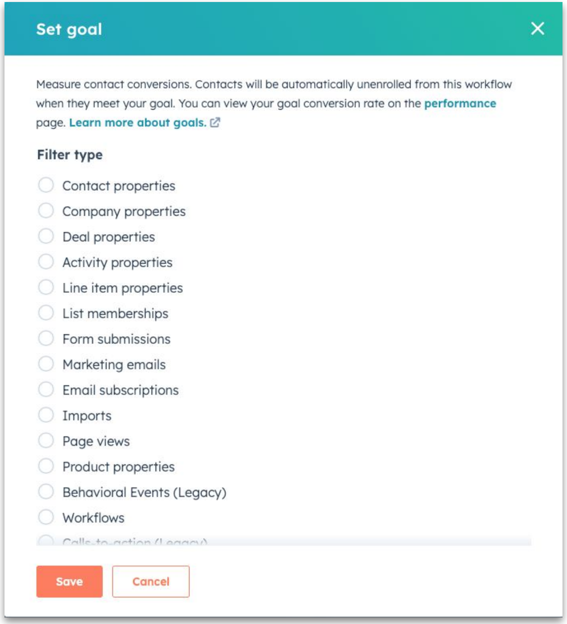
Organization can help you ensure that your HubSpot workflows are clear and easy to navigate, which in turn can improve your overall automation strategies. Try the following:

- **Use *Naming Conventions*:** Establish clear naming conventions for your workflows to make them easily identifiable. This could include the use of prefixes or tags that indicate the workflow's purpose.
- **Implement *Folders*:** Group related workflows into folders. This helps in categorizing them by function, team, or campaign, making it easier to locate and manage them.
- **Regular *Cleanup*:** Periodically review your workflows to remove or update those that are outdated or no longer in use. This prevents clutter and ensures that your workflows remain relevant.
- **Leverage *Workflow Views*:** Customize your workflow views to display the most pertinent information. You can filter workflows by various criteria such as status, type, or creator to streamline your view.

Goals

In the creation of a contact-based workflows, establishing a goal can sharpen the workflow's focus and enable you to track its effectiveness in engaging contacts. Once contacts achieve the set goal, they are automatically removed from the workflow, similar to how suppression lists function.

Please note: that tracking the rate of goal achievement—goal conversion rates—is a feature exclusive to Marketing Hub Professional and Enterprise accounts. Additionally, when a contact meets your workflow goal and was sent a marketing email in the workflow, they will count towards the workflow's goal conversion rate.

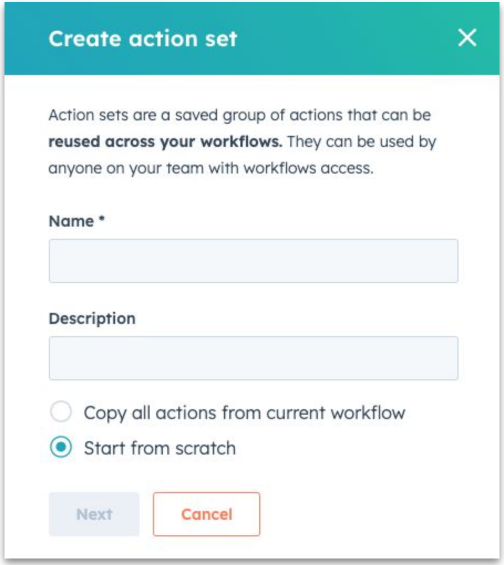


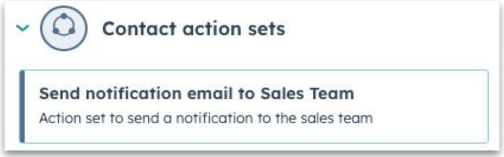
Action Sets

Action sets allow users to save and reuse a collection of workflow actions, streamlining the process of creating and managing workflows.

Once created, action sets can be utilized by any user with workflow permissions in your account.

Please note: action sets are specific to workflow object types; for instance, action sets created in contact-based workflows are only available for use in other contact-based workflows.





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Planning

The planning phase for your workflow strategy is crucial for its success. Please consider the following:

Define

- What do you want to achieve with this workflow?
- What is the desired outcome of the workflow?
- What object will be enrolled into the workflow?

Build

- What actions will be needed?
- What assets will be needed (e.g., marketing emails)?
- What enrollment triggers?

Test

- Use test records to manually enroll into the workflow
- Test enrollment criteria with an existing record.
- What are the results of your testing? Any improvements needed?

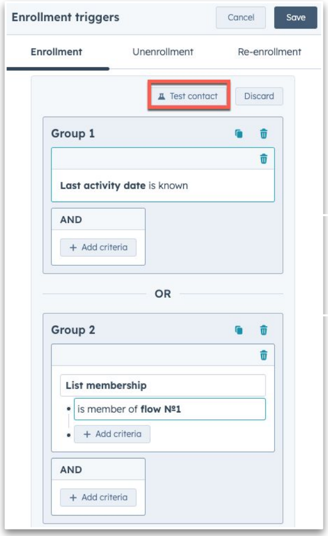
Review

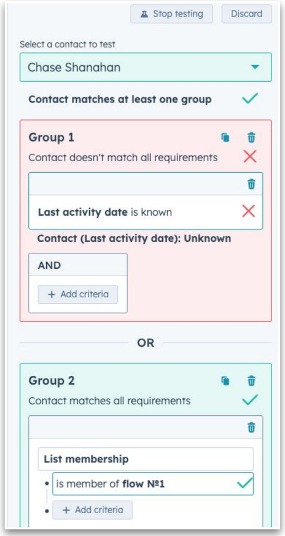
- Confirm workflow settings
- Should records re-enroll into the workflow?
- Confirm the workflow has a name and description

Testing Enrollment

Testing Enrollment Criteria:

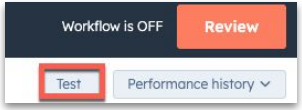
- Go to **Automations > Workflows**
- Select a workflow and click on **Enrollment triggers.**
- Use the **Test [object]** option to check if a record meets the criteria.
- The test will show if the record is eligible for enrollment.

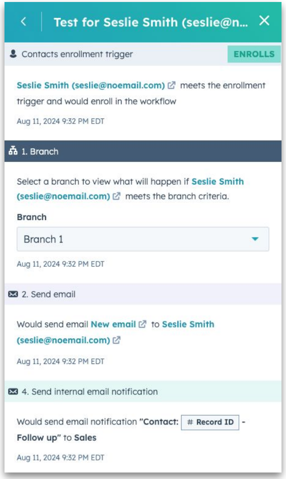




Simulating Workflow Actions:

- Within the workflow, click **Test** in the upper right.
- Choose a record to preview and opt to receive email simulations if desired.
- Click **Test** to simulate the workflow journey for the record.
- Review the outcomes and branch paths without executing real actions.





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Avoid Common Pitfalls

Editing active workflows - Being aware of the consequences when editing an active workflow ensures that the results and performance align with your expectations.	**Enrollment triggers:** editing the enrollment triggers in an active workflow doesn't automatically unenroll existing records who fail to meet the new criteria. **Delays:** shortening an existing delay may affect records already in queue; this may cause the record to exit the delay, depending on the type of delay being used. Extending a delay means records will encounter the increased wait time. **Adding or removing actions:** adding or removing an action will not affect records past that point; they will not retroactively complete or reverse the action.
Over complicated workflows - Attempting to achieve multiple objectives within a single workflow can lead to intricate branching. This not only makes logical execution tough but also increases the likelihood of mistakes.	Strategic use of branching is beneficial in complex workflows. They can make your automation seem foolproof and interconnected. However, the complexity of such workflows can become a hindrance. Overly complicated workflows are difficult to troubleshoot and comprehend during audits, particularly as time passes or if the creator leaves the organization.
Failing to optimize and review - workflows are designed to function autonomously, but they require regular evaluations to ensure efficiency.	It's advisable to conduct a thorough review of your workflows on a schedule that works for your business. This proactive approach helps identify and rectify any inefficiencies, keeping your processes streamlined and productive.

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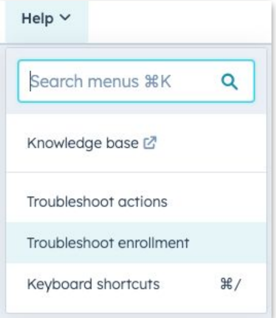
Enrollment

Why did this record not enroll?

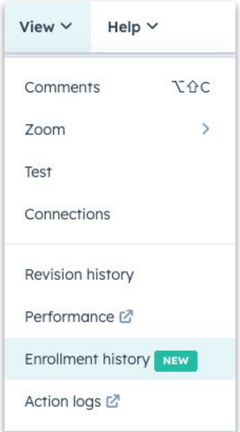
- Go to **Automations > Workflows**.
- Click on the workflow you're reviewing..
- Go to **Help > Troubleshoot enrollment option**.
- Choose the record you believe should have been enrolled from the dropdown.
- Specify the expected enrollment period using the Date range and Time range options.
- Execute the enrollment checks to understand the reasons behind the enrollment status.
- Expand the checks for more information and view the workflows configuration at the time of enrollment.

Please note: this tool only supports property, list, and form submission filters for troubleshooting.



Why did this record enroll?

- Go to **Automations > Workflows**.
- Click on the workflow you're reviewing.
- Click on View > Enrollment history.
- Hover over an enrollment event and select **Why did this enroll?** to analyze the cause.
- In the right panel, review the enrollment date, time, and rationale, along with property state details if applicable.



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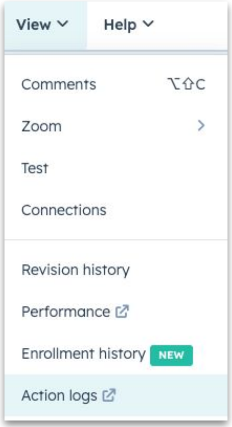
Action Logs: Errors

- Go to **Automations > Workflows**.
- Click on the workflow you're reviewing.
- Go to **View > Action logs**.
- Add a filter for **Event: Errors**



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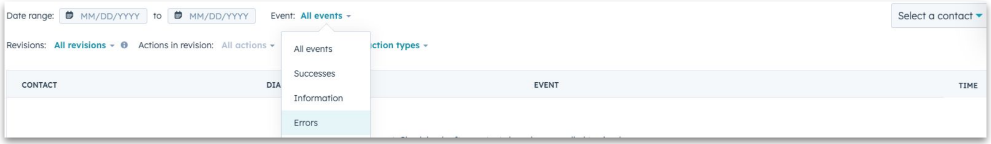

[Click here](#) for a complete list of errors, what they mean, and how to resolve.