HUBSPOT WORKFLOW & AUTOMATION SPECIALIST
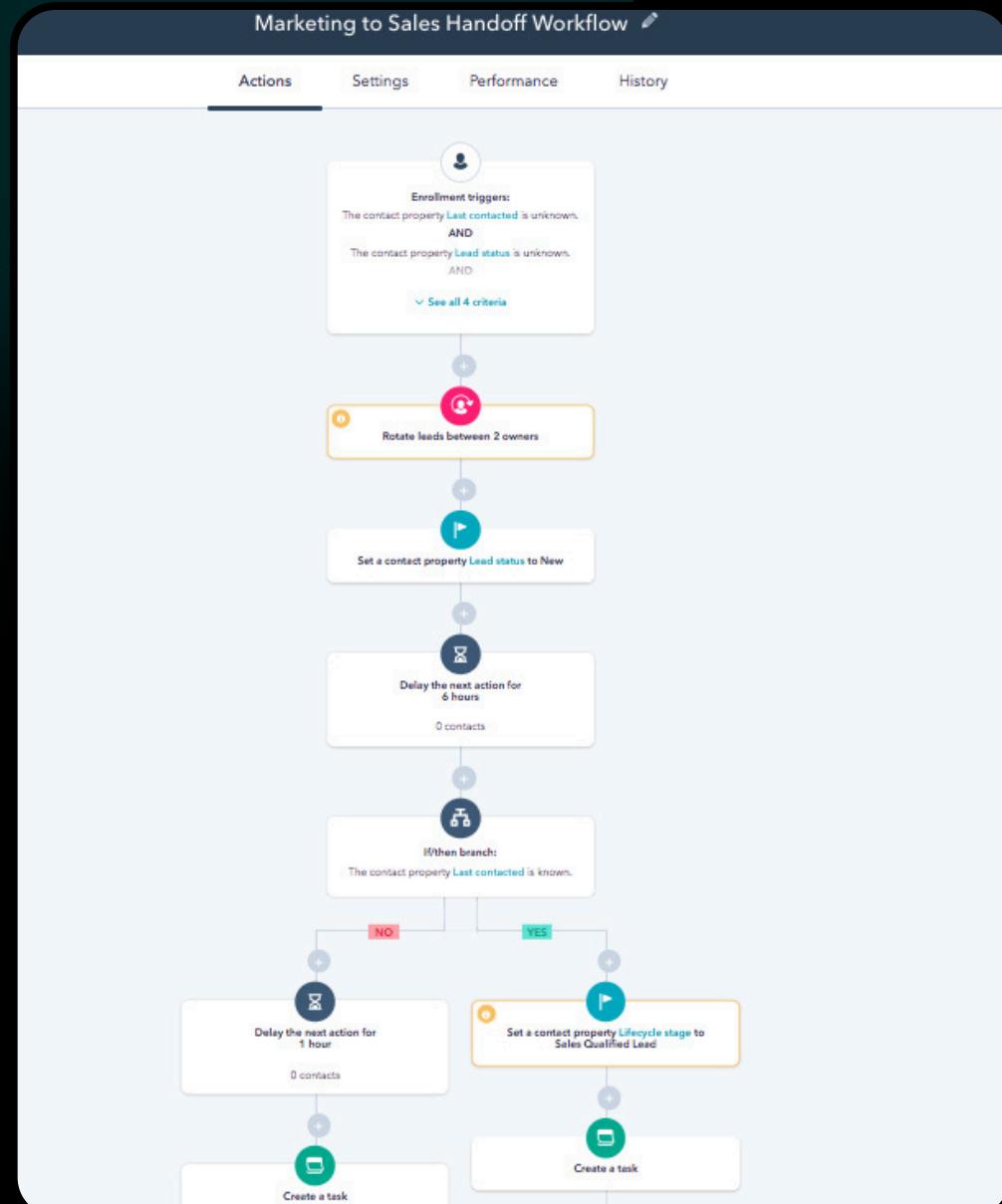
BACKGROUND & CHALLENGE

The client, a fast-growing SaaS company with a lead-gen heavy business model, struggled with:

- Manual and inconsistent follow-ups after form submissions.
- Poorly segmented nurture campaigns leading to low engagement.
- Lack of workflow logic (branching, scoring, conditional rules).
- No clear visibility into funnel progression or campaign performance.

They needed a HubSpot automation expert to build advanced workflows, create personalized user journeys, and set up reporting to optimize lead conversion rates.

OPERATIONS WORKFLOW AUTOMATION

SCOPE OF WORK

1. Workflow Architecture & Automation

- Built end-to-end workflows triggered by form fills, lead stage, and engagement.
- Implemented advanced branching logic & conditional steps for tailored messaging.
- Added lead scoring models to prioritize sales-ready leads.

2. Lead Nurture Journeys

- Designed personalized nurture sequences (email + content offers).
- Created dynamic follow-up workflows based on user engagement.
- Developed re-engagement campaigns for cold leads.

3. Measurement & Optimization

- Configured workflow performance tracking: open rates, CTR, funnel progression.
- Conducted A/B tests for subject lines, CTAs, and content delivery timing.
- Recommended data-driven adjustments based on results.

4. Sales & Marketing Alignment

- Integrated workflows to support both marketing (nurturing) and sales (handoff).
- Automated task assignments for SDRs when high-quality leads converted.
- Delivered dashboards & reports for leadership visibility.

MARKETING WORKFLOW AUTOMATION
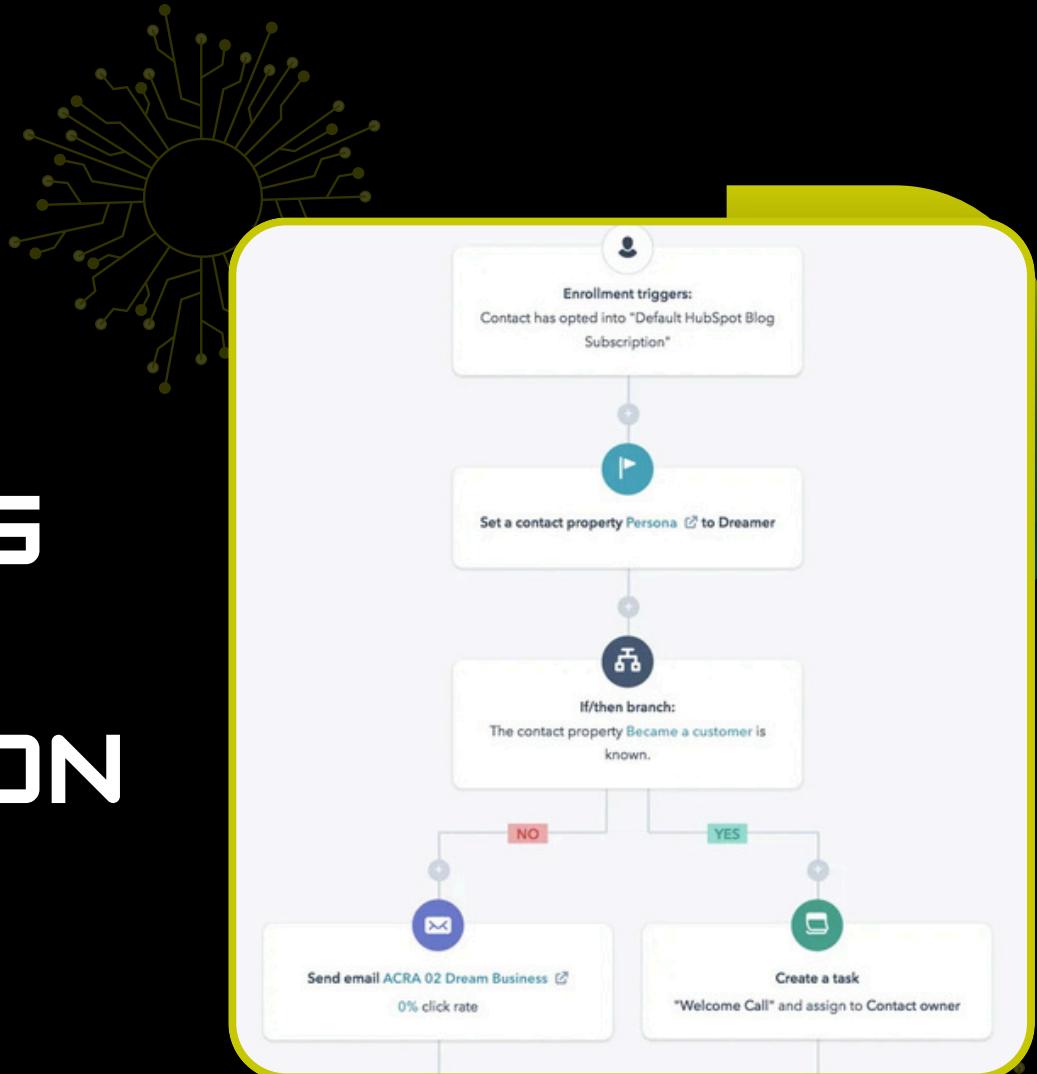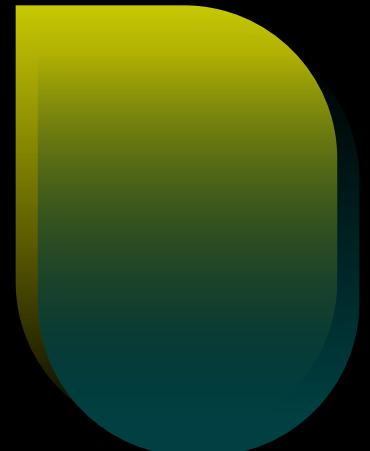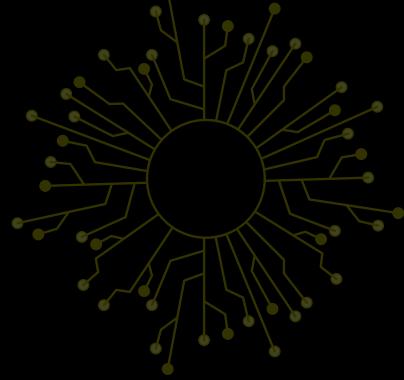
▶ Implementation Process

1. Discovery & Audit – Mapped current HubSpot setup and lead journey gaps.
2. Design – Created workflow architecture + nurture journey blueprint.
3. Build – Configured HubSpot workflows, scoring rules, and automation logic.
4. Testing – QA on triggers, personalization, and conditional logic.
5. Optimize – Monitored KPIs, ran A/B tests, fine-tuned campaigns.
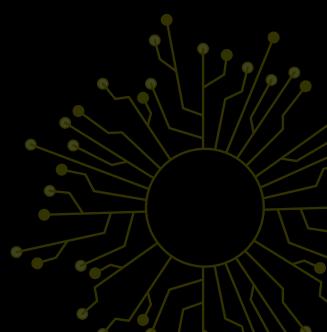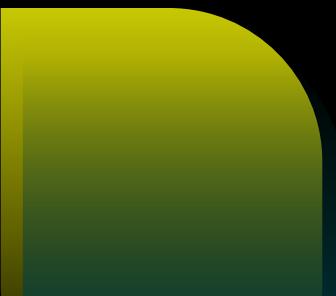
SALES WORKFLOW AUTOMATION
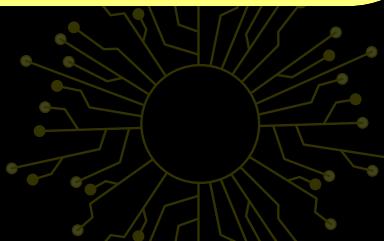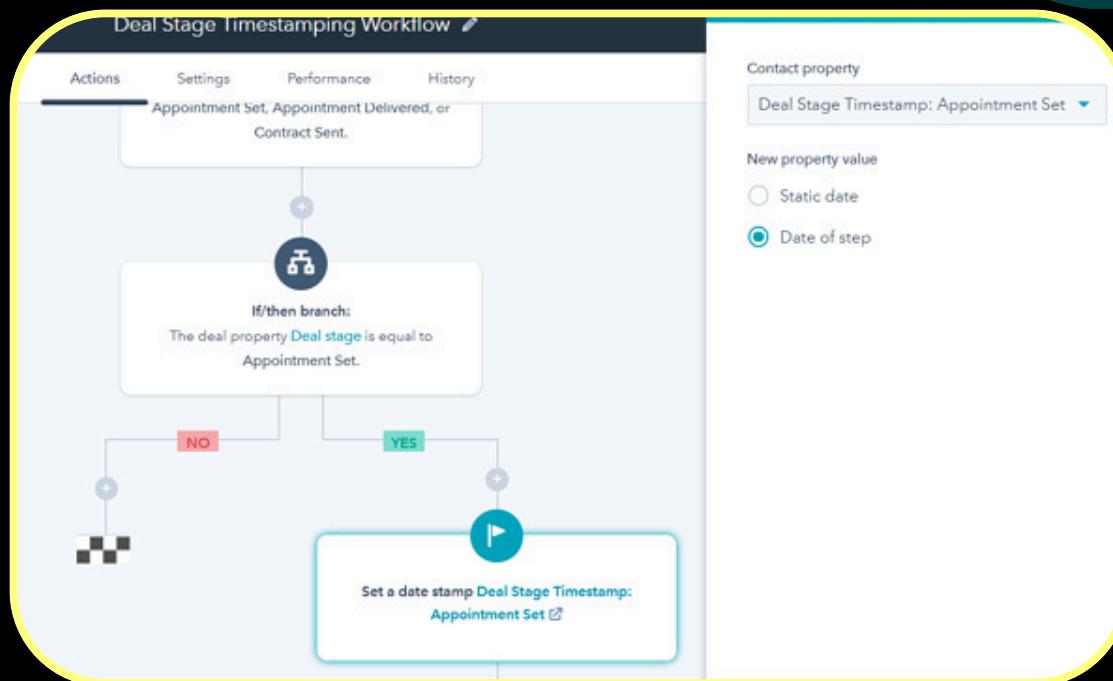
KEY ACHIEVEMENTS

Increased lead-to-opportunity conversion by 35% via personalized journeys.

Boosted email engagement (CTR up by 42%) with conditional branching.

Reduced manual follow-up tasks by 70% through workflow automation.

Improved funnel visibility with real-time HubSpot dashboards.
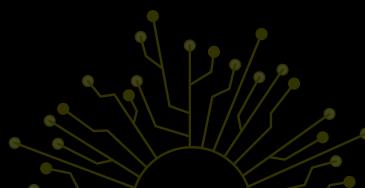
CUSTOMER SERVICE WORKFLOW AUTOMATION

SKILLS & TOOLS USED

→ HubSpot CRM & Marketing Hub – Workflows, Nurture Journeys, Scoring

→ Automation – Advanced logic, conditional workflows, lead routing

→ Reporting & Analytics – Funnel dashboards, A/B testing, attribution

→ Sales Enablement – Lead scoring, automated sales task creation

→ Marketing Automation Best Practices – Personalization, compliance alignment
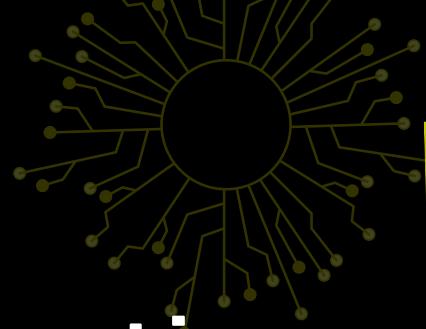
Finance Workflow Automation
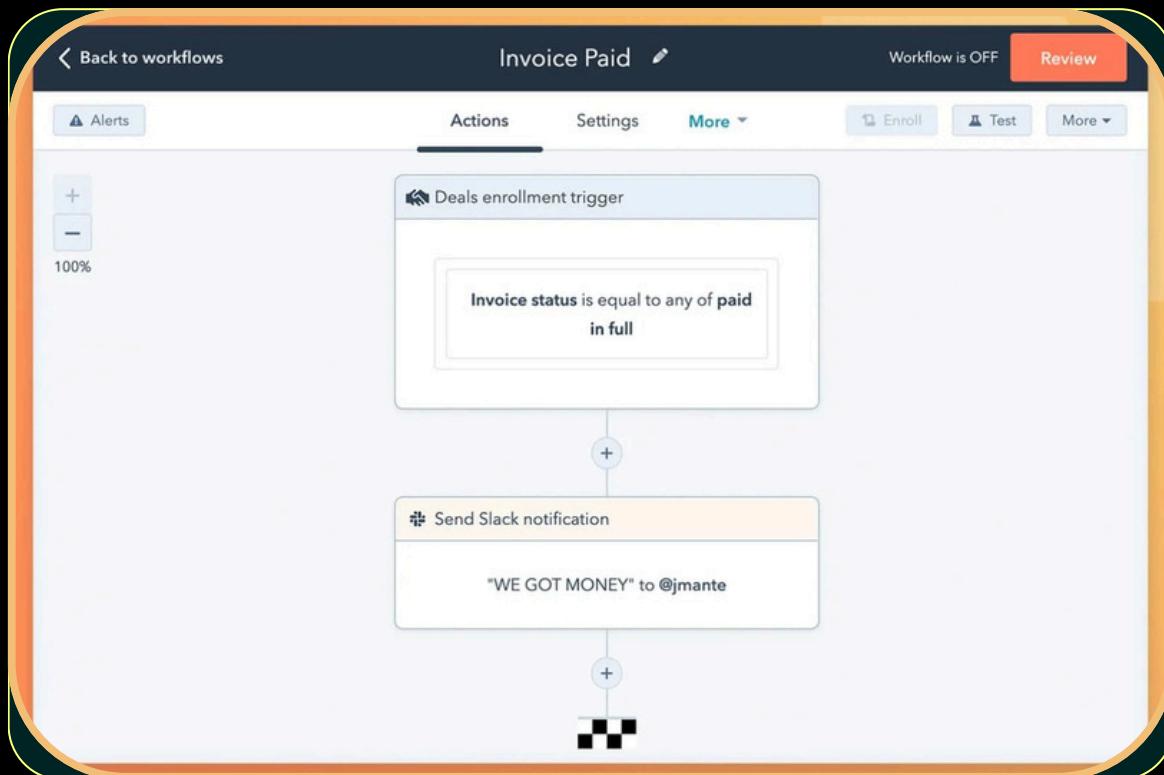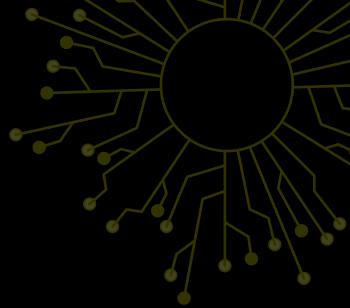
IMPACT

By implementing a robust automation framework, the client gained:

A scalable workflow system that adapts to user behavior.

Stronger marketing + sales alignment through automation.

Better decision-making with clear reporting & KPIs.

Faster lead conversion, higher ROI, and a streamlined funnel.