



CLEANING YOUR CRM WITH HUBSPOT WORKFLOWS

HubSpot
Academy



Cleaning Your CRM with Hubspot Workflows

No matter how organized your business is, you've likely had "bad" data in your CRM at one point or another. But out of date contact information or incomplete deal records can lead to a negative experience for your customers and frustration across internal teams.

Maintaining a clean database is key to growing a business, because you get valuable insight on your leads and customers so you can provide an engaging and delightful experience.

A good CRM is:

- **Focused:** Logging in brings you to the records you need to see first noise is hidden.
- **Contextualized:** It's always clear where a lead came from and what needs to happen next.
- **Actionable:** Visible data informs the next step. Everything can be acted on.

There are three key steps to having a good CRM.

Step 1: Cleaning

Step 2: Organizing

Step 3: Maintaining

So, how do you ensure your CRM is always up-to-date and populated with the most actionable information? Workflows!

Workflows are the automation engine in HubSpot. They save you time and energy by taking care of repetitive tasks, such as sending emails, creating reminders for reps, updating CRM data, and more. They remove manual work off of your employees' plates, so your employees' more time can be dedicated to marketing, selling, and servicing your customers. The best part is that once they're turned on, they work 24/7 to make your job easier.

Pro tip:

Before automating, make sure to align the following properties with your sales process: contact owner, lifecycle stage, lead status, and deal stage. This will ensure your sales workflows automate as designed!

In this worksheet, we'll cover examples of workflows that you can use to clean, organize, and maintain your CRM.

Each example includes four key elements:

- **Purpose:** What does this workflow do?
- **Segment:** What object does this workflow impact?
- **Enrollment Trigger:** What criteria must an object meet in order to automatically be enrolled into this workflow?
- **Actions:** What functions will be applied to enrolled records?

Step 1: Cleaning Your CRM

Keeping a clean CRM is crucial to building a successful business. A cluttered, inconsistent CRM could lead to decreased productivity, confusion across departments, and low customer retention.

Here are some workflows to help maintain a tidy database.

1. Permission Pass Campaign

- **Purpose:** A one-time email campaign that requests any contacts who haven't already used some form of double opt-in to confirm that they would still like to receive emails from you.
- **Segment:** Contacts that have an unconfirmed opt-in status.
- **Enrollment Trigger:** Contact is a member of [List Name].

Step 1: Enable resubscription emails for forms and review forms consent information and email subscription types.

Step 2: Create a list of contacts who have not interacted with your emails recently.

Step 3: Create a new permission pass email to send to your list of contacts.

Step 4: Review your email's post-send metrics.

Step 5: Determine which contacts to opt out of your emails.

Step 6: Opt out your unconfirmed contacts.

Step 7: Repeat. (optional)

Pro tip:

Before setting your workflow live, whiteboard or map out your workflow visually. This can help you catch conflicts or issues early!

2. Clear a Property

- **Purpose:** Has your team been using a property incorrectly or inconsistently? Use this workflow to clear all values for a specific property.
- **Segment:** Contacts who have a lead status.
- **Enrollment Trigger:** Any contact whose [Lead Status] is known.
- **Actions:** Clear contact property [Lead Status].

3. Personalization Nightmares

- **Purpose:** Replace fake form answers with personalization-friendly values.
- **Segment:** Contacts with obviously fake company names.
- **Enrollment Trigger:** Create of list of contacts using company names such as (0, -, *, a, aa, asdf, blah, and other variations you see) and use this to enroll them to this workflow.
- **Actions:** Replace property value with Your Company.

Pro tip:

Avoid editing active workflows. This can cause contacts or records to get caught between conflicting actions.

4. Let 'em go!

- **Purpose:** Automatically close deals that stall for an extended period of time.
- **Segment:** Deals with no activity in 120 days.
- **Enrollment Trigger:** All deals or even select pipelines you may notice this issue for specifically.
- **Actions:** Set deal stage to Closed Lost.

Step 2: Organizing Your CRM

The next step is make sure data is entered correctly into your CRM. Check to see what systems are working and how contact properties should be used across your business. Make sure your CRM is organized in a way that empowers employees to do their jobs efficiently.

1. Copying Properties

- **Purpose:** Use HubSpot Insights to pre-fill fields.
- **Segment:** Contacts with an unknown company name/industry.
- **Enrollment Trigger:** If property X is unknown.
- **Actions:** Copy company name and/or industry from Contact to Company record.

2. Rotating leads

- **Purpose:** Use the lead rotator to divide leads to reps based on deal amount, a lead's location, and more.
- **Segment:** Any lead located in the Northeast.
- **Enrollment Trigger:** Contact's region is [Northeast].
- **Actions:** Rotate record between [Northeast Team].

2. Set Properties

- **Purpose:** As you're organizing your contacts, you might discover a new way to group them using custom properties. For example, customers with the highest deal amounts may be labeled as "Tier 1". You can create a custom property called "Tier" with dropdown values of Tier 1, Tier 2, etc.
- **Segment:** : Any contact who has a deal amount \$10,000+.
- **Enrollment Trigger:** Contact whose deal amount is greater than \$10,000.
- **Actions:** Set contact property [Tier] as [Tier 1].

Step 3: Maintaining Your CRM

Now that you've done the hard work of cleaning and organizing your CRM, it's important to maintain it as your business continues to grow. More customers means more data that needs to be entered, but you want your sales reps to focus their time on selling, not entering data. Here are some ways you can make sure clean data continues to enter your system.

1. Create a task to remind reps to follow up on stale deals

- **Purpose:** Remind deal owner to follow-up.
- **Segment:** Deals with no recent activity.
- **Enrollment Trigger:** Deals with a last activity date of more than 7 days ago".
- **Actions:** Create task prompting update.

Pro tip:

Leave comments on workflows to provide context about a specific workflow action. You can even leave a note for yourself if you're working on a complex workflow that you'll have to come back to.

2. Automatic Deal Creation

- **Purpose:** Automatically create a deal when a meeting is booked.
- **Segment:** Contacts looking to talk to sales.
- **Enrollment Trigger:** Contacts who fill Date of last meeting booked in meetings tool is "less than 1 day" and First Deal Created Date is "Unknown"
- **Actions:** Create a new deal and assign to the existing contact owner.

3. Autobooking: Enabled

- **Purpose:** Automate follow-up when your sales team gets busy.
- **Segment:** Contacts looking to talk to sales.
- **Enrollment Trigger:** Contacts who fill out Consultation form AND are without sales activity.
- **Actions:** Wait 1 day for sales outreach. If none, send a “Book a Meeting” email.

Pro tip:

Let your team know bBefore turning an operational workflow live, let your team know the change is coming. No one likes surprises and receiving a bunch of notifications, tasks, or updates can cause alarm and confusion.

Maintaining a Clean CRM Checklist

Pro tip:

We recommend scheduling time to check on your database at least once per quarter.

- Write down all the apps you’re using outside of HubSpot.
- What app are you currently using in addition to HubSpot? (ex. Eventbrite, Zoom, etc.)
- Check out the App Marketplace to see if the apps you’re using can be connected to HubSpot.
- Integrate or explore a potential alternative.
- [Remove contacts that have hard bounced on marketing emails.](#)
- Review custom properties.

Pro tip:

Replace Single-line text properties with Dropdown select to standardize options. This will also lead to easier reporting for this property.

- Review workflows.
 - Use the “Unused Workflows” tab to look for inactive and/or out-of-date workflows.
 - These workflows are turned off or haven't had any actions executed in the last 90 days. They are also not used in a list or another workflow. Keep your library clean of any workflows that are no longer useful to you and your team.
 - Create a naming convention. (ex. Internal_Enrollment Trigger_Purpose).

Access and permissions (Check out the User Permissions Guide)

Review admin access for all employees

Is there anyone whose permissions need to be changed?

What tools or data sets do you need access to?

What data would make it easier for you to do your job?

Planning a Workflow

Workflow Name: _____

Workflow Type: _____

Enrollement Triggers:

and/or

and/or

Re-enrollment?: YES NO

If yes, when?

Goal:

and/or

and/or

Planning a Workflow Continued

General Settings:

What days do you want actions to execute?

- Business days only
- 7 Days/week

What time of day do you want these actions to execute:

Campaigns associated with:

Unenrollment and Suppression

When contacts enroll in this workflow:

- Do not remove from other workflows
- Remove them from all other workflows
- Remove them from specific workflows:

Suppression lists:

1.

2.

Workflow Map

(use this space to map out your workflow actions)

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