INBOUND

Interactive Workflow Automation: You Vote, We Build—LIVE!

SimpleStrat.com/inbound

Workflows are HubSpot's automation engine.

Tyler
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We are...
Simple Strat

HubSpot Diamond SOLUTIONS PARTNER PROGRAM

Diamond HubSpot Solutions Partner

Unleashing HubSpot for SMBs

HUBSPOT HACKS

Creators of HubSpot Hacks
(28k+ Subscribers)

Manage ~4,500 Active Workflows

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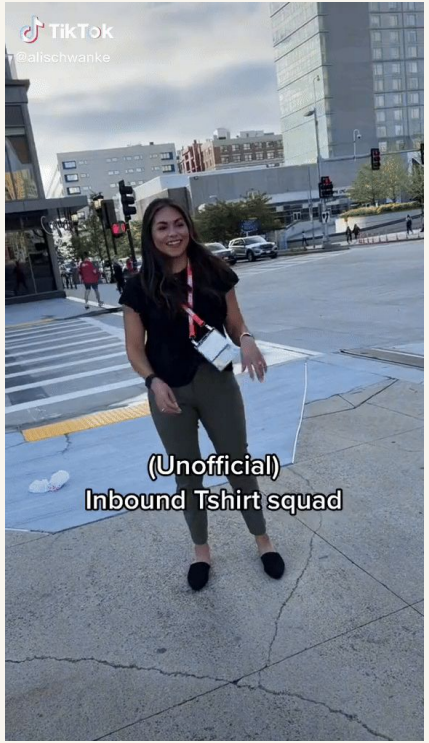
Session Introduction

- 💡 Live Workflow Building
- 🗳️ You’re in Control
- 🛠️ Real Life Examples
- 🔧 Built on the Spot
- ❓ Q&A Throughout

From the Streets to the Stage

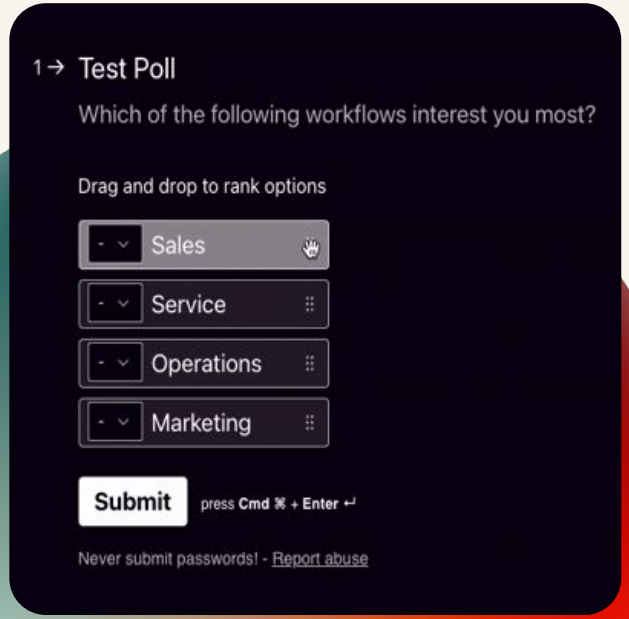


Agenda

1. Sample Poll
2. Workflow 101
3. Voting & Building
   - Marketing Workflows
   - Service Workflows
   - Operations Workflows
   - Sales Workflows
4. Q&A

Test Poll

How It Works



Which types of workflows are you most interested in seeing today?

01 Scan the QR code to access the poll

Tip: Get your phones out now!

02 Drag and drop to rank the items in order of what you want to see the most (top) to least (bottom)

03 After one minute, we'll show the results

04 We will build the top two workflows from each round of voting

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Test Poll

How It Works

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Let's See the Results

All of the workflows that we build today (***PLUS*** *the ones that aren't selected)* have been uploaded to HubSpot Hacks.

SimpleStrat.com/inbound-workflows

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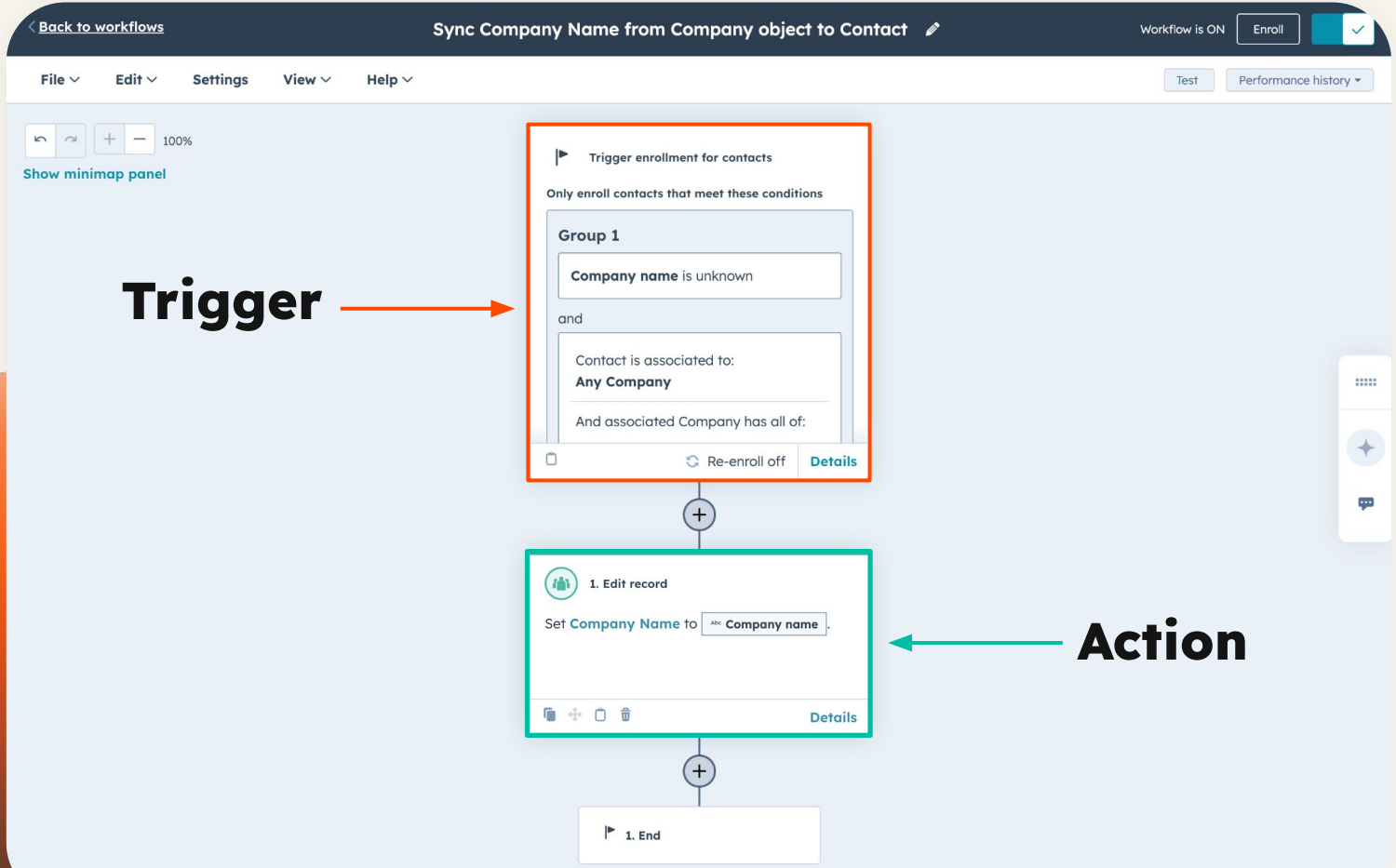
Workflows 101


Back to workflows
Sync Company Name from Company object to Contact
Workflow is ON
Enroll
File
Edit
Settings
View
Help
Test
Performance history
100%
Show minimap panel
Trigger
Trigger enrollment for contacts
Only enroll contacts that meet these conditions
Group 1
Company name is unknown
and
Contact is associated to:
Any Company
And associated Company has all of:
Re-enroll off
Details
1. Edit record
Set Company Name to Company name
Details
Action
1. End

Let’s Get Started

Ali Schwanke

Session 1

SimpleStrat.com/vote1

01 **Manage marketing and non-marketing contacts**

- Marketing Hub

02 **Sync HubSpot with Zoom Webinars**

- Any Hub

03 **Run a re-engagement nurture campaign**

- Marketing Hub

04 **Automate a new subscriber drip campaign**

- Marketing Hub

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Ali Schwanke

Session 1

SimpleStrat.com/vote1

Let's See the Results

Alexis Eaglin

Session 2

SimpleStrat.com/vote2

01 **Create onboarding objects after a deal is closed won**

- Any Hub

02 **Customer survey follow ups**

- Service Hub

03 **Automate new user onboarding**

- Any Hub (Marketing Hub Recommended)

04 **Notify teams for support ticket escalation**

- Service Hub

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Alexis Eaglin

Session 2

SimpleStrat.com/vote2

Let's See the Results

HubSpot Hacks

Straight-to-the-Point HubSpot Tips, Tricks, and Tutorials

SimpleStrat.com/HubSpot-Hacks

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Tyler Samani-Sprunk

Session 3

SimpleStrat.com/vote3

01 **Use Breeze AI to evaluate contact us form submissions**

- Any Hub

02 **Stamp contacts latest source at MQL**

- Any Hub

03 **Automate your renewal pipeline**

- Any Hub

04 **Automatically associate objects based on a matching property**

- Service Hub

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Tyler Samani-Sprunk

Session 3

SimpleStrat.com/vote3

Let's See the Results

Will DePeri

Session 4

SimpleStrat.com/vote4

01 Create deals from meetings being booked or created

- Any Hub

02 Update deal stage to Closed Won after e-sign or payment

- Sales Hub

03 Route new leads to your sales team

- Any Hub

04 Alert sales team for prospect page views

- Any Hub

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Will DePeri

Session 4

SimpleStrat.com/vote4

Let's See the Results

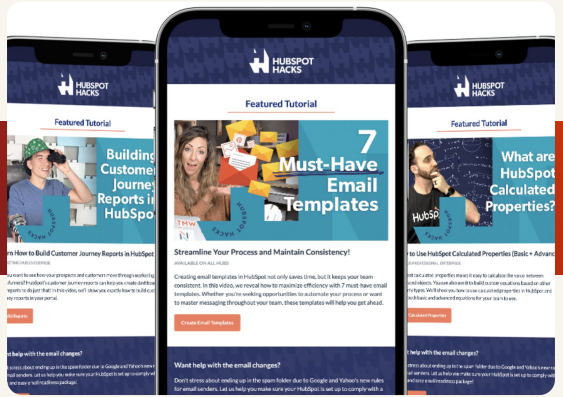
Let’s Wrap Up

If you only remember 3 things from today:

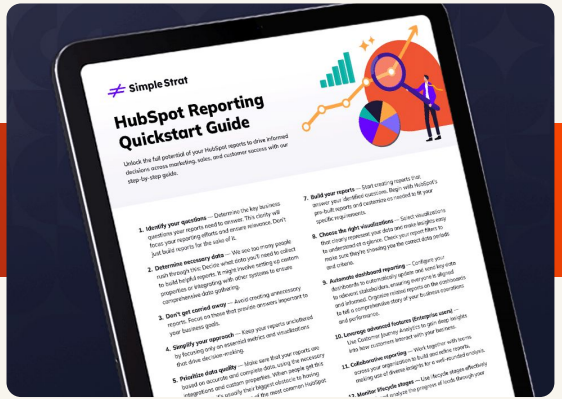
1. Double check re-enrollment settings
2. Think twice about enrolling records that already meet enrollment criteria
3. Test, test, and test again

Don't forget to visit **SimpleStrat.com/inbound** to...

Get **how-to videos** for all the workflows mentioned



Sign up for our **HubSpot Hacks newsletter**



Get one-page **workflow guides**

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Questions & Answers

Stick around after the session to chat 1 on 1!

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Thank You!

Please take a moment to rate this session in your INBOUND app.