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

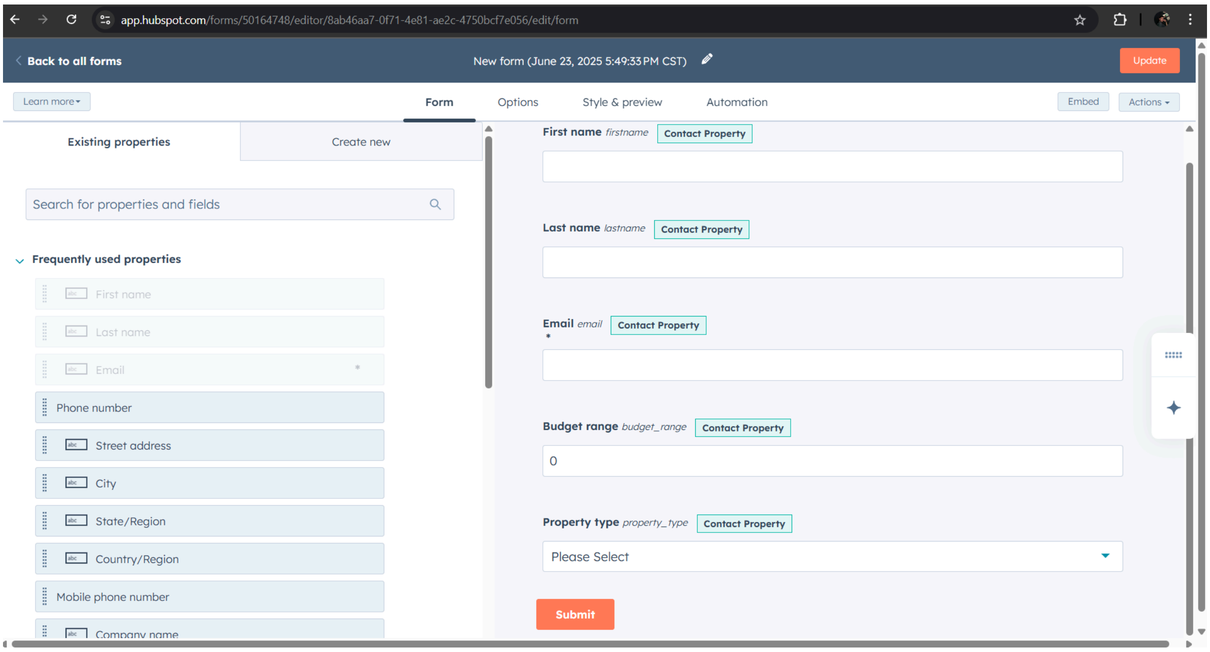
Go to *Automation* > *Workflows*

- 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"

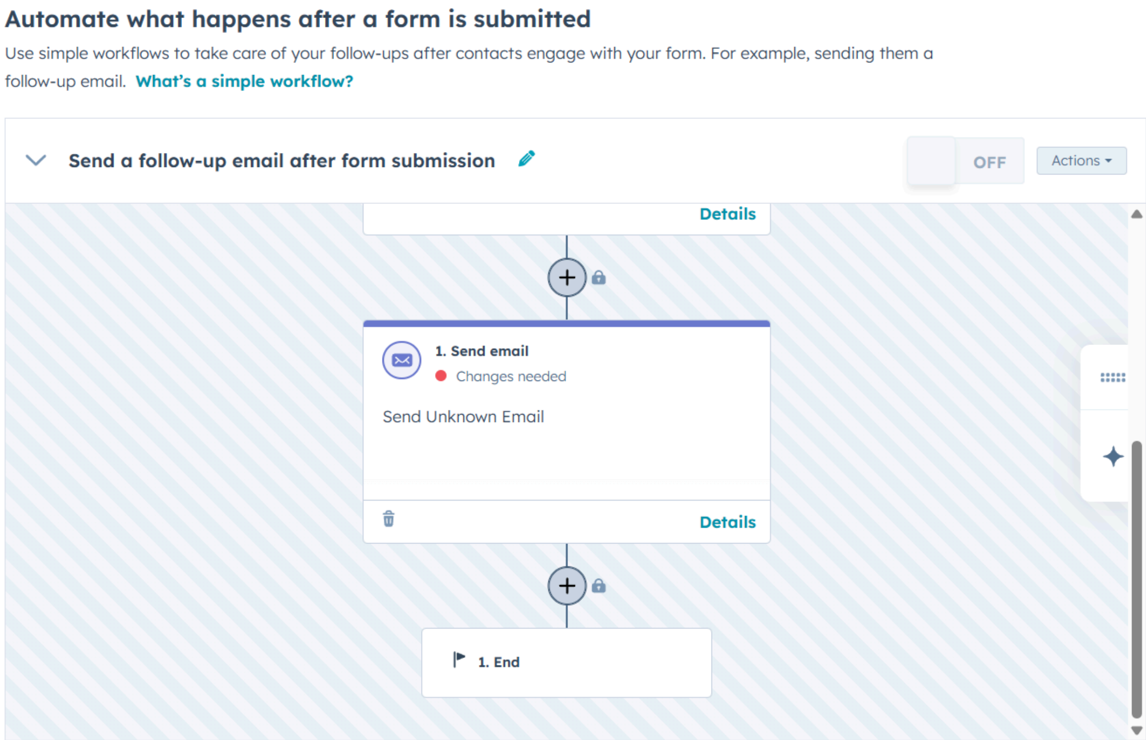
** Add a property update if useful for example: set a custom property like *Lead Source* = *Crowdfunding Form*

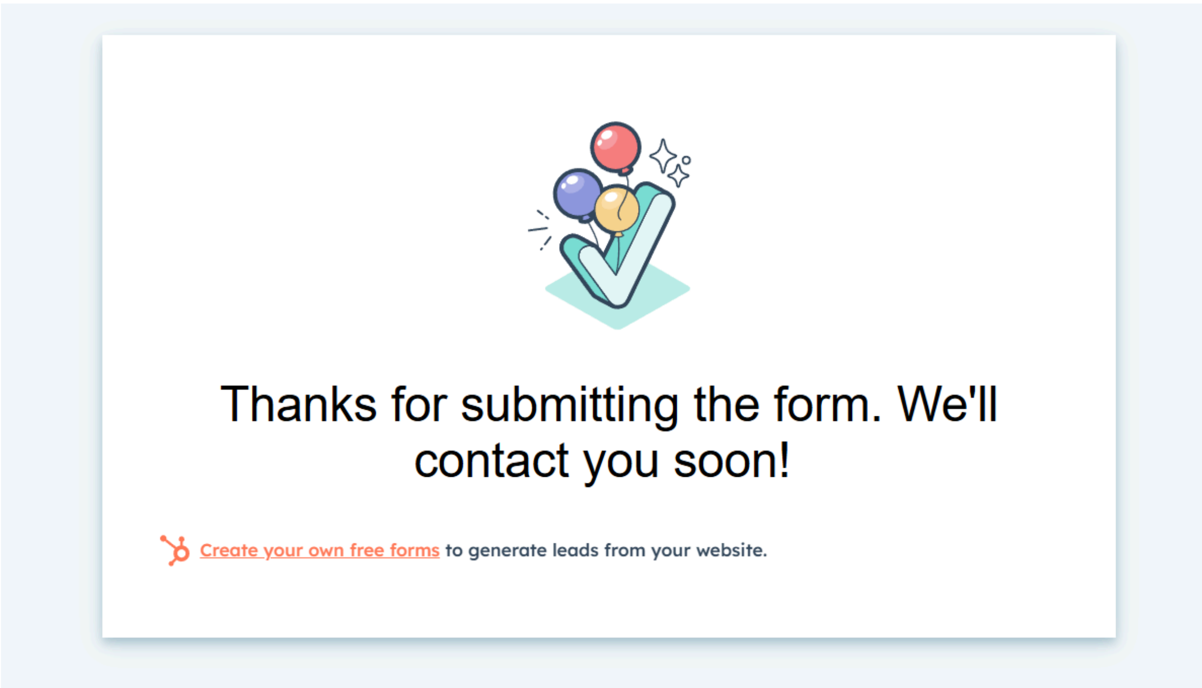
Create form to gather lead information for qualifications:



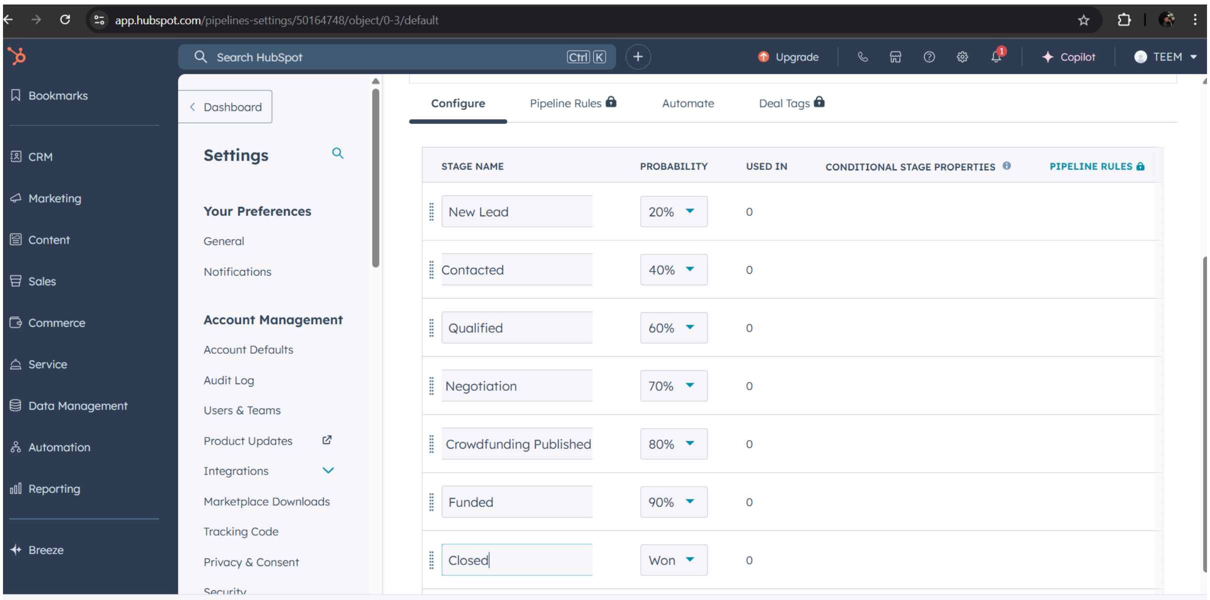
Form: https://share.hsforms.com/1irRqpw9xToGuLEdQvPfgVgtv7d8

Set automated message via email after submitting a form:

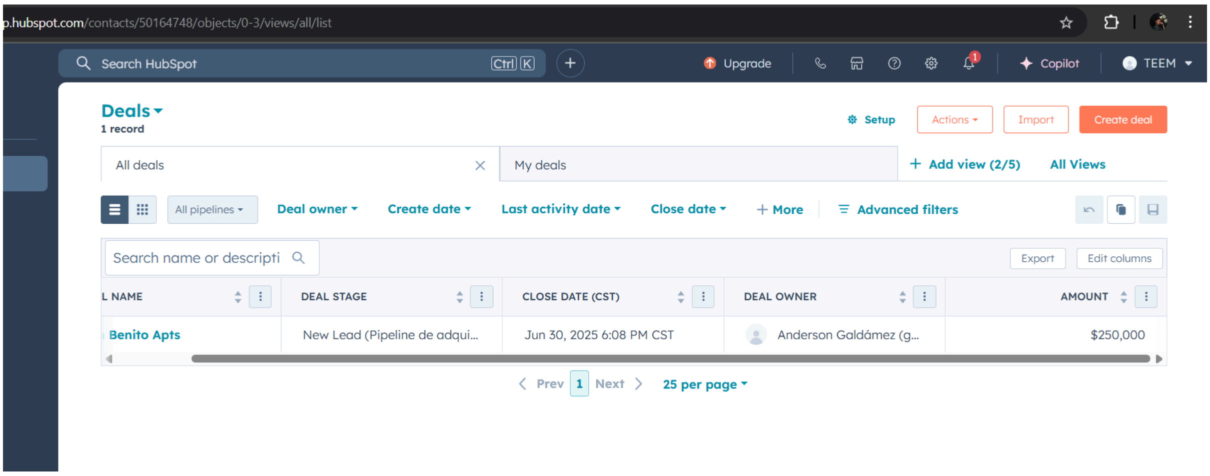




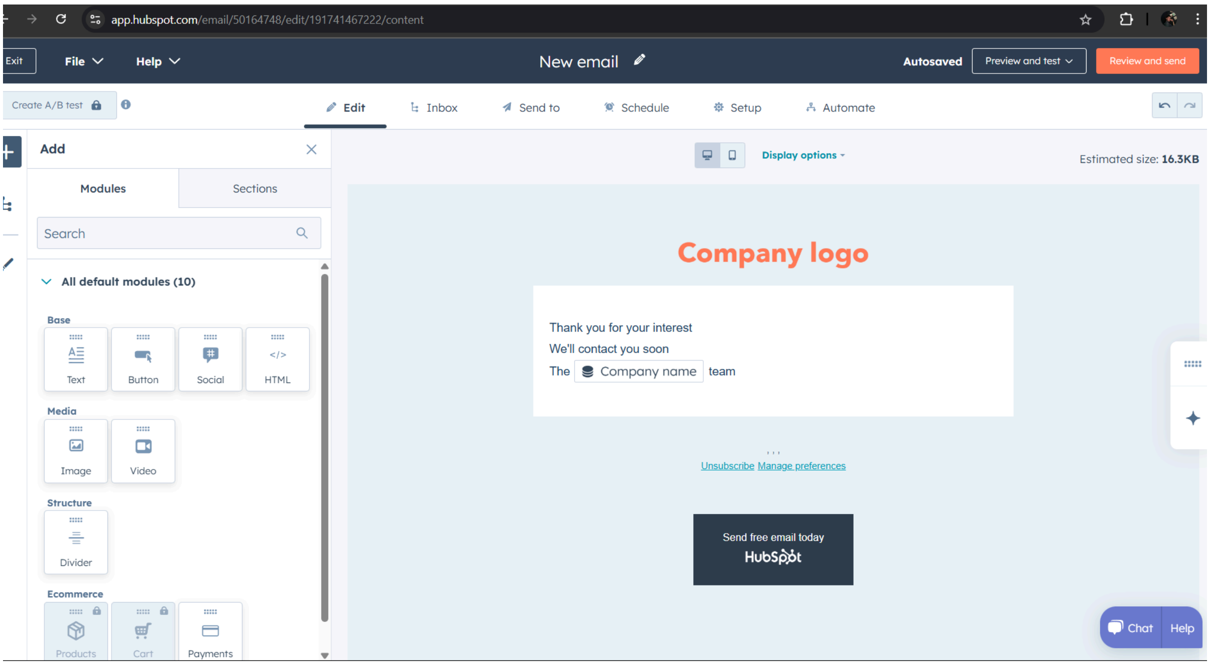
Create a pipeline to streamline the lead stages::



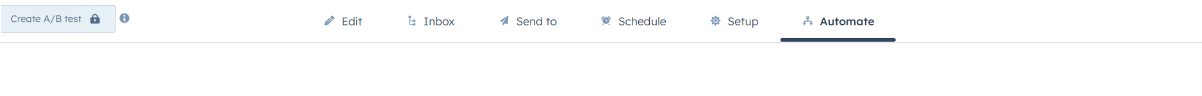
Create a new deal:



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: