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REVENUE SYSTEMS INTEGRATOR

EIGHT RECIPES · BUILD TIME: ONE AFTERNOON

HubSpot x Claude Workflow Recipe Pack

Eight automations you can build today, not a framework to think about later. Copy the logic, adapt the fields, ship it this week.

Built by Centralise : HubSpot Elite Partner and member of the Anthropic Partner Network.

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Most workflow advice tells you to automate your processes without saying which ones.

This skips that part. Each recipe has the trigger, the logic, and a Claude prompt written to adapt it to your own properties, stages and naming conventions. None of it requires a rebuild of your instance to start. Pick the one solving your loudest problem this week and build that one first.

TRIGGER

The event that starts the workflow. Match it to how your instance is actually configured.

WORKFLOW LOGIC

The branching and actions, in the order you should build them. Adjust thresholds to your sales cycle.

CLAUDE PROMPT

Paste it into Claude with your own fields in the brackets. It writes the version that fits your data.

THE EIGHT RECIPES

01 ICP-Fit Lead Routing p.3

02 MQL-to-SQL Handoff Notification p.3

03 Stale Deal Re-engagement p.4

04 Lifecycle Stage Correction p.4

05 Cold Contact Re-engagement p.5

06 Deal Risk Flagging p.5

07 Duplicate & Incomplete Contact Flagging p.6

08 Closed-Won Handoff to Customer Success p.6

01 ICP-Fit Lead Routing

Route new leads to the right rep based on fit, not just form-fill order.

TRIGGER

Contact created, or lifecycle stage changes to Lead.

WORKFLOW LOGIC

Score firmographic fields (industry, employee count, associated company revenue) into a Fit Score property. Branch by score band into Hot / Warm / Cold. Assign owner via round robin within the matching tier. Notify owner by email or Slack.

CLAUDE PROMPT

Here are our lead qualification criteria: [industry list, employee count range, revenue band]. Write the HubSpot workflow branching logic (if/then) to score leads into Hot, Warm and Cold tiers using these fields, and tell me which contact properties I'd need to create to support it.

02 MQL-to-SQL Handoff Notification

Thehandoff from marketing to sales shouldn't depend on someone remembering to check a list.

TRIGGER

Lifecycle stage changes to Marketing Qualified Lead, or lead score crosses your MQL threshold.

WORKFLOW LOGIC

Create an internal task for the deal owner with a follow-up SLA (e.g. contact within 24 hours). Send a Slack alert to the assigned rep and their channel. Log the handoff timestamp to a custom property for SLA reporting later.

CLAUDE PROMPT

Draft the internal task description and SLA copy for a HubSpot workflow that fires when a contact becomes an MQL. Keep it under 40 words and state the follow-up window clearly.

03 Stale Deal Re-engagement

Deals rarely die outright. They go quiet. Catch that before it becomes a quarter-end surprise.

TRIGGER	Deal stage unchanged for 14 days (adjust to your sales cycle).
WORKFLOW LOGIC	Notify the deal owner internally. Create a follow-up task. Optionally enrol the contact in a short automated check-in email if no rep activity is logged within 48 hours of the alert.

CLAUDE PROMPT

Write three short check-in email variants: formal, casual, direct, for a deal that has gone quiet for two weeks in [stage name], to be triggered from a HubSpot workflow.

04 Lifecycle Stage Correction

Fix the mismatches between deal stage and contact lifecycle stage before they distort every report downstream.

TRIGGER	Deal marked Closed Won but contact lifecycle stage is not Customer, or any other stage mismatch you define.
WORKFLOW LOGIC	Auto-correct the lifecycle stage property where the mapping is unambiguous. Where it isn't, flag the record to RevOps for manual review rather than guessing.

CLAUDE PROMPT

Here is how our lifecycle stages map to deal stages: [list your mapping]. Write the workflow branching logic to detect and auto-correct mismatches between deal stage and contact lifecycle stage, and flag anything it can't resolve automatically.

05 Cold Contact Re-engagement

Keep the database honest. A contact who hasn't opened an email in 90 days isn't a lead, they're a liability to your sender reputation.

TRIGGER	No email engagement in 90 days, lifecycle stage is Subscriber or Lead.
WORKFLOW LOGIC	Send a single re-engagement email offering an easy way to confirm continued interest. If no response within 14 days, move the contact to an unengaged status or suppress from future sends.

CLAUDE PROMPT

Write a single re-engagement email, subject line and body under 100 words, for contacts who haven't opened an email in 90 days, offering an easy way to confirm they still want to hear from us.

06 Deal Risk Flagging

Surface deals that are losing momentum before they slip out of the quarter, not after.

TRIGGER	No logged activity (call, email, meeting) in 10 days on an open deal.
WORKFLOW LOGIC	Set a Deal Risk Level property with three tiers based on days since last activity and current stage. Escalate to the manager if the risk tier persists for a further 7 days.

CLAUDE PROMPT

Design a HubSpot property called Deal Risk Level with three tiers based on days since last activity and deal stage. Write the workflow logic to set it and escalate it if it doesn't clear.

07 Duplicate & Incomplete Contact Flagging

Catch messy or duplicate contacts before they pollute attribution and pipeline reporting.

TRIGGER	New contact created with a matching email domain and the same name to an existing record, or missing key firmographic fields.
WORKFLOW LOGIC	Flag likely duplicates for manual merge review rather than auto-merging. Flag records missing required fields (company, industry, lifecycle stage source) for enrichment.

CLAUDE PROMPT

Write the criteria I should use in a HubSpot workflow to flag likely duplicate contacts for manual review, based on email domain, name similarity and company match, without merging automatically.

08 Closed-Won Handoff to Customer Success

Give Customer Successfullcontextondayone,notarushedSlackmessage from the closing rep.

TRIGGER	Deal stage changes to Closed Won.
WORKFLOW LOGIC	Create a handoff task that pulls in deal amount, key stakeholders, and any commitments made during the sales process. Notify the CS owner. Enrol the contact in the onboarding sequence.

CLAUDE PROMPT

Write the fields and format for a Closed-Won handoff task in HubSpot that pulls in deal amount, key stakeholders and any special commitments made during the sales process, so Customer Success has full context in one place.

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NEXT STEP

Which of these would move the needle most for your revenue engine?

Eightworkflows will tidy the edges. Knowing which one to build first is a different question and it depends on where your revenue system is actually leaking.

TWO-MINUTE REVENUE SYSTEM AUDIT

See where the gaps actually are →

centralise.com/revenue-system-audit

Centralise is a revenue systems integrator for mid-market companies.
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