

Folder: Admin company to the company						0	ther HubSpot Implementation Actio	ons:					
This See		ows	WORKFLOWS	WORKFLOWS				WORKFLOWS	WORKFLOWS			WORKFLOWS	WORKFLOWS
Table 1	Name / ref	Create workflow 'Country/Region Copy'	Name / ref	Name / ref	Name / ref	Name / ref Create workflow 'CSM Owner (Ticket)'	Name / ref Create workflow 'Sales Rep Owner (Contact)'	Name / ref Create workflow 'Sales Rep Owner (Deal)'	Name / ref Create workflow 'Sales Rep Owner (Ticket)'	Name / ref Create workflow 'Company Grade'	Name / ref Create workflow 'Customer Tier (Company & Contact)'	Name / ref Create workflow 'Customer Tier (Ticket)'	Name / ref
Sect Section	Time	0.25	Time 0.25		Time 0.5	Time 0.5	Time 0.5	Time 0.5	Time 0.5	Time 0.5	Time 0.5	Time 0.5	Time 0.5
This work flow is to empty to the property and the prop	Priority	1	Priority 1	Priority 1	Priority 1	Priority 1	Priority 1	Priority 1	Priority 1	Priority 1	Priority 1	Priority 1	Priority 1
Significant properties of the community	Task ID	lhyrgv2	Task ID 1hyrh1c	Task ID 1hyrh6r	Task ID 1hyrhag	Task ID 1hyrhr1	Task ID 1hyrj56	Task ID lhyrjc7	Task ID 1hyrjf3	Task ID lhyrjmh	Task ID 1hyrjwa	Task ID lhyrjyn	Task ID 1hyrk18
WORK-V-V-V-V-V-V-V-V-V-V-V-V-V-V-V-V-V-V-V	Message	'Country/Region' property from the company to the	Message property 'Last Name' from the Group 'Lead Gen' to the	Message CSM Owner on the company side, and populate this on all	Message CSM Owner on the company side, and populate this on all	Message CSM Owner on the company side, and populate this on all	Message Sales Rep Owner on the company side, and populate	Message Sales Rep Owner on the company side, and populate	Message Sales Rep Owner on the company side, and populate	Message known, copy to the Contact Property 'Associated Company	is known OR has been updated in the last 1 day, copy Message to the Contact AND Company	is known OR has been updated in the last 1 day, copy Message to the Ticket Property	Referral' is known OR has been updated in the last 1 day, Message copy to theCompany Property
Name/re Contact) Name/re Sales Pipeine with the detailed deal stages (Deal pipeine with the de	Folder:	Admin	Folder: Admin	Folder: Admin	Folder: Admin	Folder: Admin	Folder: Admin	Folder: Admin	Folder: Admin	Folder: Admin	Property 'Company Tier'	'Company Tier'	'Partner Referral'
Time 0 5 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1							WORKFLOWS	PIPELINES	PIPELINES	PIPELINES			
Time 05 Time 0	Name / ref	Create workflow 'SDR Owner	Name / ref	Name / ref	Name / ref	Name / ref	Name / ref						
Iffice U.S. Iffice		(Correct)	(Beal)	(Herce)	(correact)	Stage (Company)	Stage (Contact)		Name / ret				WORKFLOWS
Task ID 1hyr9xn 1 1 1 1 1 1 1 1 1	Time Priority	0.5						Pipeline)	Pipeline)	Pipeline)	Name / ref Create workflow 'Marketing Owner (Contact)'	Name / ref Create workflow 'Marketing Owner (Deal)'	Name / ref Create workflow 'Marketing Owner (Ticket)'
This workflow will take the SDR Owner on the company side, and populate this on all associated contacts. Folder: Admin Spiral Company Side, and populate this on all associated contacts. This workflow will take the SDR Owner on the company side, and populate this on all associated contacts. Folder: Admin Spiral Company Side, and populate this on all associated contacts. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR Owner on the company side, and populate this on all deals created. This workflow will take the SDR OWNER SDR OWNER SDR OWNER SDR OWNER SD	Task ID	lhyrgxn	Task ID 1hyrh4b	Task ID 1hyrh8m	Task ID 1hyrhnd	Task ID 1hyrhx8	Task ID 1hyrj92				Time 0.5	Time 0.5	Time 0.5
Message side, and populate this on all associated contacts. Folder: Admin Message side, and populate this on all associated contacts. Admin Message side, and populate this on all associated contacts. Admin Message side, and populate this on all associated contacts. Admin Message side, and populate this on all tickets created. Admin Message Contacts EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Contacts EXCLUDING Message Contacts EXCLUDING Admin Message Contacts EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Message Contacts EXCLUDING Message Contacts EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Message Contacts EXCLUDING Message Contacts EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Admin Message Company EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Admin Message Company EXCLUDING Subscriber + Turn on re-enrolment Folder: Admin Message Company EXCLUDING Admin Message Company EXCLUDING Folder: Admin Message Company EXCLUDING Admin Message Company EXCLUDING Admin Message Company EXCLUDING Folder: Admin Message Company EXCLUDING Folder: Admin Message Company EXCLUDING Admin Message Company EXCLUDING Admin Message Company EXCLUDING Admin Message Company EXCLUDING Admin Message Comp			SDR Owner on the company	SDP Owner on the company									Priority 1
Folder: Admin Message Marketing Owner on the company side, and populate Me	Message	side, and populate this on all	side, and populate this on all	side, and populate this on all	associated contacts	Message Contacts EXCLUDING	Message Company EXCLUDING						
				Folder: Admin	Folder: Admin	re-enrolment	re-enrolment				company side, and populate	Message Marketing Owner on the company side, and populate	company side, and populate

Name: Renewal End Date Field Type: Date Picker

Field Type: HubSpot User

Name: SDR Owner Field Type: HubSpot User

Name: Renewal Close Date Field Type: Date Picker

Field Options: Budget, Time, Value,

Name: Sales Rep Owner Field Type: HubSpot User

Name: SDR Owner Field Type: HubSpot User

Name: Customer Tier Field Type: Dropdown Select Field Options: 1, 2 and 3

not turned on in territory

Name: Sales Rep Owner Field Type: HubSpot User

Name: CSM Owner Field Type: HubSpot User

Name: Sales Rep Owner Field Type: HubSpot User