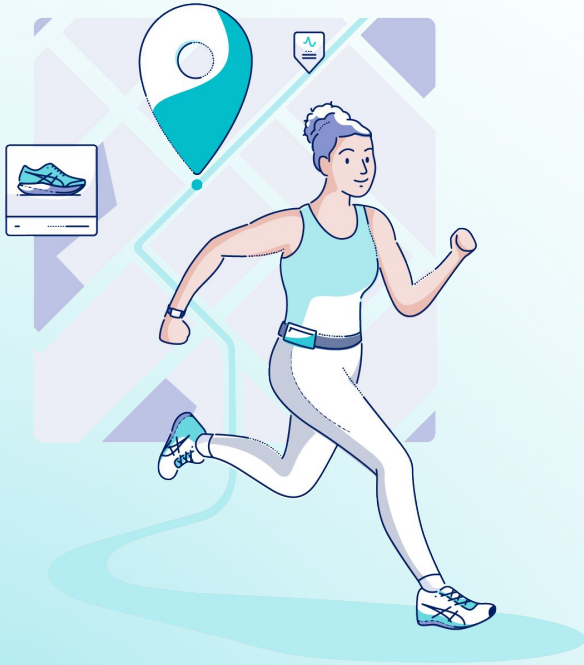


Lists & Automations

Training

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What is a List

- How you do your segmentation in HubSpot
- A list can be used for a variety of reasons and ways to segment data for emailing or other purposes
- CRM > Lists
- Views & Filters for finding my list
- Folders available for organizing
- Actions like cloning, random sample, split lists, export, import

Lists
7 lists

Edit Properties Import Create list

All lists X Unused lists Recently deleted + Add view (3/50) All views Folders

All creators All types All objects Advanced filters (1) Save view

Search lists

<input type="checkbox"/>	NAME	LIST SIZE	TYPE	OBJECT	LAST UPDATED (MDT)	CREATOR	FOLDER	USED IN
<input type="checkbox"/>	Big Lake Runnin... Details More	6,969	Active	Contact	Aug 6, 2024 6:08 PM by Melissa Erickson	Melissa Erickson	-	0
<input type="checkbox"/>	Female Runners		Active	Registration	May 13, 2024 10:21 AM by Julia Trovato	Julia Trovato	-	0
<input type="checkbox"/>	Engaged Runners		Static	Contact	May 13, 2024 9:33 AM by Julia Trovato	Julia Trovato	-	4
<input type="checkbox"/>	Engaged 5K Runners		Static	Registration	May 13, 2024 9:30 AM by Julia Trovato	Julia Trovato	-	0
<input type="checkbox"/>	Half Marathon Runners		Active	Contact	Apr 30, 2024 12:11 PM by Julia Trovato	Julia Trovato	2024 Runners	1
<input type="checkbox"/>	Marathon Runners		Active	Contact	Apr 30, 2024 12:07 PM by Julia Trovato	Julia Trovato	2024 Runners	1
<input type="checkbox"/>	5K		Active	Contact	Apr 24, 2024 8:41 AM	Julia Trovato	2024	1

Clone
Random Sample
Split List
Export
Move to folder
Set notifications
View performance
Delete

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Create & Use Lists

- Create a new list using the orange button in the upper right hand corner.
- First you will need to create a name and pick the record type, if for an email send you will pick contacts, if you are using the lists for other reasons you could do any other record type like registrations.
- Active lists are dynamic, static lists are a snapshot in time, depending what your list purpose is both may be handy, you'll need to know the type before creating.

[< Back to lists](#)

Create a list



Contact-based

Create a list of Contact records



Cart-based

Create a list of Cart records



Company-based

Create a list of Company records



Deal-based

Create a list of Deal records

List name *

Big Lake Running Series participants

Description

What kind of list are you creating?

Active list 4 of 2,000 used

Active lists automatically update over time. Records will join or leave the list as their properties change.

Static list 2 of 2,000 used

Static lists do not automatically update as your records change. A static list represents a single moment in time.

Custom properties [Customize the 'Create list' form](#)

There are no custom properties selected.

List Criteria

- Next you'll set up the list filters, which is the criteria for which makes your list or segmentation. You can use any property related to a contact, so contacts who have registered for a specific event last year but not yet this year for example.
- You can use And/Or for your filters and you can create groups, so these filters grouped together or these grouped together.
- You will see a preview of records, but won't see full # of list or view until saved.

Filters Performance Activity Settings

Filters Test contact Cancel

Group 1 📄 🗑️

🗑️

Contact is associated to:
Any Registration

And associated Registration has all of:
Event Year is equal to **2024**

+ Add filter

AND

+ Add filter

OR

+ Add filter group

Managing Lists

- Once you save your list you can see the full size of list and a who fits into it
- From here you can edit the list if you need to adjust your filters or check a couple of your added contacts to validate the criteria is sound, testing is always a best practice.

The screenshot shows a web interface for managing a list of participants. At the top, there is a navigation bar with a 'Back to lists' link, the list title 'Big Lake Running Series participants', and a status 'Active list' with a size of '6,969 contacts'. Below this are tabs for 'Filters', 'Performance', 'Activity', and 'Settings', with 'Filters' currently selected.

The 'Filters' section is open, showing a 'Group 1' configuration. It includes a 'Test contact' button and a 'Cancel' button. The filter logic is defined as follows:

- Group 1
 - Contact is associated to:
 - Any Registration
 - And associated Registration has all of:
 - Event Year is equal to 2024

Below the filter logic, there are buttons for '+ Add filter' and '+ Add filter group'. An 'OR' separator is visible below the filter logic.

The main content area displays a message: 'Select a filter to start editing'.

On the right side, there is a search bar labeled 'Search in list' and a table of participants. The table has columns for 'NAME' and 'ADDED TO LIST DATE'. The participants listed are:

NAME	ADDED TO LIST DATE
Afield Ignacius	Today at 6:08 PM
Backhurst Shaine	Today at 6:08 PM
Gay Flye	Today at 6:08 PM
Lauritz Joinson	Today at 6:08 PM
Theodora Ortell	Today at 6:08 PM
Ariana Disney	Today at 6:08 PM
Linette Shaxby	Today at 6:08 PM
Josefa Goring	Today at 6:08 PM
Buddy Tran	Today at 6:08 PM
Mingaud Shanna	Today at 6:08 PM

At the bottom right, there is a pagination control showing 'Prev 1 Next' and '25 per page'.

List Activity

- Version history for list

Big Lake Running Series participants



Active list Size: **6,969 contacts** Last contact added: **August 6, 2024 6:08 PM**

[Filters](#) [Performance](#) **[Activity](#)** [Settings](#)

Activity

View all user activity taken on this list

Event [All event types](#) ▾ Version [All versions](#) ▾ Modified by [Anyone](#) ▾

EVENT	VERSION	MODIFIED BY	DATE OF CHANGE 
List created	v1	 Melissa Erickson melissa@engaging.io	Aug 6, 2024 6:08 PM MDT

[< Prev](#) [Next >](#) **10 per page** ▾

List Settings

- List is edited or deleted
- Size of the list changes irregularly
- When list reaches a specific size
- Select user or team who receives notifications about a particular list

Filters Performance Activity **Settings**

Notifications

When this list is edited or deleted

Triggers a notification whenever a list is edited or deleted.

Trigger this notification

 OFF

When the size of this list changes irregularly

Uses HubSpot AI to analyze the previous 7 days and trigger a notification if the list increases or decreases in an unexpected way.

Trigger this notification

 OFF

When this list reaches a specific size

Triggers a notification when a list reaches a specific size. The size can be bigger or smaller than it is now. The notification will be turned off once triggered.

Trigger this notification

 OFF

List size reaches

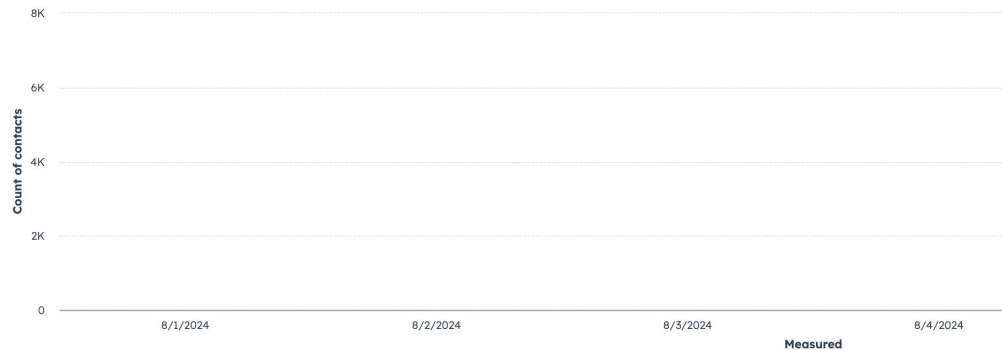
Analyze List Performance

- Performance tab will show some list specific analytics that you can filter your timespan on
- You can also look at by chart or table

List size

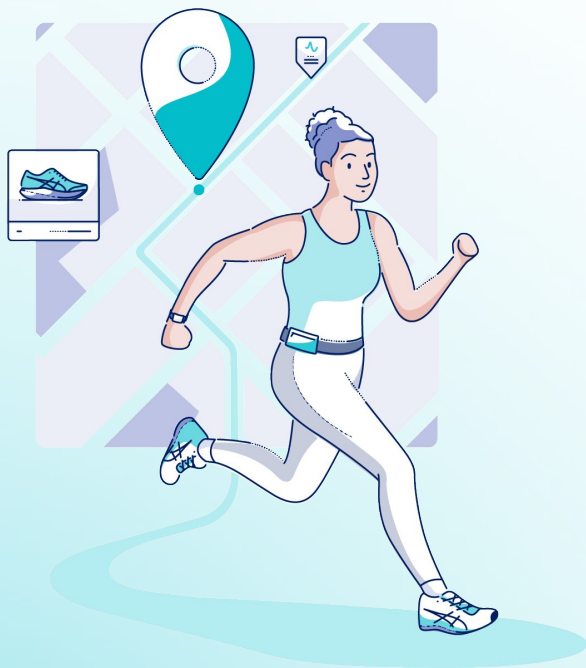
Over time ▾  

FROM 8/1/2024 TO 8/6/2024 | DAY



Contacts breakdown and engagement

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[Automations Home Page Overview](#)

See an overview of all your automations

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See the different tools that will help you with your automations

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Learn how to set the settings of your automation

006.

[Review and Publish Your Automation](#)

Double-check and set your automation live

Automation Home Page Overview

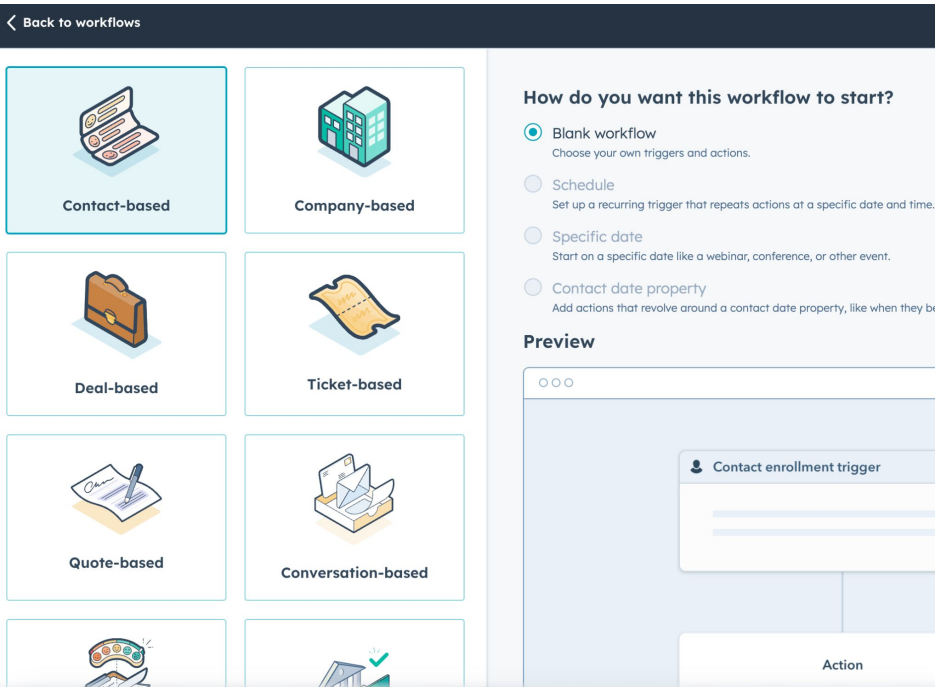
- Automation home page allows you to see a full list of all created automations
- Can use a variety of views and filters to find specific automations based on certain criteria
- Able to see quick stats of workflows such as current number of enrollments, activation status, etc.

Workflows

Manage

117 All workflows ×		Deleted	15 Needs review	Unused	+ Add view (4/50) ▼	
On or Off ▼	Type ▼	Business units ▼	Creator ▼	Teams ▼	Tool created from ▼	A
Search workflows 🔍						
<input type="checkbox"/>	NAME ⌵		ON OR OFF 🔍 ⌵			DESCRIPT
<input type="checkbox"/>	Auto create new retention deal		● On			Create a
<input type="checkbox"/>	New Event Approvals Process		● On			--
<input type="checkbox"/>	Organizations onboarding task creation		● Off			--
<input type="checkbox"/>	Company Lead Assignment		● On			--
<input type="checkbox"/>	Contact Lead Assignment		● On			--
<input type="checkbox"/>	Update Participants Range when populated		● On			--
<input type="checkbox"/>	Unnamed workflow - 2024-06-18 18:47:31 GMT+00		● On			--
<input type="checkbox"/>	Unnamed workflow - Tue Jun 18 2024 14:44:58 GM		● Off			--

< Prev **1** 2 3 4 5 Next > 25 per page ▼

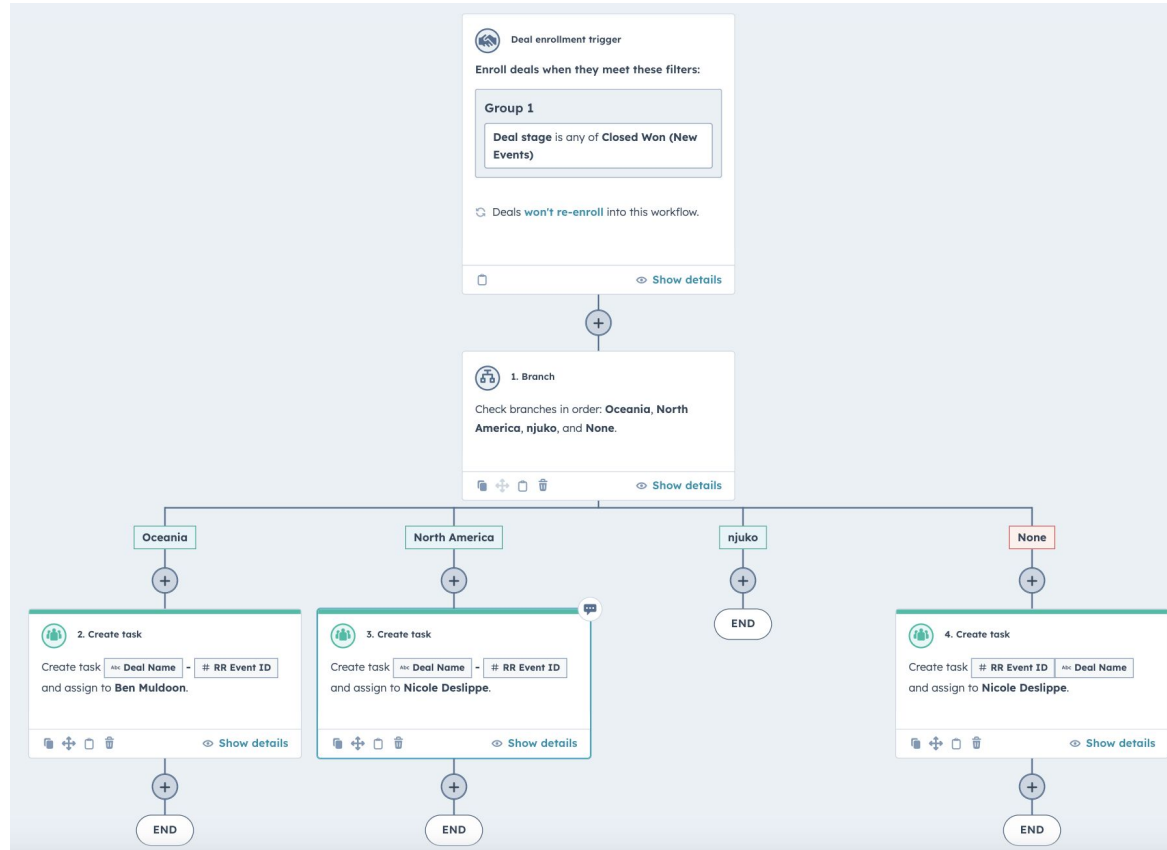


Creating An Automation

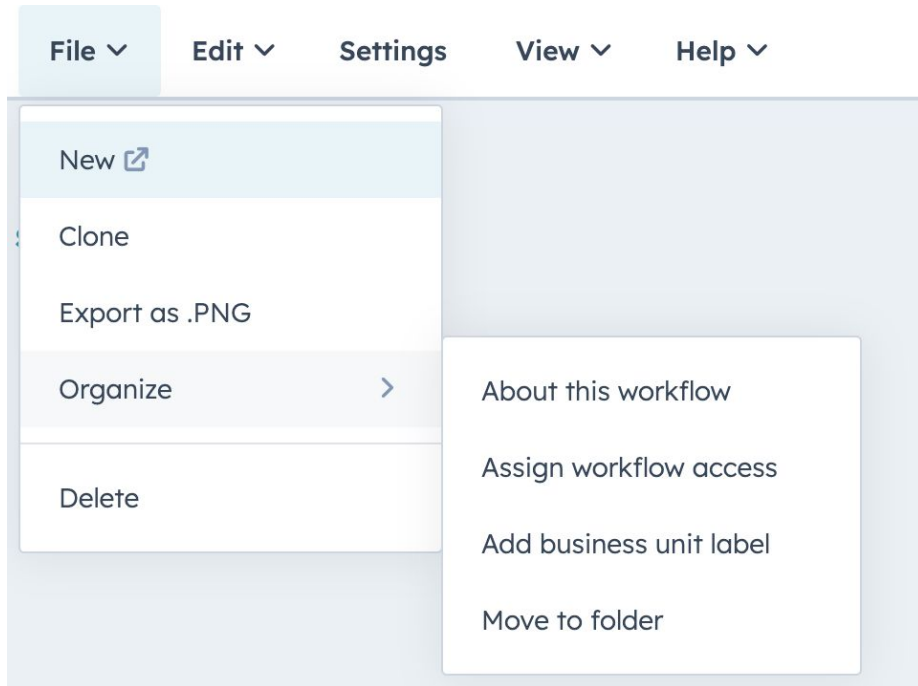
- Two ways to create a new automation: from scratch or from a template
- From scratch allows you to build and fully customize your workflow from beginning to end, while templates allow you to have a starting point quickly created depending on the type of automation you need
- Automations are built around different objects within your HubSpot account, as well as around specific tools such as Commerce Hub
- To create a new automation
 - On the automations homepage, click the orange “Create Workflow” button near the top right corner
 - Select whether you want to create a workflow from scratch, or from a template
 - Choose the object/template you’d like to use

Adding Enrollment Criteria and Steps

1. Add enrollment criteria that will have the workflow automatically enroll records into it once they meet said criteria
2. Add un-enrollment criteria to prevent certain records from being enrolled, or to remove records who meet a certain criteria
3. Choose whether to give records the chance to re-enroll after completing the workflow
4. Use one of the many steps available to build out your automation. Some of these steps include:
 - a. Send marketing email
 - b. Update specific properties
 - c. Adding delays
 - d. Create a task for an employee
 - e. Trigger a webhook
5. If applicable, you may also set up a workflow goal that will automatically unenroll the contact from the workflow once they've met said goal (i.e. signed up for an event)



Automation Tools



- There are a variety of automation tools to help make reviewing, editing, sharing, and testing your workflows much easier
- Some of these tools include:
 - Mini-Map
 - Download as .png
 - Organization Settings
 - Edit with AI
 - Comments
 - Zoom In/Out
 - Testing Workflow
 - Connections List
 - Revision History
 - Performance
 - Enrollment History
 - Action Logs
 - Knowledge Base
 - Troubleshoot Issues/Enrollment
 - Keyboard Shortcuts

Automation Settings

- There are also a variety of automation settings that will need to be adjusted before activating the workflow
- Some of these settings include:
 - Workflow run time settings
 - Notification settings for errors/changes in number of enrollments
 - Unenroll contact from other workflows when active in this workflow (either all or specific)

Settings



Timing

Run workflow

- Any time
- Specific times

Don't run workflow

+ [Add dates](#)

Schedule workflow to turn off automatically

When this setting is enabled, the workflow and setting will automatically turn off on the date and time specified. If any records are enrolled when the workflow turns off, no additional actions will run.



OFF

Notifications

Preso

**Step 1: Enrollment**

1,805 companies meet the enrollment criteria
[See all companies in lists](#)

Do you want to enroll contacts that currently meet the enrollment criteria when the workflow turns on?

- Yes, enroll existing companies who meet the enrollment criteria immediately when the workflow is turned on
- No, only enroll companies who meet the enrollment criteria after the workflow is turned on

Enrollment

Unenrollment

Re-enrollment

Companies will enroll when

They are manually enrolled

OR

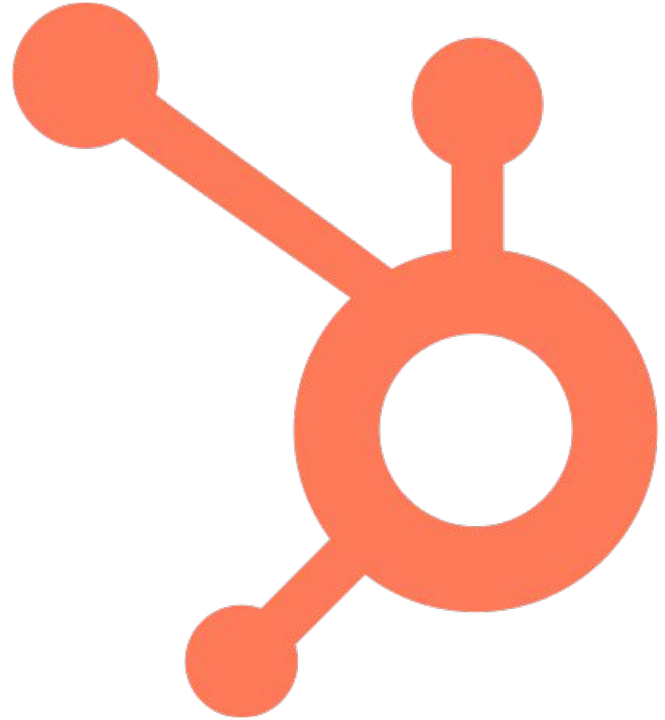
The following criteria is met[Skip to turn on](#)[Next](#)

Review and Publish Your Automation

- Once all previous steps are complete, it's time to review all parts of the workflow and publish it.
- Review Process includes 4 steps:
 - Enrollment/Unenrollment/Re-enrollment settings review
 - Timing and Notifications settings review
 - Connections review
 - Workflow Details review
- Once all sections have been fully reviewed, you can then publish your workflow

Additional HubSpot Resources

- [Create and use lists](#)
- [Determine your list criteria](#)
- [View and filter lists](#)
- [Organize lists](#)
- [Analyze your list performance](#)
- [Create workflows](#)
- [Choose your workflow actions](#)
- [Manage workflow settings](#)
- [Organize your workflows](#)
- [Understand your workflow details page](#)
- [Automate your processes](#)
- [Use automation with emails](#)
- [HubSpot Academy: Workflows Deep Dive](#)
- [HubSpot Academy: Creating a Lead Nurturing Workflow](#)
- [HubSpot Academy: HubSpot Marketing Automation Course](#)



Thank you