

## WORKFLOW EVIDENCE REPORT

# Lead-to-Booking Workflow Validation Report

HubSpot CRM + Make + Calendly + Microsoft 365

This report packages the supplied screenshots into a clean validation narrative. It shows how an inbound enquiry is captured through a HubSpot form, routed through a qualified lead path, written into HubSpot, followed up automatically, and advanced after a discovery call is booked.

HubSpot form capture

Qualified lead routing

CRM record creation

Automated follow-up

Calendly booking handoff

Deal stage progression

## End-to-end overview

Scenario 1 shows the path from form submission to follow-up.

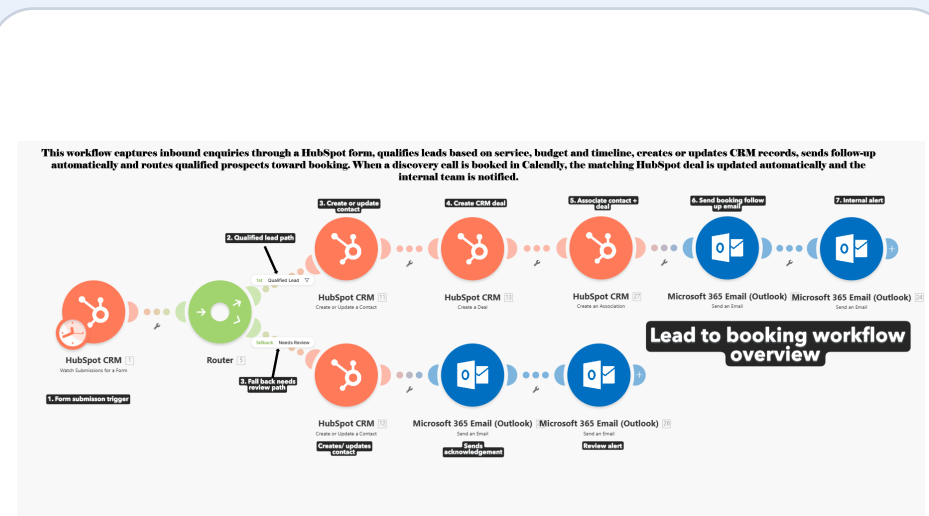


Figure 1. Scenario 1 overview showing the HubSpot submission trigger, qualified lead route, CRM updates, follow-up email, and internal alert.

# Executive summary

## Objective

Validate that the workflow captures an inbound enquiry, qualifies higher-intent leads, creates or updates the correct HubSpot records, and advances the deal automatically after a booking.

## Systems in scope

HubSpot CRM and Forms, Make, Calendly, and Microsoft 365 email.

## Test lead shown in evidence

Sarah Demo. Most screenshots reference the company name Growthsparks in the CRM and email evidence.

## Qualified lead rule shown

Budget must be GBP 2,000-4,999 or GBP 5,000+, and timeline must be within 30 or 60 days.

## Validation outcome matrix

Validated outcome	What the evidence shows	Status
Inbound enquiry captured	HubSpot form records service, budget, timeline and the problem statement.	PASS
Qualified route logic applied	Router filter sends higher-intent leads into the qualified path.	PASS
CRM records created and linked	Contact and deal are visible in HubSpot and linked together.	PASS
Immediate follow-up sent	Lead email and internal alert both show immediate timestamps.	PASS
Booking updates deal stage	After booking, the matching deal moves to Presentation Scheduled.	PASS

## Important note on the supplied screenshots

One supplied intake screenshot shows the company name BrightPeak Dental, while later CRM and email screenshots show Growthsparks. That suggests the evidence package likely combines screenshots from slightly different test iterations. The workflow behaviour itself still appears consistent across the supplied proof.

# Scenario 1: enquiry capture and qualified lead path

The first scenario listens for a new HubSpot form submission, evaluates whether the lead is strong enough to enter the qualified path, creates or updates the contact, creates the deal, links the records, sends a lead-facing booking email, and alerts the internal team.

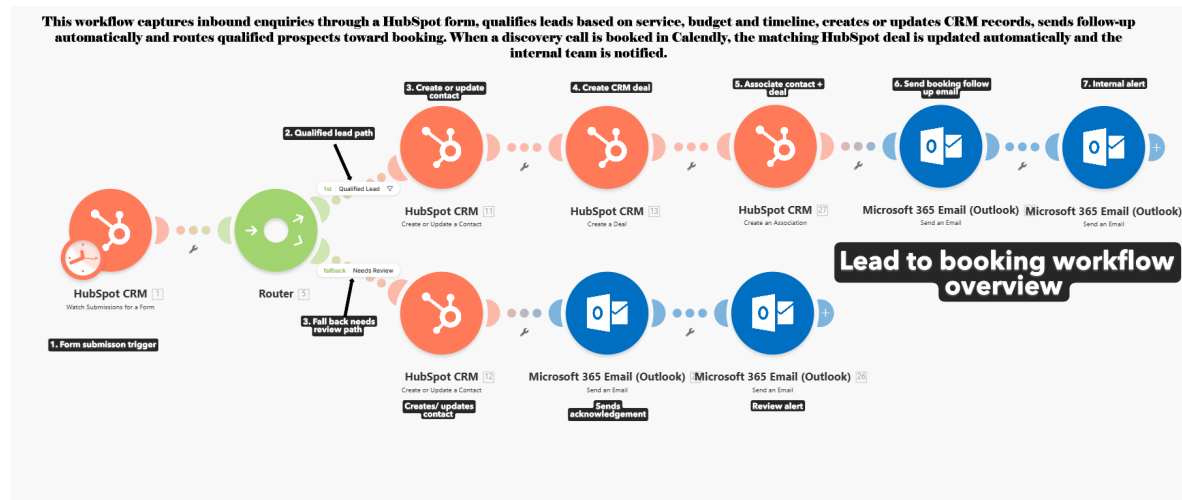


Figure 2. End-to-end view of the first Make scenario, including the HubSpot trigger, router, qualified path, fallback path, CRM updates, and both outgoing emails.

Trigger. HubSpot form submission starts the workflow.

Decisioning. Router splits qualified leads from needs-review enquiries.

Outputs. Qualified leads receive both CRM updates and immediate emails.

# Intake and qualification evidence

The screenshots below show what data enters the workflow and how the qualified route is determined.

## Inbound form captured

We'd love to hear from you! Please fill out the form and we'll get back to you as soon as possible.

First Name: Sarah, Last Name: Demo

Email: sarah@gpr

Company Name: BrightPeak Dental

Website URL: brightpeakd

Service Needed: CRM automation

Monthly Budget: £2,000-£4,999

Timeline: Within 30 days

Biggest Problem: Leads come in but nobody follows up properly

Submit

Figure 3. HubSpot discovery form capturing contact details, company name, website, service needed, budget, timeline, and the prospect's stated problem.

## Qualified route filter

**1. Filter name**

**2. Budget must be £2000+**

**3. Timeline must be near term**

**Qualified route filter:**

This filter only sends high intent leads into the qualified workflow

Budget uses OR logic within the same group

Timeline also uses OR logic within its own group

Groups are combined with AND so only strong leads pass

Figure 4. Router filter for the qualified path. The evidence labels show OR logic inside each budget or timeline group, with groups combined by AND.

# CRM records created by the qualified route

Once the lead passes the qualification rules, the workflow creates or updates the contact and creates the associated deal in HubSpot.

## HubSpot contact created

The screenshot displays the HubSpot contact record for Sarah Demo. The interface includes a sidebar with navigation options like Home, Contacts, Deals, Forms, Marketing Emails, Segments, Dashboards, and Campaigns. The main content area shows the contact's key information, including email (sarah@gn), phone number, and lead status. A timeline of activities is visible, with several items highlighted by callouts:

- 1. Qualified Lead record in HubSpot**: Located at the top of the contact record.
- 2. Form submission logged on the timeline**: A form submission for 'GrowthSpark Discovery Call' on March 21, 2020.
- 3. Contact created via Forms**: A note indicating the contact was created via the form submission.
- 4. Deal created automatically by the integration**: A deal 'Growthsparks-Discovery Call' created by integration on March 21, 2020.
- 5. Deal moved to the Qualified To Buy stage**: The deal's stage is updated to 'Qualified To Buy'.
- 6. Company record associated to the contact**: The contact is linked to the 'Growthsparks' company.
- 7. Associated deal visible on the contact record**: The deal is listed in the 'Deals' section of the contact record.

Figure 5. HubSpot contact record for Sarah Demo showing form submission, contact creation, associated company, and associated deal.

## Deal in Qualified To Buy

The screenshot displays the HubSpot deal record for 'Growthsparks-Discovery Call'. The interface shows the deal's details, including the amount, close date, and deal stage. The deal stage is 'Qualified To Buy'. The deal is linked to the contact 'Sarah Demo'. The timeline of activities is visible, with several items highlighted by callouts:

- 1. HubSpot Campaign created for the opportunity**: A campaign is created for the deal.
- 2. Deal stage is set to Qualified To Buy**: The deal stage is updated to 'Qualified To Buy'.
- 3. Timeline shows deal moved to Qualified To Buy**: The deal's stage is updated to 'Qualified To Buy' on the timeline.
- 4. Timeline confirms the deal was created by the integration**: The deal is created by integration on the timeline.
- 5. Associated company is linked to the deal**: The deal is linked to the 'Growthsparks' company.

Figure 6. HubSpot deal record created by the integration and placed in the Qualified To Buy stage with the associated contact linked.

# Immediate follow-up and internal notification

The qualified path sends two emails immediately: one booking email to the prospect and one internal alert to the business inbox.

## Lead-facing booking email

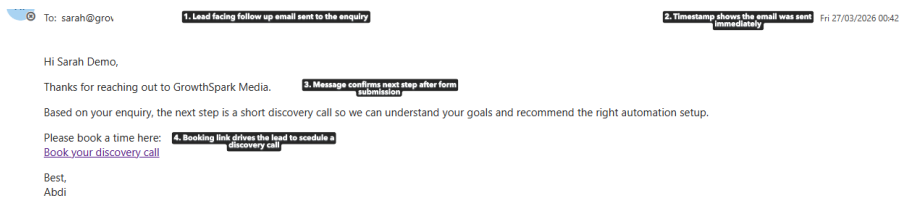


Figure 7. Lead-facing email sent immediately after qualification, inviting the prospect to book a discovery call.

## Internal alert email

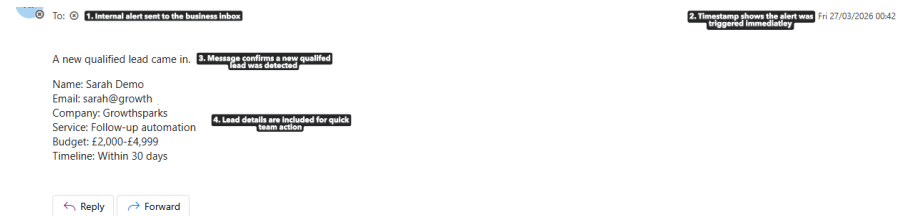


Figure 8. Internal alert email sent at the same time, summarising the lead for quick team action.

# Scenario 2: booking handoff and deal advancement

The second scenario detects the Calendly booking, pulls the invitee details, finds the matching deal in HubSpot, updates the deal stage, and sends an internal booking email.

## Booked event detected

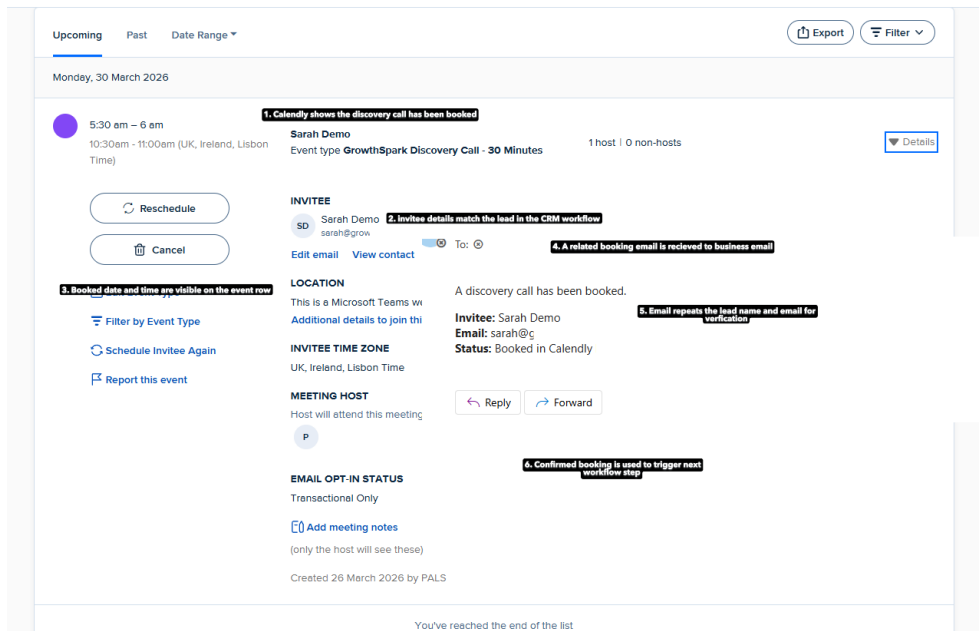


Figure 9. Calendly booking evidence showing the scheduled discovery call, matching invitee information, and related booking email.

## Scenario 2 workflow



Figure 10. Overview of the second Make scenario that handles the booked event.

## Deal stage updated



Figure 11. HubSpot activity history showing the deal move to Presentation Scheduled.

**Conclusion.** Based on the supplied screenshots, the lead-to-booking workflow appears to validate successfully end-to-end: enquiry captured, qualified, written into HubSpot, followed up automatically, and advanced after booking.