



# How HubSpot saved 100+ man-hours and centralized processes with low-code/no-code automation



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Founded in 2006, HubSpot is a customer relationship management (CRM) platform for growing companies.

HubSpot was in a state of hypergrowth and actively hiring across its 13 global offices. The existing onboarding process was highly manual and involved 50+ employees across 7 teams. These teams were also using 15 different tools and systems to manage this onboarding process.

Jasper Madrone, Technology Strategist at Hubspot, needed a more efficient and scalable way to onboard new hires, and a way to connect these apps for better collaboration organization-wide.

How did HubSpot save 100+ man-hours and centralize their processes? What results did Workato's solution deliver for the company?

Read on to learn the answers to these questions.

## Overview

Use case	Apps used	Key benefits
Use a centralized enterprise collaboration platform to track and manage the onboarding process from pre-hire to hired	<ul style="list-style-type: none"> <li>DocuSign</li> <li>Greenhouse</li> <li>An enterprise collaboration platform (ECP)</li> <li>Slack</li> <li>Workday</li> </ul>	<ul style="list-style-type: none"> <li>Internal systems usability score increased from <b>62 to 86 points</b></li> <li><b>68 hours</b> saved per month on new hire emailing (Emails sent reduced from <b>24 to 8</b> per hire)</li> <li><b>855 applications</b> automatically marked as hired within first 3 months of the integration</li> <li><b>71 hours</b> saved on task management</li> <li>Time to resolution for integration failures reduced from an average of <b>3 days to about 2 hours</b></li> <li><b>1,700 tasks</b> automatically closed on behalf of the Helpdesk team</li> </ul>

## The challenge

### Rapid scaling led to increased manual work for HR

At its hiring peak, HubSpot's HR teams had to onboard 200 hires per month, and had 20 to 30 tasks per new hire that needed to be done. This totaled up to about 4,000 - 6,000 tasks to complete, including emails to send out every single month.

In addition, these teams lacked a centralized place to track communications, integration failures, and team-specific tasks. They had no insight into inter-team dependencies, and integration failures caused delays of up to a week without clear directly responsible individuals (DRIs) for each part of the process.

The existing platform they were using did not meet critical functionalities that HubSpot needed. Some of these key functionalities included having a large set of connectors, security, access management, version control, and great UI/UX. They also struggled to enable and support integration builders organization-wide, including non-technical teams. Jasper knew that they needed to consolidate these tools into 1 centralized location, so that they could distribute the workload to the different teams in a more scalable and efficient way.

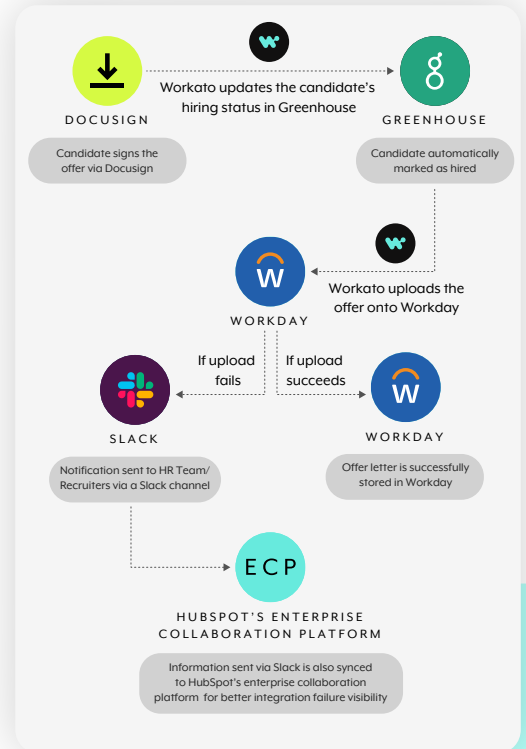
● The solution

### #1 - Connecting DocuSign, Workday, Slack, and the enterprise collaboration platform to facilitate the auto hire process

When a candidate signs their offer in DocuSign, Workato connects to Greenhouse on the backend, and automatically marks a new candidate as hired.

Once a new hire status is detected, Workato integrates Greenhouse with Workday to upload the offer letter directly into their employee profile.

When an offer fails to upload into Workday, Workato triggers a Slack notification on the backend with a summary of the issue, resources required, links to the relevant record, and employees responsible for getting the problem resolved, which is sent to HR or the recruiter to resolve the issue. This information is synced with HubSpot's enterprise collaboration platform for better integration failure visibility.



### #2 - Building a custom Workato connector to leverage on HubSpot APIs to distribute work laptops to new hires

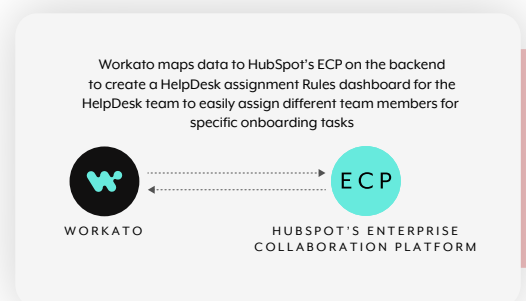
With Workato integrated into the various systems used for new hire onboarding, the platform picks up on candidates that are ready for pre-boarding, and sends an automated email via HubSpot to request for their preferred shipping / working address. Once the candidate submits the information, Workato syncs the information into the HelpDesk team's dashboard in the enterprise collaboration platform, and automatically sort the candidates by new hire class (For e.g. Class of 21' new hires).

From there, the Helpdesk team can send the appropriate email with the laptop tracking information to the new hires, at the click of a button.



### #3 - Leverage Workato and HubSpot's enterprise collaboration platform to manage task assignment

The HubSpot IT team created a HelpDesk Assignment Rules dashboard by leveraging Workato to map data to HubSpot's enterprise collaboration platform on the backend. This dashboard allows the HelpDesk team to determine which team member to assign specific onboarding tasks to, based on a set rule of configuration like office location and region. This integration also allows the HelpDesk team to automatically assign a team member for specific onboarding tasks.



## Huge time savings, manual work eliminated

After implementing Workato, the business impact and return on investment for HubSpot was evident.

- Internal systems' usability score increased from 62 points to 86 points
- 68 hours saved per month on new hire emailing
- Communications are more streamlined: No. of emails sent to new hires reduced from 24 to only 8 emails
- 71 hours saved on task management: Within the first 3 months of implementation, 855 applications were automatically marked as hired
- Time to resolution for integration failures reduced from an average of 3 days to about 2 hours
- Automatically closed 1,700 tasks on behalf of HelpDesk team

Madrone elaborates:

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[Workato] really opened up the ability for our leadership team to get a much more holistic view of the new hire onboarding process. The feedback we received was just so positive across the board and it really means a lot to me to see how happy we can make our co-workers through the use of tools like Workato.



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Now, whenever any new hire data attributes are changed, the information is automatically synced to Snowflake. In addition, with a centralized enterprise collaboration platform for onboarding, Jasper is able to generate insightful visualizations to present important data like total hires in a given month, how many notifications are being sent, the breakdown of which teams own which tasks and the statuses of them, showing the percentage of tasks that were closed out using automation rather than requiring a person to do it, and more.

Schedule a demo

Interested to see what you can do with Workato? [Schedule a demo with one of our automation experts.](#)