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Think Like a Strategist: How to Make Your Hubspot Marketing Automation Actually Work

You've set up your workflows, your emails are queued, and your CRM is humming along. Technically, your HubSpot marketing automation is "running." But is it really *working*?

Here's the thing most guides won't tell you: Marketing automation is less about plugging in tools and more about how you *think*—how you see your customers, your internal processes, and your team's goals. If you want automation that actually drives results, it's time to let go of the "set it and forget it" mindset and start thinking like a strategist.

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Treat Automation Like a Living, Breathing Campaign

Hubspot marketing automation isn't a crockpot. You don't just set it, walk away, and return six months later to find a perfectly cooked funnel.

Your workflows need regular attention, especially if your business is growing, changing, or launching new campaigns. A quarterly audit of your automations is one of the smartest habits you can build.

What you should check:

- **Are contacts getting stuck or dropping off?**
- **Are emails still relevant based on current offerings?**
- **Are you sending too much, too little, or just enough?**
- **Is your data clean and triggering things the way it should?**

Align Workflows With Business Goals

Automated emails are great, but they're not a goal. Booking a sales call, nurturing leads to MQL status, or driving repeat purchases? Those are goals.

Before you build a single email or set a delay timer, ask: What should this workflow accomplish—and how will I measure it?

Let's take an example:

Workflow Type	Business Goal	Key Metrics to Track
Lead Nurture	Convert leads to MQLs	Email CTRs, Lifecycle Stage progression
Post-Purchase	Increase repeat purchases	Order value, repurchase rate
Event Follow-up	Book sales meetings post-webinar	CTA clicks, meeting bookings

Build your workflows backward from the outcome you want. That's how you turn automation from busywork into business-building.

Map the Journey—Before You Open the Tool

Tempting as it is to jump straight into HubSpot and get right to work: take a second to think. Great automation is less about software mastery and more about journey empathy. If your workflow doesn't reflect the customer's experience, it won't resonate—no matter how sophisticated it looks behind the scenes.

Start with a simple map—nothing fancy. The point is to think like your customer:

- **Where are they coming from?** Did they download a guide, click an ad, or just browse your pricing page? That entry point gives you clues about their intent and mindset.
- **What do they know (or not know) right now?** Are they just learning about your brand, or are they knee-deep in comparisons? This helps you avoid either over-explaining or skipping essential context.
- **What's their next logical question or hesitation?** Every customer has a "but what about…" moment. If you can anticipate that, your workflow becomes a helpful guide, not a pushy sales funnel.
- **What would actually help them—rather than just sell to them?** Think tips, tools, social proof, or reassurance. Serve before you sell.

When you map it out this way, your automation becomes more than a sequence of emails or tasks. It becomes a conversation—human, timely, and genuinely helpful.

Think Behaviorally, Not Just Demographically

It's easy to lean on the basics like *job title*, *industry*, or *company size* when you're setting up your segments. And those still matter. But if you really want to personalize in a way that feels relevant and timely, behavior is where the magic happens.

Demographics tell you who someone *is.* Behavior tells you what they *care about*—and when.

For example:

- **If someone visited your pricing page—twice—** there's intent there. They're probably on the edge of a decision and could benefit from a nudge or a resource that speaks directly to their final questions.
- **If a lead clicked on your competitor comparison blog**, they're evaluating options. That's a perfect opening to provide value and position your differentiators.

Behavior-based triggers let you go beyond generic nurture sequences. You're able to respond to real actions in real time—with messages that actually match where someone is in their journey. It feels less like marketing, and more like being in the right place at the right time.

And when your automation *feels* that intuitive? Your audience notices—in a good way.

Collaborate With Sales (Yes, Really)

If your HubSpot marketing automation lives in a silo, you're only doing half the job. HubSpot makes it incredibly easy to bridge the gap between marketing and sales—but only if you set things up with collaboration in mind.

Sales teams know what signals matter most. They know when a lead is ready, what questions they're hearing in real conversations, and which contacts are just kicking tires. By looping them into your workflows, you create smoother handoffs and smarter follow-ups that lead to actual revenue—not just marketing checkmarks.

Here's how to use HubSpot to make that collaboration effortless:

- **Set up internal notifications** with the "Send internal email" or "Create internal task" actions in workflows. Use these when a lead hits a specific **lead score**, **views the pricing page**, or fills out a "Contact Sales" form. The sales team gets a heads-up *exactly when it matters.*

- **Use contact properties to keep everyone on the same page.** Properties like **"Lifecycle Stage," "Lead Status," "Sales Contacted,"** or **"Opportunity Created"** help workflows stay aligned with the sales pipeline.

The result is that fewer leads fall through the cracks. Sales teams get cleaner, more actionable data. And your automation becomes a real revenue driver—not just a set of emails.

Use Workflow Data as Your Feedback Loop

Every workflow you launch in HubSpot is doing more than just sending emails—it's quietly collecting insights that can make your next campaign even better. Open rates, click-throughs, conversions, drop-offs—it's all data. And if you're not regularly reviewing it, you're missing out on some of your most valuable feedback.

Think of your automation strategy like a conversation. The data is your audience talking back. Are they interested? Confused? Ready for more? The answers are right there in the numbers—you just have to look.

Make it a habit to review your key workflow reports at least once a month. Ask questions like:

- **Which emails have the highest drop-off rate?** That might signal weak subject lines, confusing copy, or timing issues.

- **Are contacts completing the full flow—or bouncing midway?** If your workflow falls flat halfway through, it's time to revise the middle steps.

- **Which CTAs are converting?** Test different CTA language, placements, and offers based on what actually gets clicks.

In HubSpot, head to the 'Analyze' tab in the email section to get a closer look at subject line performance, engagement rates, and device type breakdowns.

And don’t forget to bring your sales or service team into the loop, sometimes the story behind the data comes from the conversations they’re having every day.

When you treat your automation data as a two-way feedback loop,not just a delivery system, you build smarter workflows, sharper content, and a better experience across the board.

Know When to Kill a Workflow

Not every workflow is meant to be run forever. Some were great in their prime, but just aren’t pulling their weight anymore. And that’s okay—automation is supposed to evolve with your business, not collect dust while underperforming in the background.

Knowing *when* to cut a workflow loose can save your team time, improve your email deliverability, and keep your messaging aligned with what actually matters to your audience today.

Here are some clear signs it’s time to hit pause—or pull the plug entirely:

- **Open rates have dipped below 10% across multiple emails.** That’s often a signal that subject lines are stale, or the content just isn’t resonating.

- **The workflow’s content is outdated.** If you’re still pushing a product that’s been sunsetted, or promoting a webinar from two quarters ago, it’s time for a refresh.

- **Contacts aren’t taking action—or worse, unsubscribing.** Low click-through rates, skipped CTAs, and unsubscribes mid-flow are signs your automation might be hurting more than helping.

That said, not everything needs to go straight to the recycle bin. Before deleting an underperforming workflow:

- Review performance by step—some emails or actions may still be solid and worth repurposing.

- Reevaluate the enrollment trigger. Are you pulling in the right people at the right stage of their journey?

- Consider whether a minor tweak (like retiming, segmentation, or subject line testing) could revive it.

Don’t let old workflows linger just because they’re “already set up.” Treat automation like your website—if it’s outdated, underperforming, or confusing your users, it’s time to rebuild or retire.

Conclusion: Strategy Makes the Difference

Behind every powerful, high-converting workflow is a strategic mind—someone thinking about the *why*, not just the *how*. That’s the real strength of HubSpot marketing automation: it’s not just a set of tools, it’s a framework for creating personalized, intentional, data-driven customer journeys.

Because at the end of the day, automation isn’t about removing the human touch. It’s about amplifying it—so every message feels like it was sent just for the person reading it, right when they needed it most.

If you’re ready to make your workflows smarter, stronger, and more aligned with what your audience actually wants—contact the team at Modern Driven Media. Whether you're starting from scratch or refining what’s already in place, we specialize in HubSpot marketing automation that actually moves the needle.

Let’s make your automation work harder—*so you don’t have to*.