

BUILDING SALES TERRITORY & REP ASSIGNMENT RULES IN HUBSPOT

A Marketing Operations Case Study - routing companies and contacts to the right sales rep automatically

PROJECT OVERVIEW

As TruBlue's account base grew, manual lead triage couldn't keep pace. I designed and built a rules-based territory system in HubSpot that automatically assigns every company and contact to the correct sales rep the moment it enters the CRM - based on Sales Vertical and geography.

THE PROCESS AT A GLANCE

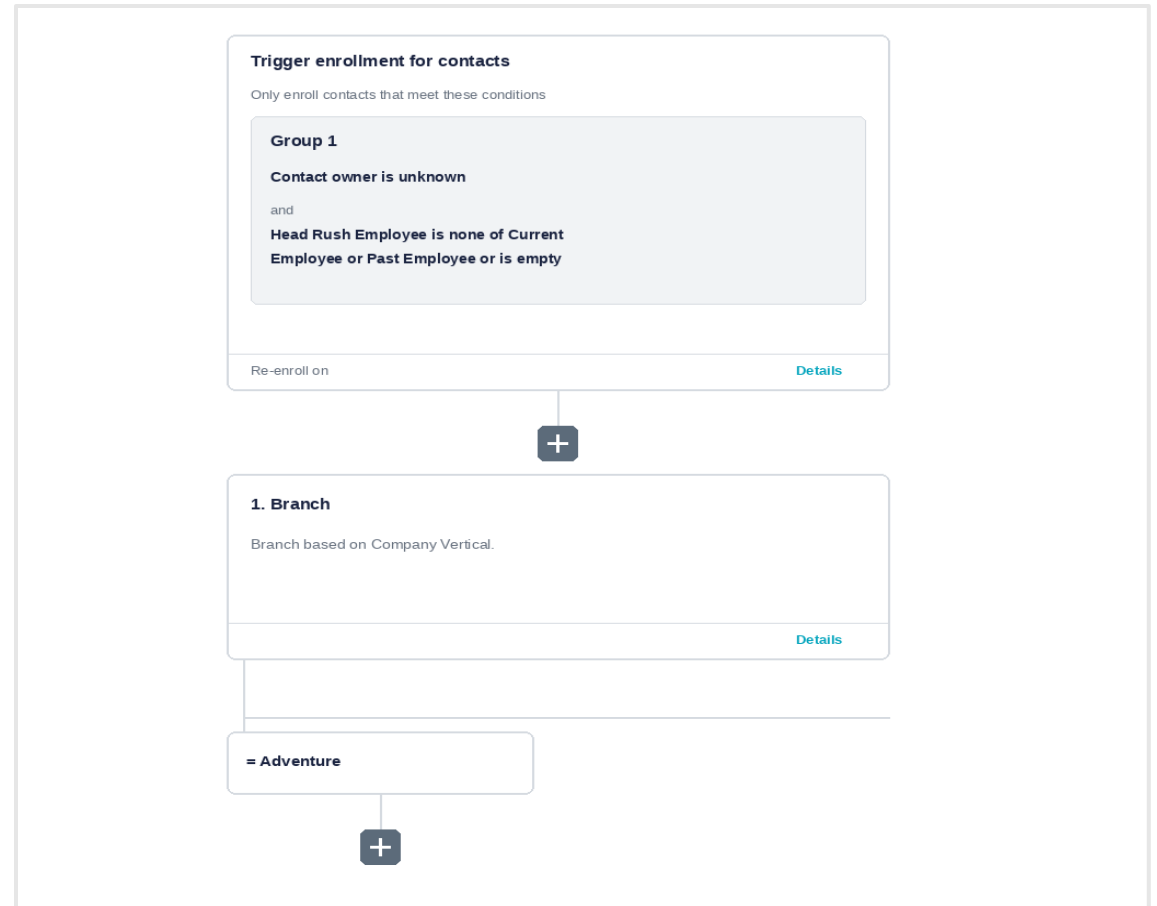


Tools used: HubSpot Custom Properties - HubSpot Workflows - Company/Contact Owner routing

Enrollment

Workflow Triggers when Sales Rep is Unknown

- The assignment workflow enrolls contacts when the contact owner is unknown
- The workflow first branches on Sales Vertical, then adds additional layers for Geography and Sales Channel
- Each combination maps to one specific rep, so every account has a single, unambiguous owner.
- It also re-enrolls existing records whenever Sales Vertical, Sales Channel or the geography property is set or changed, so territory moves and data cleanup stay accurate.

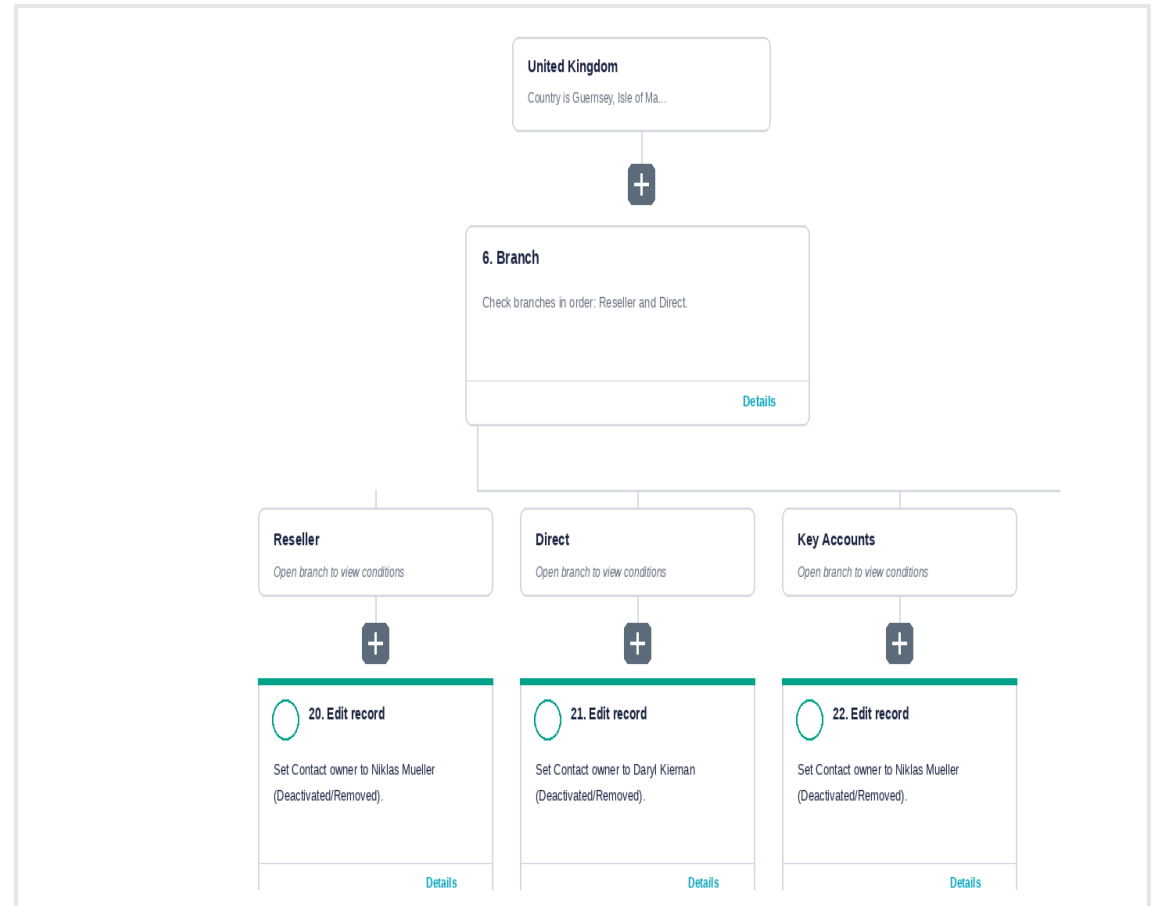


Partial view of the live workflow, shown to illustrate the branching logic. The full workflow spans many more branches.

Branching

Workflow Branches Further by Sales Channel

- Inside each vertical branch, the workflow adds a geography and sales channel layer, where appropriate.
- Each channel branch ends in its own action that sets the Contact owner to the named rep responsible for that slice of the territory.

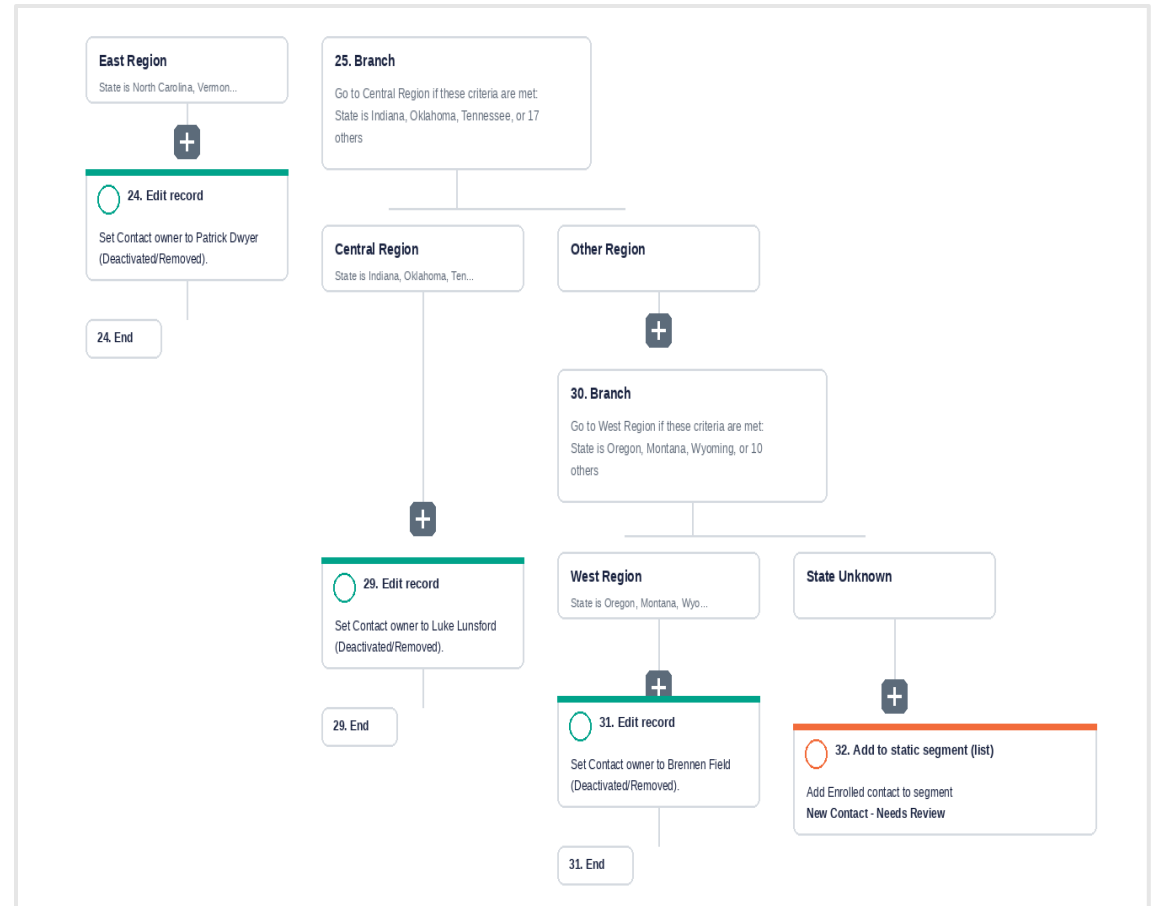


Partial view of the live workflow, shown to illustrate the Sales Channel branching layer.

Assignment

Fixed Rep Assigned as Record Owner

- Each channel branch ends in its own action that sets the Contact owner to the named rep responsible for that slice of the territory.
- State-level branches recurse down region by region (East, Central, West, and beyond), each ending in an action that sets Contact owner to the named rep for that slice of the territory.
- Records with no matching state fall into a State Unknown branch, which adds them to a review segment instead of guessing an owner.



Partial view of the live workflow, shown to illustrate region-level owner assignment and the unmatched-state fallback.

RESULTS & IMPACT

Automated territory routing replaced manual lead triage with instant, rules-based assignment.

Instant assignment

Companies and contacts get an owner the moment they're created - no manual triage.

Consistent ownership

Companies and their contacts always share the same rep, avoiding split ownership.

Scalable rules

New territories or reps can be added by extending the branch logic, not rebuilding it.

Clean data-driven routing

Assignment is driven entirely by Sales Vertical and geography properties, not guesswork.