Simple Strat

New User Onboarding

Watch the detailed video walkthrough on HubSpot Hacks.

🚩 **Trigger**

Type: Record created

Object Type: User

Conditions: Record is created + Invite Status is equal to Accepted

Option to include: Owners Team * to designate different steps for different teammember types

Re-enrollment: Off

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Type: Send Internal Email-Welcome Aboard!

Options: Send to Existing Owner

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Type: Create task

Options: Connect email and calendar integration

💡 **Tip:**

Insert links to relevant HubSpot Hack videos or HubSpot Academy Trainings they should view.

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Type: Create task

Options: Watch training videos

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Delay "X" Days

Type: Branch

Options: Branch based on Email Status Property

Not Enabled / **Enabled**

Not Enabled:

Type: Create task
Options: Reminder to complete email integration with HubSpot

GO TO ACTION →

Enabled:

Type: Branch
Options: Branch based on Calendar Status property

Not Enabled / **Enabled**

Not Enabled:

Type: Create task
Options: Reminder to complete email integration with HubSpot

GO TO ACTION →

Enabled:

Delay "X" Days

↓

Type: Send internal email–Onboarding complete!

Options: Send to Existing Owner

Sign up for the HubSpot Hacks newsletter, a must-have resource for anyone looking to unleash HubSpot.

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