

# Context

Nau Capital is a PropTech startup that facilitates property investments through crowdfunding. To improve efficiency and reduce manual effort, I designed a simple HubSpot automation system to support our sales process. The goal is to automatically capture investor interest, create deals, and trigger follow-up communications, minimizing human intervention in the early stages of lead handling.

This system demonstrates how we can:

- Capture potential investors via a lead form
- Automatically create and track deals
- Send thank-you emails immediately upon form submission
- Assign internal tasks selectively based on investor criteria

## Workflow Logic Text

**Name:** Property Investor Lead Capture and Follow-up

**Trigger:**

- When a contact submits the *Property Investment Interest* form

**Actions:**

1. Automatically create a *Deal* in the “New Lead” stage of the *Nau Capital Property Crowdfunding* pipeline.

2. Send a *Thank You* marketing email to the contact:

- Subject: *Thank you for your interest in Nau Capital properties!*
- Body: *We appreciate your interest. Our team will review your submission and contact you soon.*

3. Check if *Budget* property is greater than \$50,000:

- If **yes** → Create an internal task: “*Review high-budget lead: [Contact Name]*” assigned to the sales team.
- If **no** → No task is created; lead proceeds in the pipeline automatically.

**Goal:**

Ensure that all new investor leads are promptly acknowledged, tracked, and prioritized without manual data entry, while focusing human attention only where needed (e.g., higher-value leads).

## Improvements:

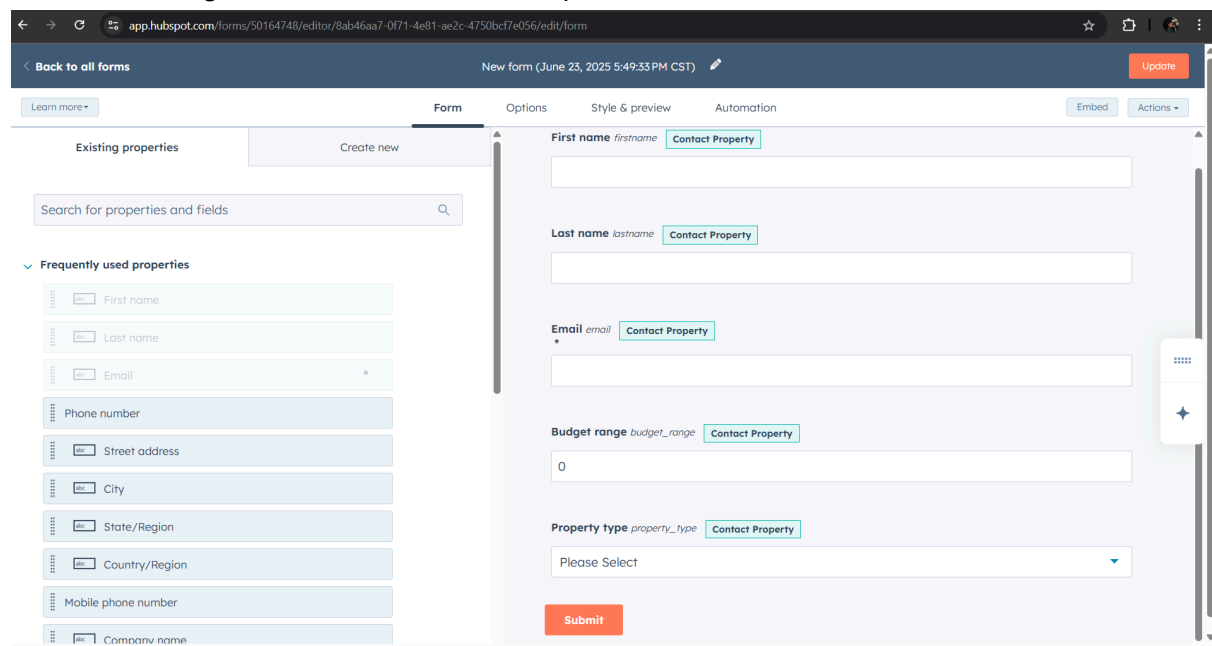
### Create a workflow

Go to *Automation > Workflows*

- Trigger: Form submission (Property Investment Interest form)
- Actions:
  - Create a deal → in *New Lead* stage
  - Send an automated “Thank you for your interest” email
  - If budget > \$50,000 → create internal task “Review high-budget lead”

\*\* Add a property update if useful for example: set a custom property like *Lead Source = Crowdfunding Form*

Create form to gather lead information for qualifications:



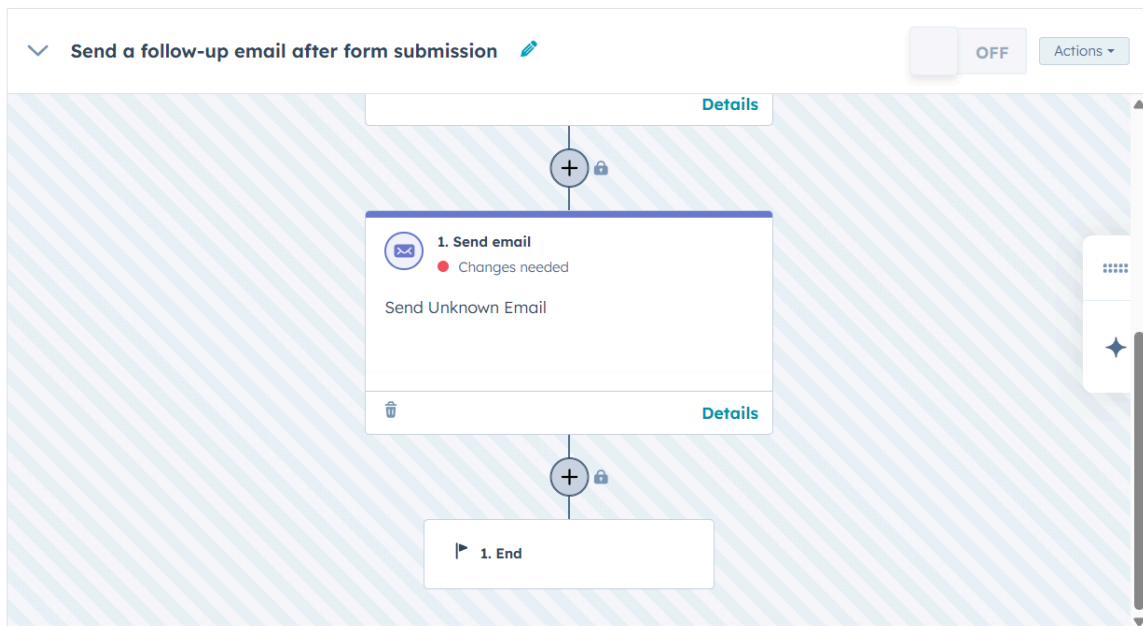
The screenshot displays the HubSpot Forms editor interface. The top navigation bar includes a 'Back to all forms' link, the form title 'New form (June 23, 2025 5:49:33 PM CST)', and an 'Update' button. Below the navigation bar, there are tabs for 'Form', 'Options', 'Style & preview', and 'Automation'. The 'Form' tab is active, showing a list of 'Existing properties' on the left and a 'Create new' button. The main area displays the form fields: 'First name' (firstname), 'Last name' (lastname), 'Email' (email), 'Budget range' (budget\_range), and 'Property type' (property\_type). Each field has a 'Contact Property' button next to it. The 'Budget range' field is a numeric input with the value '0'. The 'Property type' field is a dropdown menu with 'Please Select' as the current selection. A 'Submit' button is located at the bottom right of the form. The left sidebar shows a search bar and a list of 'Frequently used properties' including First name, Last name, Email, Phone number, Street address, City, State/Region, Country/Region, Mobile phone number, and Company name.

Form: <https://share.hsforms.com/1irRqpw9xToGuLEdQvPfgVgtv7d8>

Set automated message via email after submitting a form:

### Automate what happens after a form is submitted

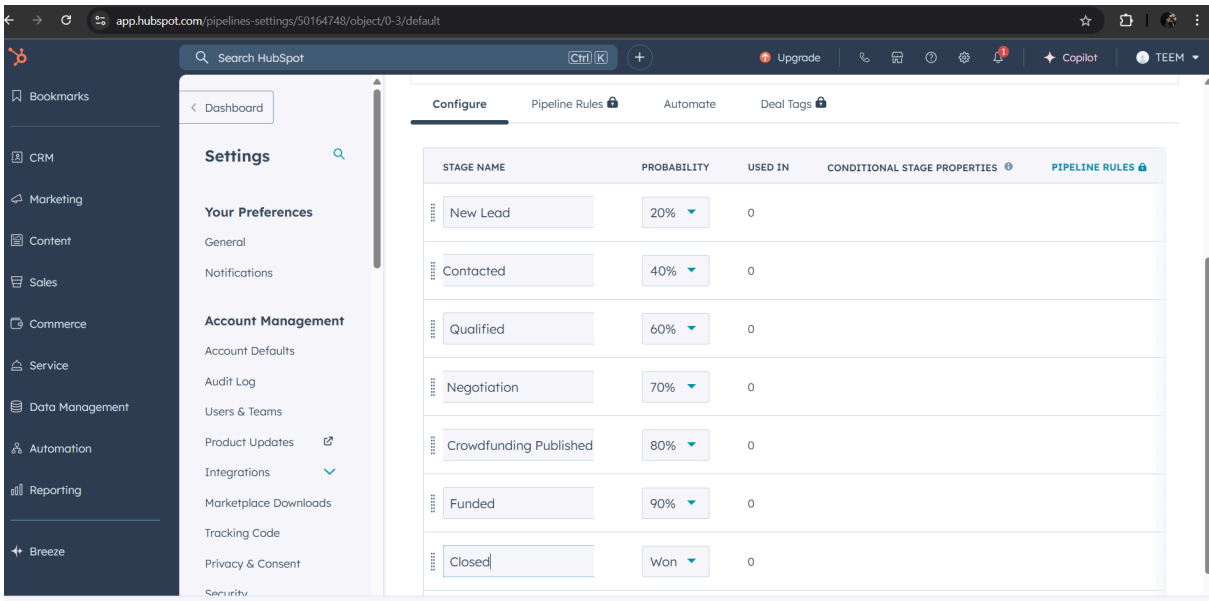
Use simple workflows to take care of your follow-ups after contacts engage with your form. For example, sending them a follow-up email. [What's a simple workflow?](#)



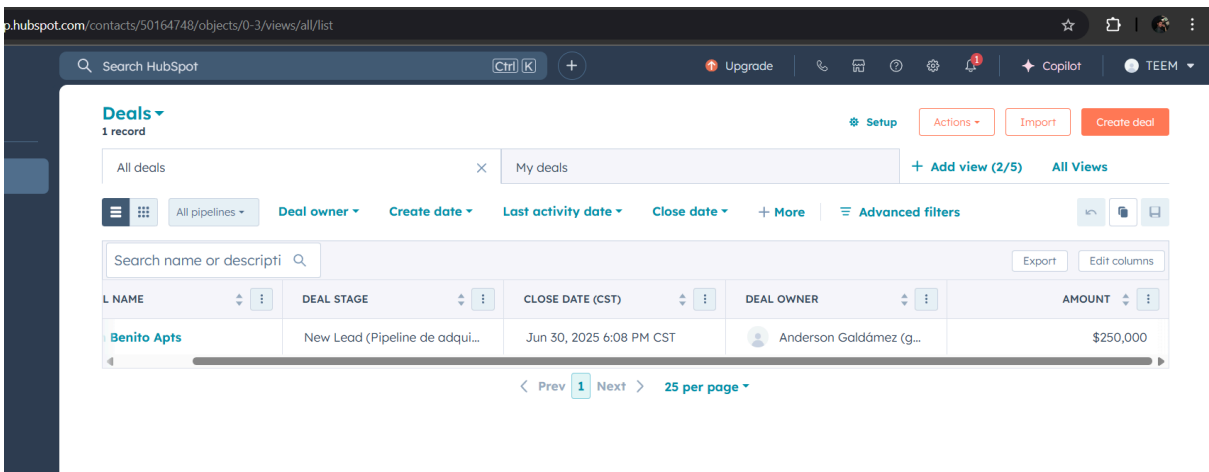
Thanks for submitting the form. We'll  
contact you soon!

 [Create your own free forms](#) to generate leads from your website.

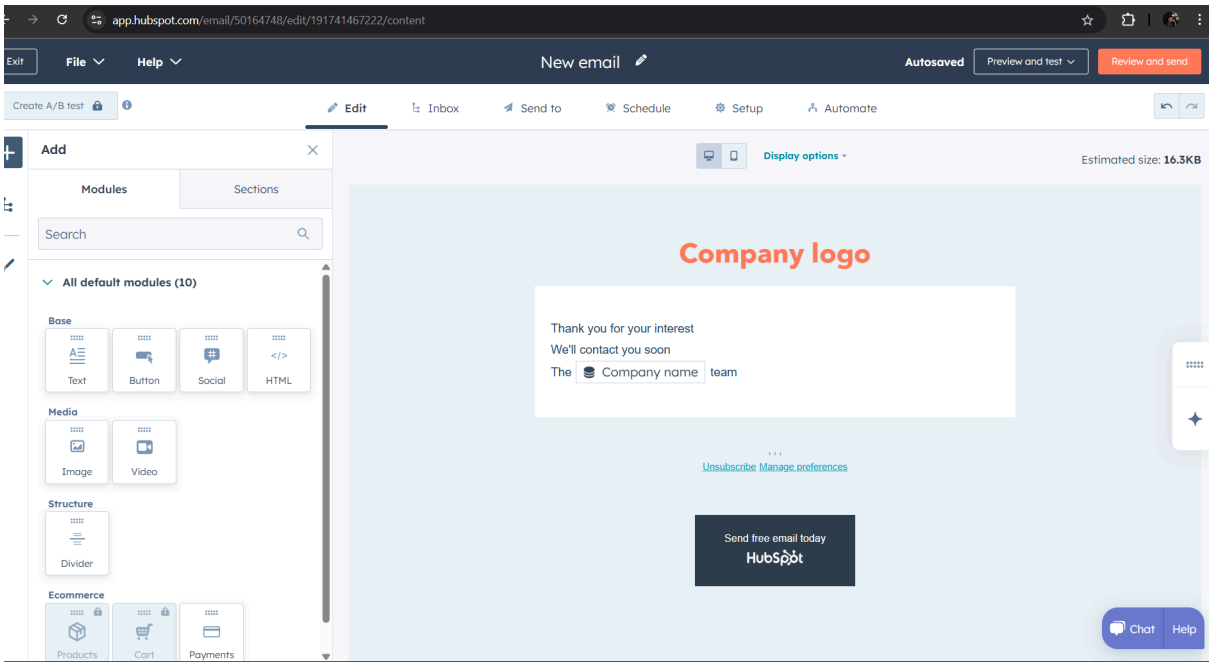
Create a pipeline to streamline the lead stages::



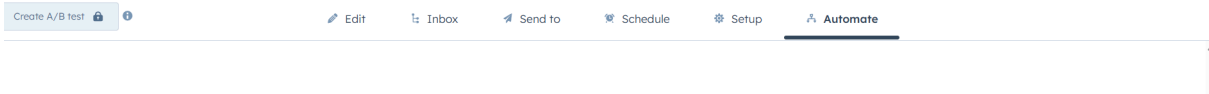
Create a new deal:



Set a success email:



We set up automation if deal is > 100,000 then email is sent in automation (starter plan and upper):



I created a dashboard to track lead generation performance:

