



Digital



HubSpot Workflows

Welcome to UX-Digital's guide to... HubSpot Workflows

Workflows can be a little daunting when you're first starting out. What should I include? Am I sharing the right information? Am I sending the right content to the right audience? All these questions and then there's the if/then branches to boggle the mind.

In reality workflows are a powerful tool in your marketing arsenal, when they are used correctly they save time, streamline lead nurturing and provide a pipeline of quality leads.

Our handy guide is the perfect place to get started on your workflow journey with useful tips and 3 detailed workflow diagrams increasing in complexity. Once you're comfortable with these starter flows, you can easily start experimenting with more complex marketing automation or apply similar flows to Sales and Service processes.

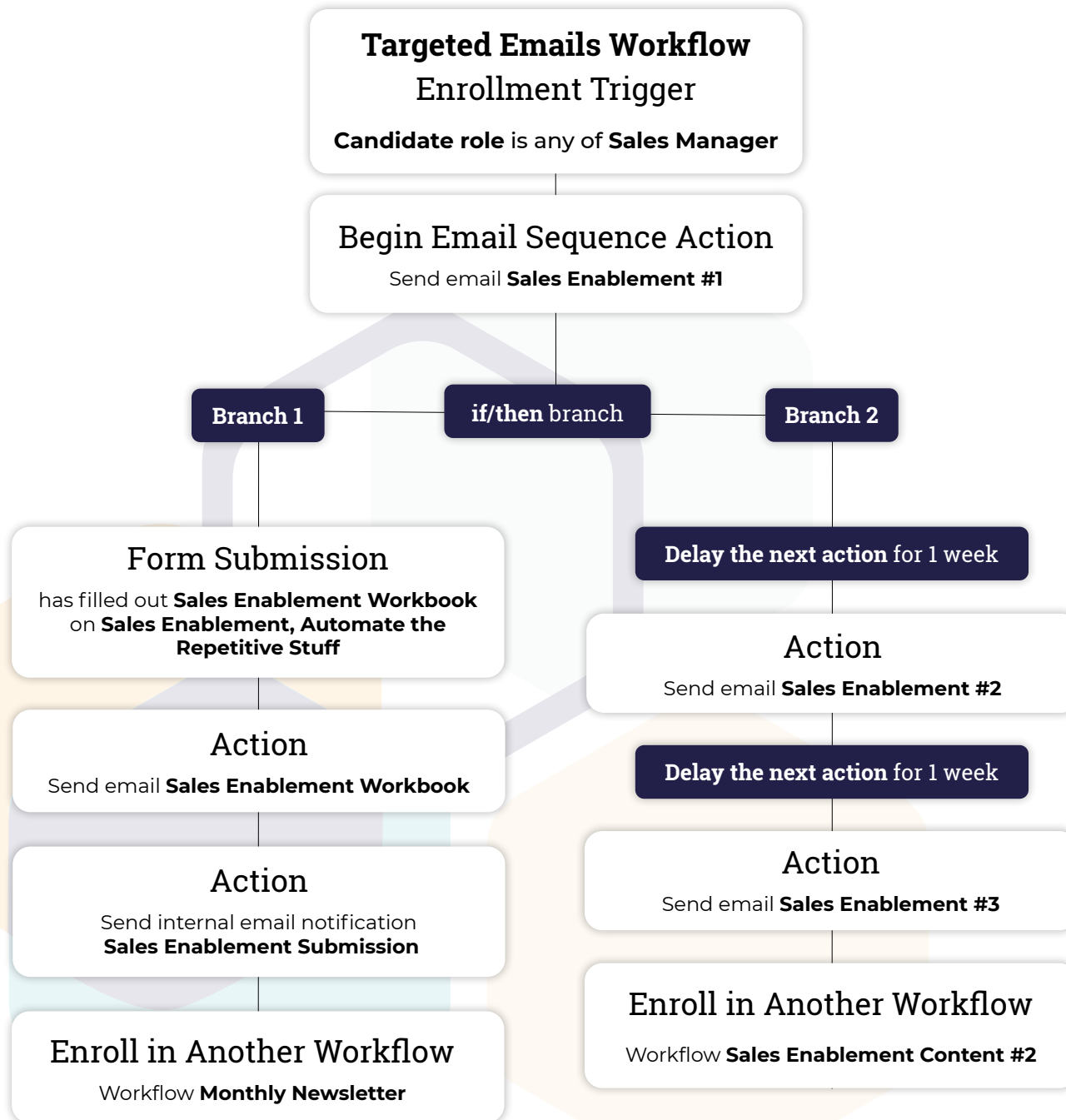




HubSpot Workflow 1. Targeted Emails

A simple automation to target specific contact properties within your contact list using an email sequence highlighting relevant and unique content. This is an awareness level flow to begin warming up your leads.





- In this example the workflow targets the job role 'Sales Manager' this simple workflow can be used to target any job role or contact property you choose.
- As an awareness stage sequence, this is a good opportunity to demonstrate how your products and services solve lead pain points as well as providing an exclusive introductory offer.
- Automated emails are used for workflows so you can craft beautiful emails packed full of useful content.
- Adding delays makes sure you're not bombarding leads with too many emails, a soft approach will reduce unsubscribe numbers.
- Your automated emails can be created in a sequence so you can drip feed quality content that is useful to the leads you are targeting.
- Using new language across your email sequence and delays can repurpose content and optimise for a specific conversion.
- You can use if/then branches to create different workflow sequences depending on specific criteria for example form submissions, page visits and call to action clicks.
- Once your sequence is complete the workflow can auto-enrol leads into another workflow to continue nurturing based on specific criteria for example a form submission or page visit.





HubSpot Workflow 2. Cold Lead Re-Engagement

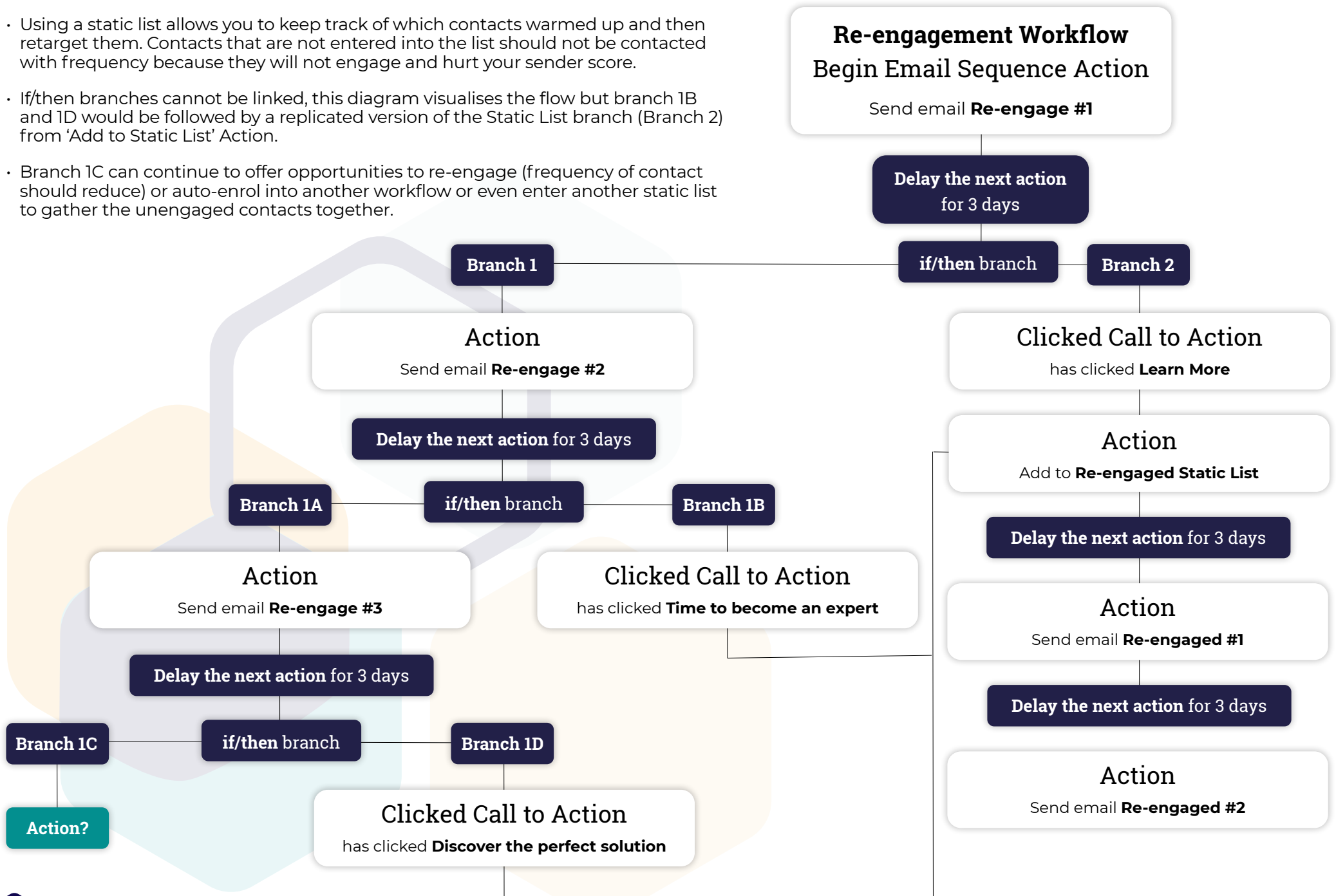
If you have a lot of contacts in your database who have gone cold, you are in fact wasting a lot of time and money just to keep them sitting there.

This simple workflow is designed to warm up cold leads with a slightly different tact than the traditional cold-contact re-engagement.

Instead of sending blogs and premium content to try and get contacts to interact, this workflow creates links enticing contacts to click and engage instead of just filling in forms. The workflow also changes how it operates based on the contacts engagement.



- Using a static list allows you to keep track of which contacts warmed up and then retarget them. Contacts that are not entered into the list should not be contacted with frequency because they will not engage and hurt your sender score.
- If/then branches cannot be linked, this diagram visualises the flow but branch 1B and 1D would be followed by a replicated version of the Static List branch (Branch 2) from 'Add to Static List' Action.
- Branch 1C can continue to offer opportunities to re-engage (frequency of contact should reduce) or auto-enrol into another workflow or even enter another static list to gather the unengaged contacts together.



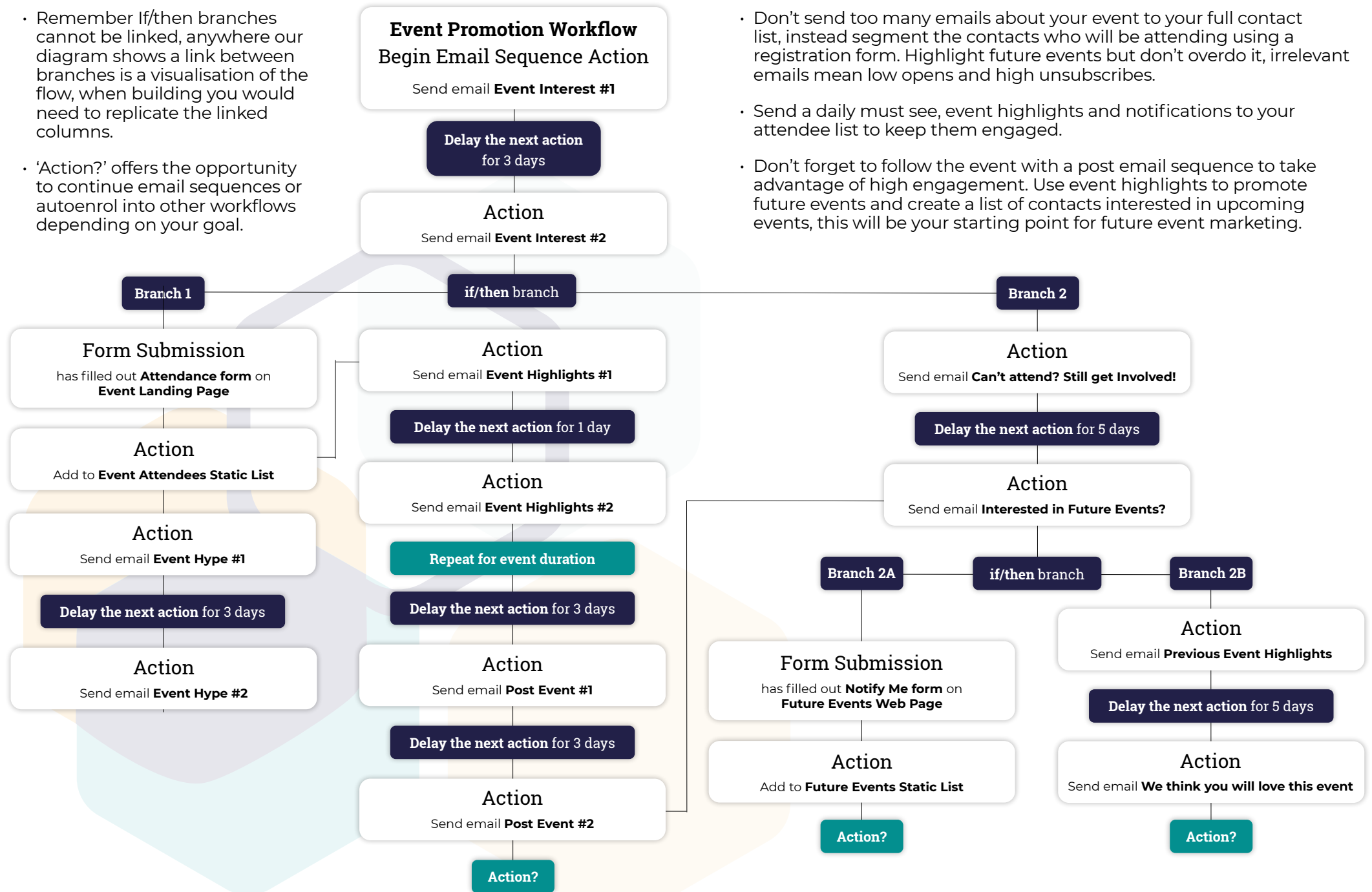
The background image shows a stage with vibrant, out-of-focus spotlights in shades of blue, purple, and pink. A large, bright blue light fixture is visible in the lower-left foreground. In the background, a large screen displays a blurred image of a person's face. The overall atmosphere is that of a high-energy event or concert.

HubSpot Workflow 3. Event Promotion

Whether it's physical events like trade shows and conferences or virtual events like live webinars, Q&A's or streams, it makes sense to utilise automation to get the most out of the exposure and engagements events can produce.

You can create hype around the event, highlight how your business is involved, ask visitors to sign up for consultation slots, webinar slots, demos etc. promote future events and finally follow up with useful content and segment event contacts for future marketing campaigns, event promotion, content etc.

- Remember If/then branches cannot be linked, anywhere our diagram shows a link between branches is a visualisation of the flow, when building you would need to replicate the linked columns.
- 'Action?' offers the opportunity to continue email sequences or autoenrol into other workflows depending on your goal.



- Don't send too many emails about your event to your full contact list, instead segment the contacts who will be attending using a registration form. Highlight future events but don't overdo it, irrelevant emails mean low opens and high unsubscribes.
- Send a daily must see, event highlights and notifications to your attendee list to keep them engaged.
- Don't forget to follow the event with a post email sequence to take advantage of high engagement. Use event highlights to promote future events and create a list of contacts interested in upcoming events, this will be your starting point for future event marketing.



