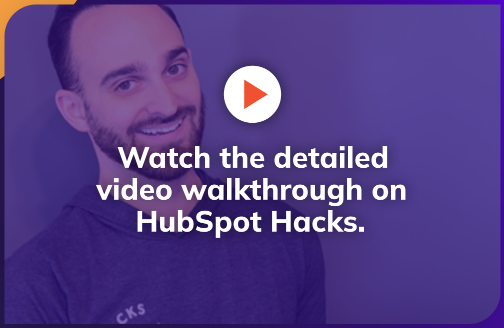
Simple Strat

WORKFLOW GUIDE —

# Route Leads to Your Sales Team




**You will need:**

- All users to have Sales Professional or Enterprise Seats

### Trigger

**Type:** Contact

**Conditions:** Lifecycle stage = MQL, or form fills (like demo request or contact us)

**Re-enrollment:** On

**Tip:**

These enrollment triggers will be unique to you and your business.

### Optional

**Type:** Branch

**Options:** And/Or Criteria

**Tip:**

Using teams allows easy adding and removing of sales reps from lead flows.

**Tip:**

Branch based on sales territories, product expertise, etc.

#### Territory A

**Type:** Rotate record to owner

Select if you want to overwrite existing owner or keep it

**Step:** Choose sales reps or sales teams to rotate leads to

#### Territory B

**Type:** Rotate record to owner

Select if you want to overwrite existing owner or keep it

**Step:** Choose sales reps or sales teams to rotate leads to

#### None Met (for tracking errors)

**Send email to HubSpot admin(s) to alert of errors**

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**Type:** Create tasks

Create a task for the contact owner to reach out ASAP

**Type:** Internal communication

Send internal emails, slacks, or team messages to alert them

**Tip:**

Use “go to action” to go from one branch into another.

**Tip:**

Use personalization tokens to insert:

- Contact owner
- Company name
- Contact info like email and phone