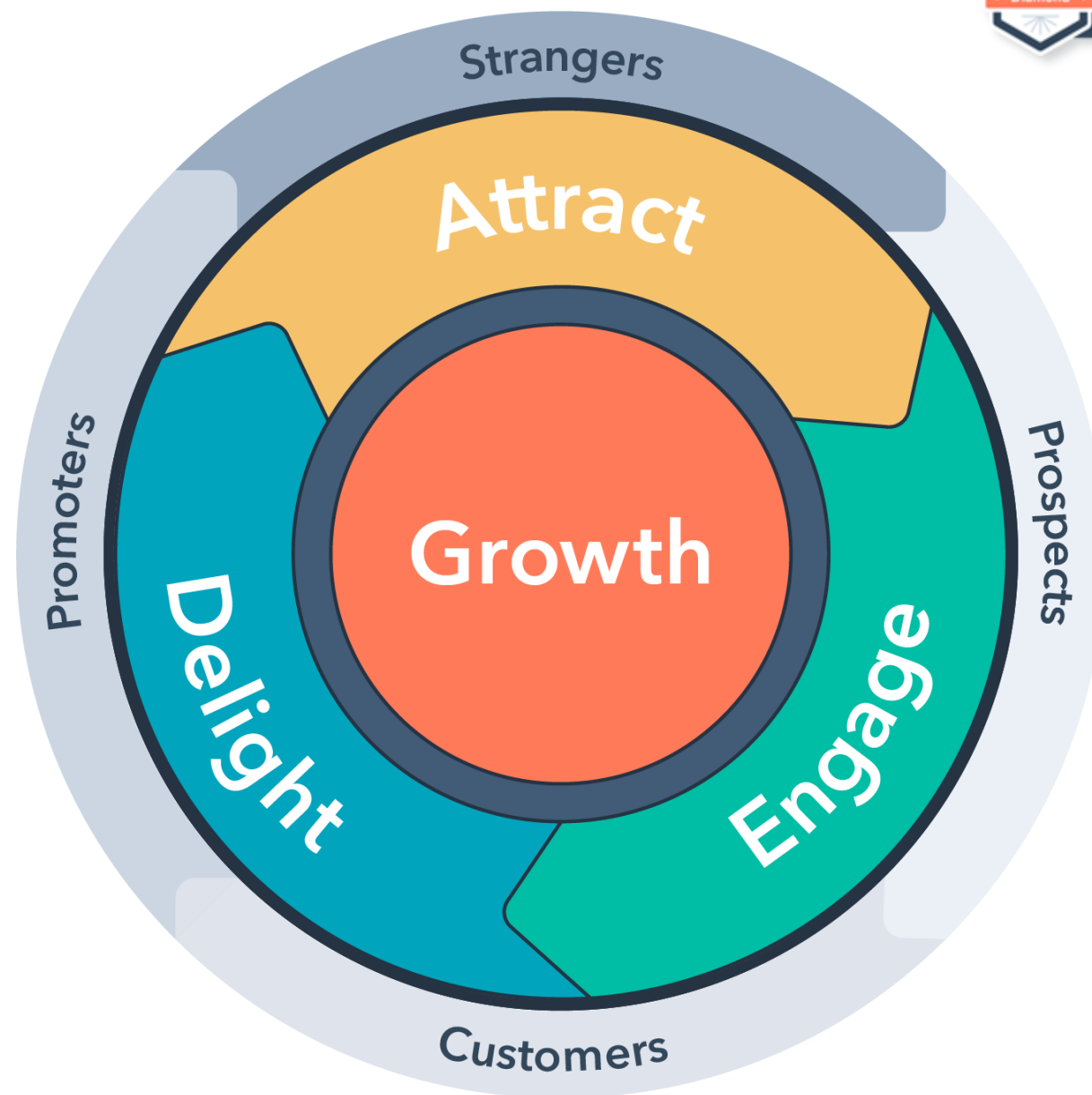


Unlocking the Power of Email Sequences for 2025

SIMPLE STRAT
FLYWHEEL FUEL SERIES

Flywheel Fuel Series

Help you create the
fuel you need to
power your
flywheel



Today's Agenda

1. Best practices and fundamentals that make for effective sequences.
2. Gain direct, tool-specific insights to leverage HubSpot for building, testing, and refining your email strategies.
3. Discover ideas and use cases to transform routine follow-ups into opportunities for meaningful engagement.
4. Learn from specific Q&A based on questions sent in prior to the webinar!





Housekeeping

- Ask questions anytime in the Zoom Q&A - we'll answer them at the end
- The recording and slides will be sent within a day or two after the webinar
- Note: Some of the examples may be limited to paid tools or specific levels of hubs in HubSpot

Our team can help you:



Buy &
upgrade



Strategy &
Build



Fix HubSpot
or Train



Support
Growth

at SimpleStrat.com/Consult



Ali Schwanke

Founder @ Simple Strat
Cohost of HubSpot Hacks
Host Marketing Deconstructed Podcast

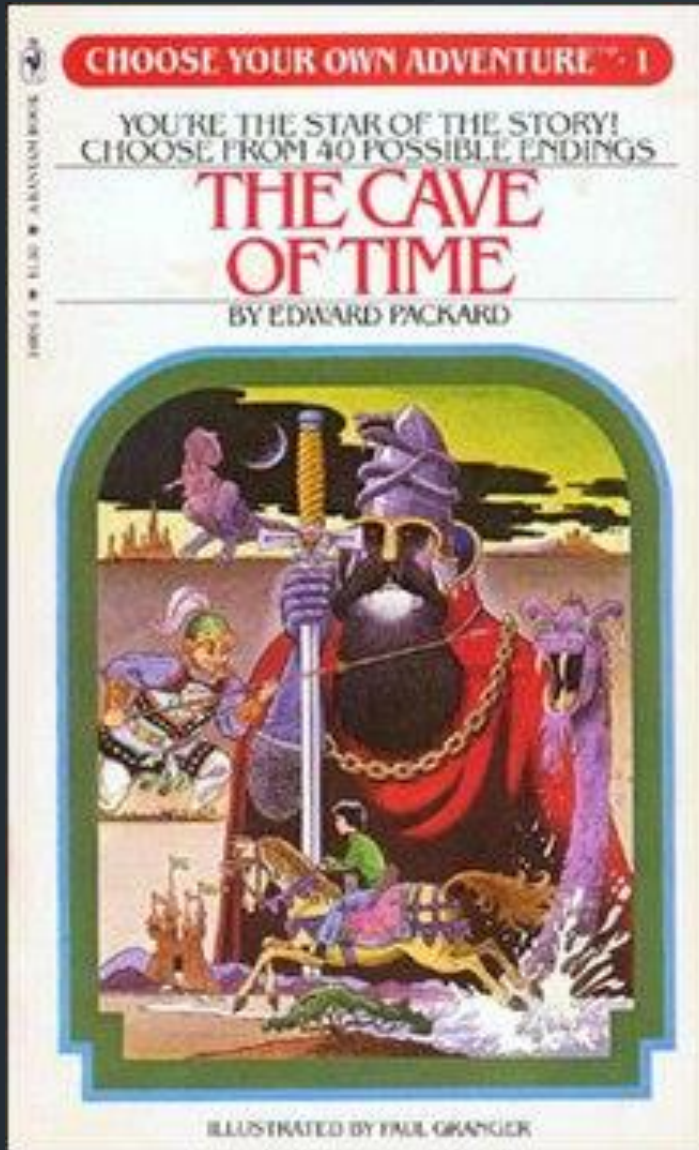
Unlocking the Power of Email Sequences

HubSpot Sequences

- Sending multiple emails in a row and trying to get a response
- Does not replace personalized 1 to 1 outreach (you can build this into your sequence however!)
- "Let the automation think for you" – helps enforce SLAs
- As your business grows, it's harder to keep track of outgoing and incoming activities. Sequences are designed to help with that.

HubSpot Sequences

Step	What the step does
Automated email	Automatically send an email to the contact enrolled in the sequence. You can choose to start a new thread or reply to a previous sequence email . You can also create a template or use an existing template .
Manual email task	Get a task reminder to manually send an email. The email will <u>not</u> be sent automatically. You can choose to start a new thread or reply to a previous sequence email . You can use an existing template or create a new email when you reach out to the contact.
Call task	Get a task reminder to manually call the contact enrolled in the sequence.
General task	Get a task reminder to manually complete an action.
InMail Task	If you're using HubSpot's integration with LinkedIn Sales Navigator , you can create a task to remind you to manually send an InMail.
Connection request task	If you're using HubSpot's integration with LinkedIn Sales Navigator , you can create a task reminder to manually send a connection request.

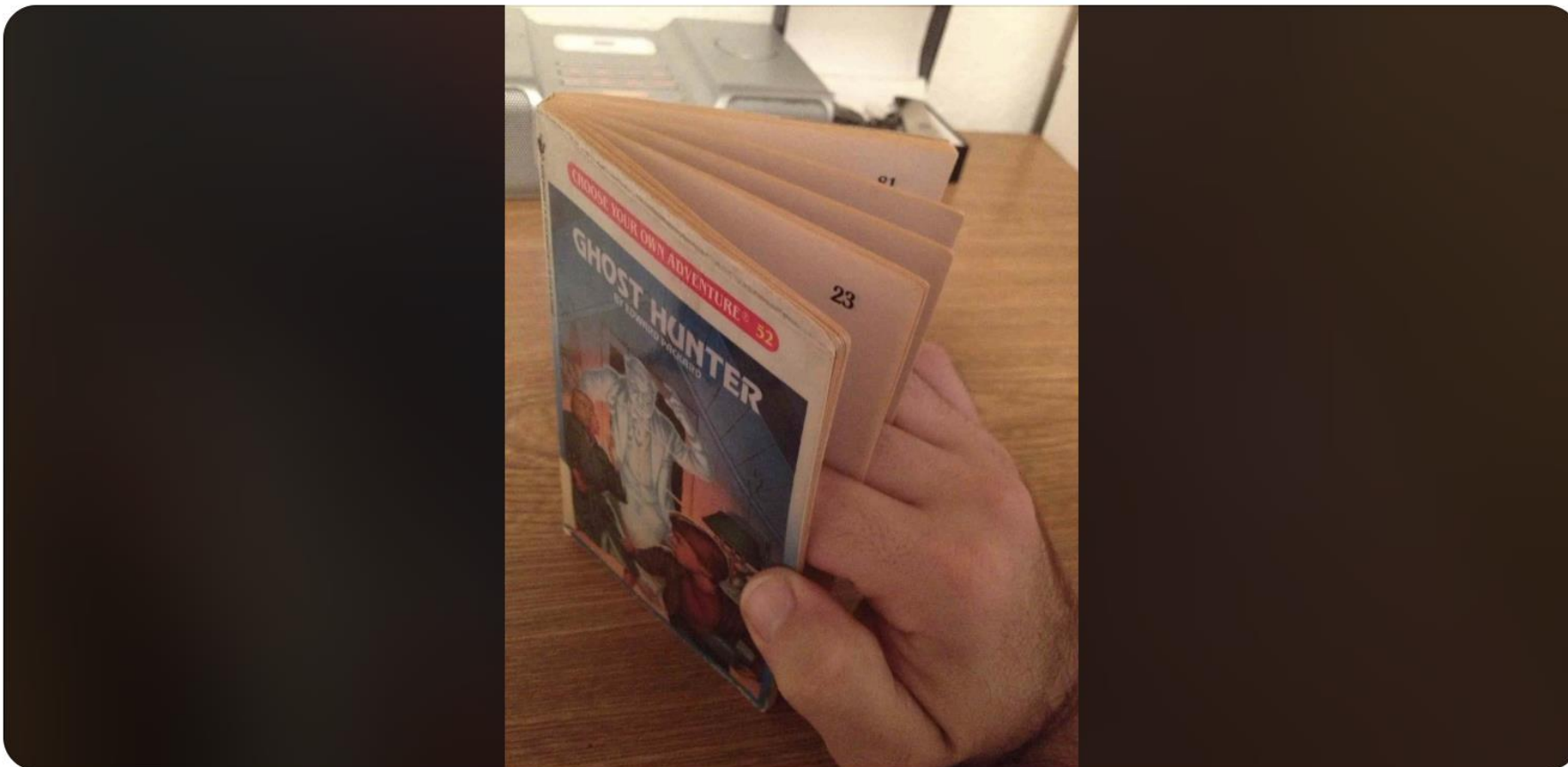


“making choices that determine the main character's actions and the plot's outcome”

←  r/funny • 11 yr. ago
HairyDBZ

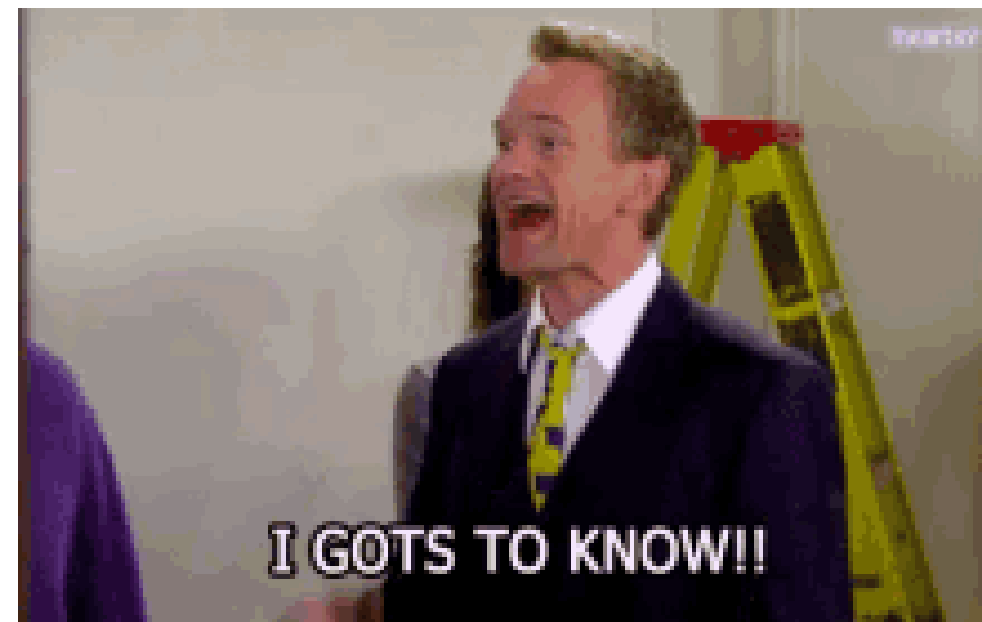


The proper way to read a "Choose Your Own Adventure" book



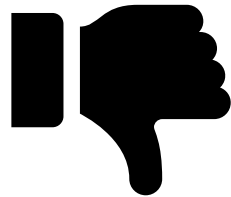
What everyone wants to know:

- What's working?
- How many touches?
- How many messages are too much?
- Should we use LinkedIn?
- A/B testing?
- Dynamic vs static?
- Emails and calls or just emails?





There is no ONE right way to use email sequences.



But there are plenty of wrong ways!



HubSpotSherpa • 4mo ago •

You will always get some people that are upset. It's part of outbound sales.



6



Reply



Award



Share



nickdeckerdevs • 4mo ago •

lol that's me. Email me and a text? Ya that's not going to work for me



2



Reply



Award

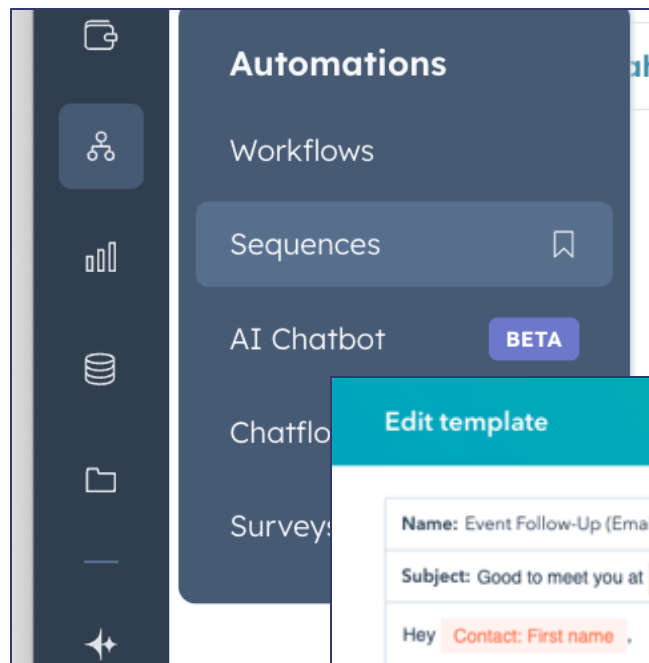


Share



Sequences vs Templates vs Marketing Emails

When we say “sequence” we referring to the HubSpot tool.



Edit template

Name: Event Follow-Up (Email #1)
Owner: Jessica Geist

Subject: Good to meet you at Placeholder: CONFERENCE NAME
Shared with everyone
No folder

Hey Contact: First name ,

It was great meeting/seeing you at Placeholder: CONFERENCE NAME this week. As we discussed, we're able to provide companies like yours a lot of different solutions, including:

- Placeholder: SOLUTION 1
- Placeholder: SOLUTION 2

Do you have some time this week to connect? I'm really looking forward to continuing our conversation.

B I U T More
Personalize
Insert

Your signature will be included when you use this template. Edit signature

Update existing template
Save as new template
Cancel

1 Content suggestions

Sequences

Manage

Analyze

Automate

Scheduled

Search sequences

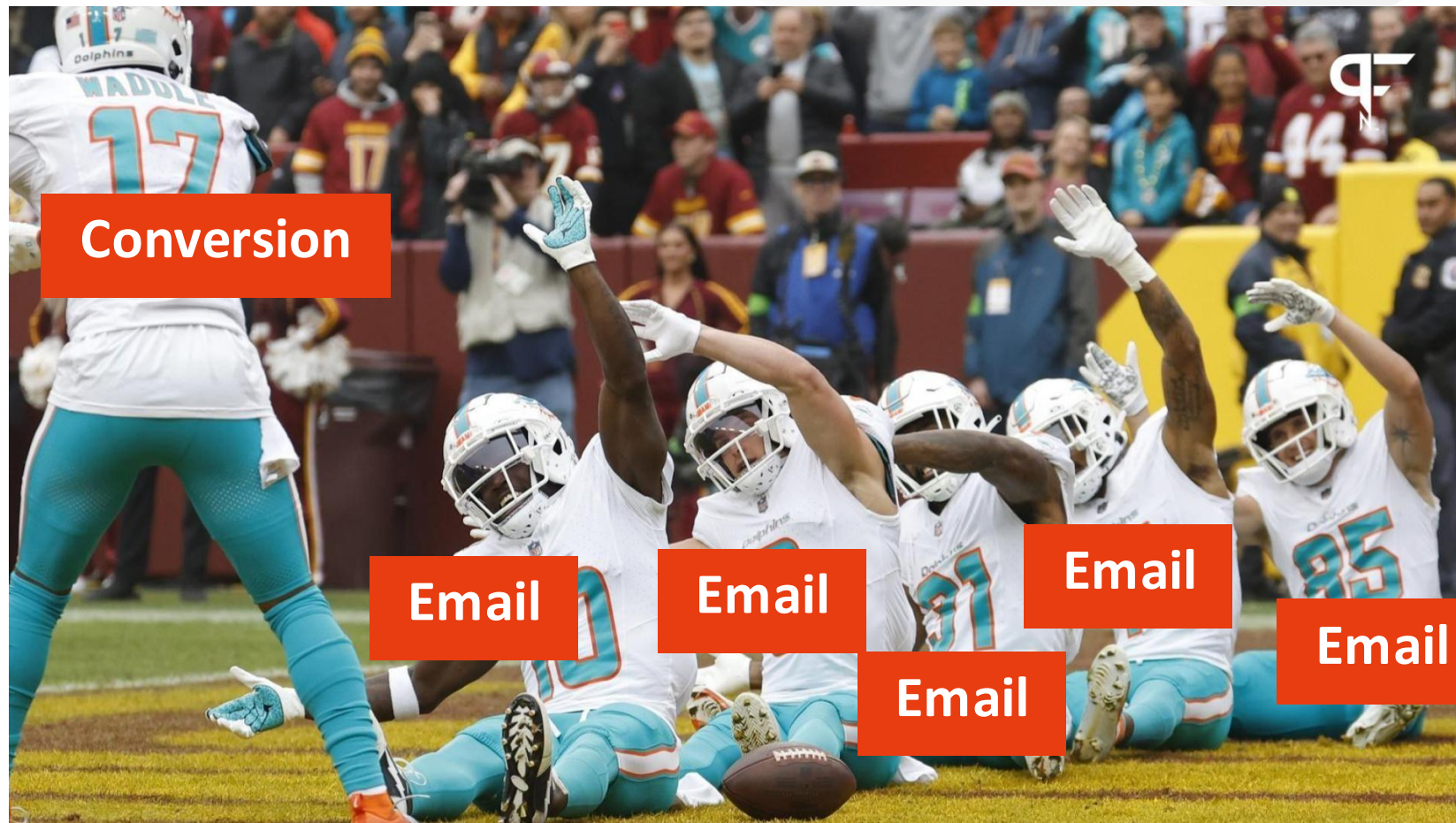
Owner: Any

<input type="checkbox"/>	NAME
<input type="checkbox"/>	03-20 webinar invites
<input type="checkbox"/>	06-05 NN webinar invites

invites

BUT:

When you're researching online, listening to a podcast, watching a video, etc. the advice about "email sequences" may just be any emails sent in a row.



Which one is which?

Sales sequences

- HubSpot Sales Pro
- Limited to 10 automated emails per sequence
- Limit 500 sends per day per user (1000 for enterprise) (tip – configure send limits in settings)
- Contact can only be in one at a time

Sales email templates

- One-off sends
- Can still measure metrics
- Are the building blocks for sequences

Marketing emails

- Sent 1 to many
- Typically designed and/or setup for a more branded experience
- No limit
- Powered by automated emails and workflows in HubSpot
- Contact can be in multiple workflows to get emails

How we're going to distinguish it today:

- 1-to-1
- Come from a person
- Typically short
- Designed to educate, engage, or compel action
- Made up of email 'templates' – delivered in a system that tracks overall effectiveness
- Deployed either at the org level or the individual producer level

Know your landscape!

Not saying this doesn't have some good ideas in it, but be careful following advice from 2015 – even if it's on page 1 of Google!



HubSpot Blog

<https://blog.hubspot.com/sales/100k-email-templates-...>

The Email Sequence That Earned Us \$100000 in 30 Days

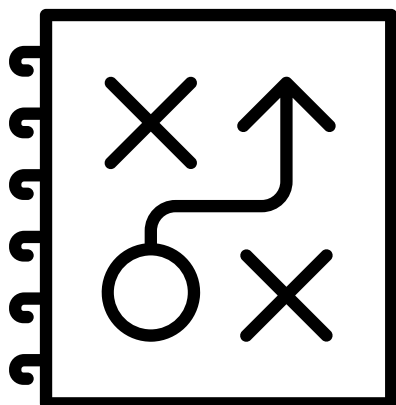
Nov 17, 2015 — Common **sequences** include a welcome **email sequence**, an onboarding **email sequence**, and a lead nurturing **email sequence**. Why are automated **email** ...

[9 Email Sequence Examples](#) · [1. Nurturing Email Sequences](#) · [Email Sequence Best...](#)

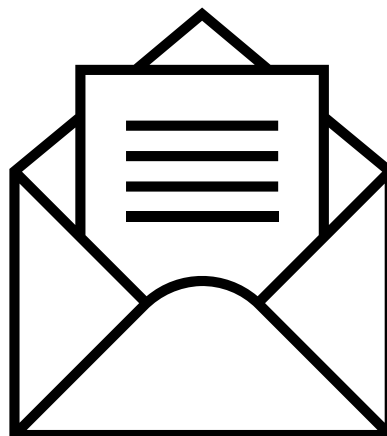
Many of the articles written about email sequences are also for SaaS – this can be wildly different if you're a services business, info product, ecommerce, etc.

Best Practices

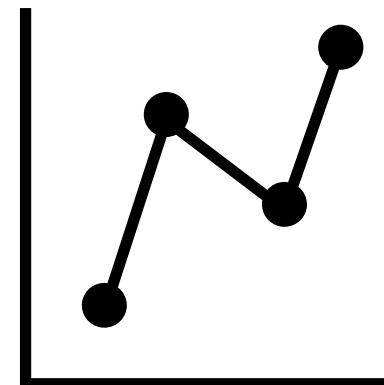
How to think about it:



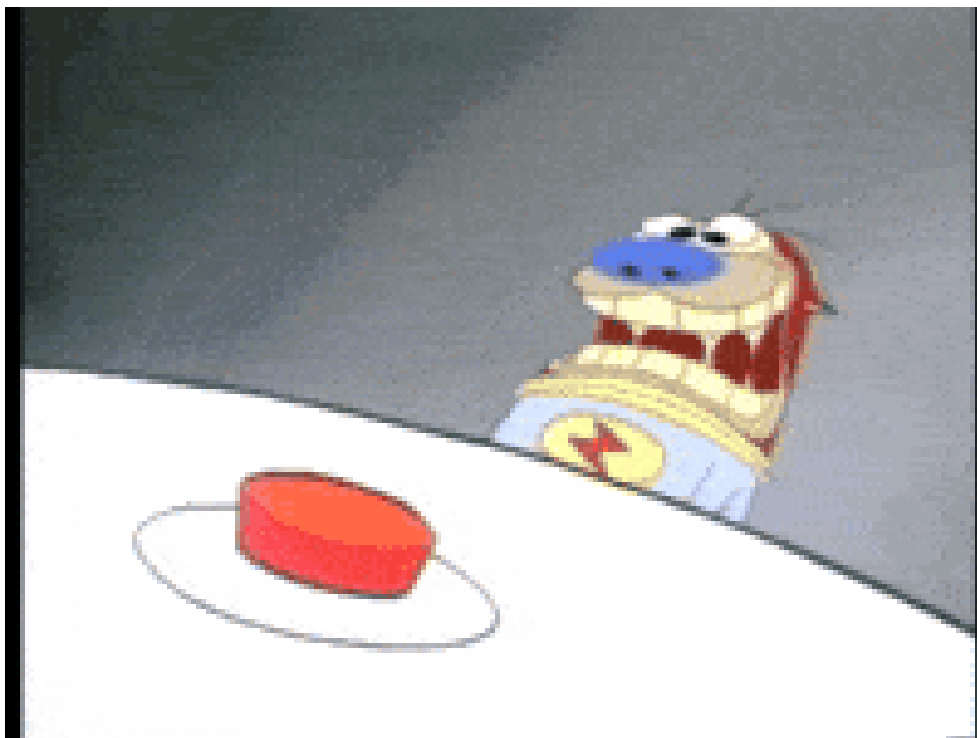
Strategy and
Segmentation



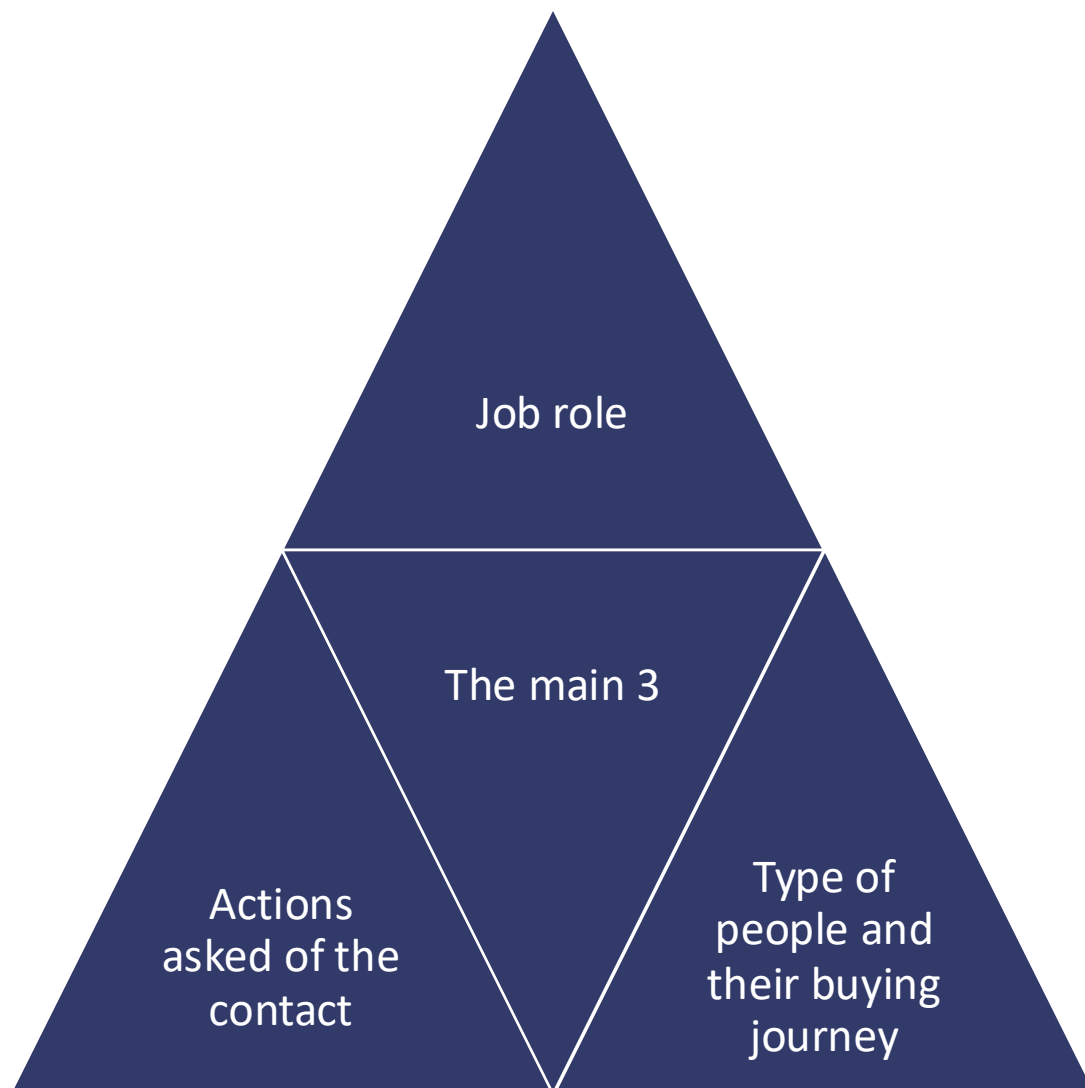
Setup and
Content



Tracking and
Adjusting



*Insert nervous laughter and
evil smiles here



Sequence setup and success factors

Effective Sequences:

- **Have a goal**
 - Each email in the sequence should have a clear goal. We will talk about a variety of goals and use cases to choose from. It also helps guide the content, how to measure success and what the cadence should be.
- **Personalized and relevant**
 - Tailored to the interests and needs of the recipient. Segmentation is critical here - demographics, behavior, event, engagement level, etc.
 - First name and company pre-fill are not personalized!
 - Think of the big 3:
 - Solves problems, answers questions, hits on pain points

Effective Sequences:

- **Put mobile-first**
 - 70% of emails are read on mobile devices. What's long on desktop is monstrous on mobile. We'll dig into this a bit later.
- **Have a clear call to action**
 - This doesn't always have to be booking a meeting! Other ideas here include: Explore this guide, watch the video, asking a question that prompts a reply, invite them to search something, email, find us on YouTube, stop by our booth, etc.
 - These can be good things to A/B test!

Effective Sequences:

- **Follow good testing practices**
 - Choose one variable and create an A/B version.
 - Study A/B testing and how it works. It doesn't mean change everything every time all the time.
- **Are always a work in progress**
 - Don't assume what works for one industry works for another.
 - Showing what you're doing and what you're learning is key for the organization at large, as many non-doers read articles about the super powers of email sequences without knowing the application/use cases

Sequences best practices checklist:


- ☐ Do I have a well-defined goal for my sequence?
- ☐ Is it personalized and relevant to the contacts I'm sending to?
- ☐ Does this solve a problem, answer a questions, and/or hits on pain points?
- ☐ Is it written with a mobile-first mindset?
- ☐ Is there a clear call to action?
- ☐ Am I following good testing practices?
- ☐ Am I documenting what we're doing and what we're learning?

Going into battle: The inbox



CEO/Founder at Simple Strat | Host of HubSpot Hacks - the #1

Latest layoffs: Atlassian and more




Jason Bay • 2nd


Helping you turn complete stran... + Follow


4h • Edited •


Remember what you're competing against when you cold email prospects.


Most cold emails start like this...

 "I was hoping..."




 "My name is..."

 "I hope this email finds you..."


 "I was reaching out because..."


 "I was following up..."


...see more


   494

67 comments • 20 reposts

 Like

 Comment

 Repost

 Send

Jason, is your podcast on TikTok? - Hey Jason, I recently listened to the latest episode of Biasful Prospecting. And to be h... Mar 5

Jason, are you creating podcast clips? - Hey Jason, I listened to one of your podcasts and I could not stop... My name is T... Mar 3

Inbox 14 killer negotiation tips from experts - View in browser New negotiators, welcome. 🙌 If you want to negotiate be... Mar 3

This will make you smile - Hey Jason, Just reaching out since we help coaching/consulting businesses like Outbound Squa... Mar 3

Jason, have you tried Tiktok? - Hey Jason, Have you tried Tiktok? Short-form content is blowing up and podcasts that are... Mar 3

Call of Fame: What an opening! 🔥 - This cold caller's opening line has us completely mindblown. Hi there, We all know ho... Mar 3

Buyer beware: Cheap web design and marketing - Hi Jason, I know you're trying to save a few bucks wherever you can, b... Mar 2

12 guest speaking inquiries for Jason - I hope all is well Jason, Are you possibly looking to do several guest appearances o... Mar 2

Hoping to Help! - Hi Jason, I work with a leading Design and Development company. I am writing to check if you are s... Feb 28

Scaling your business with us - Hi Jason? I understand that it can be difficult to balance delivering high quality sales coach... Feb 27

For Jbay - Hi Jbay, Since we don't know each other, I would never call you that on our first encounter, but hey, you gave per... Feb 26

Inbox Hey Jason, check out this picture of us - You are probably wondering why on earth I sent you this picture, Two sim... Feb 25

Article Idea for Jason - Hey Jason: I just listened to an episode that you did with Ralph Barsi about how to be a world-class... Feb 24

Sales Retention 101 with - Hi Jason - As we all know, one of the biggest challenges faced by sales manag... Feb 24

Boost Your Business With Lead Generation Skills - Hi Jason, My name is and I am a Lead Generation a... Feb 23

Inbox Jason, quick question - Jason, I currently work with coaches with low marketing budgets to deliver them qualified L... Feb 22

Revised Price: Participation in The The 10 Most Visionary Leaders To Watch in 2023. - Dear Jason, Awaiting Confirmati... Feb 22

Partnership Proposal: Create a Software Review Video for - Hello, I hope this email finds you well. My name L... Feb 22

Jason, problem - Hi Jason, I visited your website and noticed you weren't funneling your visitors in the right direction. Your ... Feb 21

\$83/Month : AI Smart Chatbot - Hi Jason, This is An AI-based Smart Assistant firm Located L... Feb 21

Searching for data monsters, you found me! - Hello Mr Jason, I have recently discovered that you'...



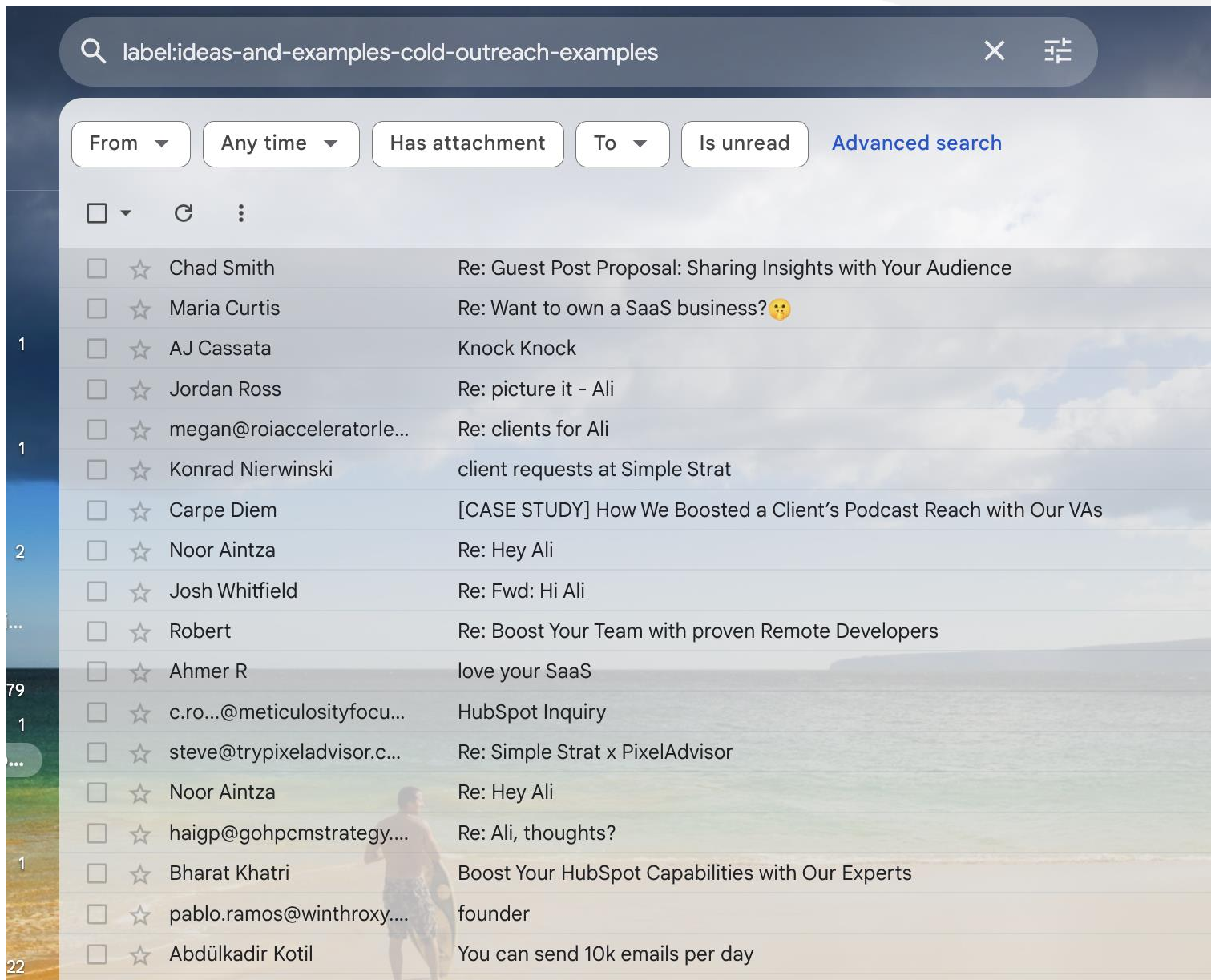


“When someone scans their inbox, they engage their mental spam filter to determine which emails to open, ignore, or delete.

A subject line like this triggers that mental spam filter and may send it straight to the trash.

Use the subject line to make your email seem like it could be an internal email so your recipient is more likely to open it.”

Source: <https://www.lavender.ai/blog/email-teardown-1>



- Do I recognize that name?
- Do I recognize that company?
- Would someone actually use that subject line if they know me?
- Get outside perspective

Deliverability and Data Checklist:

- ☐ If you plan on sending a large volume of emails to cold contacts, you'll want to set up alternative domains (not covering that in detail on this webinar) as to not harm your primary sending domain
- ☐ Set up Google Postmaster tools to track spam reports
- ☐ Make sure your email domains are warmed up
- ☐ Have a cleaning and segmentation practice within your HubSpot admin/ops plan to deal with outdated, unsubscribes, etc
- ☐ Know the habits of your market – gatekeepers, IT/compliance, cybersecurity


Sequences Ideas and Use Cases

Ideas for Using Sequences:

Cold email – though it may not be the most successful?

- Clear and direct subject lines
- Clear and relevant targeting
- Addresses key pain points
- Provide something of value
- Short and sweet
- Hoping to hit the 5% of your market that is “buying” now
- Success varies based on your market, what you’re selling, need, understanding, buying process, etc.





Transforming leaders from burned out to...

David Newman, CSP and 83 others

2 days ago

Ignore

Hi Ali,

As a fractional professional, I'd love to connect to explore potential insights. Would it make sense for us to have a call to discuss ways to optimize your business operations in terms of an effective steady outreach and increase sales conversations?

[See less](#)

Re

Ideas (continued)

- Content nurture
- Demo or meeting no show
- Meeting follow up and nurture
- Reengagement of marketing contacts gone cold
- Stuck deals or opportunities
- New relationship nurture
- Podcast guest outreach
- Webinar invites
- Webinar engagement (like the one you may have received)

Join us for these upcoming webinars

FLYWHEEL FUEL SERIES 🔥

Critical Dashboards: The Key to Driving Revenue and Business Impact using HubSpot



PRESENTED BY
ALI SCHWANKE



THE NEW AND NOW SERIES 🧩

Getting the Most Out of HubSpot's October 2024 Product Updates



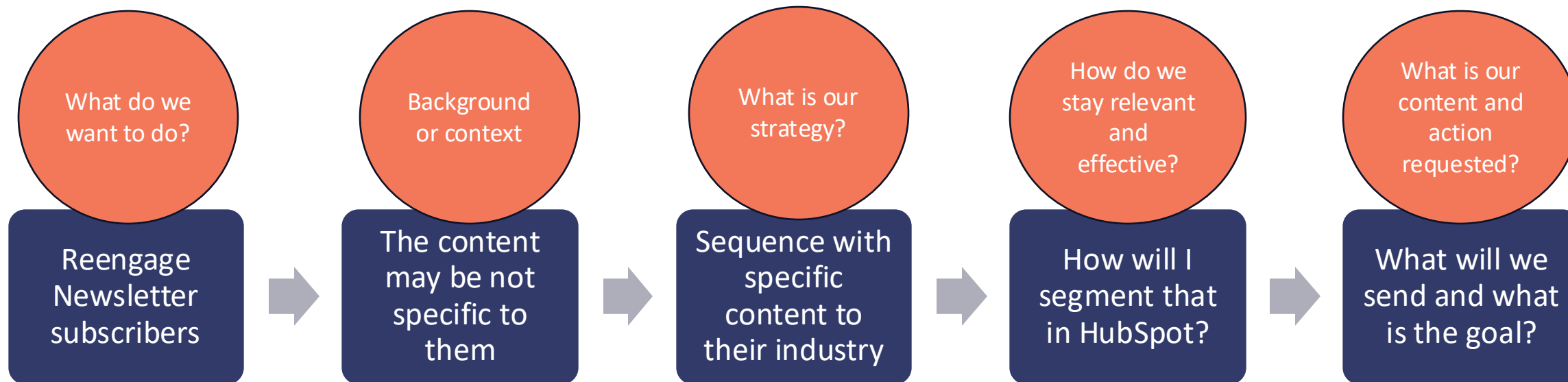
PRESENTED BY
TYLER SAMANI-SPRUNK



SimpleStrat.com/Webinars

Creating and Using Sequences in HubSpot

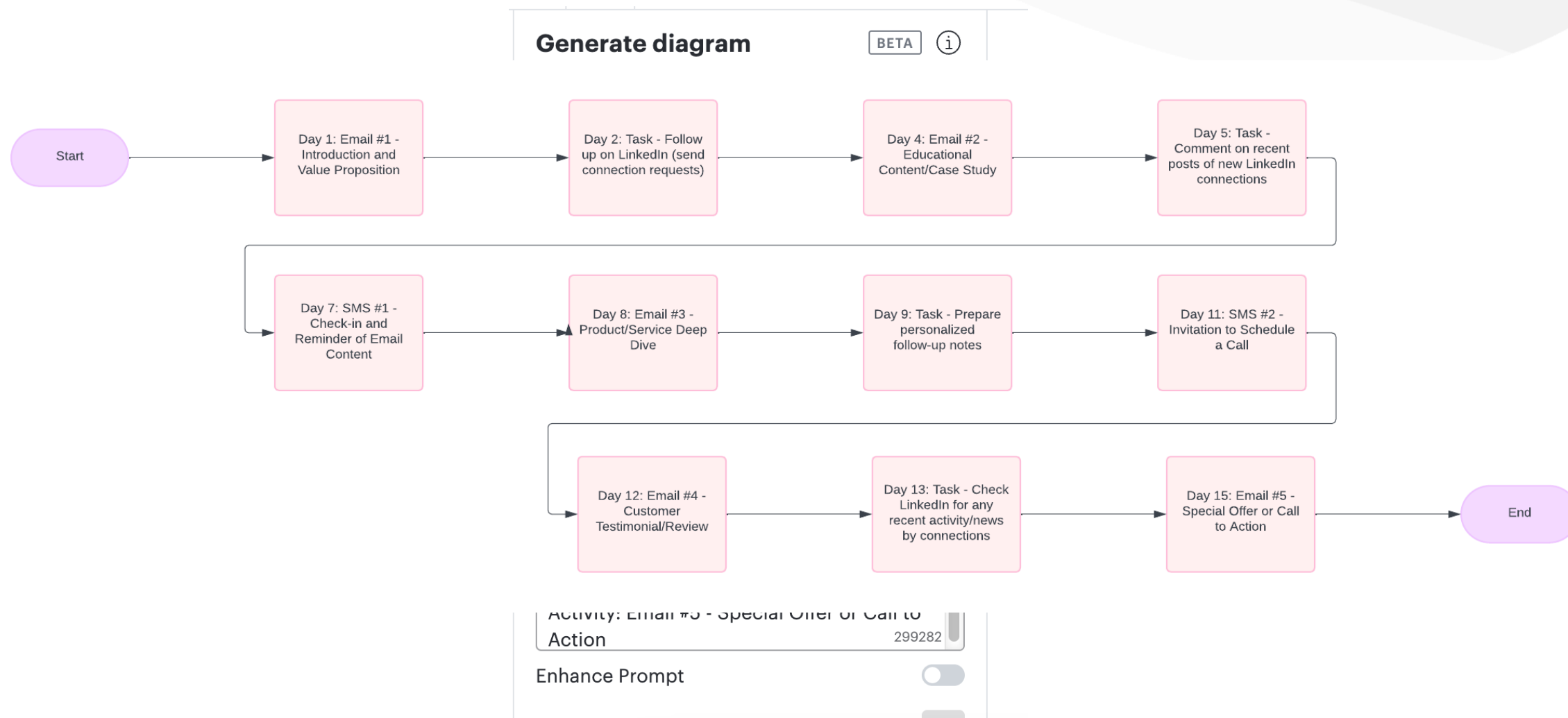
Step 0: Determine the “who” and the purpose



Step 0: Determine the “who” and the purpose



Step 1: Map out your flow and chart the assets you'll need



What you have to choose from:

Step	What the step does
Automated email	Automatically send an email to the contact enrolled in the sequence. You can choose to start a new thread or reply to a previous sequence email . You can also create a template or use an existing template .
Manual email task	Get a task reminder to manually send an email. The email will <u>not</u> be sent automatically. You can choose to start a new thread or reply to a previous sequence email . You can use an existing template or create a new email when you reach out to the contact.
Call task	Get a task reminder to manually call the contact enrolled in the sequence.
General task	Get a task reminder to manually complete an action.
InMail Task	If you're using HubSpot's integration with LinkedIn Sales Navigator , you can create a task to remind you to manually send an InMail.
Connection request task	If you're using HubSpot's integration with LinkedIn Sales Navigator , you can create a task reminder to manually send a connection request.



You're building a sequence in Hubspot and have identified the following flow of tasks, emails and details. Use the chart I will provide, review what the sequence will include, and develop a list of content that you'll need to have in order to build this. Include things like email templates (which would be what the actual email will deliver) any content in the email (such as case study), any assets needed such as LinkedIn URL, offer details, etc.

To successfully execute the sequence you've planned in HubSpot, you'll need to create and gather various content elements and assets. Here's a comprehensive list based on the stages and tasks outlined in your flow:

Day 1: Email #1 - Introduction and Value Proposition

- **Email Template:** Design an introductory email template.
- **Content:** Craft a compelling value proposition and a brief introduction to your company or service.
- **Assets:** Include appropriate branding, like logos or header images.

Day 2: Task - Follow up on LinkedIn

- **Content/Assets:** Prepare a script or guidelines for sending LinkedIn connection requests. You'll need the LinkedIn URLs for the profiles you intend to connect with.

Day 4: Email #2 - Educational Content/Case Study

- **Email Template:** Design a template that allows for the inclusion of educational content.
- **Content:** Write or source an educational article or a detailed case study relevant to your audience.

Ok, now put this into a table with the columns being | day | activity | theme | item

Here's a table organizing the content needs for your HubSpot sequence based on the day, activity, theme, and items required:

Day	Activity	Theme	Item
1	Email #1	Introduction & Value Proposition	- Introductory email template - Value proposition content - Branding assets (logos, header images)
2	Task - LinkedIn Follow-Up	Networking	- Script for LinkedIn requests - LinkedIn URLs
4	Email #2	Educational Content/Case Study	- Educational email template - Article/case study content - Images/infographics
5	Task - Comment on LinkedIn	Engagement	- Comment guidelines - Engagement strategy
7	SMS #1	Check-In & Reminder	- SMS script for content reminder
8	Email #3	Product/Service Deep Dive	- Product showcase email template - Detailed product/service content - Product/service images or videos
9	Task - Follow-Up Notes	Personalization	- Follow-up note template
11	SMS #2	Invitation to Call	- SMS script for call invitation - Link to scheduling tool
12	Email #4	Testimonial/Review	- Customer testimonial email template - Customer testimonials and reviews - Customer photos/videos
13	Task - Check LinkedIn	Monitoring	- Strategy for LinkedIn activity review
15	Email #5	Special Offer/Call to Action	- Special offer email template - Special offer content - Offer highlight images



Templates are the foundation of automated emails in HubSpot. Build those first.

Step 2: Determine the type of sequence you want to create



Sequences

89 of 5,000 created

Actions

Create sequence

Manage

Analyze

Automate

Scheduled

Search sequences

Owner: Any

Start from scratch

Create a dynamic sequence

	NAME	TOTAL ENROLLED	REPLY RATE	MEETING RATE	OWNER	DATE MODIFIED
	03-20 webinar invites	98	10.2%	16.33%	Will DePeri	5 months ago
	06-05 NN webinar invites	77	5.19%	10.39%	Will DePeri	4 months ago
	2024-10-14 Pre webinar question_email sequences	187	15.51%	1.6%	Ali Schwanke	2 days ago
	2024-10-16 Webinar Invite_2 steps	147	0%	0%	Ali Schwanke	2 days ago
	5-15 Webinar Invite	87	0%	0%	Ali Schwanke	5 months ago
	Aerotech Support Form	5	0%	0%	Will DePeri	19 days ago
	Asking for referrals	5	0%	0%	Camille Balhorn	4 months ago



Step 2: Determine the type of sequence you want to create

New Sequence

Steps Settings Automate

TOTAL STEPS

0

DAYS TO COMPLETE

1

AUTOMATION


0%

UNENROLL CRITERIA


2

Step 1


Choose the first action that the sequence will perform




Automated email
 Automatically send an email for me




Manual email task
 Get a task reminder to send an email




Call task
 Get a task reminder to make a call



General task
 Set a general task reminder



InMail task
 Get a task reminder to send an InMail



Connection request task
 Get a task reminder to send a request

Step 3: Determine automation and enrollment details



Steps Settings **Automate**

Automate your sequence

The following automations are created by HubSpot and some may not be turned off

When a contact replies to any email → Unenroll the contact from this sequence	<input checked="" type="checkbox"/>
When a contact books a meeting → Unenroll the contact from this sequence	<input checked="" type="checkbox"/>
When a contact replies to any email or books a meeting → Unenroll all contacts at the same company f	

Custom automations

Use automation to enroll or unenroll contacts from this sequence

Choose a workflow trigger

X




Choose the event or criteria that needs to happen for contacts to be enrolled in the workflow.




Contact activities

- Form submission
- Page view



Step 4: Enroll contacts in HubSpot


Search name, phone, e  2 selected. → Assign Edit Delete + Create tasks **Enroll in sequence** More ▾

	NAME	
<input checked="" type="checkbox"/>	 Henry Hoover	N
<input checked="" type="checkbox"/>	 Joy Leow	A

Enroll contacts in sequence

All contacts (2)

Personalize contacts

Find contacts 


Redford Fish
@hubspot.com

Blueford Fish
@hubspot.com

Start at: 1. Automated email Time zone: UTC +08:00 China, Hong Kong, Singapore Settings ▾

Change send options for all contacts


1. Automated email

Send now 


Subject 1:1 Lunch Appointment

Dear Contact: First Name,


Lunch? Let me know when you're free!

 See more


2. Call

Create task in 1 business day 

Task title


Follow-Up Lunch Scheduling Call ☒ End without completing task 

Cancel

From:  @gmail.com Daily email limit: 0 of 350 **Enroll 2 of 2 contacts**

Step 4: Enroll contacts in Gmail or Outlook

New Message

To  Ali Schwanke


Subject

Templates

Insert: 2024-10-14

Track

Book a meeting



HubSpot Hacks

Search sequences

NAME

03-20 webinar invites

06-05 NN webinar invites

2024-10-14 Pre webinar question_

2024-10-16 Webinar Invite_2 steps

5-15 Webinar Invite

Aerotech Support Form

1. AUTOMATED EMAIL

Send now *

1. Automated Email - Day 1

Send now

NEW THREAD Discover the newest HubSpot update TODAY

Hi Ali Test,

We are hosting a *very exciting* webinar TODAY at 1 Eastern/12 Central I thought you might want to attend. This webinar will cover the May HubSpot updates and will go over all the newest features every sales, service, and marketing team needs to know, like:

- The latest changes in HubSpot and how this impacts your team
- Ways to use the new features for more efficiency and better results
- Answer to your questions about what's changed and what HubSpot's updates can do

[Register here if you want to attend, or get the post-webinar recording](#)

I hope to see you there!

To: alisonannes@hotmail.com

From: ali@simplestrat.com

Daily email limit: 0 of 500


Start sequence

Cancel

**What if I want to add people
to sequences without having
to click a button?**

File ▾ Edit ▾ Settings View ▾ Help ▾

Choose an action

**Generate actions with AI**
Describe your workflow and AI will build actions for you


Use AI to generate

Browse all actions

sequence

Generate actions with AI
Describe your workflow and AI will build actions for you


HubSpot

✓  Communications

Enroll in a sequence

Unenroll from sequence


Apps


 **Contact enrollment trigger**


Events that will trigger this workflow:


Group 1

Has completed: Call ended

 Contacts **won't re-enroll** into this workflow.


 [Show details](#)



 **Configuring**

Configuring...

ENTERPRISE
only – use
workflow!



© Simple Strat | Diamond HubSpot Solutions Partner 2024

52

File

Edit

Settings

View

Help

< Enroll in a sequence

CancelSave

Use a sequence to start sending automated sales emails to a contact. [Learn more](#) about how to use this action.

Sequence *

Trade Show or Conference Follow Up

Sender type *

Choose a value

Specific user

Contact owner

Contact enrollment trigger

Events that will trigger this workflow:

Group 1

Has completed: List membership changed

- is added to list testt

Contacts won't re-enroll into this workflow.

Show details

Configuring

Configuring...

Use other tools to power active list membership and automate sequence enrollment from there.

Step 5: Analyze, review and adjust

[Back to all sequences](#)

2024-10-16 Webinar Invite_2 steps

Owner: Ali Schwanke

Actions

Enroll contacts

Performance Enrollments Steps Settings Automate

Company Status (1) Enrolled by Enrollment date: MM/DD/YYYY to MM/DD/YYYY

TOTAL ENROLLMENTS	MEETING RATE	REPLY RATE	OPEN RATE	CLICK RATE	BOUNCE RATE	UNSUBSCRIBE RATE
147	0%	0%	27.21%	7.48%	4.76%	0%
147 Contacts	0 Meetings Booked	0 Replies	40 Opens	11 Clicks	7 Bounced	0 Unsubscribes
See all						

Step performance						
		Rates		Counts		
Step 1 Automated email	A: 2024-10-14 Webinar Invite - ...	75	0%	18.67%	5.33%	0%
	B: 2024-10-14 Webinar Invite - ...	72	0%	16.67%	5.56%	0%
		Emails sent	Meetings	Opens	Clicks	Replies
Step 2 Automated email	A: 2024-10-14 Webinar Invite - ...	62	0%	14.52%	0%	0%
	B: 2024-10-14 Webinar Invite - ...	74	0%	17.57%	4.05%	0%
		Emails sent	Meetings	Opens	Clicks	Replies

Step 5: Analyze, review and adjust

[Back to all sequences](#)

2024-10-16 Webinar Invite_2 steps 

Owner: Ali Schwanke

Actions ▾

Enroll contacts ▾

Performance

Enrollments

Steps

Settings

Automate

Company ▾

Status ▾

(1) Enrolled by ▾ ×

Enrollment date:

 MM/DD/YYYY

to

 MM/DD/YYYY

TOTAL ENROLLMENTS

147

147 Contacts

MEETING RATE ⓘ

0%

0 Meetings Booked

REPLY RATE ⓘ

0%

0 Replies

OPEN RATE ⓘ

27.21%

40 Opens

CLICK RATE ⓘ

7.48%

11 Clicks

BOUNCE RATE ⓘ

4.76%

7 Bounced

UNSUBSCRIBE RATE ⓘ

0%

0 Unsubscribes

See all

Step performance

Rates

Counts



Step 1

Automated email

A: 2024-10-14 Webinar Invite - ...

75

Emails sent

0%

Meetings

18.67%

Opens

5.33%

Clicks

0%

Replies

B: 2024-10-14 Webinar Invite - ...

72

Emails sent

0%

Meetings

16.67%

Opens

5.56%

Clicks

0%

Replies



Step 2

Automated email

A: 2024-10-14 Webinar Invite - ...

62

Emails sent

0%

Meetings

14.52%

Opens

0%

Clicks

0%

Replies

B: 2024-10-14 Webinar Invite - ...

74

Emails sent

0%

Meetings

17.57%

Opens

4.05%

Clicks

0%

Replies

Step 5: Analyze, review and adjust

[Back to all sequences](#)

2024-10-16 Webinar Invite_2 steps 

Owner: Ali Schwanke

Actions ▾

Enroll contacts ▾

Performance

Enrollments

Steps

Settings

Automate

Company ▾

Status ▾

(1) Enrolled by ▾ ×

Enrollment date:

 MM/DD/YYYY

to

 MM/DD/YYYY

TOTAL ENROLLMENTS

147

147 Contacts

MEETING RATE ⓘ

0%

0 Meetings Booked

REPLY RATE ⓘ

0%

0 Replies

OPEN RATE ⓘ

27.21%

40 Opens

CLICK RATE ⓘ

7.48%

11 Clicks

BOUNCE RATE ⓘ

4.76%

7 Bounced

UNSUBSCRIBE RATE ⓘ

0%

0 Unsubscribes

See all

Step performance

Rates

Counts



Step 1

Automated email

A: 2024-10-14 Webinar Invite - ...

75

Emails sent

0%

Meetings

18.67%

Opens

5.33%

Clicks

0%

Replies

B: 2024-10-14 Webinar Invite - ...

72

Emails sent

0%

Meetings

16.67%

Opens

5.56%

Clicks

0%

Replies



Step 2

Automated email

A: 2024-10-14 Webinar Invite - ...

62

Emails sent

0%

Meetings

14.52%

Opens

0%

Clicks

0%

Replies

B: 2024-10-14 Webinar Invite - ...

74

Emails sent

0%

Meetings

17.57%

Opens

4.05%

Clicks

0%

Replies

DEAL OUTCOMES ⓘ

Track deals created and total revenue associated with your sequences

Step 5: Analyze, review and adjust



Templates

Email

WhatsApp

453 of 5,000 created

New folder

Analyze

New template

View sales content analytics

View reports for dashboards

Search templates

Owner: Any

<input type="checkbox"/>	NAME	OWNER	DATE CREATED	DATE MODIFIED
<input type="checkbox"/>	03-21 marketing email webinar invite	Will DePeri	7 months ago	7 months ago
<input type="checkbox"/>	03-21 marketing email webinar invite	Will DePeri	4 months ago	4 months ago
<input type="checkbox"/>	05-15 LinkedIn email webinar invite	Ali Schwanke	5 months ago	5 months ago
<input type="checkbox"/>	05-15 LinkedIn email webinar invite_200+ sales leader	Ali Schwanke	5 months ago	5 months ago

	TEMPLATE	SENDS	SEND TO OPEN RATE	OPENS	OPEN TO CLICK RATE	CLICKS	OPEN TO REPLY RATE
<input checked="" type="checkbox"/>	Webinar Intro_Email Sequences	187	54.55%	102	0.98%	1	26.47%
<input checked="" type="checkbox"/>	HubSpot Client Weekly Update	49	118.37%	58	32.76%	19	24.14%
<input checked="" type="checkbox"/>	HubSpot Client Weekly Update	54	92.59%	50	24%	12	20%






A few bonuses



NEW

Create a dynamic sequence

HubSpot's recommended outreach strategy.



Start from scratch

Start with a blank sequence and add your own emails and tasks.

Start with a pre-made sequence

Recent Conversion

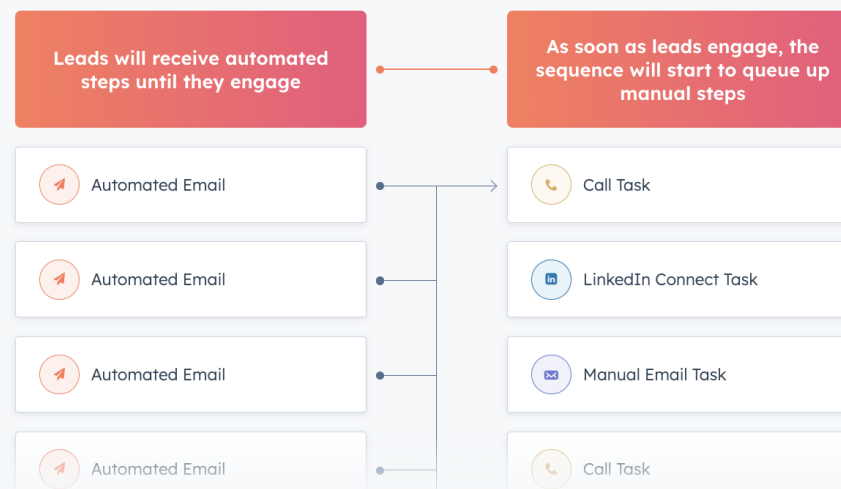
A prospect has downloaded content from your website and you want to reach out.


Event Follow-Up

Get started with a dynamic sequence

Nurture your leads with personalized, automated emails and only surface manual tasks when a lead shows interest. This means you spend more time working your warm leads while letting sequences handle the rest.

- **Improve efficiency** by automating your outreach so you spend less time on cold leads and more time on engaged leads.
- **Never miss engaged leads** with signal-based follow-ups and you choose the best next steps.
- **Book more meetings** with targeted, personalized outreach across multiple channels.



New Dynamic Sequence 

Owner: Ali Sch

Steps

Settings

Automate

Interested in sharing feedback on this

AUTOMATED STEPS

1

DAYS TO COMPLETE

1

MANUAL STEPS

0

UNENROLL CRITERIA

2

Automated outreach

Leads will receive automated steps until they engage

Automated Email

Webinar question?

Hi Contact: First Name , I saw you're signed up for the email sequences webinar this


See more

+

↓

✓

Completed

Signals: 2 opens or 1 click 

Rep-led outreach

As soon as a lead engages, the sequence will start to queue up manual steps

Create dynamic follow-up steps


Configure a series of task steps that starts as soon as a contact engages with your automated outreach

Manual email task

Get a task reminder to send an email

Call task

Get a task reminder to make a call



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New Sequence

StepsSettingsAutomate

1. Automated Email - Day 1

Version A - Webinar Intro_Email Sequences

Webinar question?

Hi **Contact: First Name**, I saw you're signed up for the email sequences

See more

Step 2

Choose the next action that the sequence will perform

Automated email

Automatically send an email for me

Call task

Get a task reminder to make a call

InMail task

Get a task reminder to send an InMail

Add manual email task

Email template

Attach an email template to this manual email task

Add email template

Task details

Pause sequence until task is completed

Task Title *

Personalize

Queue

None

Order Information

First Order Closed Date

Recent Closed Order Date

Partner Registration Information

HUG Registrant Opted In

Registration Action



HubSpot Hacks

@HubSpotHacks · 24.7K subscribers · 177 videos

The #1 Unofficial YouTube Channel for HubSpot Tutorials, hosted by Simple Strat. ...more

simplestrat.com and 3 more links

Customize channel

Manage videos

Home

Videos

Shorts

Playlists

Community

Store

sequences



Getting Started with HubSpot Sequences Training

HubSpot Hacks · 13K views · 2 years ago

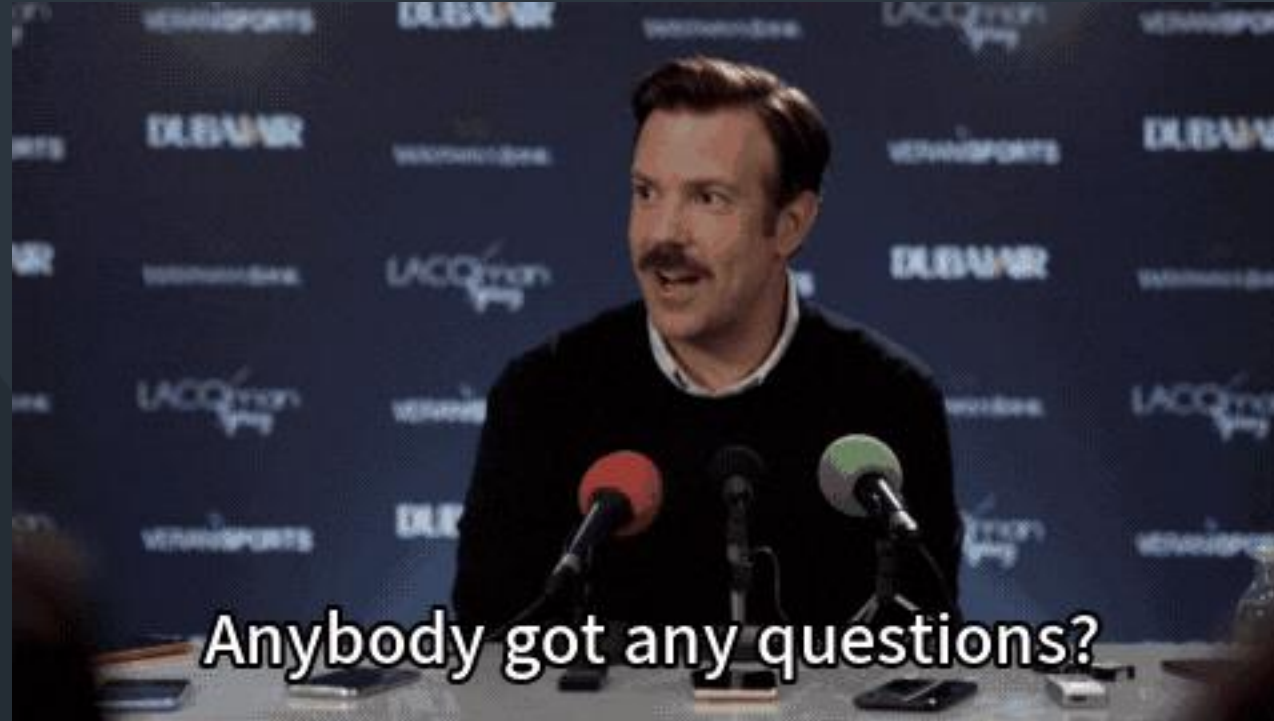
Learn how to automate outbound activities using the sequences tool. Need hands-on help? Book a call with a solutions advisor: <https://bit.ly/hs-sequences> In this Hubspot Sequences Training...



HubSpot workflows vs sequences: When to use each

HubSpot Hacks · 35K views · 4 years ago

Workflows and sequences in HubSpot can often be confused for one and other. They both feature automation tasks like nurturing leads, automating tedious sales and notifying team members, etc....



You asked, we answer:
Sequences edition!

Q: “I am struggling with using created lists to populate a sequence. That, and using a template email as part of a sequence instead of a marketing email.”

Q: When do I use a sequence vs a template vs an email campaign?

Q: “What’s the best way to identify the group to send the sequence to?”

Q: I’ve noticed that sometimes the sequence doesn’t complete and exit – is there a way to identify everyone who is hung in a sequence?

- **Q:** “How do I make sequences easy enough or simple enough for account reps to utilize?”
- **Q:** “Should I use sequences in bulk or 1:1 emails?”
- **Q:** “What should I do if someone goes through a sequence but nothing happens?”

Book a call and get clarity and better results in your sequences and HubSpot today!



Buy &
upgrade



Strategy &
Build



Fix HubSpot
or Train



Support
Growth

at SimpleStrat.com/Consult

Questions & Answers

Book a free call to see how we can put your case studies into action through HubSpot
SimpleStrat.com/Consult