Auto-clear Inactive Leads (Unassign Contact Owner)

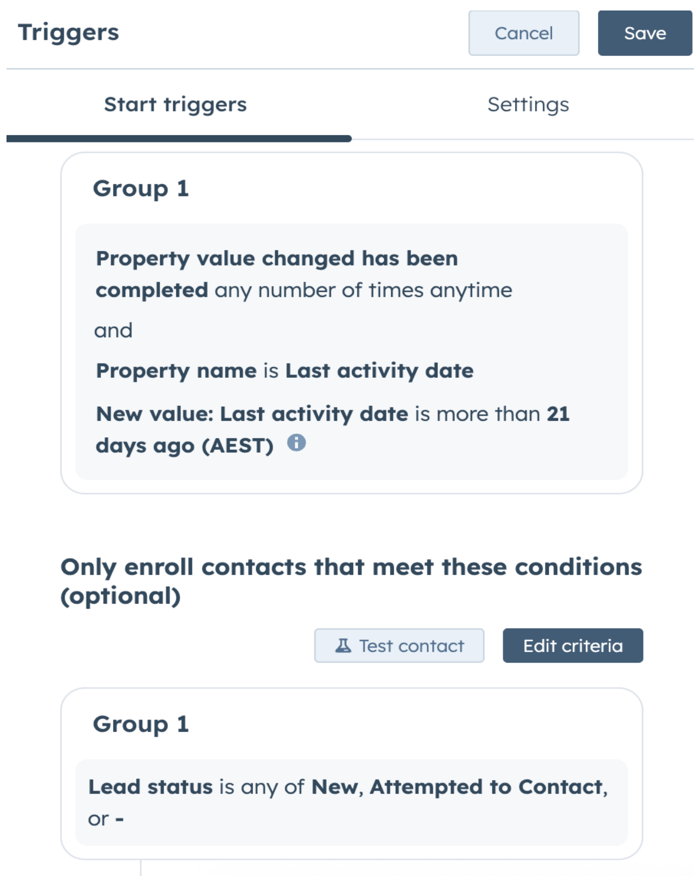
1. Overview

This automation identifies contacts that have had no recent activity for a defined period (e.g., 21+ days) and automatically clears the Contact owner field. The purpose is to prevent stale leads from remaining assigned indefinitely and to support a clean, fair re-queue or redistribution process.

> **Typical real estate use case:** enquiries often go cold quickly. Auto-clearing ownership after inactivity helps teams resurface missed follow-ups, rotate long-unresponsive leads, and keep response SLAs high.

2. Trigger design

The trigger is the most important part of this automation. It determines which contacts are considered inactive and ensures only the right records are affected.



Primary enrollment trigger

- **Workflow type:** Contact-based workflow (HubSpot).
- **Enroll when:** Contact property *Last activity date* becomes **more than 21 days ago**.
- **Re-enrollment:** Enabled (so contacts can be re-processed each time they become inactive again).

Eligibility filters

Add additional criteria so you only clear ownership for leads that are genuinely "open" and should return to the pool. Examples below should be adapted to your CRM setup.

- **Lead status** is one of: ***New, Attempted to Contact, Open*** (or your equivalent "active lead" statuses).
- Exclude contacts marked Closed Won, Closed Lost, Do Not Contact, or equivalent.
- Optional: only apply to a specific Lifecycle stage (e.g., Lead) to avoid affecting customers.

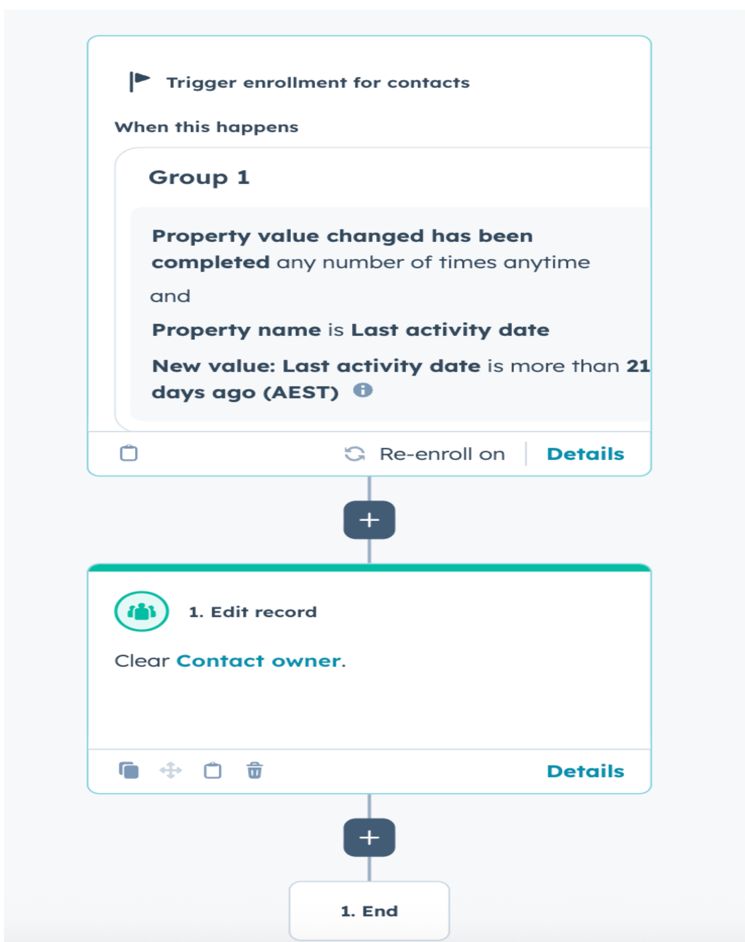
Why use "Last activity date"?

It is a practical proxy for engagement because it updates when tracked actions occur (calls, emails, meetings, notes, etc.). If team uses untracked communication, consider adding a manual "Last contacted" property instead.

3. Logic and actions

Once a contact meets the trigger and filter criteria, the workflow performs a single record update:

- **Edit record:** Clear the *Contact owner* field.
- **End workflow:** No further actions are taken.



This keeps the automation intentionally simple: it does not delete records or change lead status. It only unassigns ownership so the contact can be redistributed using your team's existing process (round-robin assignment, manual review, queues, or task-based triage).

4. Safeguards and best practices

- **Use a buffer:** 21 days is common, tune to sales cycle (7–14 days for fast inbound, 30+ for long cycles).
- **Exclude active negotiations:** Ensure contacts tied to active deals are excluded if required.
- **Time zone:** Date logic uses your portal settings; document it to avoid confusion.
- **Auditability:** Use workflow history to confirm why a contact was updated.

5. Testing checklist

- Use a test contact and set Last activity date older than the threshold; confirm enrollment occurs.
- Confirm contacts with excluded lead statuses do not enroll.
- Verify Contact owner is cleared only when all criteria are met.
- Review workflow history to ensure re-enrollment behaves as expected.

CONCLUSION (real estate)

In real estate, speed-to-lead and consistent follow-up directly influence conversion. This automation reduces lead decay by preventing unresponsive contacts from staying assigned indefinitely. Clearing ownership after inactivity helps teams:

- resurface stale enquiries for a second attempt or a different agent
- improve fairness and workload distribution across agents
- reduce pipeline clutter and improve reporting accuracy
- support operational SLAs by ensuring every open lead has an active owner