Value-First Workflow

Workflow in HubSpot

How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

HubSpot stores each automation you build as a Workflow: its name, whether it is on, and what it enrolls.

We use Workflow as HubSpot ships it, with no fields of our own. Of our workflows that are on, most enroll Friends, appointments or tickets.

Before you turn one on?

> "... broken processes create broken automation. ... spend five minutes thinking about this."
>
> Trisha Merriam, Another Orange Morning, 29 October 2026

Try it in your portal

Alert on a quiet spell. Enroll records whose date is more than 60 days ago, with an internal email to a teammate and re-enrollment on. Leave out records with no date. Automation › Workflows › Create workflow. Professional or Enterprise.

Remind three times, then stop. Alert the team when a ticket has waited 7 days in a stage. Add a 7-day delay and a branch: still waiting, alert at 14 days, then 21, and stop. Automation › Workflows. Professional or Enterprise.

Say what it does. Before you turn a workflow on, describe what it does, who it reaches, why, and who built it. Leave it blank and HubSpot writes one with AI. Review and publish › Edit. Professional or Enterprise.

Whose value does it serve?

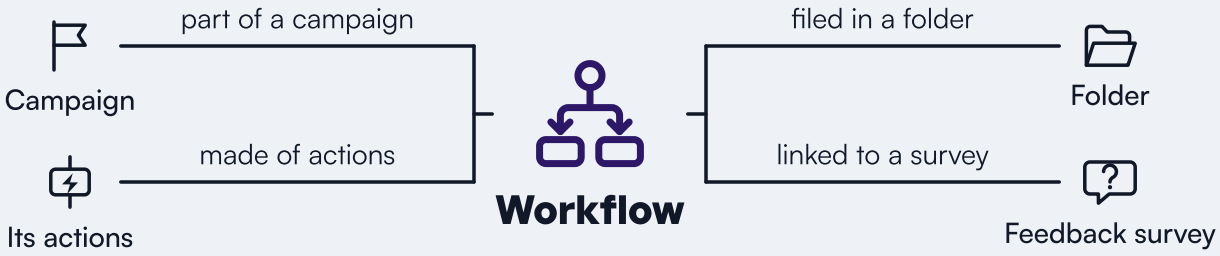
Value for the Community

Workflows carry routine coordination so people can do the work that needs them. They gather, route and record; people read and decide.



Checked against our HubSpot portal and our written method on 9 November 2026

What links to a Workflow?



How does a Workflow change?

A Workflow has no stages, and HubSpot offers it no pipeline. It is on or off, and that is the whole change.

What is a Workflow not?

Not the records it acts on. A workflow enrolls Friends, tickets or appointments. It is not linked to them.

Not where to start. Make the work visible first, then decide what needs a workflow.

Not the decision. Workflows gather, route and record. People read and decide.