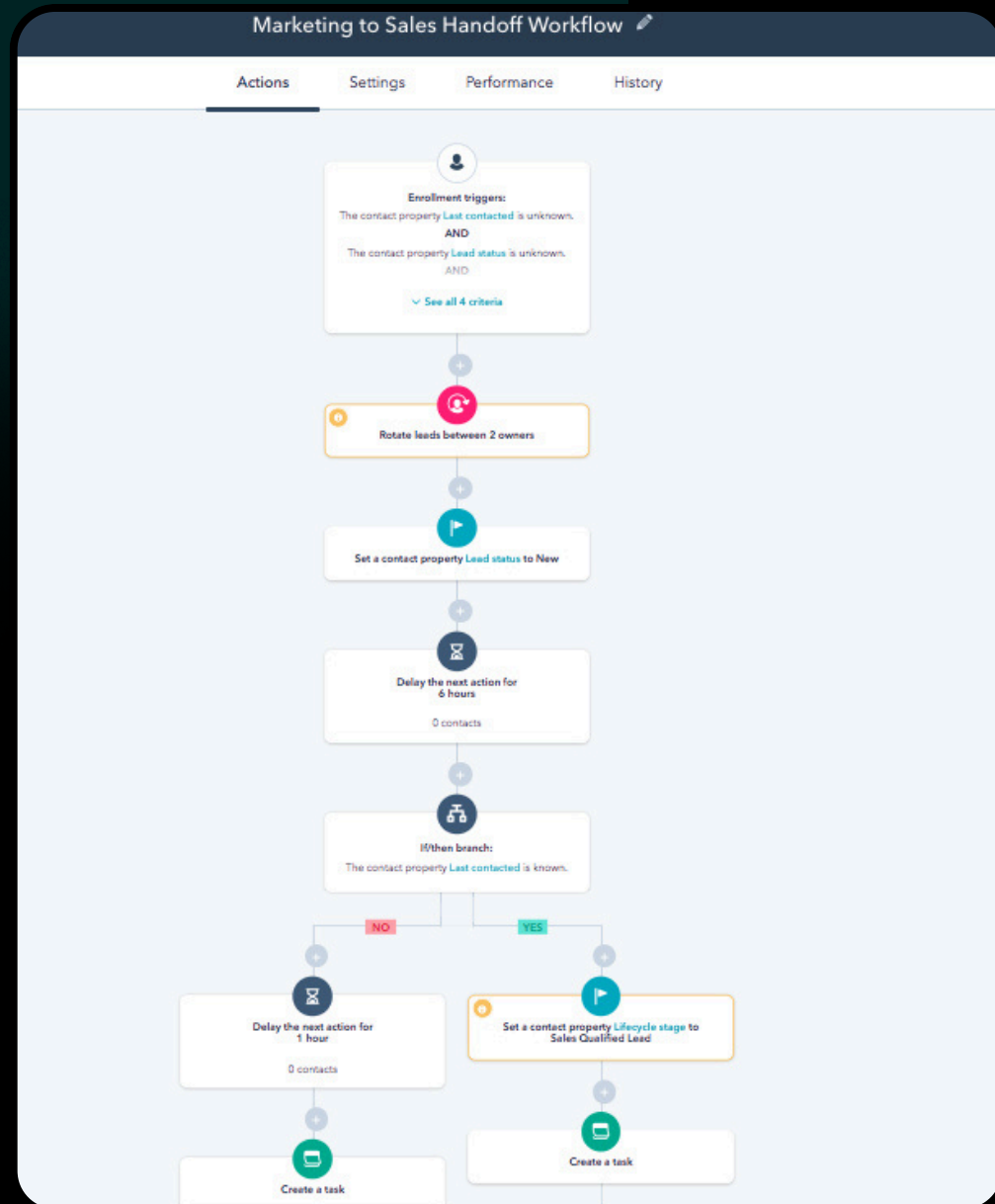


HUBSPOT WORKFLOW & AUTOMATION SPECIALIST


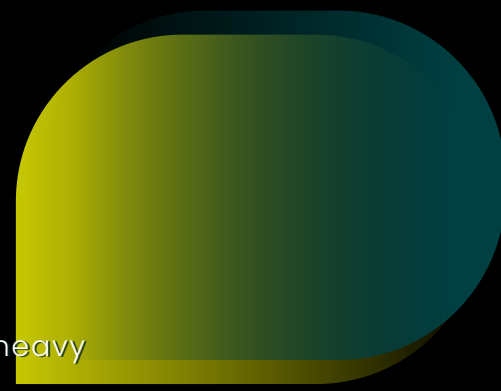




BACKGROUND & CHALLENGE

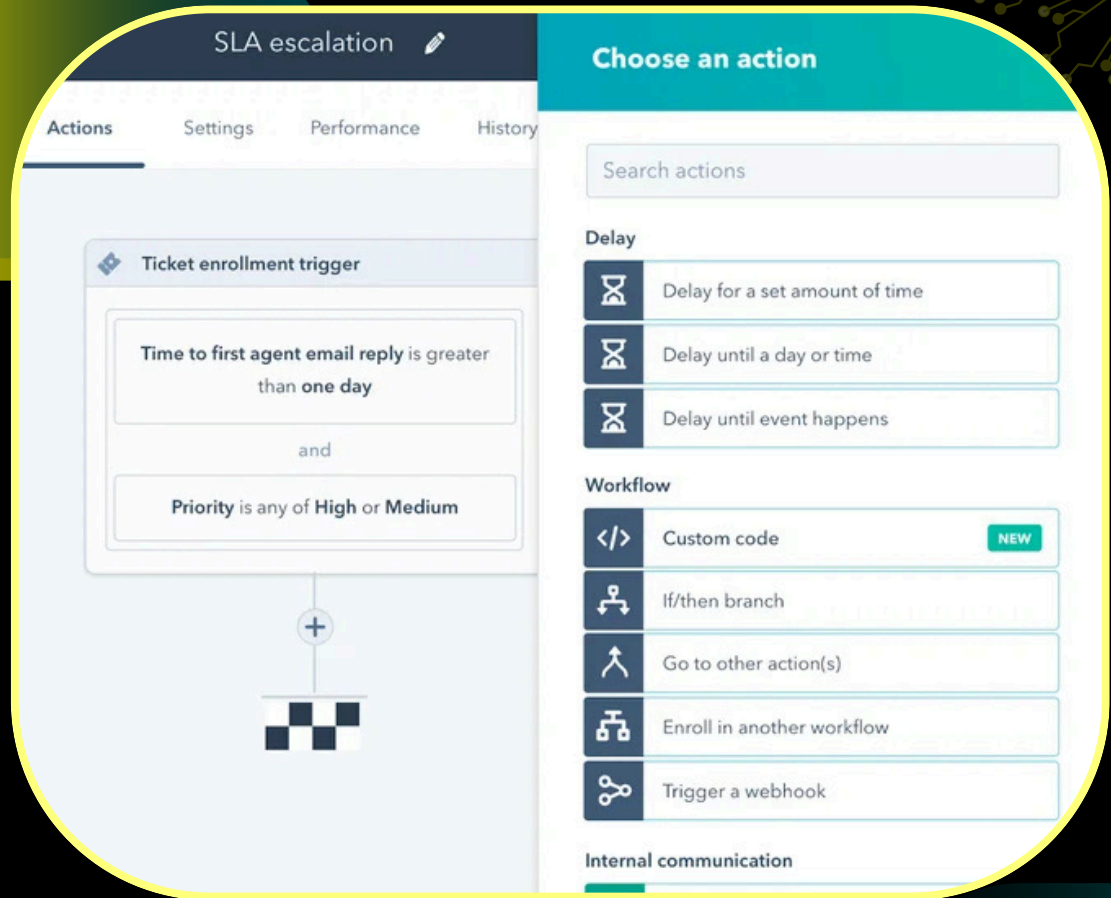
The client, a fast-growing SaaS company with a lead-gen heavy business model, struggled with:

- 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



The screenshot displays a workflow automation interface for "SLA escalation". The interface is divided into two main sections: a left sidebar for triggers and a right panel for actions.

SLA escalation (with an edit icon)

Actions | Settings | Performance | History

Triggers:

- Ticket enrollment trigger**
 - Time to first agent email reply is greater than one day
 - and
 - Priority is any of High or Medium

Choose an action

Search actions

Delay

- Delay for a set amount of time
- Delay until a day or time
- Delay until event happens

Workflow

- Custom code (NEW)
- If/then branch
- Go to other action(s)
- Enroll in another workflow
- Trigger a webhook

Internal communication



SCOPE OF WORK



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.

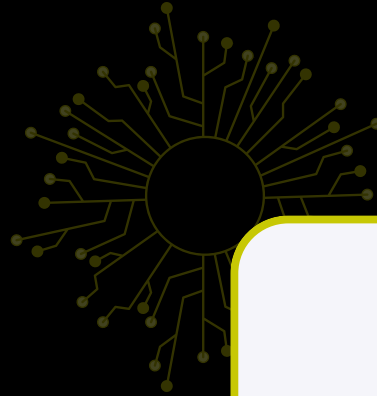


4. Sales & Marketing Alignment

- 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.

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.



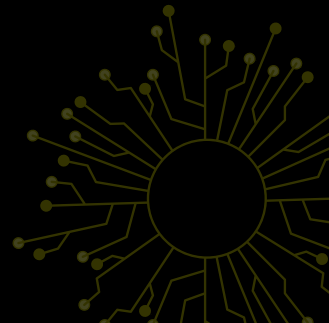
MARKETING WORKFLOW AUTOMATION





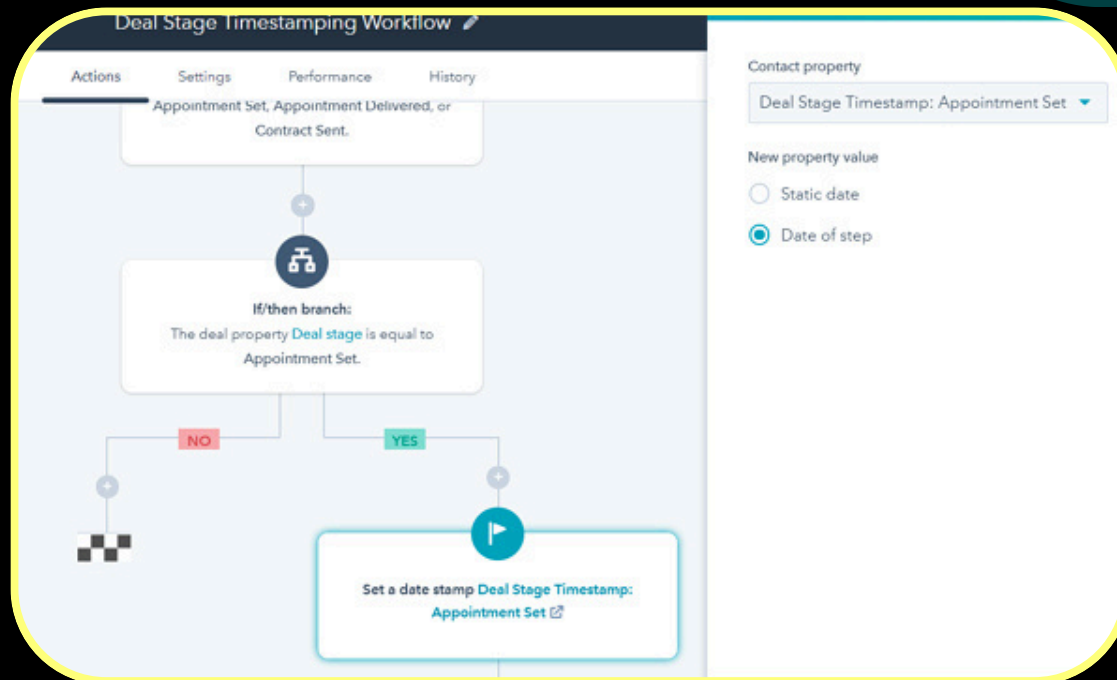
Implementation Process

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

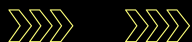


Increased lead-to-opportunity conversion by 35% via personalized journeys.

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

Workflow to workflows

Automated NPS Follow Up

Alerts Set goal

Actions Settings Performance History

100%

100%

Contact enrollment trigger

Last NPS survey rating is any of 10 or 9

Send email

Configuring...

Checkmark icon

Edit email

For more customization and templates, use the [email tool](#).

Email name *

Participate in Case Study

From name *

Shelby Colby

From address *

Choose an address

Subscription type *

Choose a subscription type

Subject line *

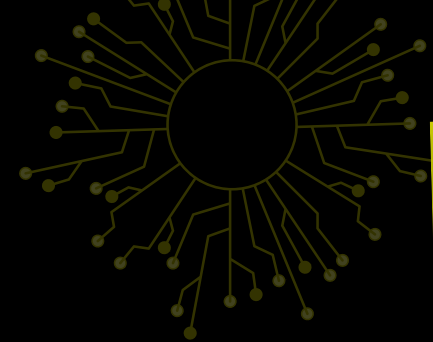
Contact token

Participate in Case Study

Body *

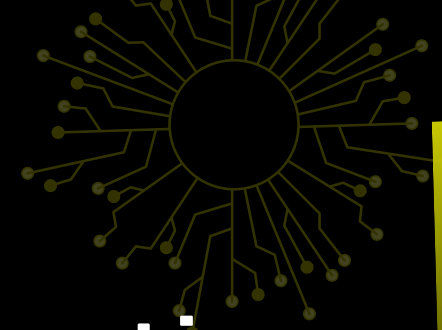
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Personalize

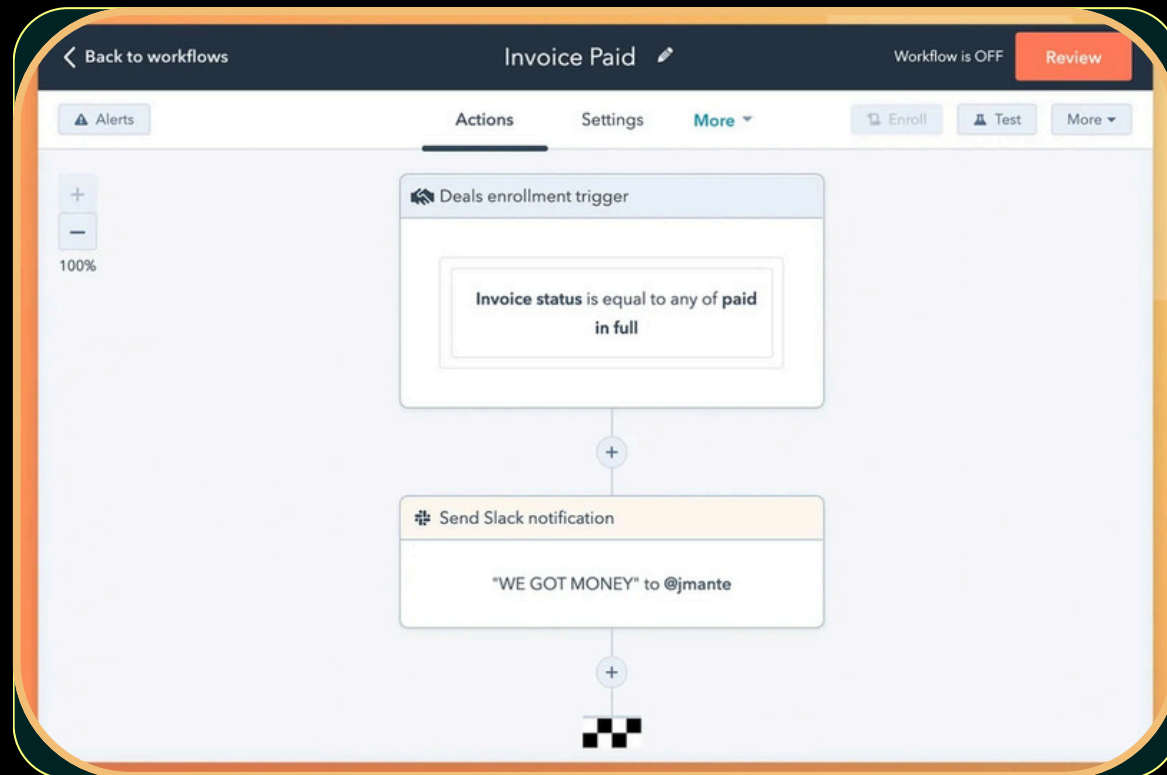


SKILLS & TOOLS USED

- 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.