SK DIGITAL SOLUTION · WORKSHEET

HubSpot workflow exit rules

Decide how each workflow ends, document the criteria and test them before activation.

Companion to the article “HubSpot Workflow Goals: Stop Nurturing Contacts Who Already Converted” · English version · Status: 17 November 2026

1. Choose the exit mechanism

Situation	Mechanism in HubSpot	Note
The contact reached the outcome the workflow was built for (e.g. meeting booked, SQL)	**Workflow goal (contact-based workflows)**	Unenrolled before the next action; checked at enrollment. Conversion rate needs a send-email action.
The contact should never be in this workflow (customers, competitors, key accounts)	**Suppression segment**	Enrolled contacts who join the segment are unenrolled immediately.
Company, deal, ticket or quote workflow should stop	**Unenrollment triggers**	Records meeting the triggers before enrollment are not enrolled later.
A contact moves from one sequence to another	**Setting: unenroll from other workflows**	Applies only at the moment of enrollment, not afterwards.

2. Workflow inventory (to be completed by your team)

Workflow	Object	Business outcome / goal	Exit mechanism	Criteria (property or event)	Data source & update timing	Owner

3. Pre-activation test (to be completed with test contacts)

Test case	Expected result	Pass	Fix needed / notes
Contact already meets the goal before enrollment	Not enrolled	☐	
Contact meets the goal between two email steps	Unenrolled before the next email	☐	
Contact joins the suppression segment while enrolled	Unenrolled immediately	☐	
Goal property is set by an integration or form	Value arrives before the next send	☐	
Contact could re-enroll after leaving	Re-enrollment rules are intended and documented	☐	
Goal criteria were edited after launch	Change and date documented next to the workflow	☐	

4. Review questions

- Does the goal describe a result sales can act on, not an engagement activity?
- Can the goal condition change back (e.g. a manually reset lifecycle stage)?
- Who reads the goal conversion rate, and with which sales feedback is it compared?
- When will the exit rules be reviewed after changes to forms, properties or integrations?

Sources (checked 17 November 2026): HubSpot Knowledge Base – “Use goals in contact-based workflows”, “Set unenrollment triggers in company-, deal-, ticket- and quote-based workflows”, “Manage your workflow settings”. Features and editions can change; confirm them in your portal. Empty fields are working fields for your team, not test results.