

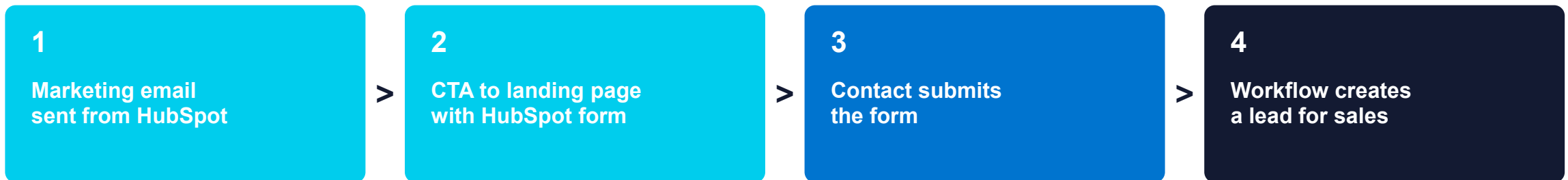
BUILDING AN EMAIL-TO-LEAD CONVERSION PROCESS IN HUBSPOT

A Marketing Operations Case Study - turning email engagement into sales-ready leads, automatically

PROJECT OVERVIEW

Every marketing email is more than an announcement - it's an entry point into the pipeline. I built a straightforward, automated path in HubSpot that takes a contact from an email click to a sales-ready lead, with no manual handoff.

THE PROCESS AT A GLANCE



Tools used: HubSpot Marketing Email - HubSpot Landing Pages & Forms - HubSpot Workflows - Lead creation

EXAMPLE: THE TRU-CLIP LAUNCH CAMPAIGN

This conversion path is illustrated using the Tru-Clip product launch campaign, which included:

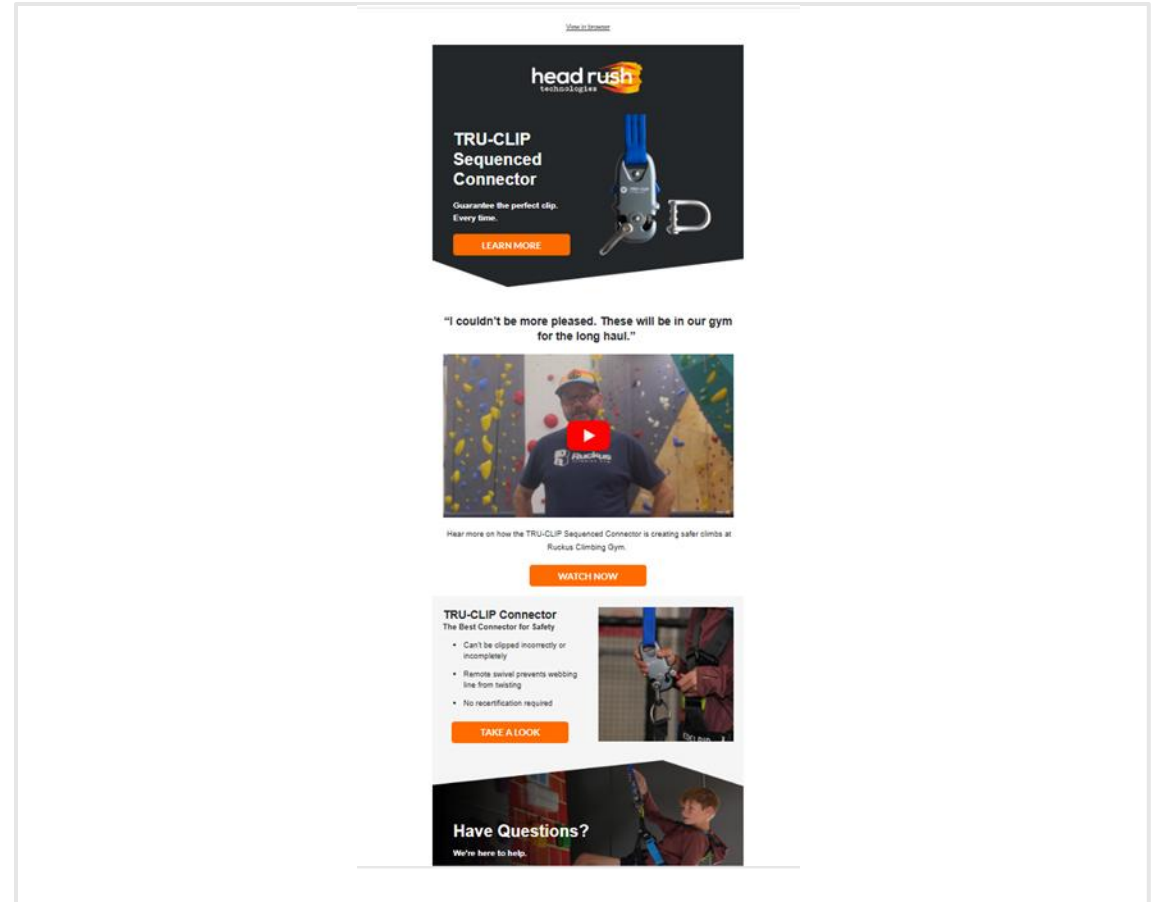


Tracking URLs on every CTA tie clicks and conversions back to the specific email, so each lead can be attributed to the exact send that drove it.

STEP 1

Tru-Clip Launch Email Sent from HubSpot

- The Tru-Clip launch email was built and sent from HubSpot to a targeted contact list, with a clear call-to-action (CTA) button placed in the body of the email.
- The CTA is the entry point into the conversion path - it's what carries the contact from the inbox to the Tru-Clip landing page.

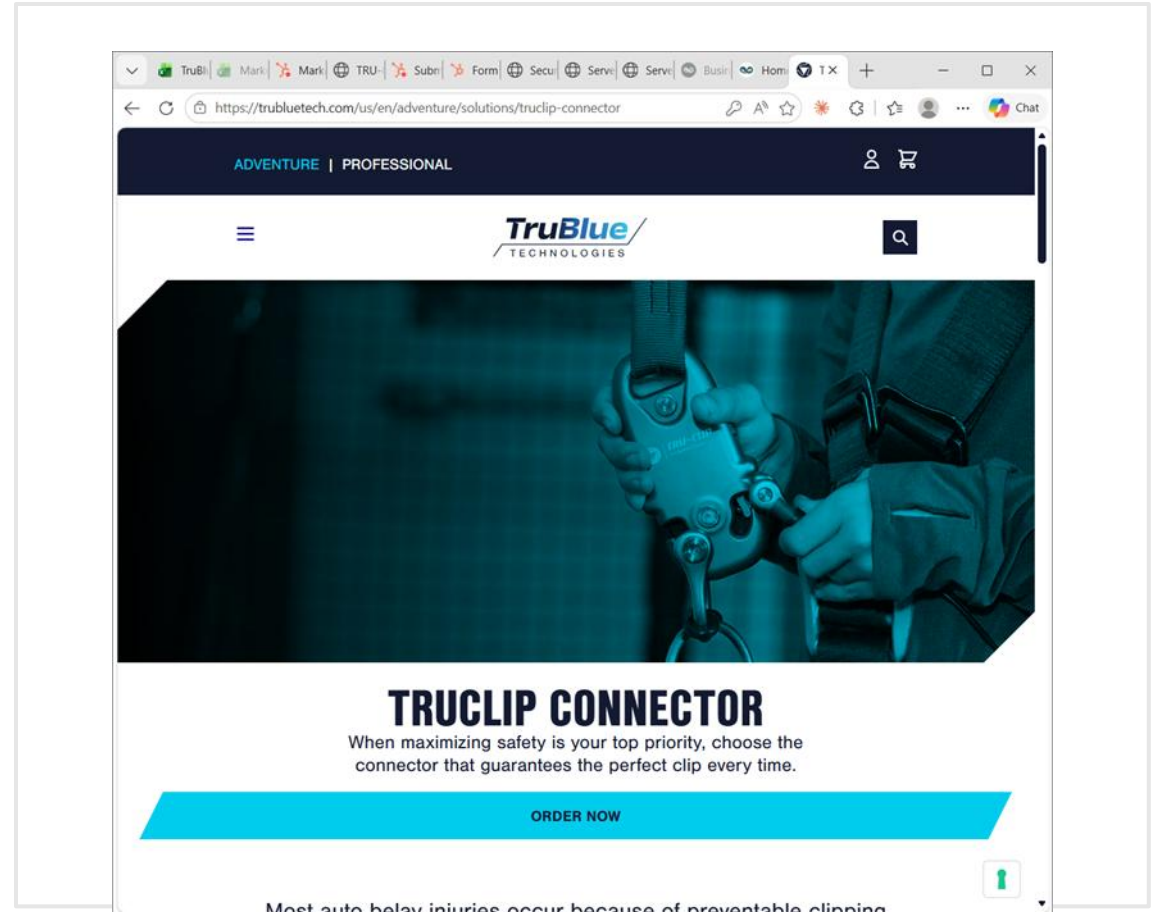


The Tru-Clip launch email, sent from HubSpot with the “Secure Yours” CTA button driving traffic to the landing page.

STEP 2

CTA Directs the Contact to the Tru-Clip Landing Page

- Clicking the CTA takes the contact to the Tru-Clip landing page, which contains an embedded HubSpot form.
- The form captures the information needed to qualify and route the contact once they convert.

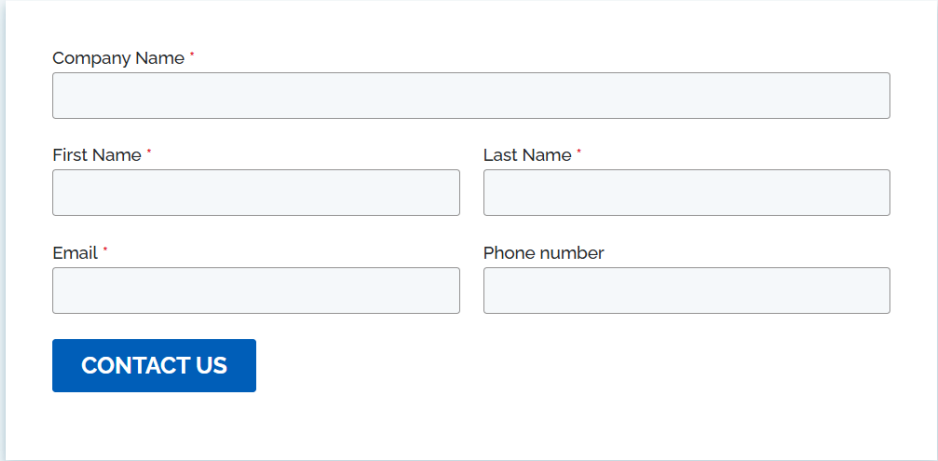


The Tru-Clip landing page. The HubSpot form shown here was embedded at the “Order Now” section and has since been retired from the live page.

STEP 3

Contact Submits the Tru-Clip Form

- The contact fills out and submits the form on the Tru-Clip landing page.
- That submission is logged on the contact's HubSpot record and becomes the trigger for everything that happens next.

A screenshot of a web form titled 'Tru-Clip' with a light blue header. The form contains four input fields: 'Company Name *' (a single wide field), 'First Name *' and 'Last Name *' (two side-by-side fields), and 'Email *' and 'Phone number' (two side-by-side fields). All fields are currently empty. Below the fields is a blue button with the text 'CONTACT US' in white capital letters. The entire form is set against a light blue background with a subtle grid pattern.

Tru-Clip

Company Name *

First Name * Last Name *

Email * Phone number

CONTACT US

STEP 4

Form Submission Triggers a Workflow That Creates a Lead

- The Tru-Clip form submission enrolls the contact in a HubSpot workflow.
- That workflow automatically creates a lead from the submission, handing sales a ready-to-work Tru-Clip lead with zero manual data entry.



The Tru-Clip workflow: sets marketing contact status, updates deal automation, branches on contact owner, creates the TRU-CLIP Inquiry lead, and notifies the owning rep.

RESULTS & IMPACT

A simple, repeatable path turns every campaign send into a source of sales-ready leads - no manual list pulls, no missed submissions.

Zero manual handoff

Every form submission automatically becomes a lead - no one has to notice it and create the record by hand.

Faster sales follow-up

Leads land in HubSpot the moment the form is submitted, so sales can reach out while interest is highest.

Consistent lead quality

The same form and workflow logic runs on every campaign, so every lead is captured and created the same way.

Reusable across campaigns

The email-to-form-to-lead path can be reused for any campaign - just swap the email and landing page.