Nordic SaaS HubSpot User Group

10 must-have workflows for B2B SaaS

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Nordic SaaS HubSpot User Group

As a member of the Nordics SaaS HUG you will:

- Learn from proven cases of inbound-driven success
- Get to share the HubSpot practices that support your growth journey
- Meet fellow 'Inbounders' who share industry-specific challenges and aspirations

The Nordics SaaS HUG is a community-led, non-commercial initiative adhering to the official HubSpot User Group principles.

Hi everyone 👋

Lotte Nedergaard Lauridsen

- Co-Founder & SaaS Lead at Helion B2B
- +8 years experience with HubSpot and Inbound Strategy for B2B SaaS
- HUG leader

Agenda

- 10 must-have workflows for B2B SaaS (30 min)
- Q&A (10 min)

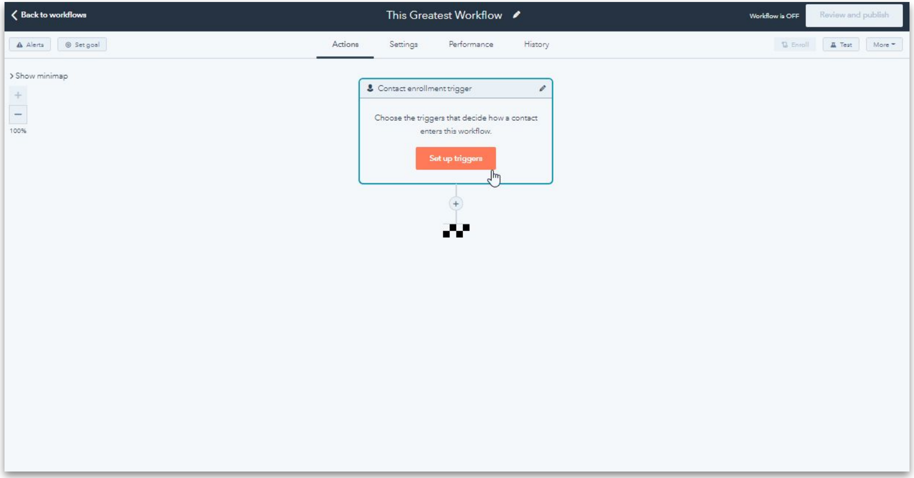
What to keep in mind

There's **not** a one-size fits all approach to building workflows but there is a handful of strategic workflows that almost all SaaS companies can benefit from as long as they are tailored to **your business.**

Remember to customize workflows based on the following to maximize their effectiveness:

- Your specific business goals
- Your target audience
- Your SaaS product features

And remember to set goals for unenrollment!

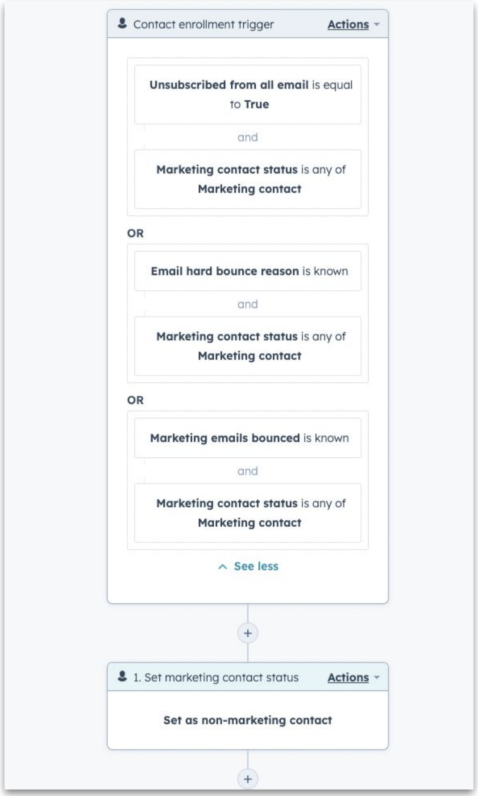


1. Marketing contact management

Make sure you're only paying for the contacts you actually market to.

There are a million good reasons to have contacts in your CRM that you can't market to. Partners, sales contacts, one-off customer success tickets… The list goes on.

Focus your tech budget on the contacts that you send marketing emails and target ads to – and enjoy free storage up to fifteen million non-marketing contacts.

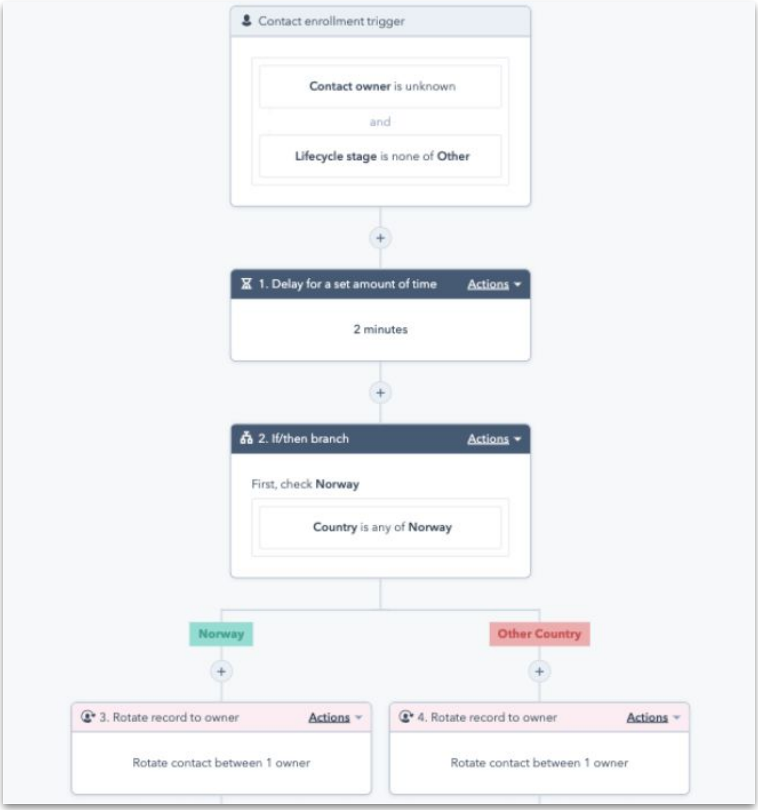


2. Lead rotation

Correctly assigning leads and responding quickly can make or break a deal. Lead rotation is the process of automatically assigning leads across your sales team, and may include choosing the right sales model for each lead.

Lead rotation rules can be based on all contact properties (default and custom), and all objects related to contacts. It all comes down to collecting *the right* data to support your sales process:

- Lead rotation by company size
- Lead rotation by lifecycle stage
- Lead rotation by location/country
- Lead rotation by use case/specification (product or industry)
- Lead rotation by lead score
- Lead rotation by availability (keep calendar updated)
- Lead rotation by weighted rules (OpsHub)

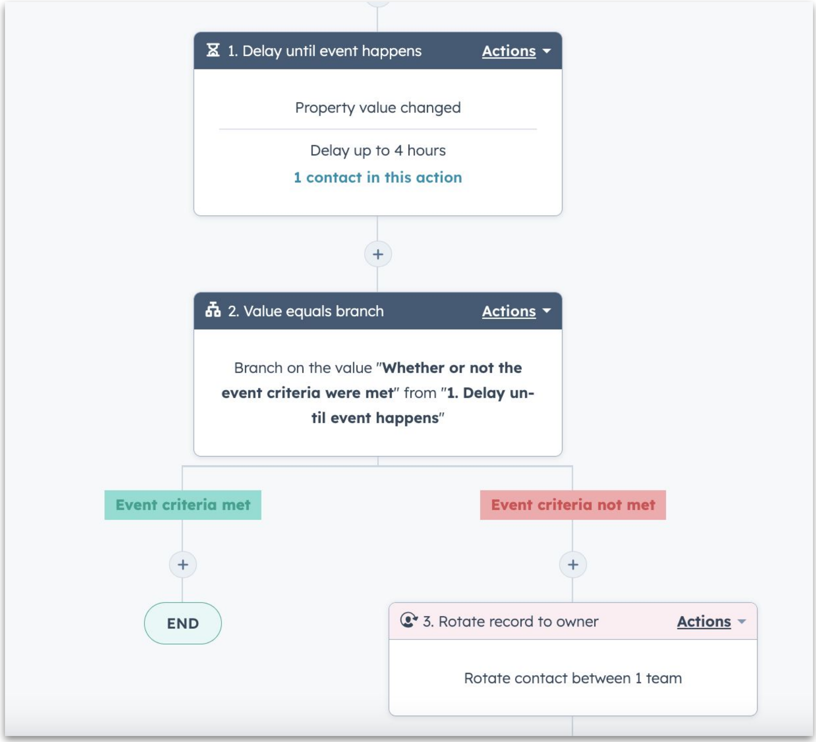


3. Lead re-rotation

You can improve your customer experience by re-rotating leads when a sales rep can't get to them fast enough. This is especially important for *book meeting* or *contact sales* requests.

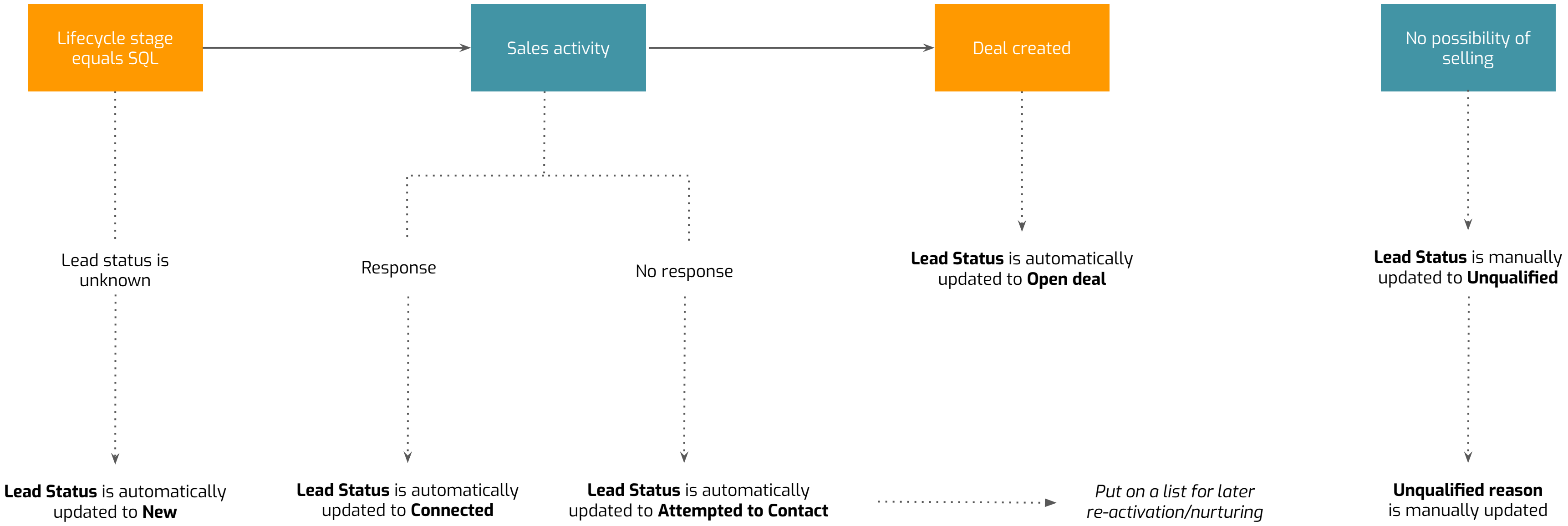
Consider what amount of time makes the most sense for reassignment, and then add that criteria to your lead-rotation rules.

Quickly responding to leads can make the conversion process quicker and more seamless for everyone involved.



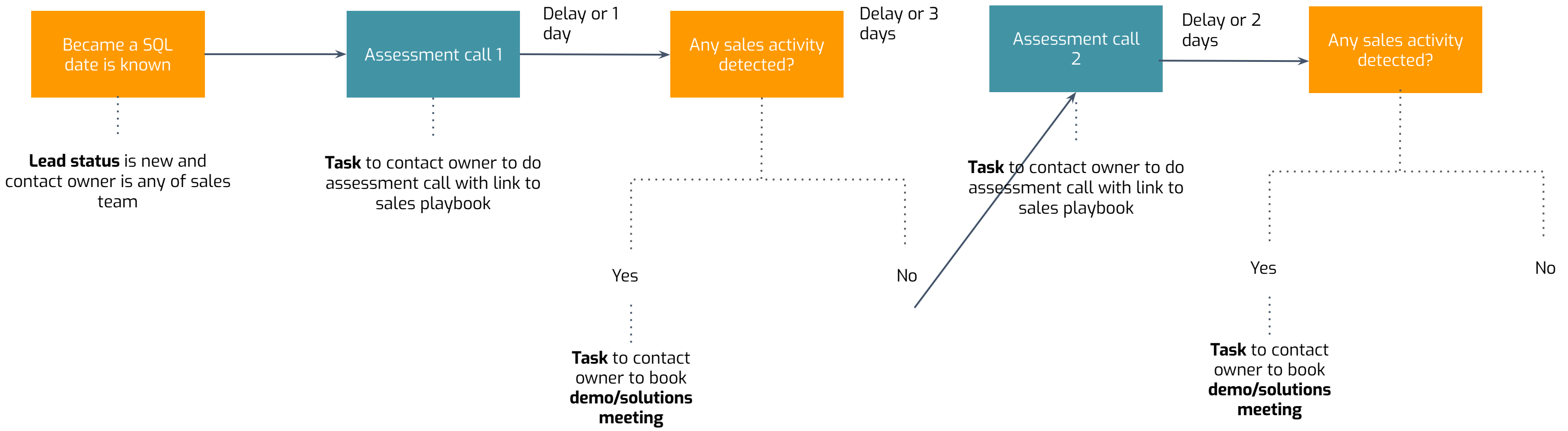
4. Lead status automation

With the lead status property, you can segment your leads based on sales activities and prioritize your outreach. Your sales reps will be able to identify the leads in their funnel and ensure no leads fall through the cracks due to lack of follow-up.



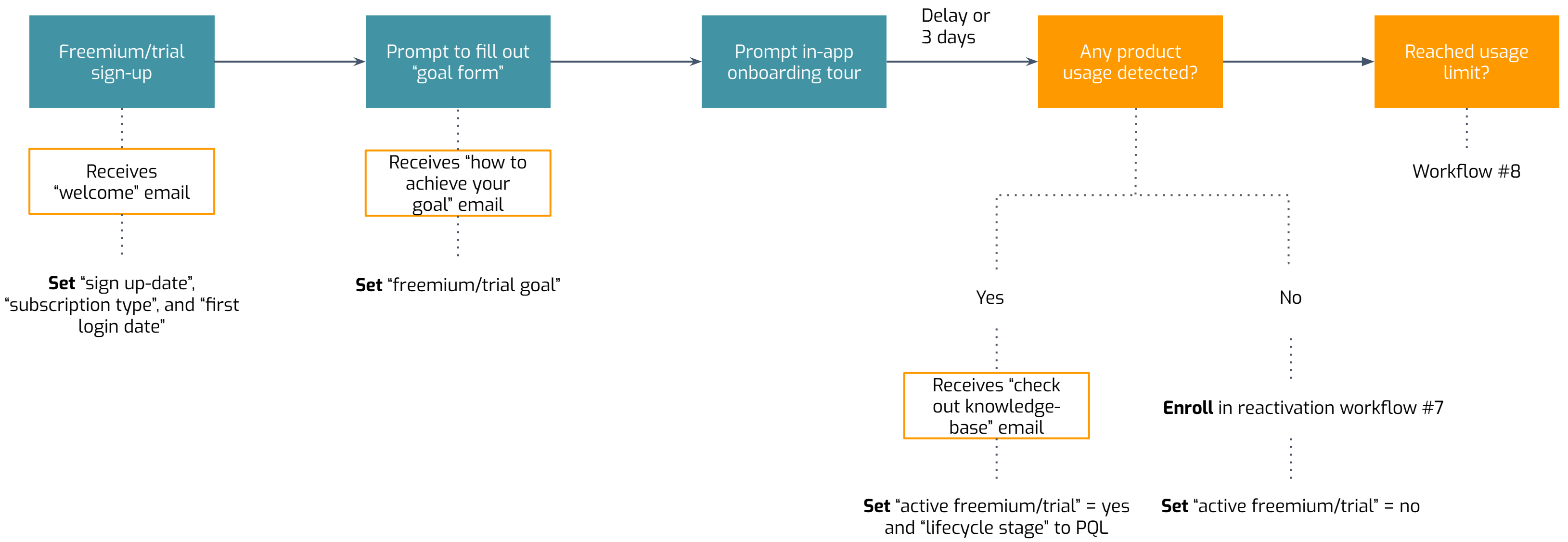
5. SQL task flow

Wanna make sure your sales people are actually working the SQLs they are signed to? Then a SQL task flow is the way to do it.



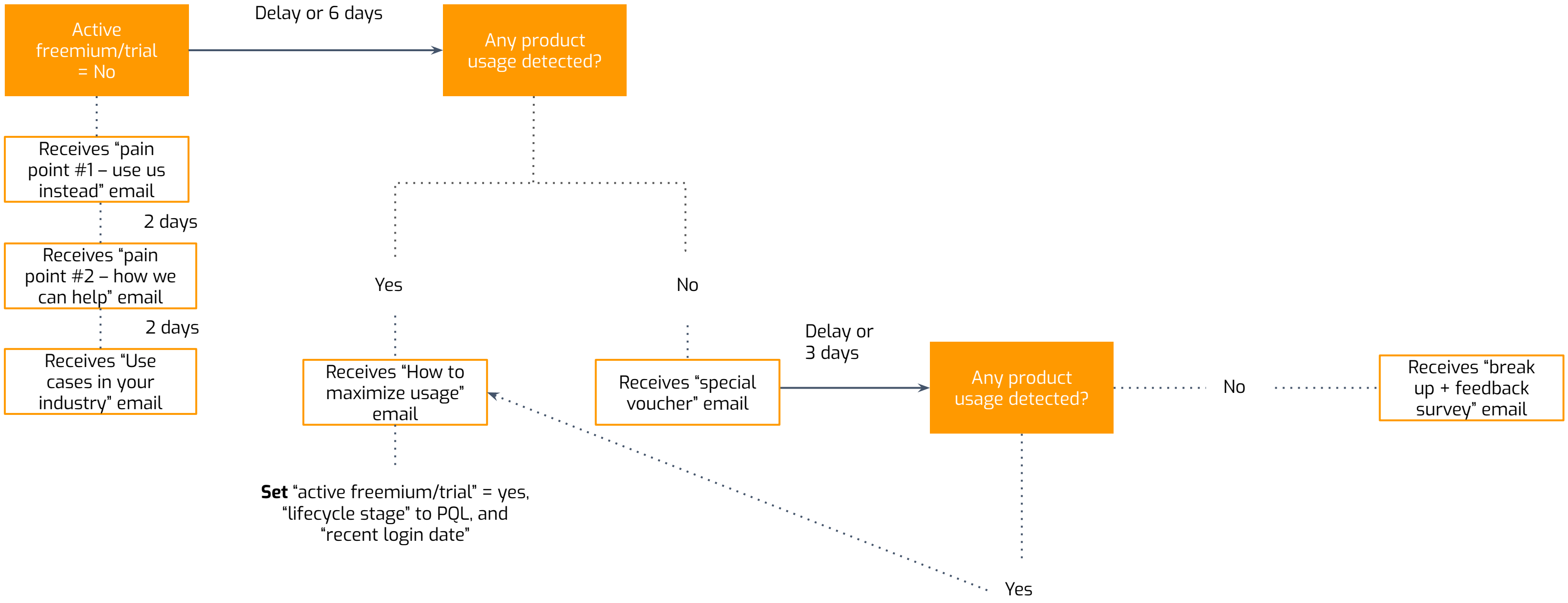
6. Freemium/Trial activation flow

When a user signs up for a freemium version or free trial of your SaaS product, this workflow engages them with relevant onboarding emails, tutorials, and product tips, aiming to convert them into paying customers when they hit their usage limit.



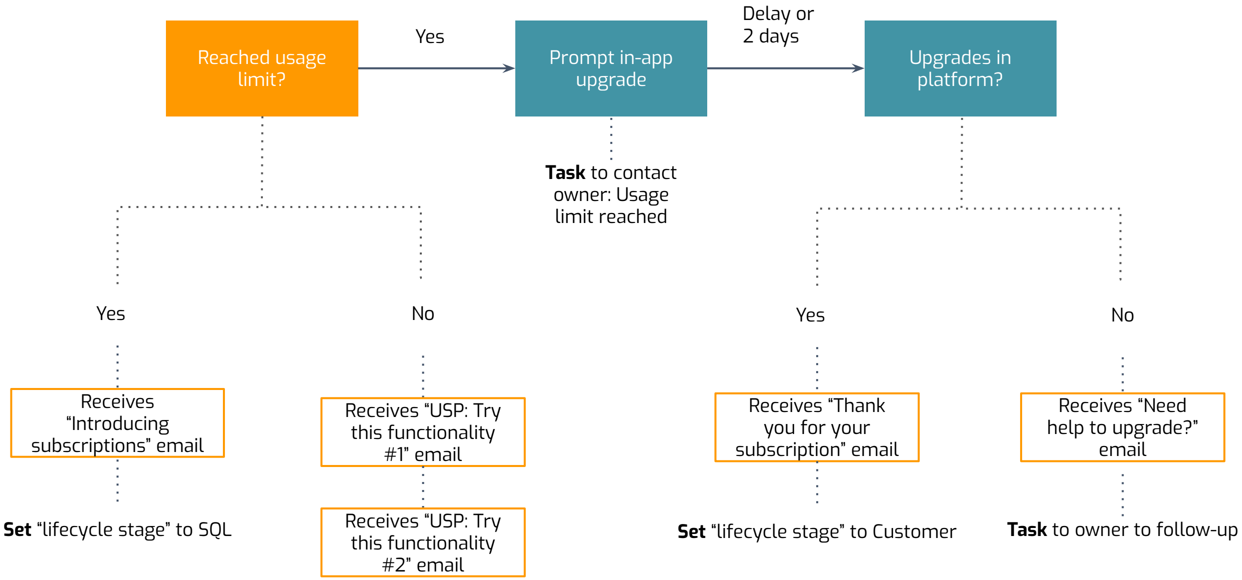
7. Freemium/Trial reactivation flow

When a user signs up for a freemium version or free trial of your SaaS product, this workflow engages them with relevant onboarding emails, tutorials, and product tips, aiming to convert them into paying customers when they hit their usage limit.



8. Usage limits for new sales/upsell

When a user signs up for a freemium version or free trial of your SaaS product, this workflow engages them with relevant onboarding emails, tutorials, and product tips, aiming to convert them into paying customers when they hit their usage limit.



9. Generic pipeline/sales automation

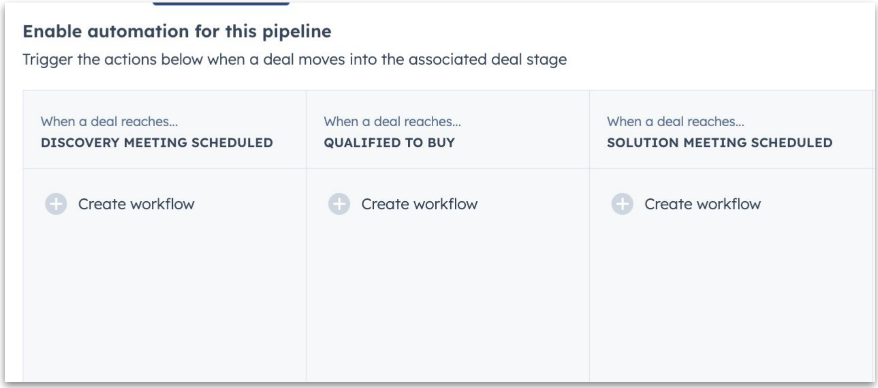
1. IF next activity date = unknown **then** notify deal owner to log next step.

2. IF lifecycle stage is SQL and lead status = attempted to contact **then** assign contact owner a follow-up task in 3 days.

3. IF deal stage = closed lost **then** set lifecycle stage to MQL and wipe lead status to allow new leads to reenter the funnel.

4. IF deal inactivity = 7 days **then** notify deal owner to log next step.

5. IF deal stage = closed won **then** set contact and company to lifecycle stage customer.

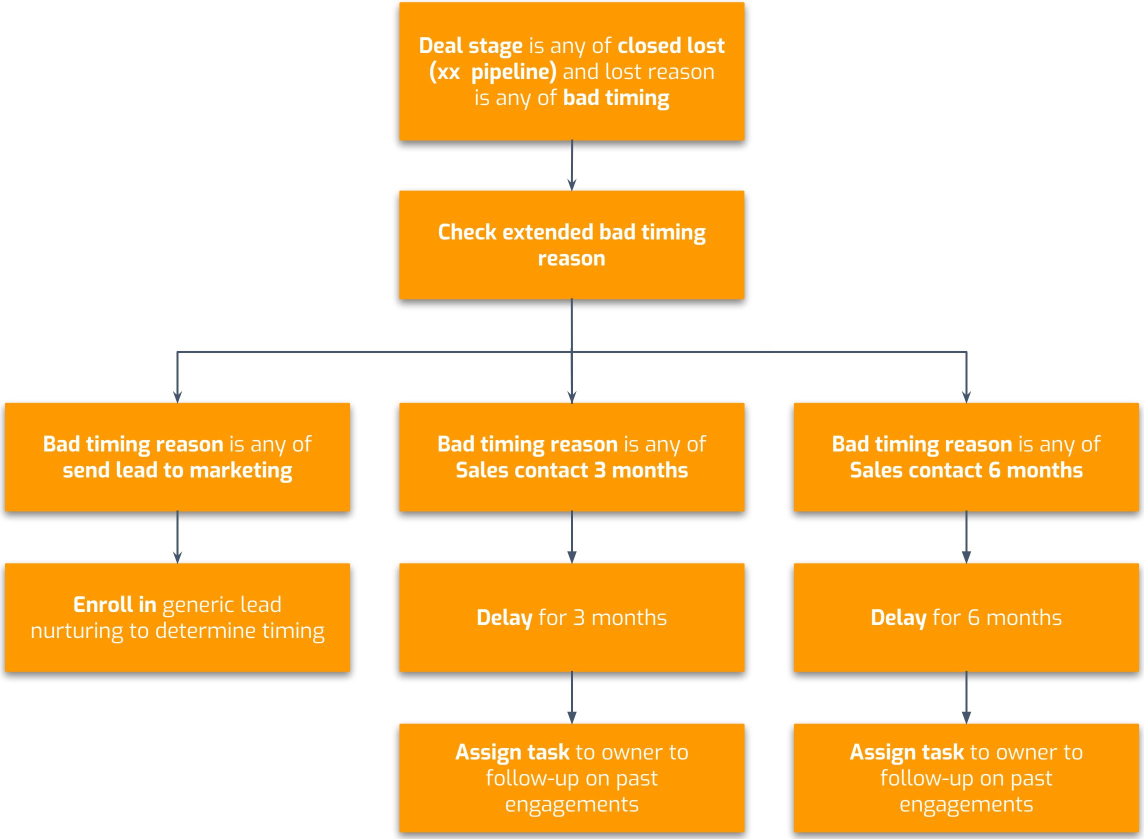


10. Lost deals afterlife

Does a lost deal mean lost forever? Not in all cases.

Determining a strategy for lost deal management is almost as crucial as your lead gen strategy.

A lot of golden nugget leads are to be found in lost deals due to *bad timing* or other closed lost reasons if you make sure to follow-up or do further nurturing.



Q&A

Thank you!