



CRM & Automation

One of the key things we get asked by our clients is how to unlock the benefits of marketing automation in their business and we want to share our first best workflows to get you off the ground.

Automating your marketing actions frees up your teams time allowing them to focus on being able to deliver content at the right time in the right moment to your prospects.

To help you get started with alleviating those mundane tasks, we've put together our top **9 HubSpot Workflow Examples** that'll support your B2B inbound marketing.

Our key picks for HubSpot workflows:

1. Lifecycle stages
2. Lead assignments
3. Internal notifications
4. Welcome emails
5. Event promotion emails
6. Lead nurturing emails
7. Lead scoring
8. Deal stage automation
9. Format data

New to HubSpot, or need extra support? Find out how we can help businesses like yours master the HubSpot CRM Suite with customised B2B HubSpot onboarding and setup.



What are HubSpot workflows?

Workflows are activated when a User triggers an automated action by entering information like a person's contact details

In the HubSpot platform, we set up workflows to automate internal processes saving time, aligning marketing and sales, which all enables improved lead nurturing.

These signals move prospects more down the funnel and internal notifications including lead scoring generates even more qualified leads

However, these are just a few examples of how HubSpot workflows can help your business.

9 HubSpot workflow examples you need to know

1. Lifecycle stages

HubSpot lifecycle stages can explain any moment a contacts journey begins. From initial engagement to that moment of purchase and indeed repurchase.

We relate it to the Buyers Journey - Are they a subscriber? Marketing Qualified Lead (MQL)? Sales Qualified Lead (SQL)? Are they an opportunity, existing customer, or are any of these applicable?

If you are using HubSpot as your marketing automation platform or CRM, the lifecycle stage is central as it is built into reporting and capabilities. The HubSpot implementation is hard-coded and, for some stages, automatically applied.

So it is important to think of terminology and configuration in the early solution phase to keep things simple and elegant.

Setting up HubSpot workflows for lifecycles automatically updates your contact's position and lets you determine where a contact or company is on the buyer's journey.



Pro Tip #1: Some of HubSpot's automation and reporting are built-in and you cannot change, add or remove the values in the lifecycle.

Pro Tip #2: You can set up an "other" stage for irrelevant contacts so as to exclude them from being qualified as a lead and thus affecting your data.

2. Lead assignment

On attaining a contact's details, the ideal next step is to automatically assign the lead to the most relevant team member – this may be by location or experience. HubSpot Workflows can handle this for you ensuring you improve quality and responsiveness.

3. Internal notifications

We all know how quickly time flies by and we are often re-prioritising our lists, but a great feature in HubSpot is that prompts can be automated. It means we ensure opportunities or changes and closing of deals don't get missed.

Internal notification choices include email, text or in the HubSpot app if a follow-up is required.

Pro Tip: HubSpot workflows are available with integration to Slack. Your team can receive messages in real-time from HubSpot via Slack by default.

4. Welcome emails

We've become so accustomed to receiving that branded, helpful, welcome email from that first contact. That moment a prospect provides their contact details is a crucial awareness to consideration stage and you want to connect straight away. HubSpot lets you automate welcome emails to new contacts.

Pro Tip: You can personalise the rules for time, channel and content making it seamless.



INBOUND MARKETING

HUMAN | HELPFUL

Previously, humans were moulding to the software, but more recently we have seen software adapting to humans.

IMPLEMENT TECH THAT IMPROVES YOUR RESPONSIVENESS



CREATE



It's time you allowed your sales and marketing teams to have more time to do the things they love at work...the creative stuff that automation can't recreate.

AWARENESS



What are they thinking?
I need to improve...
prevent..., stop...,
start..., optimise...,
solve....

CONSIDERATION



They are asking:
What tools are available? How do I solve this?
What are my options?

DECISION



What are they thinking? I need prices for..., I need to understand product specifics, I need proof that ... works, I need evidence.

ATTRACT



Empathy and approaching your content from a purely customer-centric POV is key!

ENGAGE



Get your prospect's details at every opportunity.

DELIGHT



Send them tutorials on your product and consider loyalty programmes.

THE CRM - THE HEART OF YOUR BUSINESS



The clue is in the name...Customer Relationship Management. It's the heart of every piece of your marketing, sales & service strategy.



5. Event promotion emails

If you're hosting an event (webinars, etc) it's interesting to note that 54% of attendees sign-up eight days before a webinar launches. What does this mean for a workflow? We can set the trigger to send the webinar event invite at the optimal time and of course, filter out anyone who has already signed up for the event.

6. Lead nurturing emails

It can take 5-8 marketing nudges for a Prospect to convert 79% of all marketing leads never convert to sales. That's why it's so important to send relevant regular communications and we can get this set up to run automatically.

7. Lead scoring

A lead scoring strategy helps you identify if a lead fits your ideal buyer profile, or where they are in the buyer's journey. This is usually based on a combination of behaviours, your ideal customer profile and firmographic data.

If a specific contact or company is highly valuable, you can set up a workflow to notify you. HubSpot workflows can be used to categorise these contacts into priority tiers, helping internal teams to know how much attention to pay to them.

8. Deal stage automation

If you reach a deal agreed in principle with a prospect, a HubSpot workflow can be set up to automate the deal stage and assign a task to the correct person. When it's completed, the deal can move to the next stage.

This is a powerful tool when you're working in a large-scale sales team and ensures that someone always follows up on opportunities. This is beneficial for operational processes in your business, as it generates tasks automatically and increases efficiency.

9. Format data

HubSpot has a wide range of functionalities and innovative marketers are always looking for new, more relevant ways to nurture their contacts, but it can't do everything.



You can standardise your contact's names and automatically set it to capitalise the first letter of the name & surname or phone numbers improving data hygiene and enriching the operational side of your business, enabling a standardised set of data.

However, these are just a few examples of how HubSpot workflows can help your business.

HubSpot has many workflow templates that are easy to set up.

HubSpot workflows enable better marketing automation

Marketing automation drives velocity and effectiveness through the management of multiple channels, internal teams and aligning to Customers across the buyer's journey.

HubSpot's workflows tool is automation beyond email, so you can scale your growth and spend less time on repetitive tasks.

Let our experts help you craft your marketing communications, promotions or prompts to your contacts and internal teams with workflows infused with insight, triggering the right emails at the right time.

We recommend and provide the right digital, data and design solutions that help your business grow

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