# 1. Workflows Tool (Core Engine)

**Where:** Automation → Workflows
**Why it matters:** This is the execution layer — but *not* the thinking layer.

### Best uses

- Lifecycle stage transitions (Lead → MQL → SQL)
- Owner assignment & routing
- Score changes
- Task creation
- Property updates

### Pro tips

- Use **multiple small workflows**, not one mega-workflow
- Name workflows by **intent**, not object
  - ✅ SQL – Promotion – Demo or ROI Complete
  - ❌ Contact workflow 17
- Always use **suppression rules** (SQL, Opp, Customer)

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# 2. Custom Behavioral Events (Most Underrated Tool)

**Where:** Settings → Data Management → Events
**Why it matters:** This is how you build workflows that Sales trusts.

### Best uses

- ROI calculator start / complete
- Demo started vs demo completed
- Video watched ≥50%
- Case study downloaded

### Why it's powerful

- Cleaner than page views
- Harder to game
- Perfect for **stage gates** and **lead scoring**

In your model, *every meaningful CTA should be a custom event.*

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# 3. Lead Scoring (New Scoring Tool, Not Legacy)

**Where:** Settings → Objects → Contacts → Scoring
**Why it matters:** Scoring ≠ lifecycle, but it controls it.

### Best uses

- Weight Tier 1 / 2 / 3 actions differently
- Cap low-intent behaviour
- Decay stale leads

### Pro tips

- Use **one primary score** (e.g. PPC Intent Score)
- Never mix firmographic + behavioural in one score
- Let workflows *read* scores, not manage logic inside scores

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# 4. Lists (Your Debugging Superpower)

**Where:** Contacts → Lists
**Why it matters:** Lists show you *what workflows are really doing*.

### Best uses

- “Why did this contact become MQL?”
- QA before switching workflows on
- Sales trust checks

### Must-have QA lists

- Leads with score ≥40 but **not** MQL
- MQLs without Tier 2/1 actions
- SQLs without demo or ROI completion

Build lists **before** you publish workflows.

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## 5. Workflow History & Enrollment Logs

**Where:** Inside each workflow
**Why it matters:** This is your forensic tool.

### Best uses

- Proving why a contact changed stage
- Debugging double-fires
- Auditing sales complaints

### Pro tip

If Sales asks “why did this go to me?”, you should answer in **10 seconds** using enrollment history.

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## 6. Calculated Properties

**Where:** Settings → Properties
**Why it matters:** They reduce workflow complexity.

### Best uses

- Total evaluation score
- Count of brochure downloads
- Days since last Tier 1/2 action

### Example

```
IF roi_complete = true OR demo_complete = true
THEN sales_ready = true
```

Then workflows become trivial.

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## 7. Property History (Silent Hero)

**Where:** Any contact record → Property history
**Why it matters:** Accountability.

### Best uses

- “When did this become SQL?”
- “What triggered the score jump?”
- Board / audit questions

## 8. Playbooks (Sales Alignment Tool)

**Where:** Sales → Playbooks
**Why it matters:** Workflows hand leads to humans — playbooks tell them what to do.

### Best uses

- Demo follow-up steps
- ROI discussion prompts
- Objection handling by CTA source

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## 9. Sandbox Account (If You Have It)

**Where:** Enterprise only
**Why it matters:** No fear, no damage.

### Best uses

- Workflow testing
- Score calibration
- Sales process changes

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## The “Power Stack” (If You Remember One Thing)

**Best HubSpot workflow builders use:**

1. Custom Behavioral Events
2. Lead Scoring (new tool)
3. Lists (QA & truth)
4. Small, intent-based workflows
5. Workflow history for trust

The workflow editor is just the *engine* — **events, scores, and lists are the steering wheel and brakes**.