Essential B2B Sales and Marketing HubSpot Workflows.

This toolkit includes **import-ready workflow templates** designed for HubSpot, tailored specifically for B2B buyer journeys that require high-trust engagement and cross-functional collaboration.

These workflows enable FinTech marketing and RevOps teams to:

- Reduce manual handoffs and follow-ups
- Accelerate lead movement from MQL → SQL → Opportunity
- Increase conversion with behaviour-based logic
- Drive alignment between Marketing and Sales
- Scale outreach while maintaining personalisation

Workflow 1: MQL → SQL Nurture Sequence

Example trigger: Contact submits a form on a gated whitepaper or webinar.

Steps:

1. Day 0: Send a thank-you email with additional recommended content (e.g., blog or checklist).
2. Day 3: Deliver a case study aligned with their industry.
3. Day 7: Share an ROI calculator or platform comparison asset.
4. Day 10: If the lead score is greater than 60 →
   → Create SDR task + internal Slack/email notification.

HubSpot Tips:

1. Use smart content blocks to tailor emails by industry or job title.
2. Trigger sequences based on content category downloaded.

Workflow 2: Sales handoff automation

Example trigger: Contact reaches SQL threshold (based on behaviour + score).

Steps:

1. Create a task for SDR with enriched lead notes.
2. Update contact property: Sales Stage = Discovery.
3. Auto-enroll the contact in an SDR outreach sequence.
4. Notify your Account Executive via Slack or email; associate contact to a new deal record.

HubSpot Tips:

1. Sync lifecycle changes to auto-create deals.
2. Add SDR to a task queue for batching outreach activity.

Workflow 3: Intent-Based Retargeting Trigger

Example trigger: Contact visits pricing or integration page 2+ times in 7 days.

Steps:

1. Add to Smart List: "Retargeting Segment A".
2. Sync with LinkedIn Ads or Google Ads audiences.
3. Send a time-sensitive follow-up email with a CTA (e.g., "Book a Demo" or discount).
4. Update custom property: Retargeting Cycle = Active.

HubSpot Tips:

1. Use UTMs and contact tokens to track multi-channel attribution.
2. Test different CTAs depending on the specific content viewed.

Workflow 4: Lifecycle Stage Automation (Lead → MQL → SQL)

Example trigger: Contact meets predefined criteria that qualify them to move to a new lifecycle stage (e.g., downloads gated content, reaches lead score threshold, or completes a key behavior like attending a webinar).

Steps:

1.Evaluate Entry Criteria
→ Triggered by lead score increase OR behaviour like “visited pricing page” + “submitted form.”
2.Update Lifecycle Stage
→ Set Lifecycle Stage = MQL
→ If score > 60 and visited demo page → set Lifecycle Stage = SQL
Add to Smart List
→ Automatically enroll contact in a Smart List for current lifecycle stage.
3.Notify Team Members
→ Send internal notification to SDR or AE with lifecycle change + link to contact record.
4. Trigger Next Flow
→ Enroll in MQL nurture or Sales Handoff Workflow depending on updated stage.

HubSpot Tips:

1. Set lifecycle stages once, not repeatedly. HubSpot only moves forward by default unless you use a custom reset.
2. Include safety conditions to avoid false triggers (e.g., must meet 2+ criteria).
3. Create a centralised lifecycle workflow to control all stage movements and keep your CRM clean.
4. Use lifecycle changes to trigger ads, tailored messaging, and sales handoffs automatically.

Our tips for your success:

- **Evaluate worfklow performance:** Continue to develop each workflow, you don’t need to over-engineer from day one.
- **Align workflows with lifecycle stages:** Make sure each transitions (e.g., Lead → MQL) is automated, helping you to send the right content to the right contacts at the right time.
- **Use personalisation:** Tailor your communications (e.g. emails, webpages and CTAs) using persona, industry, or product fit via HubSpot smart content.
- **Trigger meanful engagement:** Use score thresholds or page behavior to trigger follow-up engagement with your customers.