

# Automation in HubSpot



HubShots



# Today's Agenda: (Ian)

- Setting the scene
- 2 'A' words  $\Rightarrow$  2 'E' words
- Automation journey
- Workflow deep dive
- When to upgrade to Pro
- When to upgrade to Enterprise
- How we can help

# Our goals for you



## A framework for thinking about Automation in companies

- Automation unlocks **Efficiency**
- Think in terms of 'business processes'

## How HubSpot enables Automation

- Automation **tools**: Workflows, Surveys, Sequences, Ads, Reports
- Automation **types**: Communications, Data, Pipeline management, Integration

## Should I upgrade my HubSpot portal?

- What are the benefits of **Pro**
- What are the benefits of **Enterprise**

## How we can help

- Reviewing your portal and **advising best practices**

# About Us



## Ian Jacob

CEO and Founder of [Search & Be Found](#).

Ian is a business growth strategist specialising in marketing and sales strategy with a focus on HubSpot automation. With 16+ years of experience, Ian has worked with companies like Macquarie Bank, Ericsson, and Telstra (and he hopes to add you to that list!).



## Craig Bailey

CEO and Founder of [XEN Systems](#).

Craig has more than 30 years experience working in software development and IT. With a thorough understanding of both the technical and business sides of HubSpot software, he's focussed on delivering process improvement to companies using HubSpot as the foundation.

# About Us



**Ilan and Craig**

29 December 2015

Recording [episode 13](#) of HubShots  
([Episode 1](#) was recorded 06 October 2015)



**Brian**

Inbound 2016

Listen to [episode 100](#) of HubShots



**Dharmesh**

Inbound 2016

One day soon...

# Setting the Scene

(Craig)

HubShqts

## Business challenges

1. Global, Local, Company impacts
2. Knowledge worker productivity

# Business impacts

## Global

Recession fears

## Local

Talent shortage

## Company

Staff sick

Global Markets Tumble as Rec...  
nytimes.com/live/2022/09/23/business/economy-news-inflation-stocks

Sept. 23, 2022 Updated Sept. 30, 2022, 10:07 a.m. ET  
Daily Business Briefing

### Global markets tumble as recession fear returns.

Central banks around the world raised interest rates this week to combat inflation. That's raising concerns among investors about an economic slump.

- A major European stock index falls into a bear market.
- U.K. markets are rattled by the new government's tax and spending policies.
- Oil prices tumble to their lowest level since January.
- The Fed's outlook is an 'unrealistic fantasy' to some investors.
- Britain makes a risky bet on tax cuts to drive growth.
- Interest rate increases are causing pain now. But the U.S. has seen worse.
- Moves by central banks leave little room for error.

Follow our latest coverage of [business](#), [markets](#) and [economy](#).

### Global markets tumble as recession fear returns.

By Joe Rennison, Esha Nelson and Isabella Simonetti

Stocks nose-dived, government bond prices plummeted, the pound dipped against the dollar, oil prices slumped and cryptocurrencies wobbled on Friday as investors, already worried about rising interest rates and stubbornly high inflation, started quaking at the growing likelihood of a recession.

#### In a Bear

Percentage change in the S&P 500 since its peak on Jan. 3

Dow sinks to 2022 low as recession fears roil world markets  
washingtonpost.com/business/asian-stocks-slide-for-3rd-day-on-economic-growt...

September 23, 2022 at 5:20 p.m. EDT

## Dow sinks to 2022 low as recession fears roil world markets

By Damian J. Troise and Alex Veiga | AP

The New York Stock Exchange is seen, Friday, Sept. 23, 2022, in New York. Stocks tumbled worldwide Friday on more signs the global economy is weakening, just as central banks raise the pressure even more with additional interest rate hikes. (AP Photo/Mary Altaffer)

Analysis | People are fleeing Puerto Rico, Guam and every other U.S. territory. What gives?

It's the perfect starter home. But it's only for rent.

Seniors are stuck home alone as health aides flee for higher-paying jobs

If a Google billionaire can't make flying cars happen, can anyone?

U.S. economy stumbles into final stretch of 2022 facing new pressures

European stocks fell just as sharply or more after preliminary data show...

# Business impacts

## Global

Recession fears

## Local

Talent shortage

## Company

Staff sick

**Deloitte.** Services Industries Careers Search AU-EN

Blog: Economics

Posted: 23 Aug. 2022 5 min. read

## Employment Forecasts: skill shortages bite – migration to the rescue?

David Rumbens Hamish Burrell

According to Deloitte Access Economics' latest issue of *Employment Forecasts*, Australia's labour market has been the standout indicator of success since COVID first hit. **The unemployment rate is at 3.4%, a near 50 year low**, while the labour force participation rate hovers near a record high, at 66.4%.

The impact of pandemic-era international border closures, combined with an incredibly tight labour market, has seen **the number of vacant jobs reach new highs** – to the point where there are now fewer unemployed people than job vacancies.

Going forward, growth in the Australian economy is expected to slow amid the impact of inflation running ahead of wages, rising interest rates, and weaker global economic conditions. Despite future headwinds, there are still opportunities for white collar workers in Australia, and it may still be some time before the number of unfilled job vacancies returns to more normal levels.

**Deloitte Access Economics expects that total national white collar employment gains may moderate from a record breaking 352,200 in 2021-22, to a still strong 205,200 in 2022-23.** National white collar employment is expected to grow on average by 1.6% per year between June 2022 and June 2023 – outpacing total national employment which is forecast to grow on average by 1.4% per year. (Chart 1).

**Chart 1: Forecast growth in national employment**

Year	% change on a year earlier
1990	~3.5
1995	~3.5
2000	~3.5
2005	~3.5
2010	~3.5
2015	~3.5
2020	~3.5
2021	~3.5
2022	~10.0
2023 (Forecast)	~1.4

**FINANCIAL REVIEW** Newsfeed

## How bad is Australia's skills shortage?

The low supply of available workers has translated to **almost a third (31 per cent) of businesses struggling to find suitable workers**, ABS data released on Thursday indicates.

Most of these businesses attributed their struggles to applicants not having the required skills (59 per cent) and a lack of applicants (79 per cent).

The inability to find workers is also not sector-specific, with the shortage affecting every industry.

**Firms reporting labour as a significant constraint (%)**

Year	Firms reporting labour as a significant constraint (%)
1990	~15
1995	~15
2000	~15
2005	~15
2010	~15
2015	~15
2020	~55

Chart: Financial Review • Source: NAB

NAB chief economist Alan Oster says the widespread difficulty in finding suitable labour indicates the hundreds of thousands of job vacancies is just as much a labour shortage problem as it is a skills one.

NAB metrics paint an even starker picture, with almost 53 per cent of businesses having difficulty finding suitable labour during the April to June quarter.

"On these measures, it's as bad as we've had it since the early nineties," Mr Oster told *The Australian Financial Review*.

**LATEST STORIES**



# Business impacts

## Global

Recession fears

## Local

Talent shortage

## Company

Staff sick

Reuters.com - Aerospace & Defense - 2 minute read - September 14, 2022 12:08 PM GMT+10 - Last Updated 19 days ago

### Virgin Australia says high staff illness rates hampering capacity, lifting fares

By Jamie Freed

Travelers stand at a Virgin Australia Airlines counter at Kingsford Smith International Airport, following the coronavirus outbreak, in Sydney, Australia, March 18, 2020. REUTERS/Loren Elliott/File Photo

SYDNEY, Sept 14 (Reuters) - Virgin Australia has been unable to provide enough domestic capacity to meet demand, which is tracking above 2019 levels because of high illness rates among staff, its chief executive said on Wednesday.

"It is people capacity, not aircraft capacity," Virgin Chief Executive Jayne Hrdlicka said of the problems at a CAPA Centre for Aviation conference. "Hopefully by Christmas time it is a bit more back to normal."

Capacity constraints made it "inevitable" that ticket prices remain a bit higher than normal for a while, she said.

Total Australian domestic capacity is running at about 86% of 2019 levels, according to data from CAPA and OAG, with Qantas Airways Ltd (QAN.AX) and Virgin scaling back capacity in recent months to help cover higher fuel prices and improve reliability.

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### Ending mandatory isolation does not mean Covid is over. But we need to move beyond short-term fixes

Catherine Bennett

The virus is here to stay and we have to find sustainable ways of managing it for the long haul

This is not about "giving up" or "letting it rip", it is about handing over to sustainable measures that will take us forward. Photograph: Diego Fedelini/AP

Changes in Covid-19 policy settings always invoke mixed reactions, and the national cabinet decision to stop isolation requirements for most people is one of the more substantial announcements since the opening of international borders, and the end to supervised quarantine.

Some of us have felt protected by rules, others frustrated by them, while the majority probably sit somewhere in the middle - being reassured that they were there when needed, and relieved when we can ease them safely.

This is not about "giving up", or "letting it rip", it is about handing over to sustainable measures that will take us forward.

It was right to be cautious as we have taken a different path to many countries with most of the population having vaccine-induced immunity by the time we opened our borders, rather than immunity through infection.

Omicron was a late curveball landing just as Australia took those steps. We also had two years of more strict controls in place, especially in states affected more frequently by outbreaks, and with that some serious anxiety-

**Most viewed**

- Petrus: US would destroy Russia's troops if Putin uses nuclear weapons in Ukraine
- Live: Australia news live: Optus commissions external review of data breach; dams spill as rain sweeps east coast
- Live: Brazil elections 2022 live: Lula headed for run-off with Bolsonaro
- Capitol attack officer Fanone hits out at 'weasel' McCarthy in startling interview
- Brazil election 2022: live results from the presidential race

# Knowledge Workers



60% of US workers are considered knowledge workers ([source](#))

- Knowledge workers' highest value is realised when they focus on 'creative', **thinking activities**
- Any time spent on repetitive tasks is **an opportunity for automation**

How to tell: were you able to easily WFH during the pandemic?

- You're probably a knowledge worker
- You could probably be more productive - getting rid of repetitive tasks
- Which repetitive tasks (business processes) are candidates to be automated?

# Which leads to staffing problems



## Staff capacity is constrained

- Expensive (inflation and recession impacts)
- Hard to hire (talent shortage) - even if you have the cash
- Unreliable (sickness) - even if you manage to hire them

## Staff capacity is diluted

- Senior staff forced to fill the gaps in junior work
- Knowledge workers pulled away from strategic (thinking) work

# Which means...



## Efficiency is reduced

- Things get missed
- Things take longer
- Things are assigned to less capable staff

## Effectiveness is unknown

- Can't tell what's working
- Don't know where to place focus

(Our two 'E' words...)

# Transformation

(Craig)

HubShqts

## Business Improvement

- Two 'A' words  $\Rightarrow$  two 'E' words
- What is business 'transformation'?

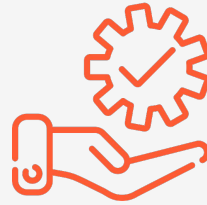
# Efficiency versus Effectiveness

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## Efficiency

Doing the things right



## Effectiveness

Doing the right things

# Business Improvement



## Automation ⇒ Efficiency (Saves money)

- Unlocks Efficiency
- Workflows, Sequences, Notifications
- >> More with less <<
- Our topic for today!

## Attribution ⇒ Effectiveness (Scales money)

- Enables Effectiveness
- Contact, Deal, Revenue
- >> Show me what's working <<
- (Our [topic last time](#))

# Efficiency versus Effectiveness



## Efficiency

- **Repeatable** processes
- **Tactical**
- **Tasks**

Examples:

- Waiting for your doctor's appointment
- Production lines
- Repetitive manual processes
- **Busy** work
- Standard quoting
- Ecommerce transactions

## Effectiveness

- **Creative** processes
- **Strategic** (& Diagnostic)
- **Outcomes** (Impact)

Examples:

- Surgery by your doctor
- Einstein, Picasso, artists
- Experts doing their thing
- Managing **relationships**
- Tailored proposals
- Custom transactions

Q: Was Einstein efficient?  
A: Who cares



# Efficiency versus Effectiveness



## Key takeaway

- The value of **Automation** depends on **the task at hand** ('jobs to be done'), not the industry
- Look for the repeatable processes in any industry
- “Don't try to sell automation to Einstein”

# Business transformation



## We're in the transformation business

Business process transformation:

- A combination of **resilience** combined with **scalable repeatability**
- Freeing up people to **work on impactful activities**

# HubSpot Outcome Journey (Ian)

HubShqts

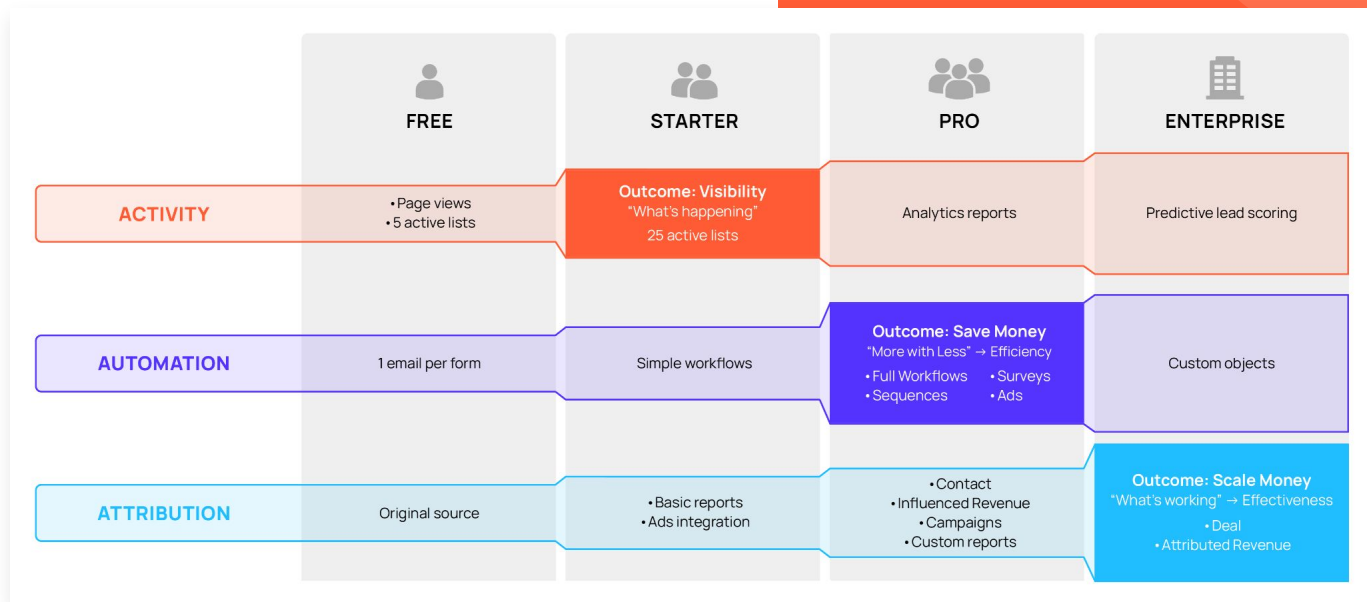
Which outcome are you focussed on:

- Activity
- Automation
- Attribution

# Outcome Journey

## HubSpot Outcome Focus

- Activity
- Automation
- Attribution



# Automation Benefits



## Quick wins

- Automating a manual process provides **immediate benefit** (no waiting for results later in the month)

## Speed

- Save time
- Scale easily

## Accuracy

- Reduce errors
- Consistent reporting

## Resource optimisation

- Free up head count

## Foundation to Attribution

- Consistent data input and management is a key foundation for attribution

# Automation Types



## Communication

- External: Emails
- External: Surveys
- External: Calendar bookings
- External: Call transcription (intelligence)
- Internal: Notifications
- Internal: Tasks
- Internal: Scheduled reports and dashboards

## Integration

- Sync to ad platforms
- Sync with other systems (eg financial, delivery)

## State Management

- Lifecycle stage (Contacts)
- Pipeline management (Deals, Tickets)

According to Harvard Business Review, only 3% of companies' data meet even basic data-quality standards.

## Data Confidence

- Object data cleanliness

# Automation in HubSpot









HubShqts

## How to enable automation in HubSpot

- Workflows
- Sequences
- Ads
- Surveys
- Reports
- (Integration)

# Workflow comparison

## Hub vs Tier

	 <b>FREE</b>	 <b>STARTER</b> Simple workflow editor	 <b>PRO</b> Full workflow editor	 <b>ENTERPRISE</b> Full workflow editor
 <b>Marketing Hub™</b>	Trigger based on Form submit only 1 follow up email per form	Trigger based on <b>Form submit</b> only 10 actions per form	Trigger based on anything Unlimited actions per workflow Add/Remove from Static list Send marketing email Send internal marketing email Goals (Contact)	Trigger based on anything
 <b>Sales Hub™</b>		Trigger based on <b>Deal Stage</b> only	Trigger based on anything Quote workflows Rotate record to owner	Trigger based on anything Enroll/Unenroll from a sequence
 <b>Service Hub™</b>		Trigger based on <b>Ticket Status</b> only	Trigger based on anything Ticket workflows Feedback submission workflows Rotate record to owner	Trigger based on anything Enroll/Unenroll from a sequence
 <b>Operations Hub™</b>			Trigger based on anything Trigger a web hook Custom Code action Format Data action	Trigger based on anything



# Workflow Components

## Triggers and Actions

- Trigger: initiate a **process**
- Actions: the business **process** 'recipe' ingredients

## Re-enrollment & Unenrollment

- Repeating the **process**
- Stopping the **process**

## Goals & Campaigns

- Measuring the **process**
- Part of the attribution foundation  
(workflows associated to campaigns)

The screenshot displays the HubSpot Business Process Automation interface. The main window shows a workflow configuration screen for 'Contact enrollment trigger'. A sidebar on the right is open to the 'Enrollment triggers' section, which lists various filter types for triggering a workflow. Below this, a 'Choose an action' dialog is visible, showing a list of available actions categorized by type.

**Enrollment triggers**

Contacts can always be enrolled manually.

Trigger workflow when:

Filter type

- Contact properties
- Company properties
- Deal properties
- Activity properties
- Line item properties
- List memberships
- Form submissions
- Marketing emails
- Email subscriptions
- Imports
- Page views
- Product properties
- Behavioral Events (Legacy)
- Workflows
- Calls-to-action
- Ads interactions
- HelloSign: Declined to Sign Document
- HelloSign: Received Deferred Signature Request
- HelloSign: Received Signature Request
- HelloSign: Signature Request All Signed
- HelloSign: Signature Request Canceled
- HelloSign: Signature Request Declined
- HelloSign: Signature Request Reminded
- HelloSign: Signature Request Sent
- HelloSign: Signature Request Signed
- HelloSign: Signature Request Viewed
- HelloSign: Signed Document
- HelloSign: Viewed Document
- Hotjar: PollResponse
- Mailchimp: Bounce
- Mailchimp: Click
- Mailchimp: Open
- Mailchimp: Sent

**Choose an action**

Available actions

Search actions

**Delay**

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

**Workflow**

- Enroll in another workflow
- Send a webhook
- Custom code
- Format data

**Branches**

- If/then branch
- Value equals branch
- Go to other action

**Internal communication**

- Send internal email notification
- Send internal marketing email
- Send in-app notification

**External communication**

- Send email
- Enroll in a sequence
- Unenroll from sequence

**Slack**

- Send Slack notification

Save Cancel

# Workflow Components

## Triggers and Actions

- Trigger: initiate a **process**
- Actions: the business **process** 'recipe' ingredients

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- Repeating the **process**
- Stopping the **process**

## Goals & Campaigns

- Measuring the **process**
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(workflows associated to campaigns)

The screenshot displays the HubShots Business Process Automation interface. The top section shows a workflow diagram with a 'Contact enrollment trigger' (Form submission has filled out HubShots | HubSpot QuickCheck Form on Any page) followed by an action '1. Delay for a set amount of time' (1 hour). The right sidebar is titled 'Enrollment triggers' and lists criteria for re-enrollment, such as 'Allow contacts who meet the trigger criteria to re-enroll when any one of the following occurs' and 'They are manually enrolled'. The bottom section shows the 'Unenrollment and suppression' settings, including options for when contacts enroll, when they no longer meet conditions, and when two contacts are merged. A suppression list 'XEN | Global Suppression List' is also visible.

# Workflow Components

## Triggers and Actions

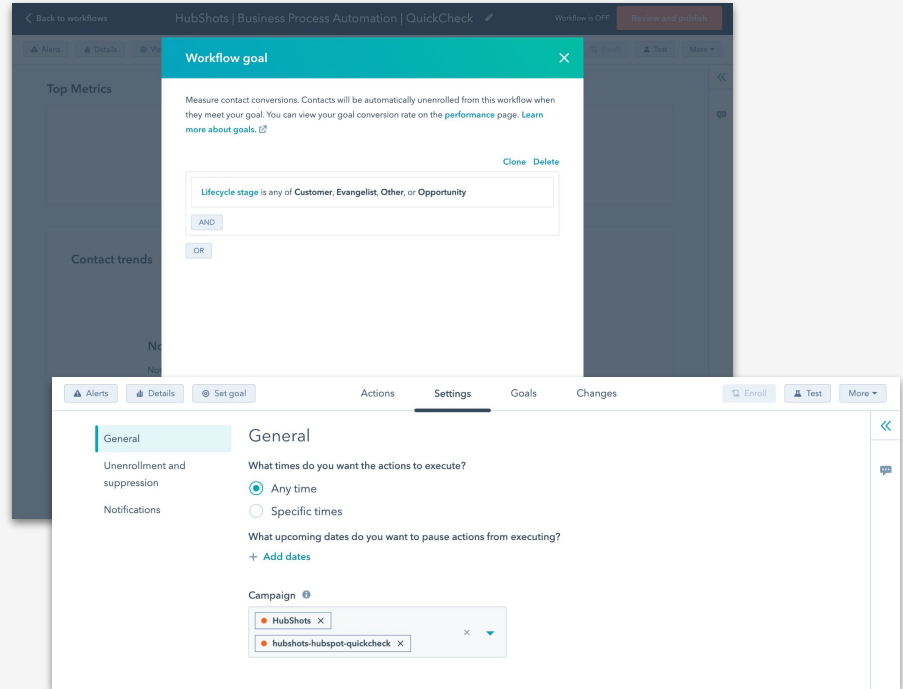
- Trigger: initiate a **process**
- Actions: the business **process** 'recipe' ingredients

## Re-enrollment & Unenrollment

- Repeating the **process**
- Stopping the **process**

## Goals & Campaigns

- Measuring the **process**
- Part of the attribution foundation  
(workflows associated to campaigns)



# Workflow Common Examples



## Contact processes

- Contact assignment
- Contact qualification (& lead scoring)
- Nurture sequences
- Internal notifications
- Adding to lists (Campaign associated)

## Sales processes

- Creating/assigning deals
- Moving deals along pipelines
- Booking meetings
- Internal notifications

## Service processes

- Creating/assigning tickets
- Moving ticket stages
- Closing tickets
- Internal notifications
- After sales follow-up (request Review)

# Sequences

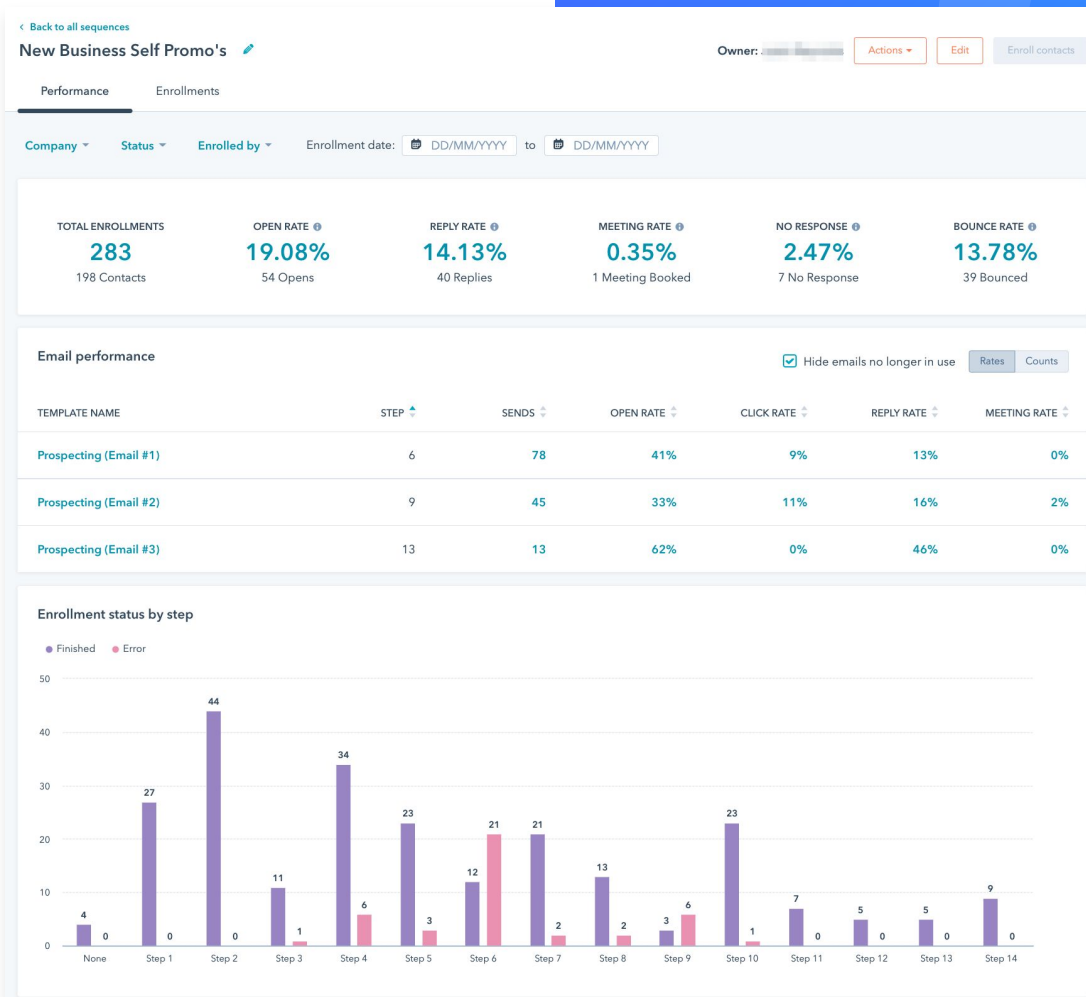
- 1:1 Sales communication
- Personalised
- Optimised based on data in HubSpot

The screenshot shows a HubSpot sequence configuration page for a sequence titled "New Business Self Promo's". The page has a dark header with the title and a pencil icon for editing. Below the header are three tabs: "Steps", "Settings", and "Automation", with "Steps" being the active tab. A summary box at the top indicates "14 steps | 19 business days to complete" and "A contact will be unenrolled from this sequence in any of these cases". The sequence consists of six steps, each with a specific action and configuration:

- Step 1: To-do** (Actions): Task title: Send Week 1 Self Promo. Configuration:  Continue without completing task.
- Step 2: Call** (Actions): Configuration: Create task in [dropdown], 2 business days. Task title: Call contact to follow up on Week 1 Self Promo. Configuration:  Continue without completing task.
- Step 3: To-do** (Actions): Configuration: Create task in [dropdown], 1 business day. Task title: Follow on LinkedIn. Configuration:  Continue without completing task.
- Step 4: Call** (Actions): Configuration: Create task in [dropdown], 1 business day. Task title: Call contact to follow up call number 2. Configuration:  Continue without completing task.
- Step 5: To-do** (Actions): Configuration: Create task in [dropdown], 1 business day. Task title: Send Week 2 Self Promo. Configuration:  Continue without completing task.
- Step 6: Automated email** (Actions): Configuration: Send email in [dropdown], 1 business day. Task title: Send Week 2 Self Promo. Configuration:  Continue without completing task. Template: Prospecting (Email #1). Template owner: Justin Reynolds.

# Sequences















Consistent emails unlock insights



# Ads





Automate the syncing of audiences between the ad platforms used

(Also a privacy compliance consideration)

NAME	TYPE	SOURCE	SIZE
 All pages - 7 days <span>● Ready</span>	Website traffic		740
 HubSpot - Customer with SAP ID <span>● Ready - Last synced 5 Oct 2022 11:12 AM</span>	Contact list	Customer with SAP ID Last updated 5 Oct 2022 11:...	200
 HubSpot - Enquiry Type // Spare Parts <span>● Ready - Last synced 29 Sep 2022 6:00 PM</span>	Contact list	Enquiry Type // Spar... Last updated 29 Sep 2022 5:...	300
 HubSpot -  Customers <span>● Syncing - 2,841 of 2,842 contacts synced</span>	Contact list	 Last updated 5 Oct 2022 12:...	200
 HubSpot - Hako Opportunities <span>● Syncing - </span>	Contact list	 Last updated 5 Oct 2022 12:...	200
 HubSpot - Leigh - Non Customers no co... <span>● Ready - Last synced 5 Oct 2022 8:44 AM</span>	Contact list	Leigh - Non Custome... Last updated 5 Oct 2022 8:3...	0
 HubSpot -  contacts <span>● Ready - Last synced 29 Sep 2022 3:51 PM</span>	Contact list	 Last updated 29 Sep 2022 3:...	200

# Ads

- Take optimisation of ads to another level by given the platforms signals and values of lifecycle stages
- Automating conversion feedback

Manage	Audiences	Events	Analyze
Accounts: 4 accounts selected ▾			
NAME ▾	EVENT TRIGGER ▾	EVENTS SYNCED ▾	
 <b>Hubspot - Customers</b> ● Active - Last synced 30 Sep 2022 10:1...	<input checked="" type="checkbox"/>	Lifecycle stage change	25
 <b>Hubspot - Opportunities</b> ● Active - Last synced 9 Sep 2022 10:54...	<input checked="" type="checkbox"/>	Lifecycle stage change	121
 <b>Hubspot - Opportunities</b> ■ [Redacted]	<input checked="" type="checkbox"/>	Lifecycle stage change	0
 <b>Hubspot - Customers</b> ● Active	<input checked="" type="checkbox"/>	Lifecycle stage change	0



# Surveys

- Feedback Surveys
- Automatically set to resend

HubShots | NPS - Customer Loyalty Survey

Published

Responses Analyze View email performance

All responses 98 responses Date range: 01/01/2022 to 05/10/2022

SENT 1,162 DELIVERED 1,155

Your NPS score

How your customers are feeling

93% Promoters - minus 3% Detractors

- 90 NPS

Who

Choose who you want to survey

Choose the criteria your contacts have to meet to receive the survey

Become a customer date More than 30 days ago

Start from scratch Set your own enrollment criteria

Static lists Existing marketing lists

Criteria

Estimated recipients 428

When

Choose when the survey is sent

When the recipient meets the criteria

Add delay You can choose to add a delay to the survey send once a recipient meets the recipients criteria.

Send the survey 14 days after meeting the required criteria

Frequency

Choose how often the survey will be sent

You can choose a recurring or one-off survey, depending on your product or service.

Recurring Survey your customers regularly if your product or service changes often and if your customers engage with your brand on a regular basis, such as a SaaS product.

Every 3 months (recommended) after meeting the required criteria

One off Survey your customers once if your product or service doesn't change often and if your customers only engage with your brand on a limited basis, such as a mattress company.

# Surveys

- Automatically notify about responses
- Speed to respond to feedback

The screenshot shows the HubSpot Automation editor for a survey. The browser address bar indicates the URL: `app.hubspot.com/feedback-editor/306227/loyalty/96/automation`. The page title is "HubShots | NPS - Cu...". The navigation bar includes "Exit", "Save", "Unpublish", and "Review and update" buttons. The main content area is titled "Automation" and features a sub-header "Save time. Automate your follow-up actions." with a link to "Learn more about automation." A "Pro tip" box suggests enabling Slack for notifications. The "Who gets notified about new survey responses?" section allows adding users or teams (e.g., `craig@een.com.au` and `lan.jacob@searchandbefound.com.au`) and includes a checkbox for "Only send notifications for survey responses that contain comments". The "Send survey reminder email" section is currently disabled (checkbox checked) and includes a dropdown for "2 days recommen..." and the text "after the survey was sent". The "Automate your follow-up actions" section includes a "Please note" warning and three workflow templates for different NPS scores: "0 - 6 Detractors", "7 - 8 Passives", and "9 - 10 Promoters". Each template shows a "1. Create task" action with specific details like "Review and contact" or "Connect on LinkedIn". A "Help" button is visible in the bottom right corner.

# Reports

- Scheduled Dashboards
- Scheduled Reports

The top screenshot displays the 'Reports dashboard' interface. It features a navigation bar with various menu items like 'Contacts', 'Conversations', 'Marketing', 'Sales', 'Service', 'Automation', 'Reports', 'CRM Development', 'Asset Marketplace', and 'Partner'. Below the navigation, there are buttons for 'Create dashboard', 'Actions', 'Share', and 'Add report'. The main content area shows 'Marketing Performance' with a date range of 'This year so far' and a frequency of 'Daily'. It displays 'SESSIONS' as 207,119 (down 14.71%) and 'NEW CONTACTS' as 4,574 (down 15.92%). There are also 'CUSTOMERS' listed as 121 (up 2.65%). A 'Filter dashboard' menu is visible on the left, and an orange arrow points from it to a dropdown menu with options: 'Copy URL', 'Email this dashboard', and 'Manage recurring emails'.

The bottom screenshot shows the 'Reports' list page. It includes a search bar and filters for 'Dashboard: Any', 'Owner: Anyone', and 'Last updated: DD/MM/YYYY to DD/MM/YYYY'. A table lists various reports with columns for 'NAME', 'DASHBOARDS', 'OWNED BY', 'ASSIGNED', and 'LAST UPDATED'. An orange arrow points from the 'Actions' dropdown menu for a report to the 'Email this report' option.

	NAME	DASHBOARDS	OWNED BY	ASSIGNED	LAST UPDATED
<input type="checkbox"/>	XEN   Revenue Interaction	0	Craig Bailey	Everyone	11/9/2021
<input type="checkbox"/>	XEN   Revenue Attribution	0	Craig Bailey	Everyone	11/9/2021
<input type="checkbox"/>	XEN   Form Submits	1	Craig Bailey	--	11/6/2020
<input type="checkbox"/>	XEN   Deals Analysis	0	Craig Bailey	Everyone	11/5/2021
<input type="checkbox"/>	XEN   Date Part versus Frequency   Example 1	0	Craig Bailey	Everyone	9/8/2022
<input type="checkbox"/>	XEN Solar   New Contacts by Source (This Week)	1	Andrea Villaflores	--	19/11/2021
<input type="checkbox"/>	XEN Solar   New Contacts by Source (Last Month)	1	Andrea Villaflores	--	19/11/2021
<input type="checkbox"/>	XEN Solar   New Contacts by Source	1	Andrea Villaflores	--	13/10/2021
<input type="checkbox"/>	XEN Solar   Landing pages by most total views (xs.com.au)	1	Andrea Villaflores	--	13/10/2021
<input type="checkbox"/>	XEN Solar   Landing pages by most total views (xs.com)	1	Andrea Villaflores	--	13/10/2021
<input type="checkbox"/>	XEN Solar   Email sent totals with engagement rates (Test)	1	Andrea Villaflores	--	13/10/2021
<input type="checkbox"/>	XEN Solar   Email (Test)	1	Andrea Villaflores	--	13/10/2021
<input type="checkbox"/>	XEN Solar   Contacts Created By Month	1	Andrea Villaflores	--	9/11/2021

# Reports

- Scheduled Dashboards
- Scheduled Reports

### Email this dashboard ✕

Is this a recurring email?

No, this email will only be sent once

Yes, this is a recurring email

Email nickname \*  
Recipients won't see this name

Weekly Management Dashboard

Recipients \*

Craig Bailey (craig@xen.com.au) ✕ Tara Connolly (tara@xen.com.au) ✕

Roselen Fernandez (roselen@xen.com.au) ✕

Kylie Browne (kylie@xen.com.au) ✕

Email subject

XEN | All Divisions

Message

Weekly management dashboard

Schedule

Weekly

Day of week \*

Friday ✕

Time of day \*  
Data is captured up to 2 hours before this email is sent. This is to make sure this email is delivered as on-time as possible.

🕒 1:00 PM AEDT

Attach downloadable file

PDF

Formatting options

One chart per page  Multiple charts per page

Dashboard context

Send dashboard without filters

Send with filters

This email is scheduled to send every week on Friday at 1:00 PM AEDT.

Not getting our emails? Make sure that you've added HubSpot email addresses to your [allowlist](#) and turned on your [share notifications](#).

Schedule email Preview ✕ Cancel

# When to upgrade (Craig)

HubShots

## The benefits of

- Pro hubs
- Enterprise hubs

# Should I upgrade my HubSpot portal?

## Upgrade to Pro

- If you have **repeatable** business processes
- Focussed on improving **efficiency**

## Purchase other Pro hubs

- If you have automation in one Hub (eg Marketing Hub) working well
- If you can unlock automation in other areas (eg Sales Hub or Service Hub)

## Upgrade to Enterprise

- If **Custom objects** are a good fit
- If you use **Sequences** extensively

	FREE	STARTER	PRO	ENTERPRISE
ACTIVITY	• Page views • 5 active lists	<b>Outcome: Visibility</b> "What's happening" 25 active lists	Analytics reports	Predictive lead scoring
AUTOMATION	1 email per form	Simple workflows	<b>Outcome: Save Money</b> "More with Less" → Efficiency • Full Workflows • Surveys • Sequences • Ads	Custom objects
ATTRIBUTION	Original source	• Basic reports • Ads integration	• Contact • Influenced Revenue • Campaigns • Custom reports	<b>Outcome: Scale Money</b> "What's working" → Effectiveness • Deal • Attributed Revenue

# How we can help

HubShqts

## HubSpot Guidance

- HubSpot QuickCheck Session
- HubSpot Advisory Session

# How we help

## HubSpot QuickCheck

[MORE DETAILS HERE](#)

- 90 minute call
- High-level, **general** review of entire portal
- Come away with a clear understanding of what's working, what can be improved, etc

## HubSpot Advisory Sessions

[MORE DETAILS HERE](#)

- 50 minute calls
- Deep-dive into **specific** topic
- Discuss a specific topic or item, get actionable, real-world experience, advice



# Summary

(Craig)

HubShqts

**The final slide is coming**

Did we meet our goal?

# Recap: Our goals for you

## A framework for thinking about Automation in companies

- Automation unlocks **Efficiency**
- Think in terms of 'business processes'

## How HubSpot enables Automation

- Automation **tools**: Workflows, Surveys, Sequences, Ads, Reports
- Automation **types**: Communications, Data, Pipeline management, Integration

## Should I upgrade my HubSpot portal?

- What are the benefits of **Pro**
- What are the benefits of **Enterprise**

## How we can help

- Reviewing your portal and **advising best practices**

	FREE	STARTER	PRO	ENTERPRISE
ACTIVITY	<ul style="list-style-type: none"> <li>Page views</li> <li>5 active lists</li> </ul>	<b>Outcome: Visibility</b> "What's happening?" 25 active lists	Analytics reports	Predictive lead scoring
AUTOMATION	1 email per form	Simple workflows	<b>Outcome: Save Money</b> "More with Less" → Efficiency Full Workflows → Surveys → Ads → Sequences	Custom objects
ATTRIBUTION	Original source	<ul style="list-style-type: none"> <li>Basic reports</li> <li>Ads integration</li> </ul>	<ul style="list-style-type: none"> <li>Contact</li> <li>Influenced Revenue</li> <li>Campaigns</li> <li>Custom reports</li> </ul>	<b>Outcome: Scale Money</b> "What's working" → Effectiveness → Deal → Attributed Revenue

	FREE	STARTER Simple workflow editor	PRO Full workflow editor	ENTERPRISE Full workflow editor
Marketing Hub*	Trigger based on Form submit only 1 follow up email per form	Trigger based on Form submit only 10 actions per form	Trigger based on anything Unlimited actions per workflow Add/Remove from Static list Send marketing email Send internal marketing email Goals (Contact)	Trigger based on anything
Sales Hub*		Trigger based on Deal Stage only	Trigger based on anything Quote workflows Rotate record to owner	Trigger based on anything Enroll/Unenroll from a sequence
Service Hub*		Trigger based on Ticket Status only	Trigger based on anything Ticket workflows Feedback submission workflows Rotate record to owner	Trigger based on anything Enroll/Unenroll from a sequence
Operations Hub*			Trigger based on anything Trigger a web hook Custom Code action Format Data action	Trigger based on anything

# Questions?

Podcast: [www.hubshots.com/subscribe](http://www.hubshots.com/subscribe)

YouTube: <https://www.youtube.com/c/HubShotsShow/>

**HubShqts**



# Thank you!

Podcast: [www.hubshots.com/subscribe](http://www.hubshots.com/subscribe)

YouTube: <https://www.youtube.com/c/HubShotsShow/>

**HubShqts**



# Appendix



# Workflow Limitations

HubShqts

## Wishlist items

- Updating deals from contacts
- Association labels
- Lists for other objects (deals, tickets, etc)

# Workflow Limitations



## Difficult to update a subset of deals from a contact workflow

- Association labels are an option
- But association labels need to be set manually ([automation is coming](#) though!)

## Wishlist: Lists for all Objects

- Would love to be able to create Lists for: Deals, Tickets, Custom objects
- To use in Workflows
- Eg can't use Views as Workflow triggers

