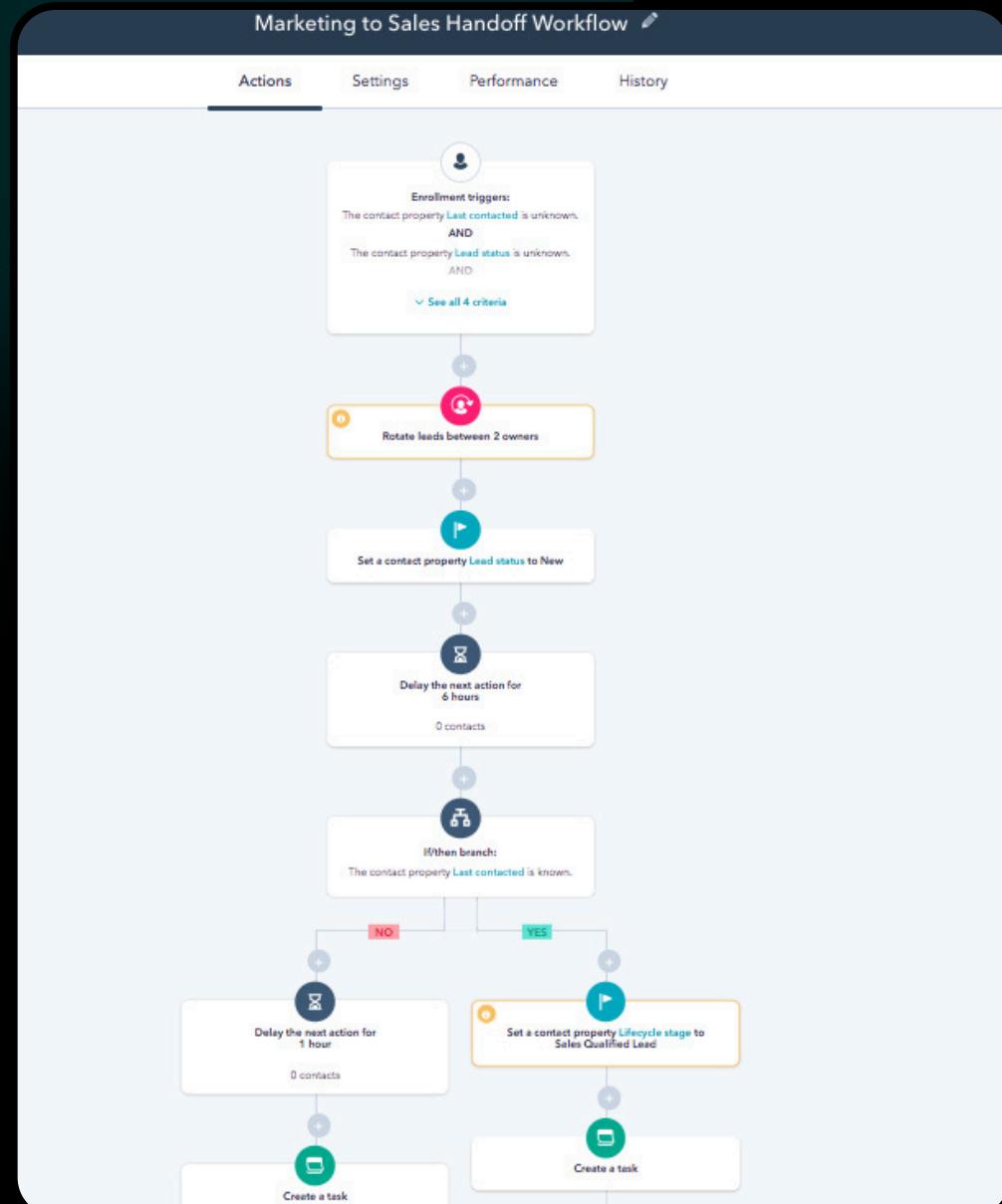


# HUBSPOT WORKFLOW & AUTOMATION SPECIALIST



# 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

SLA escalation

Actions Settings Performance History

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
- 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

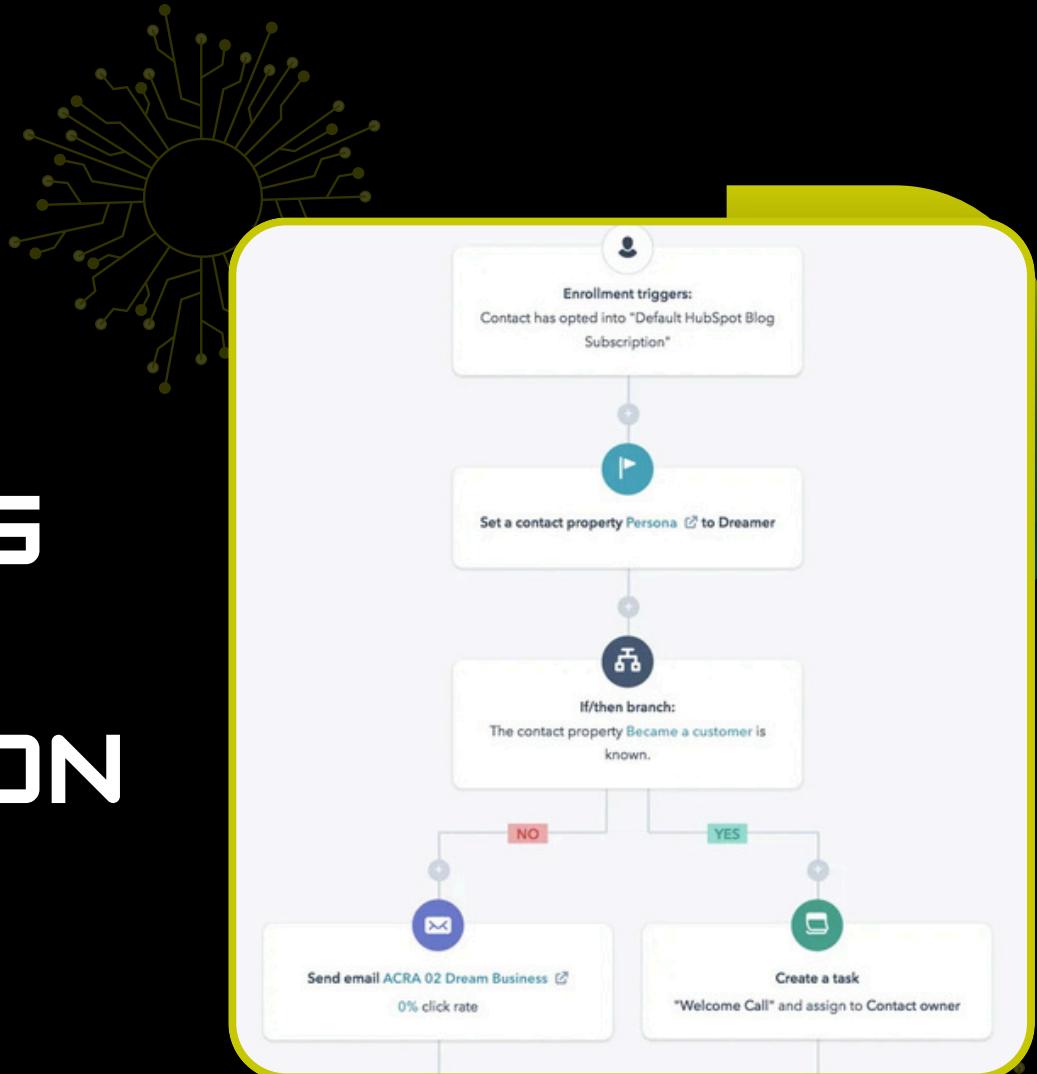
- Integrated workflows to support both marketing (nurturing) and sales (handoff).
- Automated task assignments for SDRs when high-quality leads converted.
- Delivered dashboards & reports for leadership visibility.

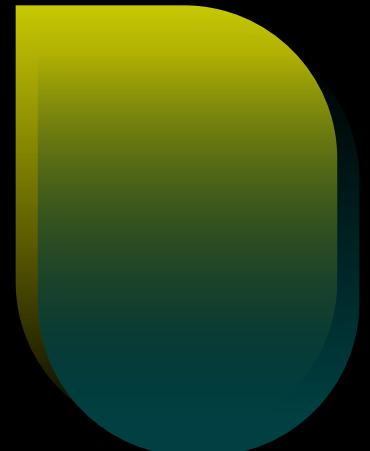
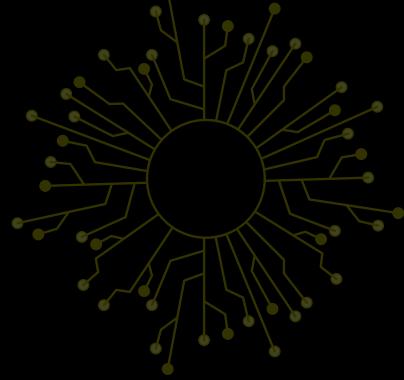
## 1. Workflow Architecture & Automation

- 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.



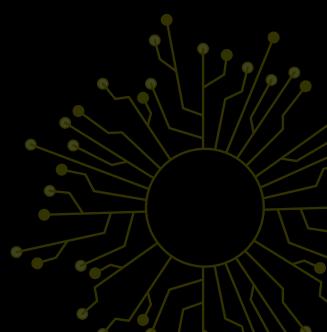
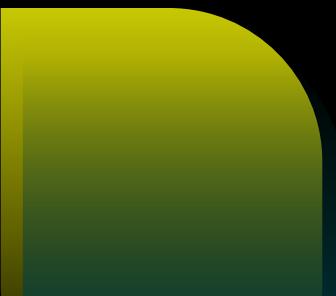
# MARKETING WORKFLOW AUTOMATION





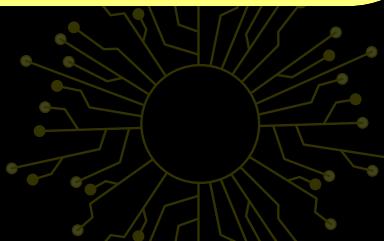
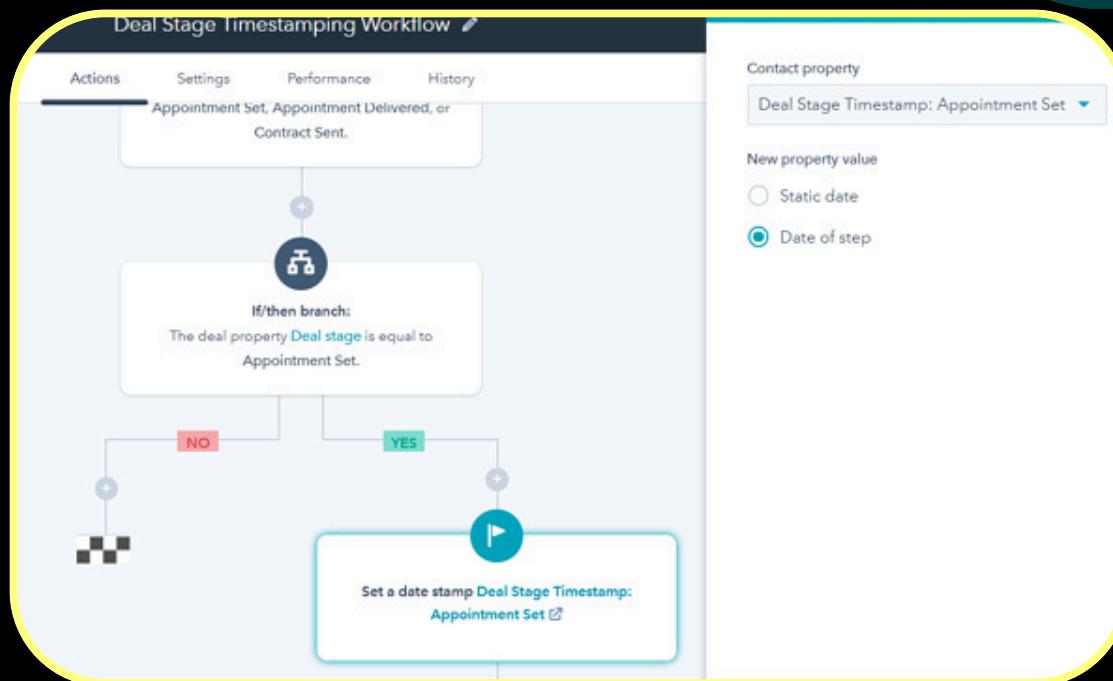
## ➡ Implementation Process

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



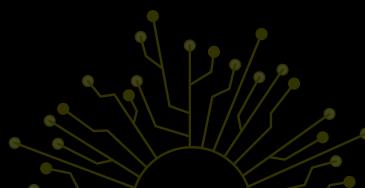
# KEY ACHIEVEMENTS

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.

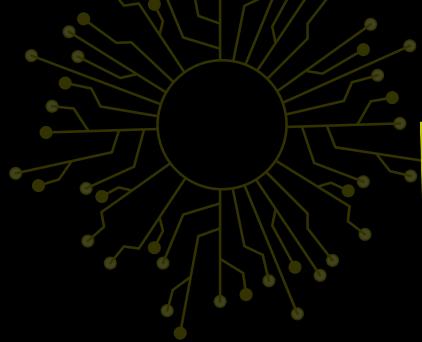
Improved funnel visibility with real-time HubSpot dashboards.





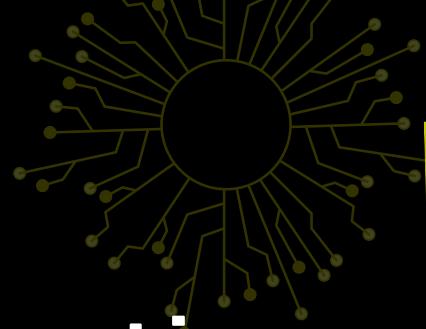
# CUSTOMER SERVICE WORKFLOW AUTOMATION

The screenshot displays a software interface for customer service workflow automation. On the left, a workflow editor titled "Automated NPS Follow Up" shows a sequence of steps: "Contact enrollment trigger" (triggered by "Last NPS survey rating is any of 10 or 9") followed by "Send email" (status: "Configuring..."). On the right, a modal window titled "Edit email" is open, allowing customization of an email message. The modal includes fields for "Email name" (Participate in Case Study), "From name" (Shelby Colby), "From address" (Choose an address), "Subscription type" (Choose a subscription type), "Subject line" (Participate in Case Study), and "Body" (Rich text editor with "Personalize" button). The entire interface is set against a background featuring abstract yellow and teal circular shapes.

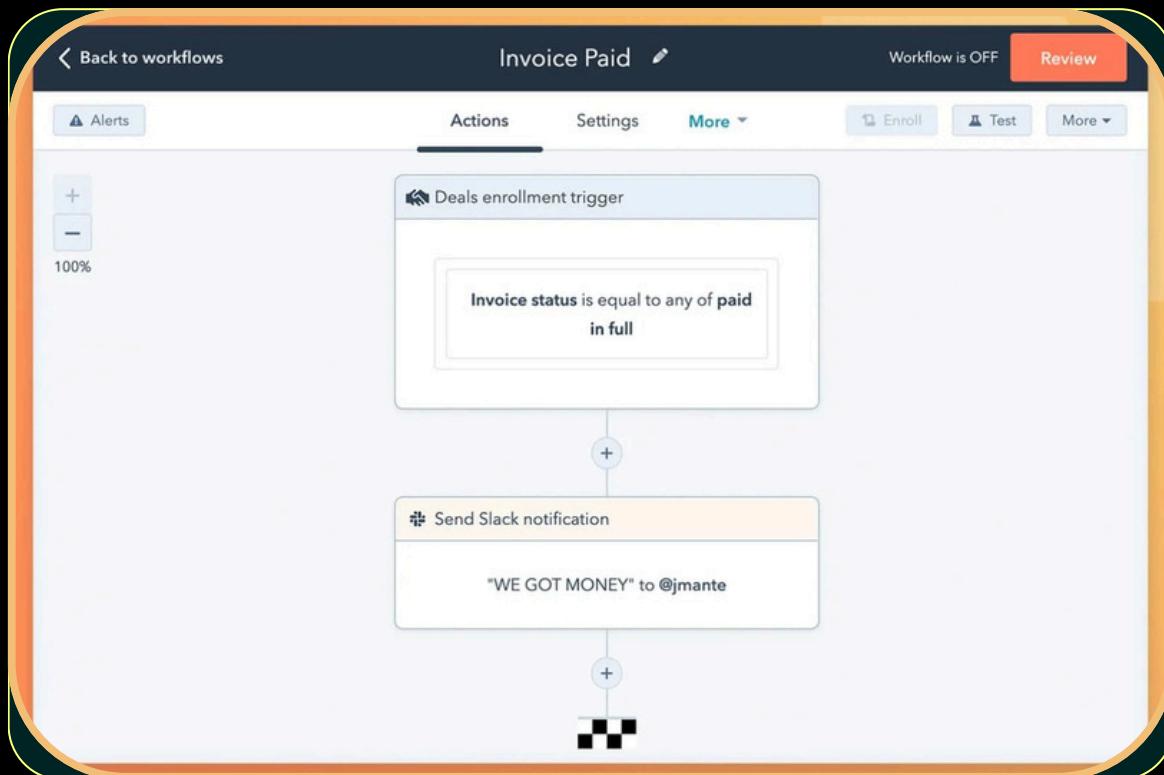


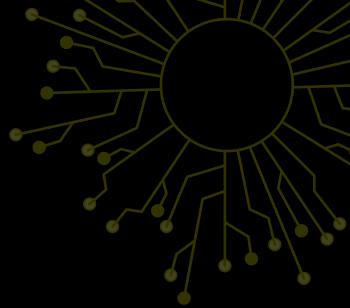
## SKILLS & TOOLS USED

- 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.

