

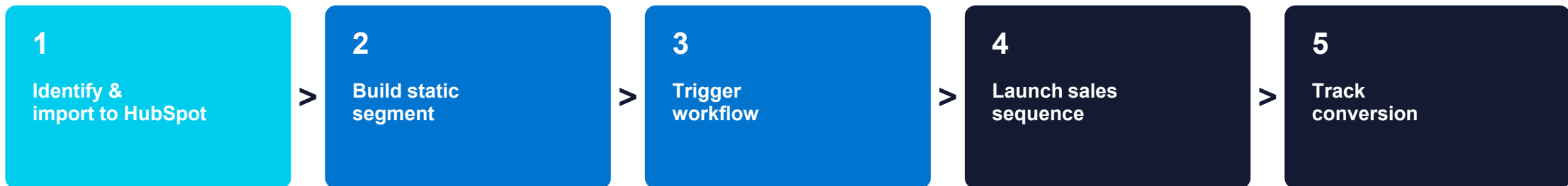
BUILDING A SCALABLE PROSPECTING PROCESS IN HUBSPOT

A Marketing Operations Case Study - turning customer behavior signals into a sales-ready prospect pipeline

PROJECT OVERVIEW

TruBlue's Customer Success team continuously surfaces high-intent accounts based on customer behavior. I designed and built the operational workflow that takes that raw signal and turns it into a fully automated, trackable prospecting motion in HubSpot, equipping Sales with a ready-to-send outreach sequence.

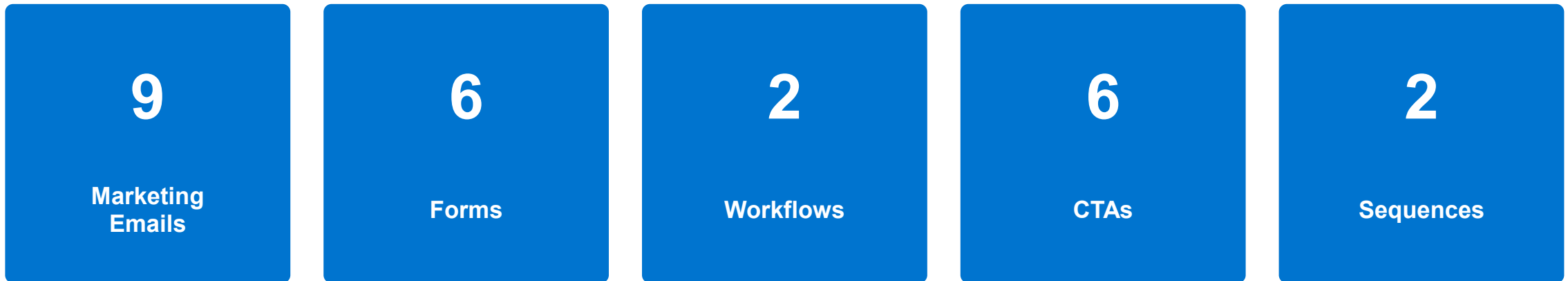
THE PROCESS AT A GLANCE



Tools used: HubSpot Segments, Workflows, and Sequences

PART OF THE BROADER 2025 NDB CAMPAIGN

The prospecting workflow in this deck was one piece of TruBlue's full 2025 No Delay Belay (NDB) campaign, which also included:



This deck focuses on the prospecting workstream: 1 of the 2 workflows and 1 of the 2 sequences built for the campaign.

STEP 1

Customer Success Identifies Prospects & Hands Off to Marketing Ops

Identify

The Customer Success Manager identifies potential No Delay Belay Service Subscription candidates using a clear behavioral trigger: accounts with 5+ devices overdue for annual service.



Import to NetSuite

She hands that data, and I import it into HubSpot, aligning record fields so each account is ready to move cleanly into the next step.

STEP 2

Static List Built in HubSpot

- The imported list is used to generate a static list in HubSpot - for example, NDB_US_Leads_Past_Due, built from Customer Success's overdue-service criteria.
- Using a static (not active) list locks membership in place, so the group being worked stays consistent throughout the prospecting cycle - critical for clean workflow triggering and reporting.

[Back to segments](#)

NDB_US_Leads_Past_Due_Oct_2025

Contacts Static Size: 126

[Prospect Creation](#)

SIZE	% OF DATABASE	PREDICTED EMAIL ENGAGEMENT	7 DAY CHANGE	CREATED ON
126	0.29%	MEDIUM	--	10/30/25

Search in segment [Export segment](#) [Edit columns](#)

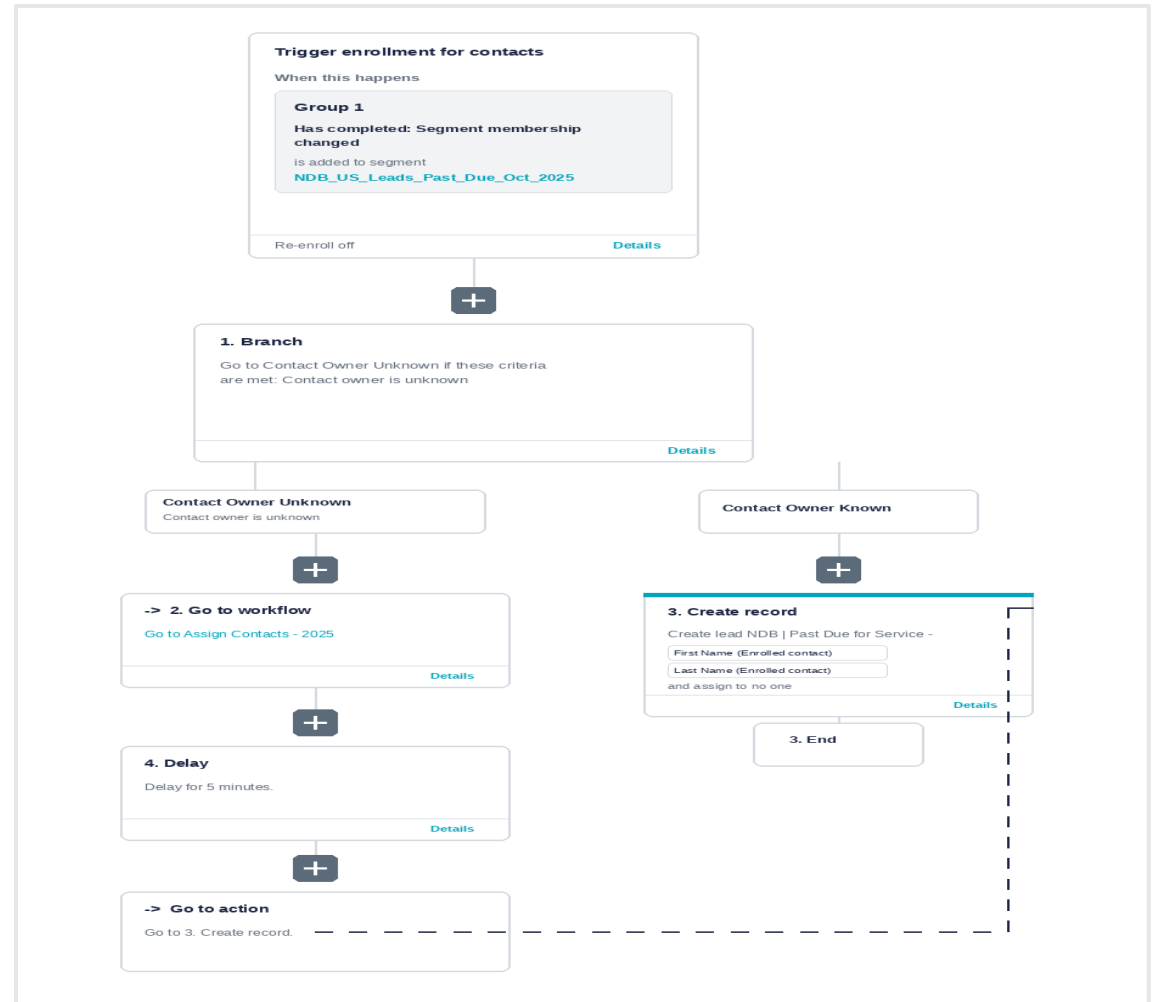
NAME	EMAIL	PHONE NUMBER	CONTACT OWNER
 Granville K-6 PTO	[REDACTED]	[REDACTED]	Patrick
 Jacqueline Kane	[REDACTED]	[REDACTED]	Patrick
 Isi Poler	[REDACTED]	[REDACTED]	Patrick D.
 Viktor Bohorquez	[REDACTED]	[REDACTED]	Patrick D.
 Michael Moore	[REDACTED]	[REDACTED]	Candice
 Abe Mease	[REDACTED]	[REDACTED]	Luke Lu.
 Kevin Rice	[REDACTED]	[REDACTED]	Brennen

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STEP 3

Workflow Triggers Lead Creation in NetSuite

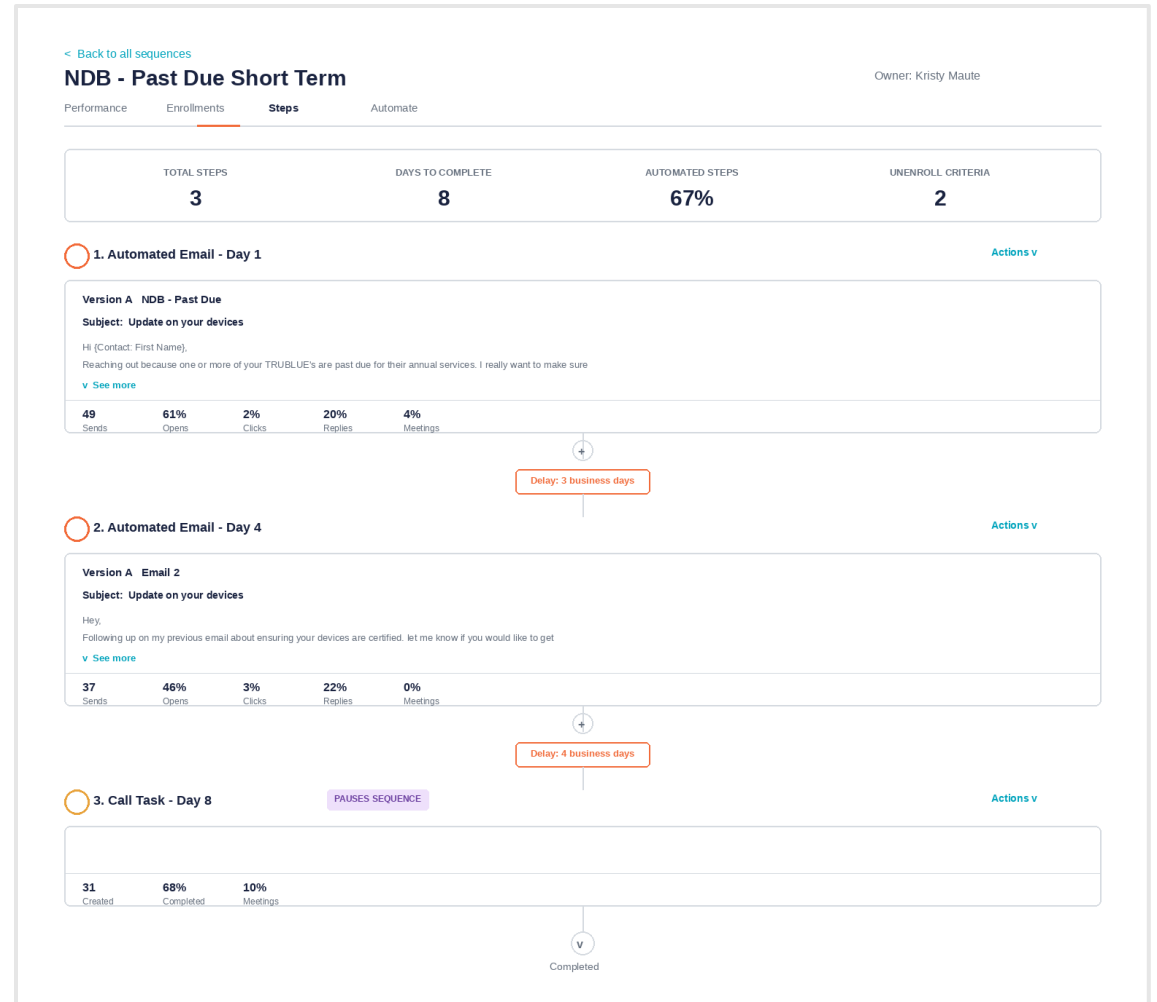
- Enrollment in the static list triggers a HubSpot workflow.
- The workflow automatically populates a Lead in NetSuite tagged Lead Type: Prospect - keeping HubSpot Leads filterable and tagged appropriately without manual entry.



STEP 4

Sales Rep Enrolls Prospects into Sequence for Sales Outreach

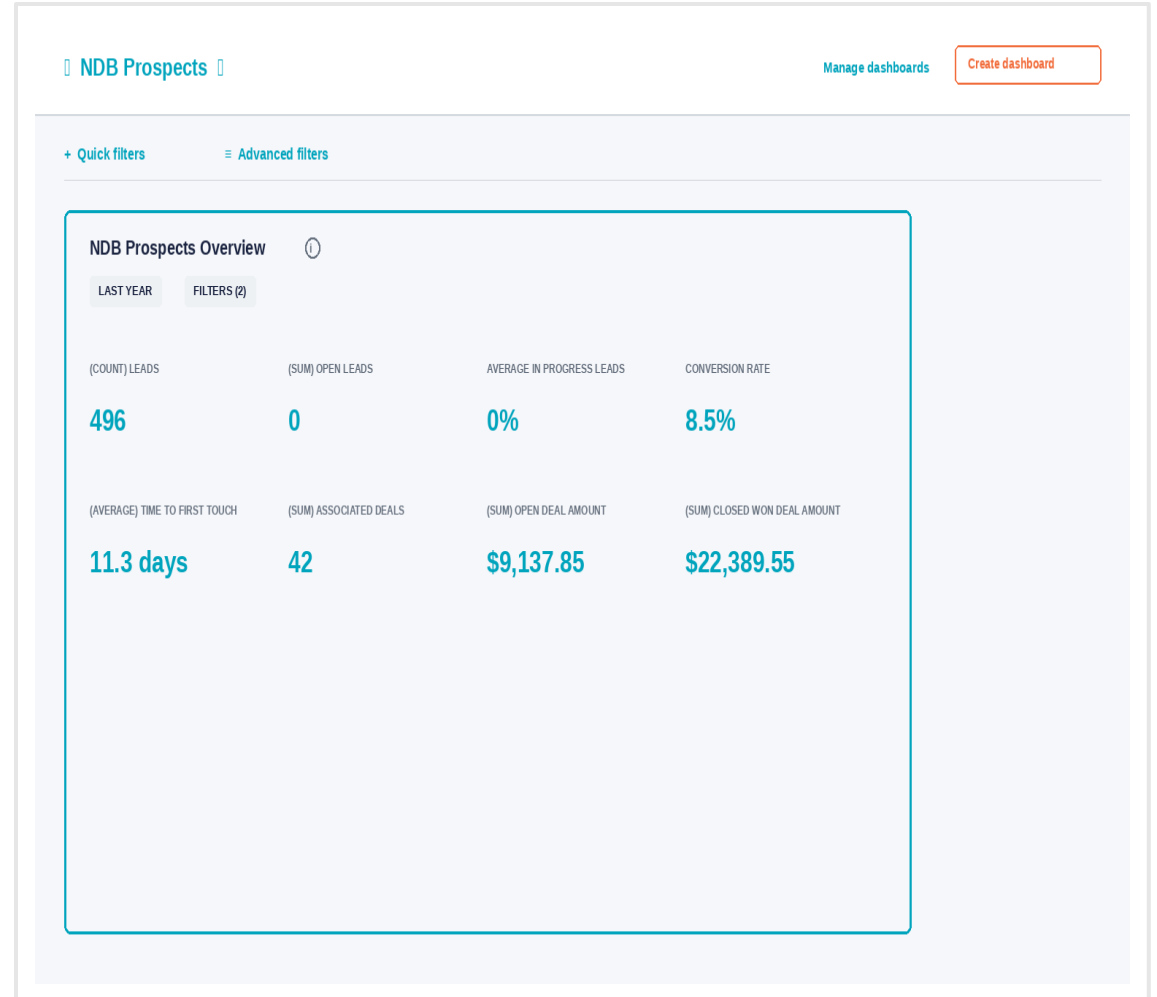
- A HubSpot sequence is built for the sales team, giving them a consistent, timed set of touches to reach every prospect on the list.
- This hands Sales a ready-to-run outreach motion instead of a raw list - removing guesswork and standardizing the follow-up cadence.



STEP 5

Conversion Is Tracked to Deals

- Success is measured by tracking how many prospects on the list convert into deals.
- This closes the loop - tying a customer behavior signal all the way through to pipeline and revenue, and giving Marketing Ops a clear read on process ROI.
- *Note: HubSpot was not integrated with our e-commerce platform so we couldn't not track Prospect to Sales Order conversions*



RESULTS & IMPACT

Automating this process replaced a manual, ad hoc hand-off between Customer Success and Sales with a repeatable, trackable system.

496

Leads generated

Total leads created as prospects from the NDB static list, tracked in HubSpot.

42

Associated deals

Prospects that progressed into open sales opportunities.

8.5%

Conversion rate

Share of prospects that converted into a deal.

\$22,389.55

Closed-won revenue

Revenue directly attributable to this prospecting motion.