PipelineSync

FREE TEMPLATE · SALES AUTOMATION

HubSpot Sequence Planner

Plan each sequence before you build it, write every step's copy with its tokens, check the settings that break sequences, and track whether it books meetings. Reference pages, a worked example and fillable worksheets.

Sequence brief | Step planner | Copy drafts | Monthly tracker

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Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

Most sequence problems are decided before the first email: who is enrolled, who sends, how many emails each rep can send, what unenrolls a contact and what a token says when data is missing. Write those decisions down here, then keep it as the record of what is live.

1 Check your plan and seats
Confirm plan, seats, inboxes and send limits (pages 3 and 4).

2 List what is live
One inventory row per sequence before you add new ones (page 5).

3 Write the brief
Audience, exclusions, goal, senders and settings (page 7).

4 Plan steps and copy
Lay out every step, then draft each email and its tokens (pages 8 to 11).

5 Check and test
Settings checklist and an internal test enrollment first (page 12).

6 Track monthly
Replies, meetings, bounces and what you changed (pages 13 and 15).

What is inside

Page	Section	Use it to
03	**Reference: requirements and limits**	Check plans, seats, inboxes, send limits and enrollment options
04	**Reference: steps, exits and metrics**	Understand step types, timing, unenrollment and which numbers to trust
05	**Sequence inventory**	Record every live sequence, its owner, audience, senders and status
06	**Worked example**	See a complete plan for an inbound demo no-show sequence
07	**Sequence brief**	Decide audience, exclusions, goal, senders and settings
08	**Step planner**	Lay out every step with its day, type, subject, copy and tokens
09	**Tokens and fallbacks**	Make sure no email goes out with an empty or literal placeholder
10-11	**Email copy drafts**	Write subject lines and body copy for each email step
12	**Settings checklist and test**	Confirm the settings that break sequences and log a test enrollment
13	**Performance tracker**	Track reply, meeting and bounce rates per sequence each month
14	**Troubleshooting**	Find out why a contact can't be enrolled or an email didn't send
15	**Monthly review and change log**	Keep sequences healthy and every change explained

Tip: Every worksheet is fillable: type into the boxes in Adobe Acrobat Reader, Preview or your browser, or print it. Copy pages 7 to 11 for each new sequence. A spreadsheet version is on the template page at pipelinesync.net.

REFERENCE · CHECKED OCTOBER 2026

What you need to run HubSpot sequences

Sequences are timed series of one-to-one sales emails and tasks, sent from a rep's own connected inbox. When we checked HubSpot's documentation in October 2026, they needed Sales Hub or Service Hub Professional or Enterprise, an assigned Sales or Service seat and a connected individual work inbox. Each sequence can hold up to 10 email templates.

Requirements

Requirement	What HubSpot documents (October 2026)	Plan for it
Subscription	Sales Hub or Service Hub Professional or Enterprise	Check the hub and tier of your portal
Seat	An assigned Sales or Service seat for each user who sends	List every sender on the brief (page 7)
Inbox	A connected individual work inbox. Team inboxes connected to the conversations inbox can't send sequences	Each rep connects their own inbox first

Send limits

Limit	What HubSpot documents (October 2026)	What it means for planning
Professional seat	Up to 500 sequence emails a day, over a rolling 24 hours	The limit counts emails sent, not contacts enrolled. Add up every step that sends on the same day
Enterprise seat	Up to 1,000 sequence emails a day, over a rolling 24 hours	
Bulk enrollment	Up to 50 contacts at once, sending at most three emails a minute	Large batches take time to send
Email provider	Your provider's own daily limit also applies	Check it for each sender's inbox
Trial accounts	Don't get higher send limits; HubSpot can't raise the sequence limit	Plan volume to fit the limit

Ways to enroll contacts

01
From a record
Rep picks sender inbox and time zone

02
In bulk
Up to 50 contacts at once

03
Automation tab
Professional: form submission or page view

04
Workflow action
Enroll in a sequence: Enterprise

One sequence at a time

Each contact can only be enrolled in one sequence at a time. Check the inventory (page 5) for overlapping audiences.

Workflow enrollment

Needs Sales Hub or Service Hub Enterprise and a sender with a connected inbox. HubSpot advises against it for over 100 contacts or recent cold imports.

REFERENCE · CHECKED OCTOBER 2026

Steps, unenrollment and metrics

Steps can be automated emails, manual email tasks, call tasks, general tasks and LinkedIn tasks. By default, a reply or a booked meeting unenrolls the contact, and unsubscribes and bounces unenroll them too. Judge a sequence on reply rate and meeting rate: HubSpot notes open tracking can be blocked or inflated.

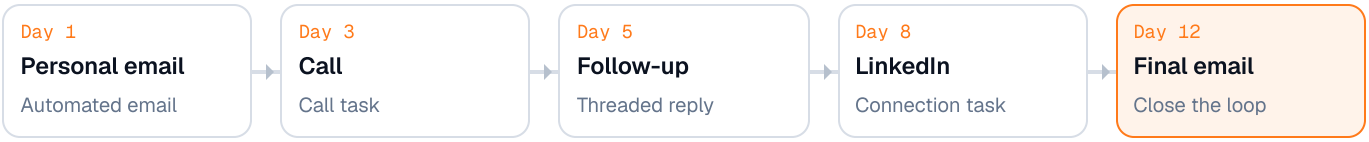
Step types

Step type	How it works
Automated email	Sends on schedule from the sender's inbox. On Gmail or Office 365, follow-ups can thread as replies
Manual email task	Creates a task for the rep to review and send the email
Call task / general task	A task for the rep, created at the start of the day in the time zone chosen at enrollment
LinkedIn InMail / connection request task	Available with the Sales Navigator integration

Timing: emails can wait up to 90 business days, send on business days by default, and use a send window HubSpot optimizes from past opens. Dynamic sequences start rep-led steps only after engagement, such as opens or a click. A/B testing runs up to six email versions, four at a time; HubSpot suggests 100 contacts per version.

A typical outreach sequence

Illustrative, not a HubSpot rule: many teams use four to seven steps over two to three weeks.



Unenrollment and re-enrollment

A reply or booked meeting unenrolls the contact, or everyone at their company if you choose. Unsubscribes and bounces unenroll too. Re-enrollment needs the original inbox still connected, and unsubscribed contacts can't be re-enrolled.

Tokens and placeholders

Token values are captured when the contact enrolls. Placeholders left unfilled send as literal text, such as a bracketed first name, so check them at enrollment.

Which metrics to trust

Metric	What HubSpot documents (October 2026)
Reply rate	Sender score guidance calls a reply rate of 7 to 13 percent good
Meeting rate	Counts meetings booked while enrolled or up to seven days after
Bounce rate	Sender score guidance calls a bounce rate under 3 percent good; scored after 100 ended enrollments
Open rate	Less reliable: the pixel can be blocked; previews, forwarding and IP changes inflate opens
Deal rate, revenue	Sales Hub Enterprise: shows whether a sequence creates pipeline

WORKSHEET

Sequence inventory

One row per sequence. Fill this in before planning new sequences, and update it at every monthly review. Contacts can only be in one sequence at a time, so look for overlapping audiences.

ID	Name	Owner	Audience	Goal	Senders	Steps / days	Enrollment	Shared with	Status	Last review
SEQ-01	*SDR | Inbound demo no-show | Rebook*	*SDR lead*	*Demo booked, meeting no-show*	*Rebooked meeting*	*SDR team*	*5 / 12*	*Manual*	*SDR team*	*Live*	*2026-10*

Status: Planned, Drafting, Testing, Live, Paused, Retired. Enrollment: Manual, Bulk, Automation tab (Professional, form or page view), Workflow (Enterprise). New sequences are shared with Only me by default.

WORKED EXAMPLE

SDR | Inbound demo no-show | Rebook

An illustrative plan for rebooking prospects who missed a demo. Your audience, timings and copy will differ; the point is how much is decided before building.

Goal	A rebooked meeting with the prospect who missed their demo
Audience	Contacts with a demo meeting marked as no-show in the last two days
Never enroll	Customers, contacts with an open deal owned by an AE, unsubscribed contacts, contacts already in another sequence
Owner / senders	SDR lead owns the copy; each SDR sends from their own connected inbox
Enrollment	Manual, by the SDR who owned the demo, choosing the prospect's time zone
Expected volume	About 6 enrollments per SDR per day, well inside the seat's daily send limit
Unenroll on	Reply or meeting booked, for the contact only
Threading / business days	Steps 3 and 5 reply in thread (Gmail) / business days only
Tokens and fallbacks	Contact first name (fallback: there), company name (fallback: your team)
After the sequence	No reply: lead status set to Unqualified, contact added to the marketing nurture

Step	Day	Type	Subject or task	Purpose	Copy / talking points	Tokens	Thread
1	1	Automated email	Missed you today	Rebook the meeting	Short, personal, one link to book	First name, company	No
2	3	Call task	Call to rebook	Live conversation	Ask what got in the way; offer two times		
3	5	Automated email	(reply in thread)	Gentle nudge	Two lines, one question	First name	Yes
4	8	LinkedIn connection request task	Connect	Second channel	Personal note, no pitch		
5	12	Automated email	(reply in thread)	Close the loop	Polite last message with an easy yes or no	First name	Yes

STEP 1 DRAFT (ILLUSTRATIVE)

Subject: Missed you today · **Body:** Hi {first name, fallback "there"}, sorry we missed each other today. If you still want to see how it would work for {company, fallback "your team"}, pick a time that suits you here: [meeting link]. If now isn't a good time, just reply and say so.

Example month (made-up numbers): 100 enrolled, 9 replies (9%), 4 meetings (4%), 2 bounces (2%). Change made: shortened step 1.

WORKSHEET · COPY FOR EACH SEQUENCE

Sequence brief

Sequence name	Pattern: Team | Audience | Goal _____
Inventory ID / owner	SEQ-_____ Owner: _____
Goal (the reply or meeting it exists to get)	

Audience: who is enrolled

Exclusions: who must never be enrolled

Senders	Seat + individual inbox each: _____
Enrollment method	☐ Manual ☐ Bulk (up to 50) ☐ Automation tab (Professional) ☐ Workflow (Enterprise)
Expected volume per rep per day	Emails a day: _____ Seat limit: _____ Provider limit: _____
Unenroll on	☐ Reply ☐ Meeting booked For: ☐ Contact only ☐ Everyone at the company
Threading	☐ Follow-ups as replies (Gmail or Office 365 only) ☐ Separate emails
Business days / time zone	☐ Business days only Time zone rule: _____
Send window	
Shared with	Users or teams (default is Only me): _____
After the sequence	What happens to contacts who finish without replying: _____
Overlapping sequences	Could these contacts already be in another sequence? _____

DONE FOR YOU

Rather have a HubSpot Gold Partner plan it?

We plan and build sequences, connect enrollment to your routing and fill in this planner for you.

Book a free consultation

WORKSHEET · COPY FOR EACH SEQUENCE

Step planner

One row per step, in order. Write the copy outline here and the full emails on pages 10 and 11. Up to 10 email templates per sequence; emails can wait up to 90 business days.

Step	Day	Step type	Subject or task title	Purpose	Copy / talking points	Tokens	Threaded?
1	*1*	*Automated email*	*Missed you today*	*Rebook the meeting*	*Short, personal, one link to book*	*First name, company*	*No*
1							
2							
3							
4							
5							
6							
7							
8							
9							

Step types: Automated email, Manual email task, Call task, General task, LinkedIn InMail task, LinkedIn connection request task (with the Sales Navigator integration). Threading works on Gmail or Office 365 only.

WORKSHEET

Tokens and fallbacks

Token values are captured when a contact enrolls, and placeholders left unfilled send as literal text. List every token and placeholder the sequence uses, decide the fallback, and check the data before you enroll.

Tokens

Token	Property (object)	Used in steps	Fallback text	Records missing it	Checked
First name	*First name (contact)*	*1, 3, 5*	*there*	*3 of 40 in the test list*	*2026-10-27*
Company	*Company name (company)*	*1*	*your team*	*0 of 40*	*2026-10-27*

Placeholders the rep fills in at enrollment

Placeholder	What the rep should write	Steps	If left empty
[reason for reaching out]	*One sentence on what the prospect asked about*	*1*	*Sends as literal text*

Before each enrollment

- [ ] Every token above has a fallback
  Or the email reads well without it
- [ ] Placeholders filled in for every contact
  Empty ones send as text
- [ ] Missing values fixed or excluded
  Values are captured at enrollment
- [ ] Preview checked for one real record
  Read it as the prospect would

WORKSHEET · ONE BOX PER EMAIL STEP

Email copy drafts

Email step _____ **Day** _____ ☐ Automated ☐ Manual task ☐ Threaded reply

Subject line A	
Subject line B (A/B test)	

Body

Tokens / placeholders		**Call to action**

Email step _____ **Day** _____ ☐ Automated ☐ Manual task ☐ Threaded reply

Subject line A	
Subject line B (A/B test)	

Body

Tokens / placeholders		**Call to action**

WORKSHEET · COPY THIS PAGE FOR MORE STEPS

Email copy drafts

Email step _____ **Day** _____ ☐ Automated ☐ Manual task ☐ Threaded reply

Subject line A	
Subject line B (A/B test)	

Body

Tokens / placeholders		**Call to action**	

Email step _____ **Day** _____ ☐ Automated ☐ Manual task ☐ Threaded reply

Subject line A	
Subject line B (A/B test)	

Body

Tokens / placeholders		**Call to action**	

WORKSHEET · BEFORE THE FIRST ENROLLMENT

Settings checklist and test enrollment

These are the settings that quietly break sequences. Confirm each one in HubSpot, then enroll an internal contact and check every step end to end.

- [ ] Every sender has a connected individual inbox
  Team inboxes can't send sequences
- [ ] Every sender has a Sales or Service seat
  On Professional or Enterprise
- [ ] Volume fits the daily send limit
  The limit counts emails sent, not enrollments
- [ ] Unenroll on reply and meeting is on
  Stops follow-ups after someone responds
- [ ] Tokens have fallbacks
  Values are captured at enrollment (page 9)
- [ ] Templates are shared with the team
  Private templates may not send for other users
- [ ] Sequence is shared with the right users or teams
  New sequences default to Only me
- [ ] Unsubscribe link setting checked
  How your account handles it in one-to-one email
- [ ] Time zone and business days set
  Tasks run in the time zone chosen at enrollment
- [ ] Threading matches the plan
  Gmail or Office 365 only
- [ ] No more than 10 email templates
  The per-sequence limit
- [ ] Audience isn't in another sequence
  One sequence at a time per contact
- [ ] Workflow enrollment only on Enterprise
  And not for cold imports or over 100 contacts
- [ ] Inventory row added
  Page 5

Test enrollment log

Date	Test contact	Step	Expected	Actual	Pass / fail
2026-10-27	*Test contact (internal)*	*3*	*Threads under step 1, first name filled*	*Threaded, name filled*	*Pass*

Who watches it in the first week, and what they check

Approved by		Date	

WORKSHEET · ONCE A MONTH

Monthly performance tracker

One row per sequence per month. Rate = count divided by contacts enrolled. Judge sequences on reply and meeting rate, and investigate any bounce rate above 3 percent.

Month	Sequence	Enrolled	Replies	Reply rate	Meetings	Meeting rate	Bounces	Bounce rate	Change made	Notes
2026-10	*SDR | Inbound demo no-show | Rebook*	*100*	*9*	*9%*	*4*	*4%*	*2*	*2%*	*Shortened step 1*	*Example row*

HubSpot's sender score guidance (October 2026) calls a reply rate of 7 to 13 percent and a bounce rate under 3 percent good. Open rates are left out on purpose: tracking pixels can be blocked or triggered by previews.

TROUBLESHOOTING

When a sequence doesn't do what you expected

Most problems trace back to a setting: the contact is already in another sequence or unsubscribed, the sender's inbox isn't a connected individual inbox, the day's send limit is used up, or unenrollment, sharing or tokens weren't set as planned. Check the brief and the settings checklist first.

Symptom	Likely cause	What to check
Contact can't be enrolled	Already in another sequence, or unsubscribed (can't be re-enrolled)	Contact record, inventory page 5
Rep can't send at all	No Sales or Service seat, or a team inbox instead of an individual inbox	Seat assignment, connected inbox
Emails waiting to send	Daily send limit reached (it counts sends), the provider's limit, or bulk sending at three a minute	Volume on the brief, page 7
Email sent with a bracketed placeholder	Placeholder left unfilled at enrollment sends as literal text	Placeholders, page 9
Token shows an old value	Token values are captured when the contact enrolls	Fix data before enrolling
Follow-up not threaded	Threading works on Gmail or Office 365 only	Sender's email provider
Kept emailing after a reply	Unenroll on reply or meeting turned off	Sequence settings
Colleague can't find or use it	Sharing left at Only me, or private templates	Sharing settings
Tasks appear at odd times	Tasks are created at the start of the day in the time zone chosen at enrollment	Time zone at enrollment
Re-enrollment fails	The original inbox is no longer connected	Sender's connected inbox
High opens, few replies	Opens can be inflated by previews, forwarding or IP changes	Reply and meeting rate, page 13

Your troubleshooting notes

Date	Sequence	What happened	Cause and fix

WORKSHEET · ONCE A MONTH

Monthly review and change log

Check	How	Done	Notes
Rates updated	Performance tracker filled in for every live sequence		
Where replies stop	Step-level performance: which step gets replies and which gets none		
Bounces	Any sequence above 3 percent: check the audience and data source		
Compare sequences	The Analyze tab, side by side on reply and meeting rate		
Copy and tokens	Still accurate, fallbacks still read well		
Senders and sharing	Inboxes still connected; leavers removed; shared with the right teams		
Inventory	Page 5 matches what is live in HubSpot; retire unused sequences		

Change log

Date	Sequence	What changed	Why	By
2026-10-27	*SDR | Inbound demo no-show | Rebook*	*Shortened step 1 to three lines*	*Few replies to step 1*	*SDR lead*

PipelineSync

HUBSPOT GOLD SOLUTIONS PARTNER

Want sequences planned, built and tested for you?

We plan and build sequences, connect enrollment to your routing and track the meetings they book, then hand over this planner filled in.

RevOps infrastructure

Lead scoring and routing with SLAs and fallback owners, sales and marketing automation, and executive dashboards.

Ongoing HubSpot administration

Monthly support for teams without an internal CRM owner: workflow changes, reporting updates, data hygiene and user support.

CRM cleanup and data quality

Deduplication, field standardization and the required properties that keep tokens and records clean.

Training and SOPs

Live sessions and written documentation for teams inheriting a system, onboarding new hires or lifting adoption.

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