**Procedure: Sequences in HubSpot**

This procedure outlines how to use the sequences function (automated emails) in HubSpot. Please note, you must be logged in as the person who you want the email to be from. You can also get the HubSpot in-app feature for Office 365 or chrome extension – info here: <https://knowledge.hubspot.com/connected-email/how-to-install-hubspot-sales>

1. **Set up the email list(s)**
   * Go to Contacts > Lists and choose ‘Folders’
   * Click the appropriate folder (i.e. is it an Outreach or Product Campaign?)
   * Create a new folder using the following naming convention: [Title] Campaign – [Date]
   * In the folder create your list. If it’s more than one list (i.e. segmented by company title/position etc.) please include ‘Segment 1’ etc. in the name. Segment 1 will correspond to Email 1 later
2. **Create the email templates** (i.e. for the different segments and for each strike)
   * Go to Conversations > Templates
   * Create a new Folder using the following naming convention (please be sure to have ‘1.’ In the beginning to bring this to the top of the templates list): 1. Outreach: [Title] Templates – [Date]
   * Click your new folder, and top right click ‘New template’ > ‘From scratch’
   * Under ‘Name’, name it using the following convention: [Title] – List [X] – Strike [X]
   * Enter a ‘Subject’ for the email thread
   * Write the email copy being sure to include all links. Save template
   * Write a template for each email and each strike
3. **Create the Sequence**
   * Click Automation > Sequences
   * Click ‘Manage’ then ‘New Folder’
   * Name the folder according to the following naming conventions: 1. [Outreach or Product]: [Title] – [Date]
   * In your folder, choose ‘Create sequence’, then top right, again click ‘Create sequence’
   * Click the + symbol in front of an orange circle
   * On the right side, click the first option ‘automated email’
   * Choose one of your existing templates, e.g. [Title] Email/Segment 1 - Strike 1
   * Check that it is all correct then click the grey + below and add the next automated email (this will be strike 2), set how many days later you want this email to go out
   * Repeat for strike 3 (again setting how many days later you want this email to go out)
   * Click Save.
   * Repeat if you have more than one Email (i.e. segment) for this campaign
4. **Schedule it**
   * Go to Contacts > Lists and find the relevant lists for this sequence
   * Click the list
   * Click the top white box to select all persons in the list
   * An option will appear to ‘Enroll in sequence’, click that
   * Select the correct/corresponding sequence
   * In the new window, where it says ‘send now’ click it and change it to ‘send later’. Choose the ideal date and time for the send and check the number of days for the strike 2 and strike 3 emails
   * Bottom right, click ‘Enroll XX of XX contacts’
   * You are done! They are enrolled and the sequence is set
   * Repeat if segmenting the emails/have multiple emails for the campaign