PipelineSync

FREE TEMPLATE · LEAD ROUTING

Lead Routing Decision Tree

Six yes/no questions, in order, that decide what happens to every new lead. Agree them on paper, write your own rules into each node, then build and test them in HubSpot.

Decision tree | Owner roster | SLA worksheet | Test log

Edition October 2026 · HubSpot facts checked 27 Oct 2026

START HERE

How to use this template

Most routing problems are disagreements about the rules, not about the workflows. This template gets the rules agreed and written down first, then becomes your build plan and your test record.

1 Read the tree
Learn the six questions, why the order matters and what HubSpot gives you to build them (pages 3 and 4).

2 Agree the inputs
Settle required fields, owner precedence, territories, fit and response times with sales and marketing in one session (page 5).

3 Write your rules
Fill in each node of the tree, then the routing rules table and the team roster (pages 7 to 9).

4 Set rotation and SLAs
Decide the round robin settings, the fallback owner and the response target for each lead type (pages 10 and 11).

5 Build and test
Build one workflow per decision, then run one test record per branch, including the awkward ones (pages 12 and 13).

6 Review monthly
Check the queues, the rotation and the misses, and log every rule change (pages 14 and 15).

What is inside

Page	Section	Use it to
03	**Reference: the six questions**	See the decision tree and why the questions run in this order
04	**Reference: building it in HubSpot**	Check the rotate action, plan requirements and the properties SLA checks use
05	**Inputs and routing properties**	Agree the five inputs and the properties your workflows will write
06	**Worked example**	See a complete, illustrative tree for a team routing by region
07	**Your decision tree**	Write your own rule into every node and branch
08	**Routing rules table**	List every assignment rule in the order it runs
09	**Teams, territories and owners**	Record who owns each territory, who is in each rotation and who covers absences
10	**Round robin and fallback owner**	Set each rotation and make sure no lead ends without an owner
11	**SLA and escalation**	Set response targets by lead type and the escalation ladder
12	**HubSpot build plan**	Plan one workflow per branch, with triggers, actions and owner
13	**Test cases log**	Prove every branch with a named test record
14	**Troubleshooting**	Find out why a lead went unassigned, unworked or to the wrong rep
15	**Monthly routing health review**	Keep routing healthy and every rule 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

The six questions, in order

Ask six questions in a fixed order: ready to route, existing owner, territory or segment, fit, response time, then escalation. The order matters. Checking for an existing owner before territory stops a customer's new form fill from landing with a different rep, and checking readiness first keeps junk out of every queue.

1 Is the record ready to route? Valid email, country, source, consent, not a duplicate	**YES** Go to 2	**NO** Data-quality queue or nurture; fix and re-enter
2 Does the contact or its company already have an owner?	**YES** Assign to that owner; go to 5	**NO** Go to 3
3 Does it match a territory, segment or named account?	**YES** Assign to that team or owner; go to 4	**NO** Assign to the fallback owner; go to 4
4 Does it meet your fit criteria for sales? Your definition of a sales-ready lead	**YES** Set lifecycle stage for sales follow-up; go to 5	**NO** Nurture with a clear re-entry rule
5 Was it worked within the agreed response time? The SLA for this lead type	**YES** Done; routing ends	**NO** Go to 6
6 Has the owner been reminded once already? One reminder before escalation	**YES** Reassign or escalate to the sales lead	**NO** Send a reminder; check again at the next deadline

Dashed boxes are where a lead leaves the tree. Every other branch leads to another question, so no lead stops without an owner or a next step.

Why this order

Readiness first

Records missing the fields a rep needs go to a fix or nurture path, so sales never receives a lead it can't act on.

Owner before territory

Keeps one owner per account and avoids two reps calling the same buyer.

Timer after assignment

The response clock can only start once someone owns the lead, and it needs a reminder and an escalation path.

Tree owner	**Fallback owner**
Sales sign-off	**Marketing sign-off**

Keep the tree as small as your sales team can explain from memory. Every extra branch is another rule to test and another place for a lead to get stuck.

REFERENCE · CHECKED OCTOBER 2026

What HubSpot gives you to build it

Build the tree as a small set of workflows, one per decision, rather than one huge workflow. Use if/then branches for the questions, owner properties for assignment, the Rotate record to owner action for round robin within a team, and date properties to stamp assignment and first response so the SLA checks have something to measure.

Requirements, as of October 2026

Piece	What HubSpot's documentation said when we checked
Workflows	Professional or Enterprise subscription. Lead workflows need Sales Hub Professional.
Rotate record to owner	Sales Hub or Service Hub Professional or Enterprise. Every user in the rotation needs a paid seat and must have accepted their invite. Rotating by team only uses main team members. If nobody is eligible, the record is left without an owner.
Lead scoring	Marketing Hub or Sales Hub Professional or Enterprise. Each score creates a score property and a threshold property you can trigger on.
Lead SLA	No lead SLA setting. HubSpot's SLA goals belong to the help desk and apply to tickets. A lead SLA is a written target plus a workflow.

Workflow pieces you will use

- **If/then branches:** up to 20; records follow the first branch they match, so put the strictest rule first.
- **Value-equals branches:** up to 250 for one property, useful for a region or country list.
- **Delays:** a set time with a business-days option, for SLA windows.
- **Test:** simulates a record's path before you turn it on; event triggers can't be tested this way, so enroll a test record.

How the rotate action behaves

- Shares records **equally** between the chosen users or team. No weighting in the workflow action.
- Has an option to **overwrite** an existing owner. For most lead flows, leave it off.
- Each rotate action keeps its **own count**, which **resets** when users are added or removed.
- **Available users only** is offered for leads (beta), tickets and conversations, not documented for contacts and deals.

Properties the SLA checks can read

Property	Object	What it tells you
Owner assigned date	Contact, lead	The most recent assignment. Use it as the SLA trigger and delay base.
Lead response time	Contact	Time from owner assignment to the current owner's first qualifying engagement. Starts again on reassignment.
Last contacted	Contact	The latest call, chat, one-to-one email, meeting or logged message. A plain "was it worked?" check.
Time to First Touch	Lead	Time from lead creation to first outreach.

HubSpot changes tiers, seats and options often. Check each requirement in your own portal before you build around it.

STANDARDS · AGREE BEFORE BUILDING

The five inputs and your routing properties

Agree these with sales and marketing in one session. Write the decision as properties and values HubSpot can check, not as descriptions.

Input	What to decide	Your decision	Agreed by
Required fields	The minimum a rep needs to act, such as email, country, company and source		
Owner precedence	Whether contact owner or company owner wins when they differ		
Territories	By region, company size, industry or named-account list, with one owner or team for each		
Fit	The firmographic and behavioral signals that make a lead worth a sales call, as properties HubSpot can check		
Response times	Per lead type, for example demo requests faster than content downloads, plus who gets escalated to		

Assignment rule order

Run the rules that must never be broken first, then the ones that balance workload. A lead stops at the first rule that assigns it.

01 **Existing owner** — One owner per account

02 **Named accounts, territory** — Must not be overridden

03 **Product, language, segment** — Can sell what was asked

04 **Customer status** — To account management

05 **Round robin** — The remainder, fairly

06 **Fallback owner** — No lead left without one

Routing properties your workflows will write

Property	Type	Values	Written by	Read by
Ready to route	*Single checkbox*	*Yes / No*	*Readiness workflow*	*Assignment workflow*
Recycled reason	*Dropdown*	*Timing, No budget, Wrong contact, Other*	*Sales rep*	*Nurture, reports*

Capture reasons as dropdowns, not free text, so you can report on them. Lifecycle stage records the relationship; lead status records the working state. Keep them separate.

WORKED EXAMPLE · ILLUSTRATIVE

A team routing inbound leads by region

An illustrative tree for a sales team split into EMEA, Americas and APAC. Your fields, regions and timings will differ; the point is how specific each rule is before anyone builds it.

#	Rule written for this team	If yes	If no
1	Email, Country and Lead source are known; consent recorded; no duplicate by email or company domain	Set Ready to route = Yes; go to 2	Data-quality view; marketing ops fixes within 1 business day
2	Contact owner is known, or the associated company has an owner (company owner wins)	Keep or copy that owner; go to 5	Go to 3
3	Country is in the EMEA, Americas or APAC list; or company is on the named-account list	Rotate within that region's team, overwrite off; go to 4	Assign to the fallback owner (sales manager); go to 4
4	Combined lead score label is A1 or A2	Lifecycle stage = Marketing qualified lead; Lead status = New; go to 5	Nurture; re-enter when the label reaches A1 or A2
5	Last contacted is known within the SLA window: 1 business hour for demo requests, 1 business day for other lead types	Done	Go to 6
6	Owner already sent one reminder for this assignment	Rotate to another rep in the team; notify the regional manager	Notify the owner; wait half the window; check again

WF 1
Readiness
Q1, sets Ready to route

→

WF 2
Assignment
Q2 and Q3, rotate per region

→

WF 3
Lifecycle update
Q4, stage and lead status

→

WF 4
SLA
Q5 and Q6, remind, escalate

Roster used

Territory	Team	Fallback
Region EMEA	EMEA team (3 reps)	Sales manager
Region Americas	Americas team (4 reps)	Sales manager
Region APAC	APAC team (2 reps)	Sales manager
Named accounts	Account executive per account	Head of sales

Tests that proved it

Test record	Result
TEST missing country	Data-quality view. Pass
TEST existing customer	Kept owner. Pass
TEST outside every territory	Sales manager. Pass
TEST nobody responds	Reminder, then rotation. Pass

All names, regions, team sizes and timings on this page are made up to show the level of detail. Agree your own with sales leadership.

WORKSHEET

Your decision tree

Write the exact rule for each question as properties and values, then what happens on each branch. Grey text is the default; overwrite it with yours.

1	**Ready to route?** Required fields, consent, duplicate check	YES Go to 2	NO Data-quality queue or nurture
2	**Existing owner?** Contact or company owner; which wins	YES Keep that owner, go to 5	NO Go to 3
3	**Territory or segment match?** Region, segment or named account	YES Assign to that team, go to 4	NO Fallback owner, go to 4
4	**Meets fit criteria?** Score label or fit properties	YES Lifecycle stage for sales, go to 5	NO Nurture with a re-entry rule
5	**Worked within the response time?** Target per lead type; what counts as worked	YES Done	NO Go to 6
6	**Owner already reminded?** One reminder before escalation	YES Reassign or escalate	NO Remind, check again

Tree agreed by	Date	Version

WORKSHEET

Routing rules table

One row per assignment rule, in the order it runs. A lead stops at the first rule that assigns it, so the last row is always the fallback owner.

Order	Rule name	Applies when (properties and values)	Assign to	Method	Overwrite owner?	Lifecycle / lead status set	Notify	Workflow	Notes
1	*Existing owner*	*Contact owner is known, or company owner is known*	*That owner*	*Copy owner*	*No*	*Lead status = New*	*Owner*	*Assignment*	*Company owner wins*
2	*EMEA region*	*Country is any of the EMEA list*	*EMEA team*	*Rotate*	*No*	*Lead status = New*	*New owner*	*Assignment*	
1									
2									
3									
4									
5									
6									
7									
8									
9									
Last	Fallback owner	No rule above assigned an owner		Set owner	No				

Method: Copy owner, Set owner, Rotate. If/then branches send each record down the first branch it matches, so this order must match the branch order in HubSpot.

WORKSHEET

Teams, territories and owner roster

Territory or segment	Rule (properties and values)	Owner or team	Rotation?	Fallback owner	Escalate to	Notes
Region EMEA	*Country is any of the EMEA list*	*EMEA team*	*Yes*	*Sales manager*	*Regional manager*	*Illustrative*

Rep roster

Rep	Team	Paid seat	Invite accepted	Main team member	Rotations they are in	Away dates	Who covers their open leads
Rep A	*EMEA team*	*Yes*	*Yes*	*Yes*	*Assignment: EMEA*	*2026-12-22 to 01-02*	*Regional manager watches*

Seat, invite and main team member columns matter because, when we checked in October 2026, HubSpot only rotated to users with a paid seat who had accepted their invite, and team rotations only used main team members.

WORKSHEET · ONE BLOCK PER ROTATION

Round robin and fallback owner rules

> Round robin is the last assignment rule, not the first. Keep existing owners, then rotate the remainder within the matching team, then add an if/then branch after the rotate step: if the owner is still unknown, set a named fallback owner and notify them. Nothing then sits unassigned because a rotation had no eligible rep.

Rotation A	
Workflow	
Object	☐ Contact ☐ Lead ☐ Deal
Owner property set	
Overwrite owner	☐ Off ☐ On, why: _____
Rotate between	☐ Users ☐ Team: _____
Members	
Fallback owner	

Rotation B	
Workflow	
Object	☐ Contact ☐ Lead ☐ Deal
Owner property set	
Overwrite owner	☐ Off ☐ On, why: _____
Rotate between	☐ Users ☐ Team: _____
Members	
Fallback owner	

Fallback owner and away reps

Fallback owner (named person)		**Backup**	
Fallback queue reviewed by		**How often**	e.g. every business day
When a rep is away	☐ Remove from rotation ☐ Available users only (leads, beta) ☐ Reassign open leads ☐ Manager watches		
Team changes made	e.g. in planned batches, so the count resets once	**Who approves**	

- ☐ Subscription and seats checked
  Sales or Service Hub Pro or Enterprise, as of Oct 2026
- ☐ One rotation for new leads
  Separate actions keep separate counts
- ☐ Overwrite left off
  Existing customers keep their owner
- ☐ Fallback branch after the rotate step
  Owner unknown: set fallback, notify
- ☐ Leads object: owner sync setting off
  If you rotate HubSpot leads
- ☐ Fairness measured per period
  Count what the rotation assigned

Rotation changes

Date	Rotation	Who was added or removed, and why	Open leads reassigned to

WORKSHEET

SLA and escalation

HubSpot has no lead SLA setting, so write the target down and enforce it with a workflow: enroll when an owner is assigned, wait the SLA window in business days, branch on whether a real response happened, remind the owner, wait again, then notify the manager or rotate to another rep.

Response targets by lead type

Lead type	Priority	Target	Business hours	Reminder at	Escalate to	Then
Demo request	*High*	*1 business hour*	*Mon-Fri 9-17*	*At target*	*Regional manager*	*Rotate to next rep*

Escalation ladder

01 **Owner assigned** — Owner assigned date known

02 **Wait** — SLA window, business days

03 **Worked?** — No: notify owner

04 **Wait again** — A shorter window

05 **Still unworked?** — Manager or rotate

What counts as worked (pick one definition)

- [ ] Last contacted is set after the latest assignment
  Call, chat, one-to-one email, meeting, logged message
- [ ] Lead response time is set
  Also counts starting or completing a task
- [ ] Other: _____

Clock you report to leadership

- [ ] Lead response time (contact)
  From assignment; restarts on reassignment
- [ ] Time to First Touch (lead)
  From lead creation to first outreach
- [ ] Re-enrollment on, so reassigned leads start again
  Trigger: Owner assigned date

Escalation recipients		**Misses reviewed**	e.g. weekly, rep by rep
SLA agreed by / date		**Version**	

DONE FOR YOU

Rather have routing designed and tested for you?

We build the tree, rotations, fallback owners and SLAs in your portal, test every branch and fill in this template for you.

Book a free consultation

WORKSHEET

HubSpot build plan: one workflow per branch

Build a small set of workflows, one per decision, rather than one huge workflow. Complete the brief for each before you open HubSpot.

Workflow	Tree	What it does	Trigger	Writes	Owner	Status
Readiness	Q1	Checks required fields and duplicates, then sets "ready to route" or sends the record to the data-quality path				
Assignment	Q2, Q3	Enrolls ready records, keeps an existing owner, otherwise branches by territory and assigns or rotates within the team				
Lifecycle update	Q4	Sets the lifecycle stage and lead status from the fit check				
SLA	Q5, Q6	Starts from the assignment time, waits for the response window, then reminds, reassigns or escalates				
Recycle and re-entry	Q4 no	Sets lead status to recycled with a reason, nurtures, and sends re-engaged leads back to the top				

Status: Planned, Building, Testing, Live.

Branch map for the assignment workflow

Branch	Condition (in branch order)	Action	Then
1			
2			
3			
4			
None met	No branch matched	Set fallback owner; notify	

Before you turn each one on

- [ ] Every action is in your subscription
  Check page 04
- [ ] Branch order matches the routing rules table
  First match wins
- [ ] Every branch has a none-met path
  Ends with the fallback owner
- [ ] One workflow owns each property it writes
  Owner, lifecycle stage, lead status
- [ ] Existing-records choice made on purpose
  Usually only new leads
- [ ] Test cases on page 13 all pass
  Then switch on for real leads

WORKSHEET

Test cases log

One test record per branch, named so you can find and delete them afterwards. Write what you expect before you run each test. Shorten the SLA wait in a test copy of the workflow to see escalation fire.

Test record	Branch it should take	Expected owner	Expected lifecycle stage	Actual result	Result	Fix needed	Date	By
TEST missing country	Question 1: data-quality queue							
TEST existing customer	Question 2: keep existing owner							
TEST outside every territory	Question 3: fallback owner							
TEST poor fit	Question 4: nurture							
TEST nobody responds	Questions 5 and 6: reminder, then escalation							
TEST reassigned partway	SLA restarts for the new owner							

Result: Pass or Fail. Check the owner, lifecycle stage and timestamps on every test record. A failed test isn't done until the fix is made and the same record passes.

TROUBLESHOOTING

When a lead goes the wrong way

A lead was left unassigned

> Usually a rule never fired or had nobody to assign to: the record was missing a property the workflow checks, the owner in the rotation was deactivated or had no seat, two workflows conflicted, or no fallback owner was set. A daily list of contacts with no owner catches all four.

Symptom	Likely cause	Where to look or fix
Existing customer went to a new rep	Overwrite on, or territory checked before existing owner	Rotate action settings; branch order
Rotation looks uneven	Several workflows rotate separately; count reset after a team change; a rep lost their paid seat	List every rotate action; compare per period
Response shown that never happened	Starting a task counts toward Lead response time; creating a task moves a lead to Attempting	Branch on Last contacted instead
Lead response time is empty	Owner hasn't engaged yet, or no owner; Date of first engagement clears when the owner is set to No owner	Waiting-leads report
Response looks faster than the buyer felt	Reassignment restarts the contact clock	Report reassignments alongside response time
Record never entered routing	Didn't meet the triggers, or an event happened before the workflow was on	Troubleshoot enrollment
Recycled lead never came back	No re-entry trigger, or re-enrollment off	Recycle workflow settings

Your troubleshooting notes

Date	Lead or test record	What happened	Cause and fix

WORKSHEET · ONCE A MONTH

Monthly routing health review

Check	How	Done	Notes
No-owner queue	Contacts with no owner; why each landed there; fix the rule		
Fallback queue	What reached the fallback owner, and which rule should have caught it		
Data-quality queue	Records that failed readiness; which required field was missing		
SLA misses	Lead response time report by rep and team; misses by lead type		
Rotation fairness	What each rotate action assigned this month, not total ownership		
Roster	Seats, team membership, leavers and away dates match page 09		
Fit thresholds	Quarterly: check score thresholds against closed-won deals		

This month's numbers

Month	New leads	To fallback	No owner	SLA misses	Reassigned	Biggest issue

Rule change log

Date	Rule or workflow	What changed	Why	By
2026-10-27	*Assignment: APAC*	*Added a second APAC rep to the rotation*	*Team growth*	*RevOps*

In the first two weeks after launch, review the no-owner and data-quality queues every business day, not monthly.

PipelineSync

HUBSPOT GOLD SOLUTIONS PARTNER

Want lead routing built and tested for you?

We agree the tree with your sales team, build the routing, rotations, fallback owners and SLAs in HubSpot, test every branch and hand over this template filled in.

RevOps infrastructure, lead to close

Lifecycle stage definitions, lead scoring and routing with SLAs and fallback owners, sales and marketing automation.

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