PipelineSync

FREE TEMPLATE · AUTOMATION

HubSpot Workflow Design Template

Plan every workflow before you build it, test it against what you expected, and keep a record of what each one does. Reference pages, a worked example and fillable worksheets.

Workflow inventory | Design worksheet | Test log | Monthly review

Edition October 2026 · HubSpot facts checked 27 Oct 2026

Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

Most workflow problems are decided before the first action: what enrolls, whether records re-enroll, what takes them out, and which properties the workflow writes. This template makes you write those decisions down, then keeps them as the record of what is live.

1 Check your plan
Confirm workflows and the actions you need are in your subscription (page 3 and 4).

2 List what is live
Fill in the workflow inventory, one row per workflow, before you add new ones (page 6).

3 Design on paper
Copy the design worksheet for each new workflow and complete it before opening HubSpot (pages 8 and 9).

4 Check conflicts
List every property it writes and every workflow that reacts to the same data (page 10).

5 Test and launch
Run the pre-launch checklist, then log every test with the expected and actual path (pages 10 and 11).

6 Review monthly
Use the monthly review and change log to keep the inventory matching HubSpot (page 13).

What is inside

Page	Section	Use it to
03	**Reference: enrollment**	Understand plans, limits, trigger types, re-enrollment and exits
04	**Reference: actions and organization**	Check which actions need which hub, branch limits, delays and how to undo changes
05	**Naming and folders**	Agree one naming pattern and folder structure for the whole portal
06	**Workflow inventory**	Record every live workflow, its owner, triggers and exits
07	**Worked example**	See a complete design for an inbound lead routing workflow
08-09	**Design worksheet**	Plan one workflow: brief, settings, actions in order and branch map
10	**Conflicts and pre-launch checklist**	Catch two workflows fighting over a property before it happens
11	**Test plan and log**	Prove each path works with test records
12	**Troubleshooting**	Find out why a record didn't enroll or an action failed
13	**Monthly review and change log**	Keep workflows 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. The same template is also available as a spreadsheet on the template page at pipelinesync.net.

REFERENCE · CHECKED OCTOBER 2026

How HubSpot workflows enroll records

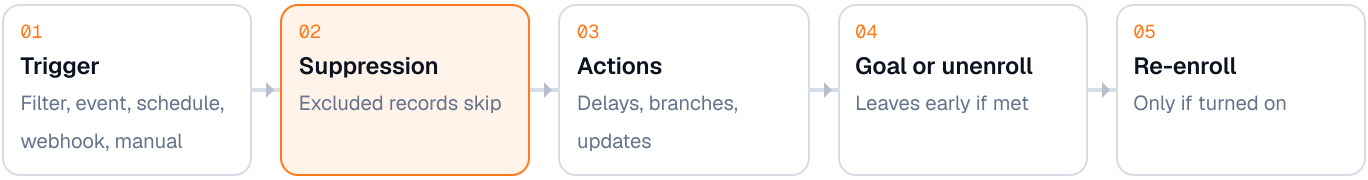
A workflow enrolls records, such as contacts, deals or tickets, when they meet the triggers you set, then runs actions in order. By default each record enrolls only once. Workflows need a Professional or Enterprise subscription; Starter gets simple workflows on forms and marketing emails, and basic automations from record index pages or Agent Hub.

Plans and workflow limits

Plan	Automation included (HubSpot workflows FAQ, October 2026)
Free tools	One simple workflow per form, with one action
Starter	Simple workflows on forms and marketing emails; basic automations from record index pages or Agent Hub
Professional	Up to 300 workflows on Marketing, Sales or Service Hub; 400 on Data Hub
Enterprise	Up to 1,000 workflows, or 1,100 on Data Hub, plus custom object workflows

With several subscriptions, the highest limit applies. Simple workflows from forms, emails and ads don't count toward the limit. Ticket workflows need Service Hub Professional and lead workflows Sales Hub Professional.

The path of a record



Trigger types

Type	How it behaves	Design question to answer
Filter	Checks a record's properties or segment memberships	Which exact values, with AND / OR groups? Up to 250 filters.
Event	Reacts to something that happens, such as a form submission, only after the workflow is turned on	Do past events matter? They won't enroll records.
Schedule	Enrolls records on a date or recurring schedule	How often, and what stops a record repeating?
Webhook / manual	Enrolls from an incoming webhook or by a user	Who or what is allowed to enroll records?

Re-enrollment

Lets a record enroll again from the beginning when a chosen trigger repeats. It can't use AND criteria or activity properties. Decide it before launch.

Exits

Contact workflows use suppression segments and goals; other objects use unenrollment triggers. When you turn a workflow on, choose whether records that already meet the triggers enroll now.

REFERENCE · CHECKED OCTOBER 2026

Actions, branches and keeping workflows tidy

Every workflow plan can use delays, if/then and value-equals branches, record edits, tasks and internal notifications. Some actions depend on your hubs. Check each action in your design against this table before you build, so a workflow isn't designed around an action your account doesn't have.

Actions that need a specific hub

Action	Needs
Delays, branches, edit record, tasks, internal notifications	Any plan with workflows
Send marketing email	Marketing Hub or Service Hub Professional
Rotate record to owner	Sales Hub or Service Hub Professional
Enroll in a sequence	Sales Hub or Service Hub Enterprise
Send a webhook, custom code, format data	Data Hub Professional
Random split	Marketing Hub Professional; HubSpot says about 1,000 records for an even split
AI actions (summarize a record, run an agent)	Use HubSpot credits

Branches

- **Value-equals:** up to 250 branches for one property.
- **If/then:** up to 20 branches; records follow the first branch they match, so order matters.
- Always design a **none met** path.

Delays

- Until a date or a date property
- Until an event happens
- For a set time, with a business-days option
- Until days and times of the week

Testing tools

- **Test** simulates a record's path before you turn it on; no actions run. Event triggers can't be tested this way: enroll a test record.
- **Action logs and enrollment history**, kept for six months.
- **Troubleshoot enrollment** explains why a record didn't enroll.
- **Health tab** flags workflows that need review or aren't used.

Undoing changes

- Deleted workflows restore within 90 days, off and without history.
- Revision history reverts most changes, except webhook and custom code actions.
- Enterprise: restore property changes a workflow made in the last 14 days.

Turning a workflow off: enrolled records stay enrolled, but actions other than delays don't run, and skipped actions don't run later. Plan a clean exit instead of switching off mid-process.

STANDARDS

Naming and folders

A name should tell the next admin what a workflow does without opening it. HubSpot's search matches both the name and the description, so write both. Agree the pattern once and apply it to every new workflow.

RECOMMENDED PATTERN

Object | Purpose | Detail

Example: **Lead | Assign owner | Inbound demo** · **Deal | Notify finance | Closed won** · **Ticket | Escalate | No reply 24h**

Your pattern

Pattern	
Object labels	
Purpose verbs	e.g. Assign, Notify, Update, Nurture, Escalate, Clean
Test workflows	e.g. prefix TEST and delete after use
Description must say	what it does, why, and who owns it
Agreed by / date	

Folder structure

Folder	Owner
Sales / Routing	*RevOps lead*
Marketing / Nurture	*Marketing ops*

Rules worth adopting

- [ ] Every workflow has an owner and a one-line description
  Search matches name and description
- [ ] One workflow owns each property it writes
  Avoids two workflows overwriting each other
- [ ] Test workflows are labeled and deleted after use
  Keeps the Health tab meaningful
- [ ] Unused workflows are turned off, then deleted
  Deleted workflows can be restored for 90 days

Description template

Paste this into each workflow's description field in HubSpot and fill in the blanks.

```
Does: _____ for _____ records
Why: _____
Owner: _____ Writes: _____
Design sheet: WF-____ Last tested: ____ / ____ / _____
```

WORKSHEET

Workflow inventory

One row per workflow. Fill this in before designing new workflows, and update it at every monthly review.

ID	Name	Object	Purpose	Owner	Status	Triggers	Re-enroll	Exits	Tested	Rev.
WF-01	*Lead | Assign owner | Inbound demo*	*Contact*	*Assign inbound demo requests to the right owner*	*RevOps lead*	*Live*	*Form submission: Demo request*	*No*	*Suppress: customers segment*	*2026-10*	*10/26*

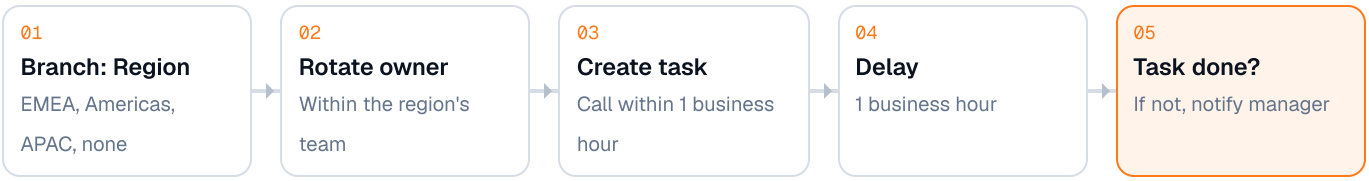
Status: Planned, Building, Testing, Live, Off, To delete. Object: Contact, Company, Deal, Ticket, Lead, Quote, Custom object. The object type can't be changed after the workflow is created.

WORKED EXAMPLE

Lead | Assign owner | Inbound demo

An illustrative design for routing demo requests. Your regions, teams and timings will differ; the point is how much is decided before building.

Purpose	Assign every inbound demo request to the right owner and make sure someone calls within one business hour.
Object type	Contact
Plan needed	Sales Hub Professional (for rotate record to owner)
Trigger	Event: form submission on the Demo request form
Enroll existing records?	No. Only new requests should be routed.
Re-enrollment	On, for the same form submission, so a returning lead is routed again
Suppression	Existing customers segment; contacts with an open deal
Properties written	Contact owner, Lead status
Other workflows affected	Any workflow triggered by Contact owner or Lead status changes



Step	Action	Details	Branch	Notes
1	If/then branch	Region is EMEA / Americas / APAC	All	Add a none-met path to a fallback owner
2	Rotate record to owner	Rotate among the region's team	Each region	Sales Hub Professional
3	Edit record	Lead status = New	All	This workflow owns Lead status on entry
4	Create task	Call the lead, due in 1 business hour	All	
5	Delay	1 business hour	All	Business-days option on
6	If/then branch	Task completed?	All	
7	Internal notification	Notify the team manager	Not completed	Escalation

WORKSHEET · COPY FOR EACH WORKFLOW

Workflow design: the brief

Workflow name	
Purpose (one sentence)	
Owner	
Object type	☐ Contact ☐ Company ☐ Deal ☐ Ticket ☐ Lead ☐ Custom object (can't be changed later)
Plan or hub needed	
Trigger type	☐ Filter ☐ Event ☐ Schedule ☐ Webhook ☐ Manual

Enrollment criteria (exact filters or events, with AND / OR groups)

Enroll existing records?	☐ Yes ☐ No Why: _____
Re-enrollment	☐ Off ☐ On, triggers: _____
Suppression / unenrollment	
Goal (contact workflows)	
Time window / business days	
Properties written	
Other workflows affected	

DONE FOR YOU

Rather hand the design to a HubSpot Gold Partner?

We map your process, design and build the workflows, test every path and fill in this template for you.

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WORKSHEET

Workflow design: actions in order

Step	Action type	Details (values, delays, recipients)	Branch	Properties touched
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

Action types: Delay, If/then branch, Value-equals branch, Random split, Edit record, Create task, Internal notification, Send email, Rotate record to owner, Create record, Add to or remove from static segment, Enroll in sequence, Send a webhook, Custom code, Format data, AI action, Go to workflow.

Branch map

Sketch each branch and where it ends. Remember: if/then records follow the first branch they match.

WORKSHEET

Conflict check and pre-launch checklist

Properties this workflow writes

Property	Value set	Other workflows that write or react to it	Resolution
Lead status	*New*	*Lead / Nurture / No response*	*This workflow owns it on entry only*

Before you turn it on

- [ ] Every action is in your plan
  Check page 04
- [ ] Triggers match the brief exactly
  Including AND / OR groups
- [ ] Re-enrollment matches the brief
  No AND criteria or activity properties
- [ ] Suppression, unenrollment or goal set
  So records leave when they should
- [ ] Every branch has a none-met path
  No record left without an owner
- [ ] Conflicts above resolved
  One owner per property
- [ ] Test run on sample records
  Filter triggers with Test; events with a test record
- [ ] Emails go to marketing, subscribed contacts
  A common workflow error
- [ ] Existing-records choice made
  Yes or No, on purpose
- [ ] Name, description, owner and folder set
  Follows page 05
- [ ] Inventory row added
  Page 06
- [ ] Someone will watch it for the first week
  Action logs and Issues

Approved by		Date	

WORKSHEET

Test plan and log

Plan one test record per branch, including the none-met path. Write the path you expect before you run the test, then the path the record actually took.

Date	Workflow	Test record	Expected path	Actual path	Result	Fix needed	Tested by
2026-10-27	*Lead | Assign owner | Inbound demo*	*Test contact, Region EMEA*	*EMEA branch, rotate, task*	*EMEA branch, rotate, task*	*Pass*		*RevOps lead*

Result: Pass or Fail. A failed test isn't done until the fix is made and the same record passes.

TROUBLESHOOTING

When a workflow doesn't do what you expected

A record didn't enroll

> Common reasons are that it didn't meet the triggers, it was already enrolled and re-enrollment is off, the event happened before the workflow was turned on, or a suppression segment or unenrollment trigger excluded it. Use Troubleshoot enrollment in the editor and the enrollment history to check.

Symptom	Likely cause	Where to look
Record never enrolled	Criteria not met, or an event before the workflow was on	Troubleshoot enrollment
Enrolled once, not again	Re-enrollment off, or the trigger isn't a re-enrollment trigger	Workflow settings
Enrolled, then left early	Goal met, or an unenrollment trigger or suppression segment	Enrollment history
Action failed	Missing association, lifecycle stage that can't move backwards, or email to a non-marketing or unsubscribed contact	Action logs, Issues section
Two values keep flipping	Two workflows write the same property	Conflict check on page 10
Branch went the wrong way	If/then order: records follow the first branch they match	Branch order in the editor

Your troubleshooting notes

Date	Workflow	What happened	Cause and fix

WORKSHEET · ONCE A MONTH

Monthly review and change log

Check	How	Done	Notes
Unused workflows	Health tab: workflows needing review or not used; turn off or delete		
Errors and issues	Each live workflow's Issues section and action logs		
Missed enrollments	Spot-check with Troubleshoot enrollment		
Conflicts	Two workflows writing the same property; agree one owner		
Owners and descriptions	Every workflow has a current owner and description		
Names and folders	New workflows follow the pattern and folder structure		
Inventory	Page 06 matches what's live in HubSpot		

Change log

Date	Workflow	What changed	Why	By
2026-10-27	*Lead | Assign owner | Inbound demo*	*Added APAC branch*	*New APAC rep*	*RevOps*

PipelineSync

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