WebGuruz

PetroSuites

CASE STUDY

FORMS AND WORKFLOWS

PRESENTED BY :

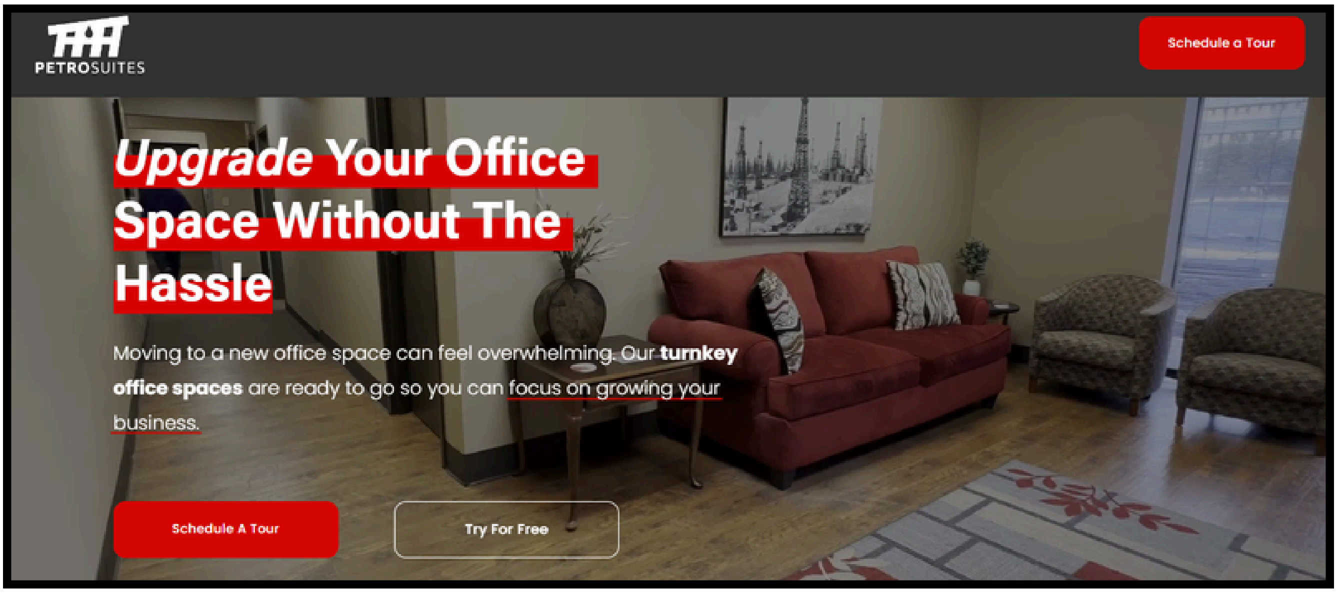
WebGuruz

(+91) 708 723 3361

webguruz.in

About PetroSuites

PetroSuites provides ready-to-move-in office spaces and virtual offices across Midland, Texas. Their fully furnished workspaces, conference rooms, and membership plans cater to small businesses and professionals seeking flexibility and speed.



With affordable rates and a seamless transition process, PetroSuites eliminates the common challenges of setting up a new office. Their turnkey solutions are designed to help businesses hit the ground running, offering everything from high-speed internet to fully equipped meeting rooms, all without the long-term commitment of traditional office leases.

S.no	PetroSuite Forms
1	Schedule A Tour - PetroSuite
2	PetroSuites Application
3	Free Space
4	Free Trial membership - PetroSuites
5	PetroSuites Business Growth Plan form (Separate page)
6	PetroSuites Business Growth Plan form (Accounting)
7	PetroSuites - NPS Test Form
8	Schedule A Virtual Tour - PetroSuites
9	Newsletter Sign up - PetroSuites
10	Free Trial PetroSuites (Conference room)
11	PetroSuites Business Growth Plan form (Services page)
12	PetroSuites Reference Check Form
13	PetroSuites Temp Survey
14	PetroSuites Business Growth Plan form (Legends Gym)
15	PetroSuites Business Growth Plan form (IT Helpdesk)
16	Virtual Office Virtual Tour - PetroSuites
17	Virtual Office Inquiry - PetroSuites
18	Free Trial PetroSuites (Office for a day)
19	Free Trial PetroSuites (Home page)
20	Director of Operations - PetroSuites Application Form 1
21	Director of Operations - PetroSuites Application Form 1
22	Director of Operations - PetroSuites Application Form 1 O Ga
23	PS Health Insurance Guide (TCTA) (Not in use)
24	PS IT Guide (TCTA) (Not in use)
25	PS Gym InBody Scan (TCTA) (Not in use)
26	PS Accounting Guide (TCTA) (Not in use)
27	PS - Director Application - Form 2
28	PS Referral Form
29	Free Trial membership - PetroSuites (Not in use)
30	Ideal Team Player Self Assessment

Form 1: Schedule A Tour - PetroSuites

This form is used on the PetroSuite website on the following links:
1. https://www.petrosuites.com/schedule-a-tour-redirect
2. https://www.petrosuites.com/schedule-a-tour

On the submission of this form workflow [1] is triggered (this workflow is supposed to set the contact type as a "PetroSuites" contact by updating the value with "PS Lead Value"). Will create a deal in the PetroSuites pipeline the Pipeline has the following stages:

Pipeline Name: PS Member Stages:

1) Lead
2) Contact Made
3) Tour Scheduled
4) Tour Completed
5) Application Sent
6) Application Returned
7) References Checked
8) Qualified to Buy
9) Quote Sent
10) First Payment Secured (Closed Won)

11) Stalled

12) Follow Up

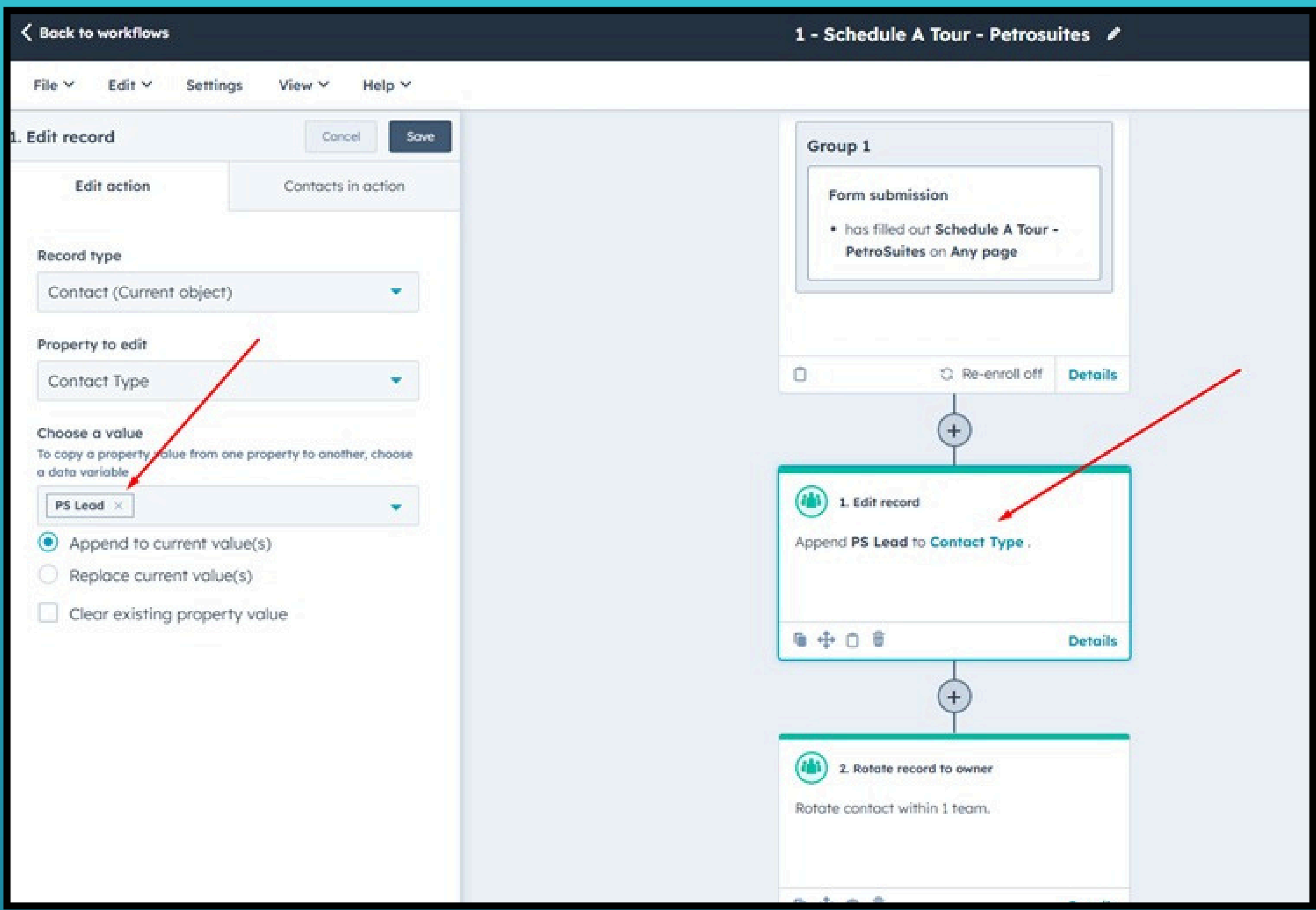
13) Follow Up Apex

14) Contract Renewed

15) Closed Lost

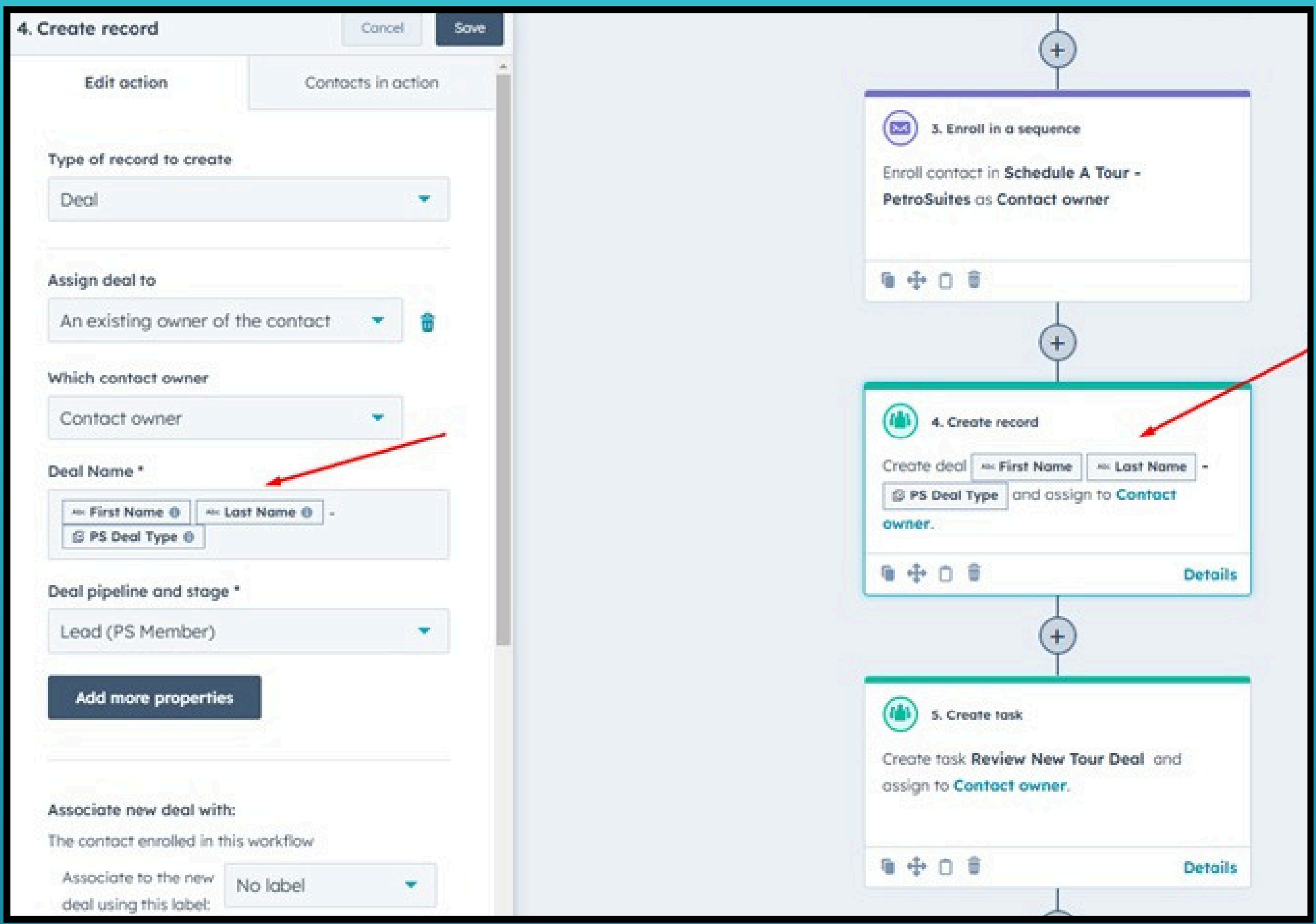
STAGE NAME	DEAL PROBABILITY	CONDITIONAL STAGE PROPERTIES
Lead	15%	
Contact Made	20%	
Tour Scheduled	25%	
Tour Completed	30%	
Application Sent	30%	
Application Returned	70%	
References Checked	80%	
Qualified to Buy	80%	
Quote Sent	90%	
First Payment Secured	Won	
Stalled	50%	
Follow Up	20%	
Follow Up Apex	20%	
Contract Renewed	Won	
Closed Lost	Lost	

Schedule A Tour - Petrosuites workflow:

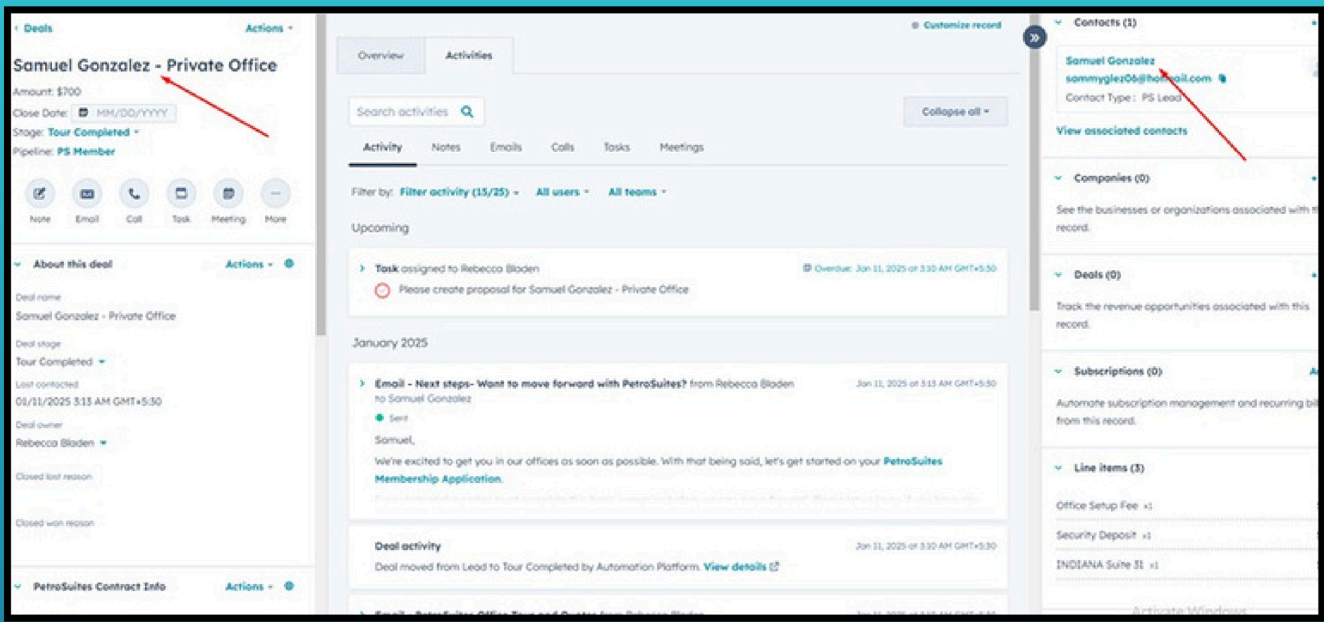


Assign an owner from the ("PS Contact Owner") team and initiate a sequence. In this sequence, an email with a meeting link and an explanation would be sent to the contact.

After completing this process, create a deal in the "PS Member Pipeline" with the contact's name, set it to the "Lead" stage, and also associate the contact with the deal. Lastly, Create a task “Review New Tour Deal” to assign the owner.

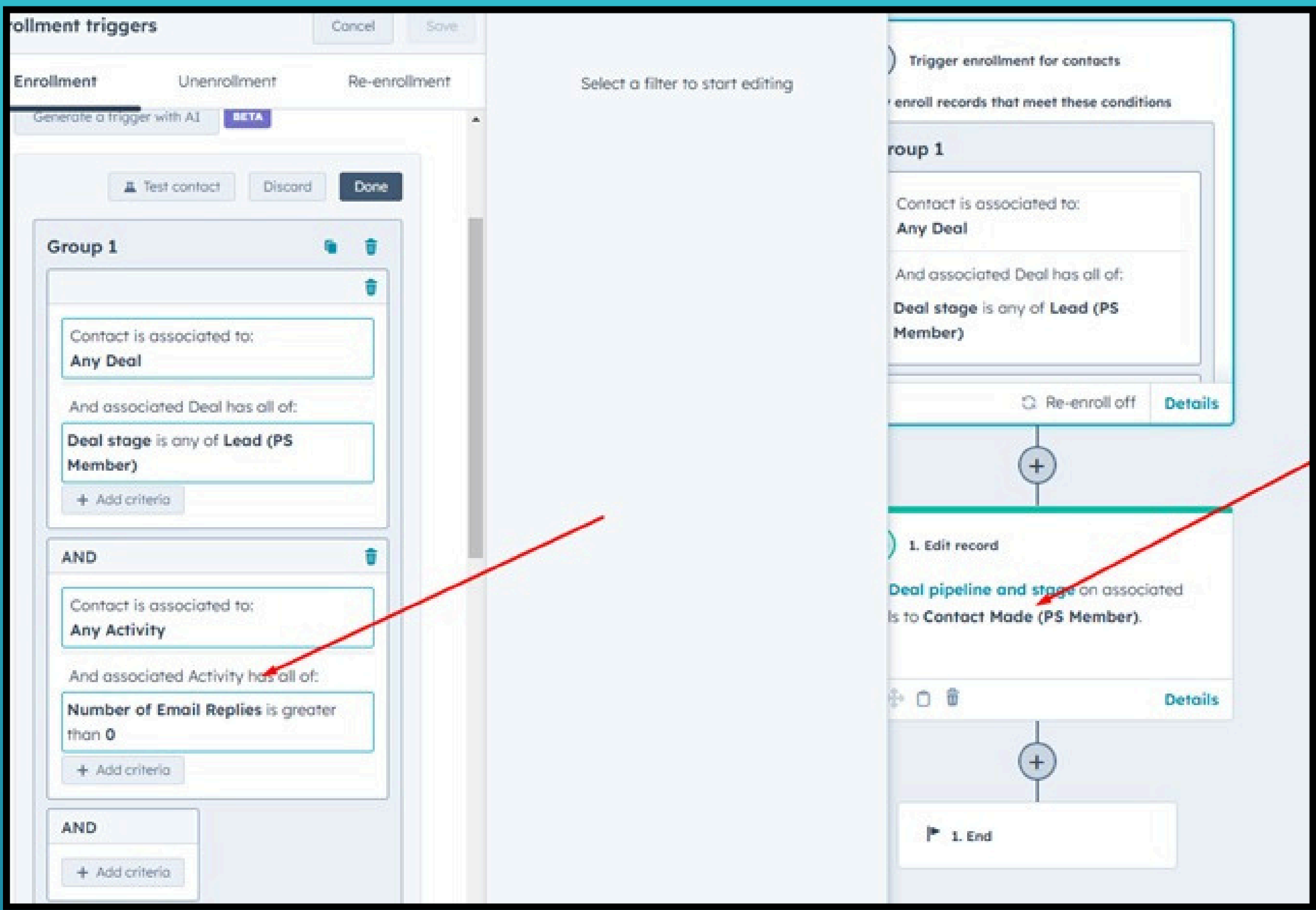

4. Create record
Cancel
Save
Edit action
Contacts in action
Type of record to create
Deal
Assign deal to
An existing owner of the contact
Which contact owner
Contact owner
Deal Name *
First Name
Last Name
PS Deal Type
Deal pipeline and stage *
Lead (PS Member)
Add more properties
Associate new deal with:
The contact enrolled in this workflow
Associate to the new deal using this label:
No label
3. Enroll in a sequence
Enroll contact in Schedule A Tour - PetroSuites as Contact owner
4. Create record
Create deal First Name Last Name - PS Deal Type and assign to Contact owner.
Details
5. Create task
Create task Review New Tour Deal and assign to Contact owner.
Details

Associate contact with the deal in the below Image

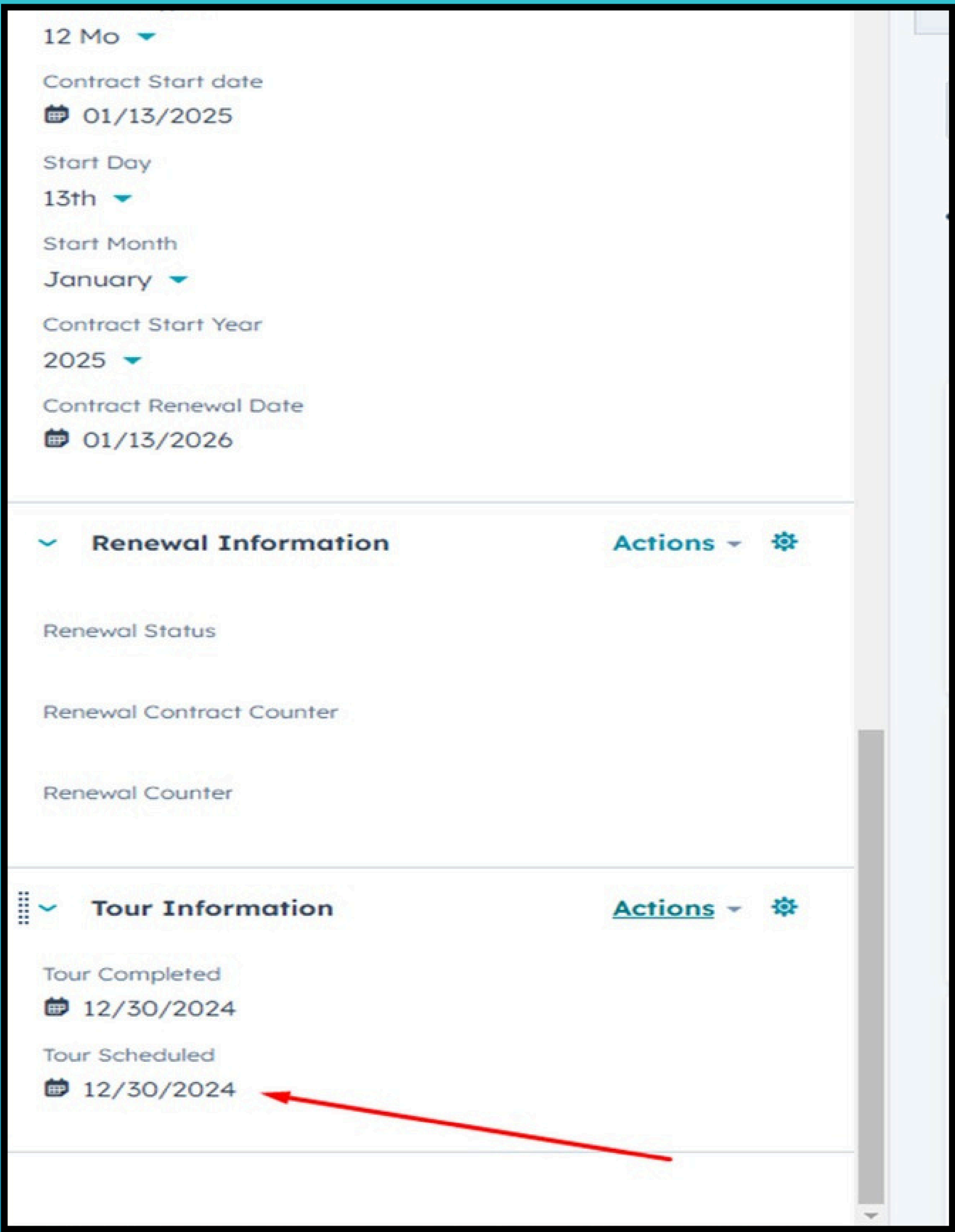


This workflow [2] would be triggered once a user replies to an email sent in the previous workflow [1]. Upon triggering, update the deal stage from "Lead" to "Contact Made."

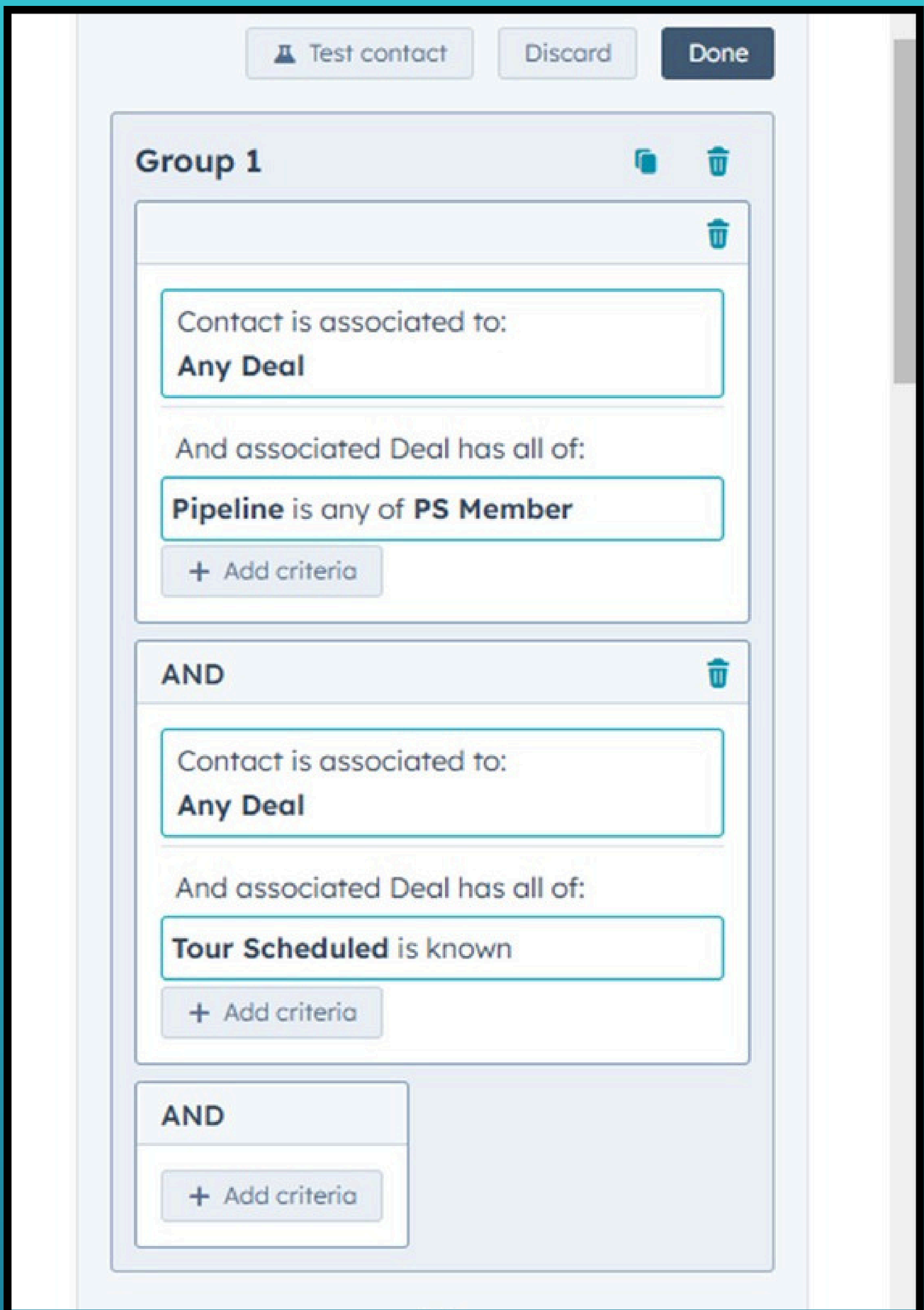
Workflow 2: PS Member Pipeline automation | Move Deal Made to Contact



Once the deal owner adds Tour Date in the tour information workflow[3] will be triggered.



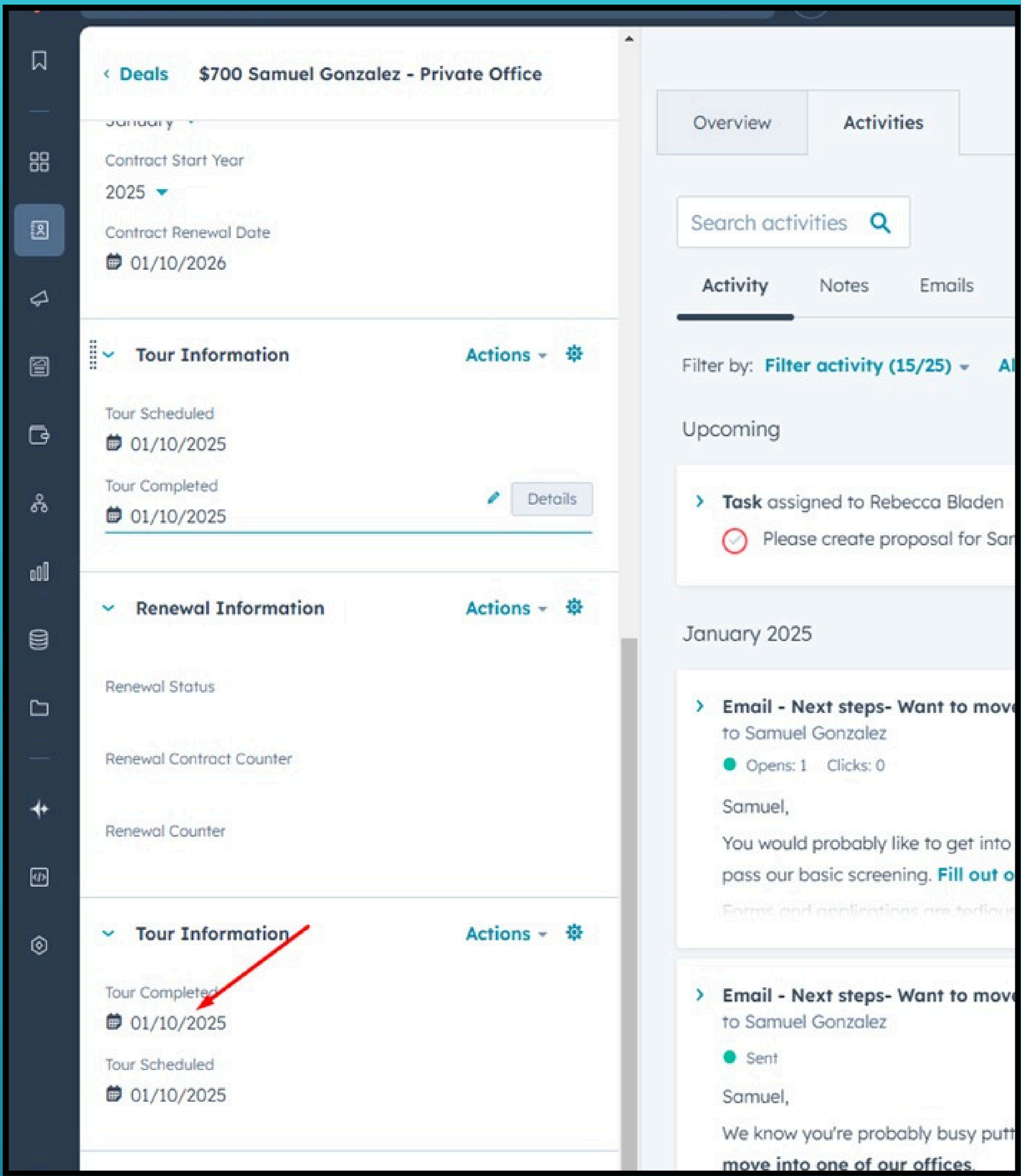
Workflow3:PS | Move Deal to Tour Scheduled



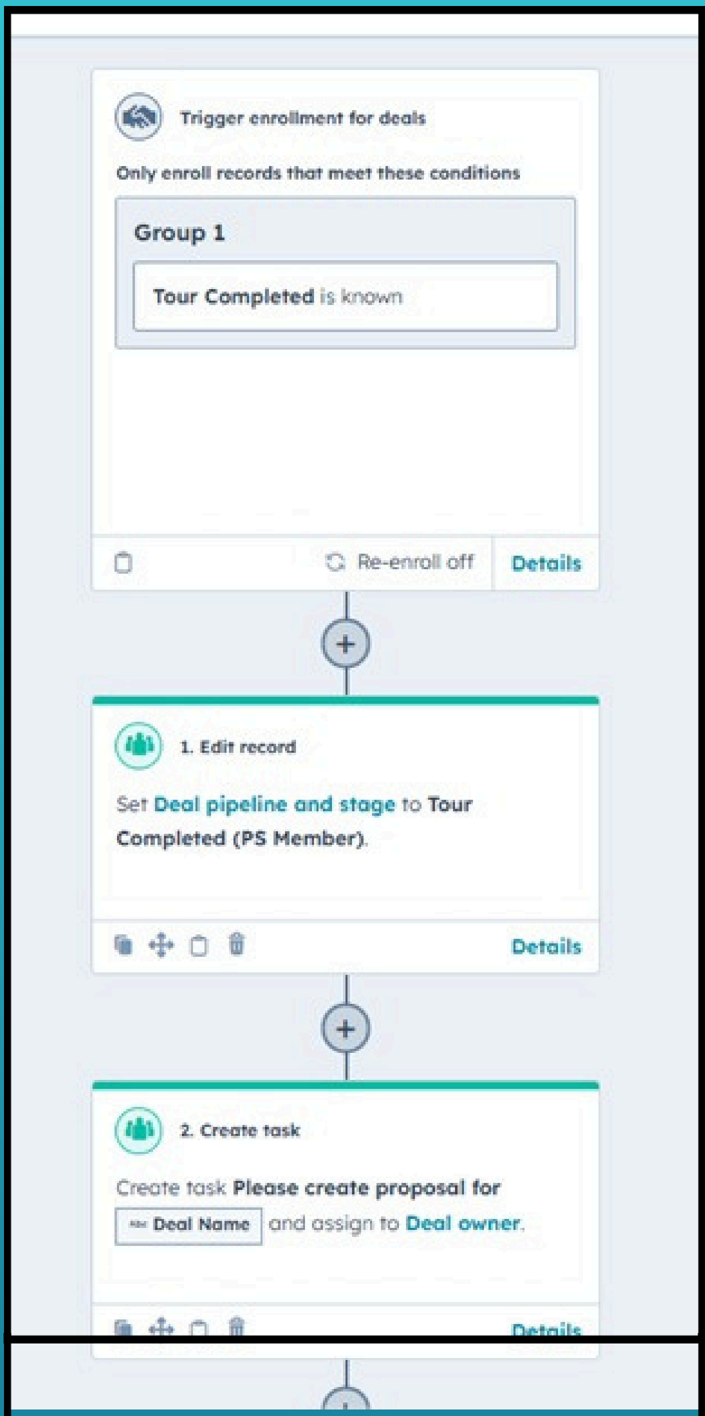
In this workflow, if the user books a meeting with the owner using the link sent in the first workflow [1], then the owner confirms the meeting and updates the deal property **Tour schedule**

Then triggered the workflow and the deal goes to **Contact Made to Tour Scheduled Stage.**

When the Deal Owner completes the tour Workflow [4] will be triggered.

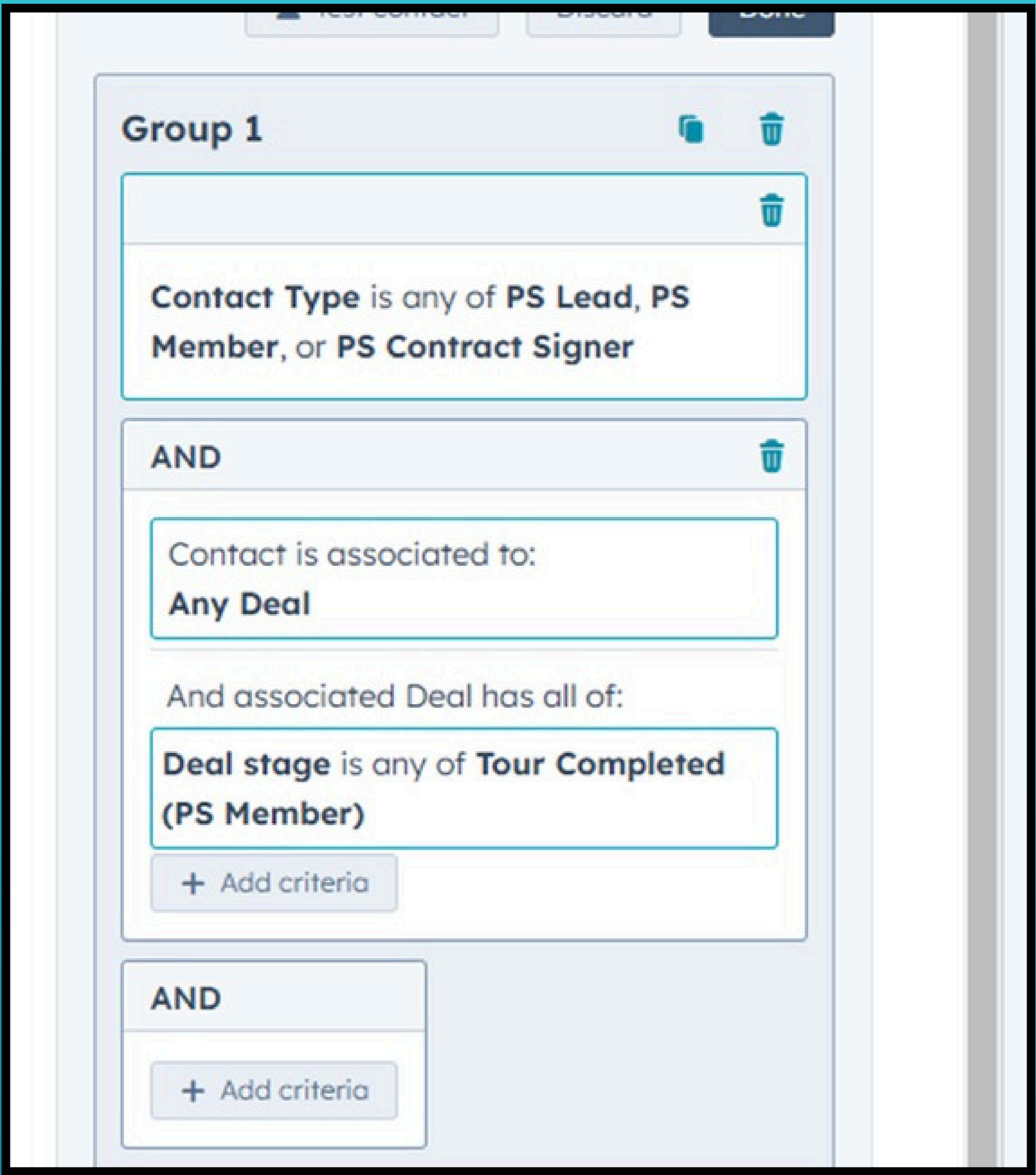


Workflow 4: PS I Move Deal to Tour Completed When the Deal Owner completes the tour, the deal stage should update from "Tour Scheduled" to "Tour Completed," and a task should be created for the owner with the name "Please create a proposal following the tour."

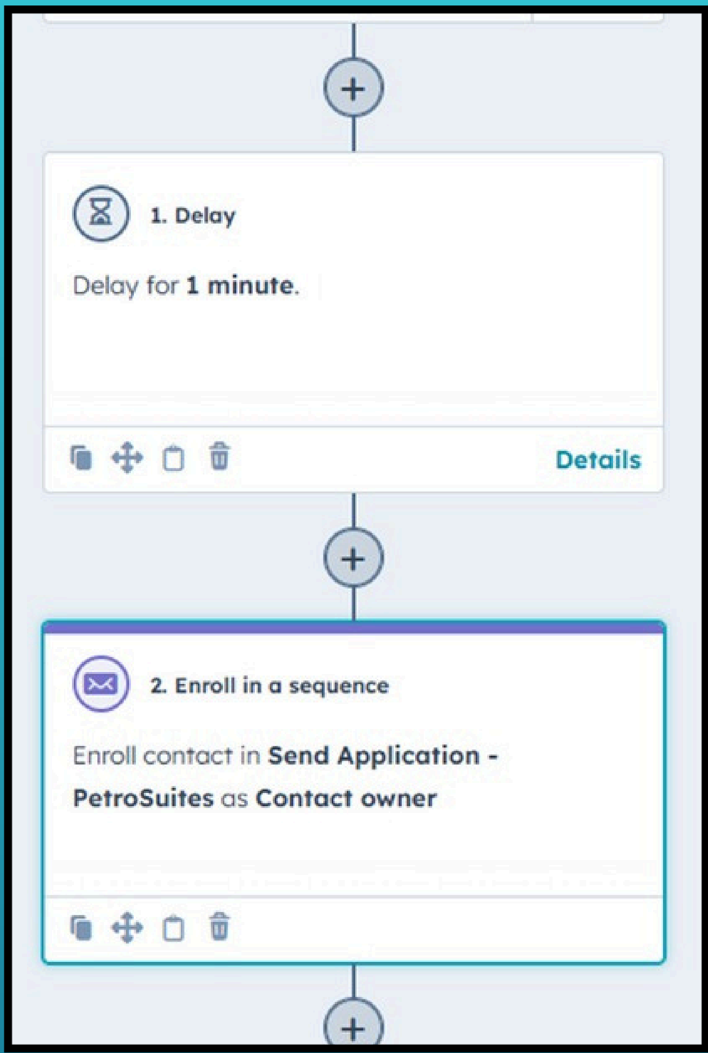


After Tour Completion send an application form to contact in the next workflow [5]

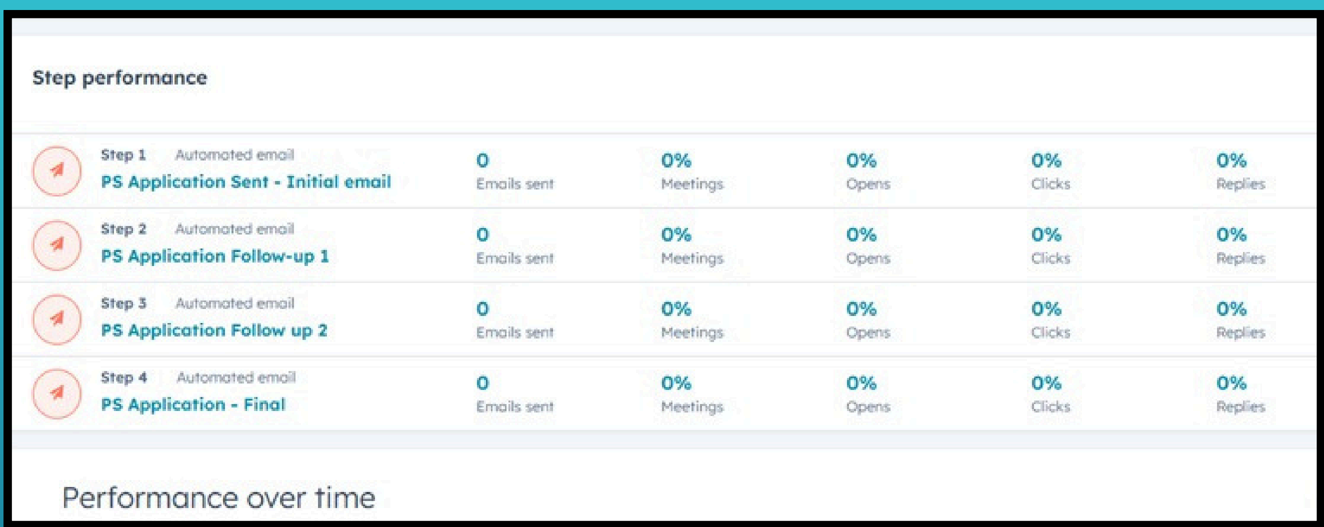
Workflow 5: PS I Send Application Email



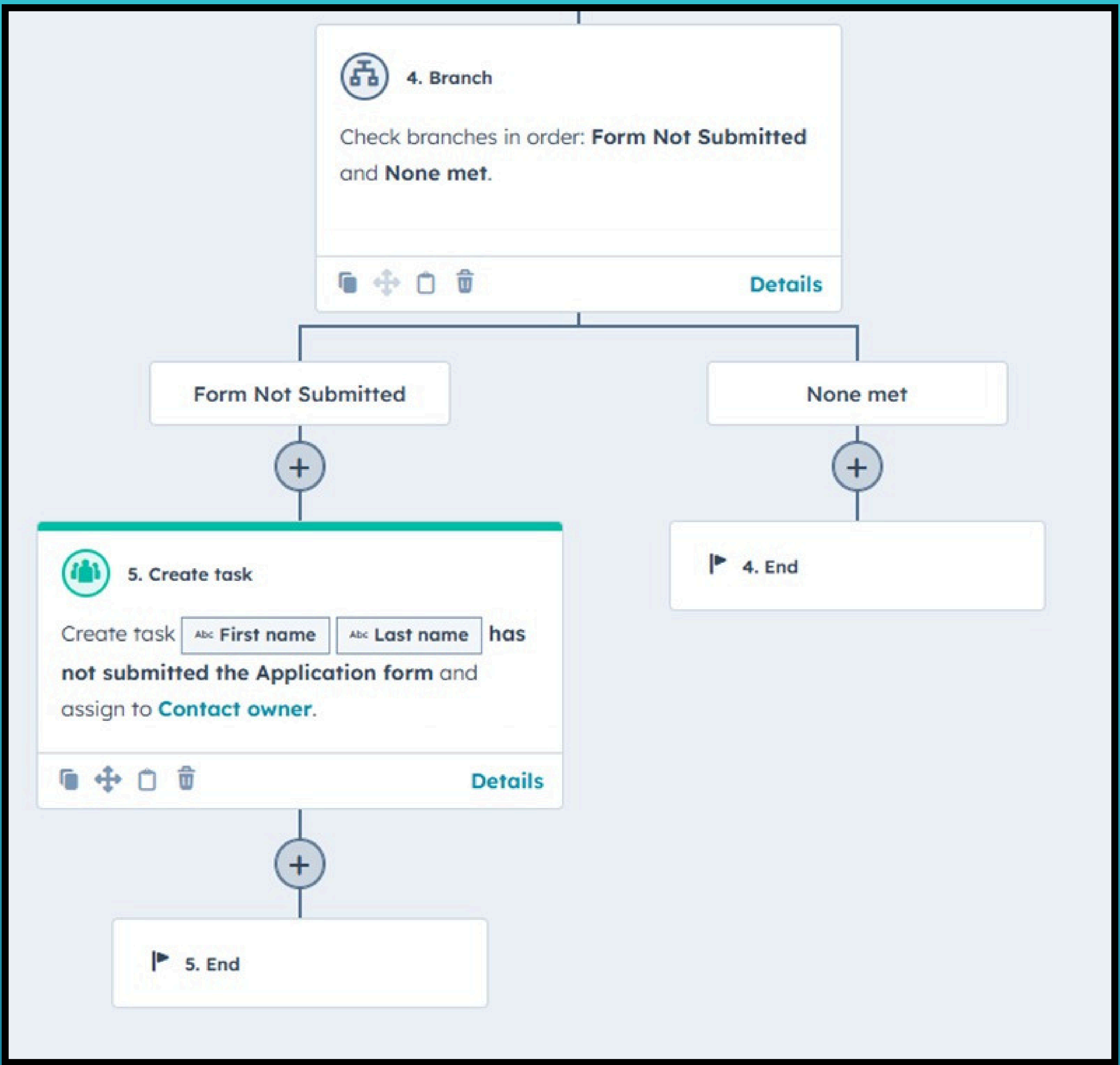
If the "Contact Type" property of a contact matches any of these three types, a sequence(An email is sent as part of the sequence, which includes a form.) is triggered and sent to the contact again.



This sequence consists of four steps, including sending the Application Form to the enrolled contact.



A 7-day delay has been added after sending the email containing the Application Form to the contact. If the form is not submitted within this period, a task is created and assigned to the owner. After the email is sent, the owner manually updates the deal stage to "Application Sent."

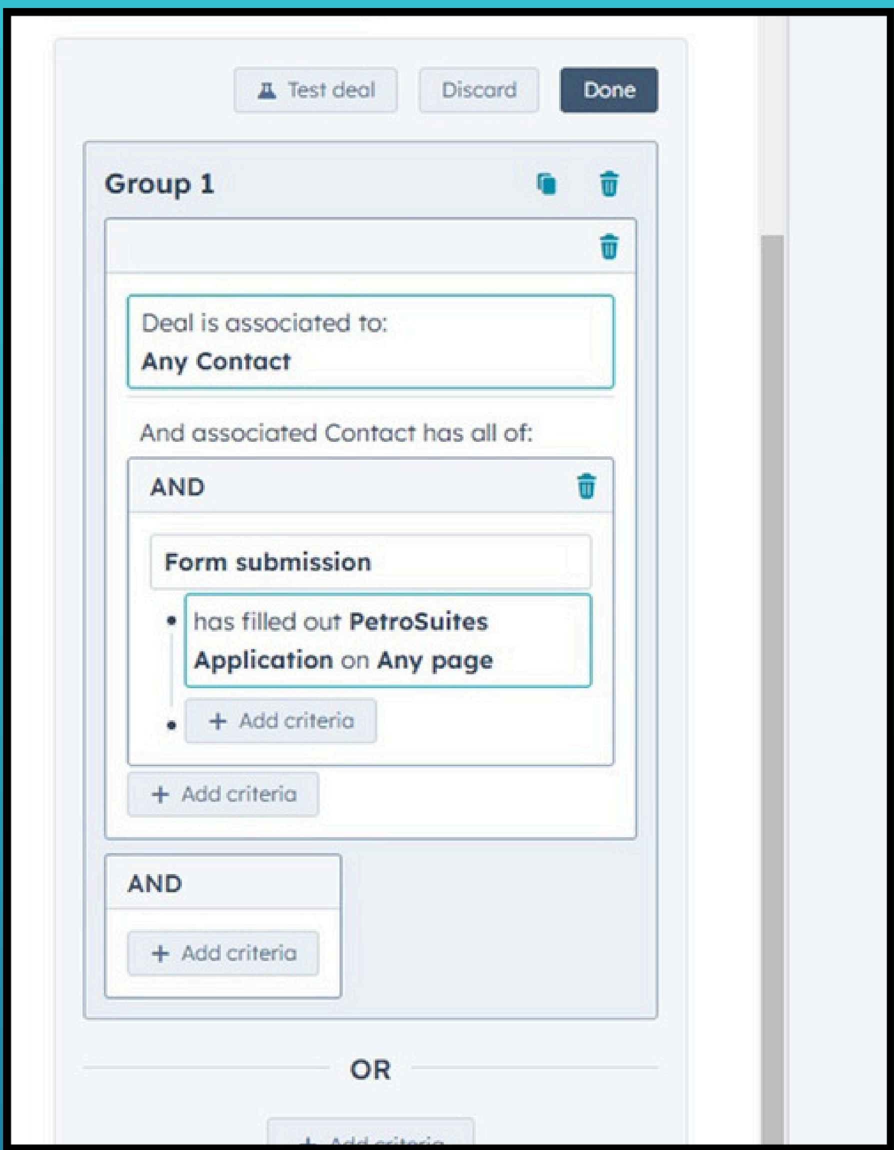


Form No: 2 => PetroSuites Application Form

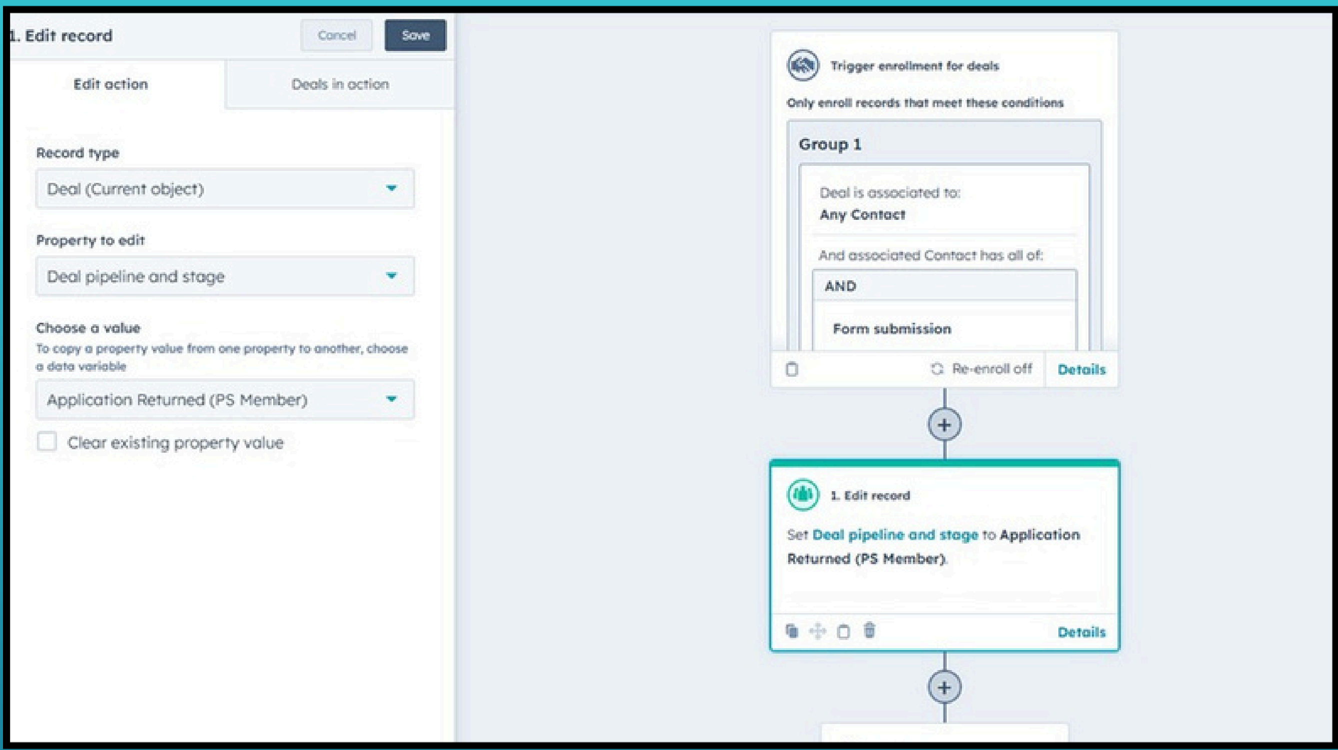
This Form is used in the Below Workflows

5 - PS | Send Application Email [5] 6 - PS | Move Deal to Application Returned [6] 7 - PS | Create and Associate Reference Contacts after Form Submission [7] Sequence 101290872 automation - Wed Jul 17 2024 19:12:54 GMT+0200 PS | Move Deal to Application Returned

Workflow 6: 6 - PS | Move Deal to Application Returned



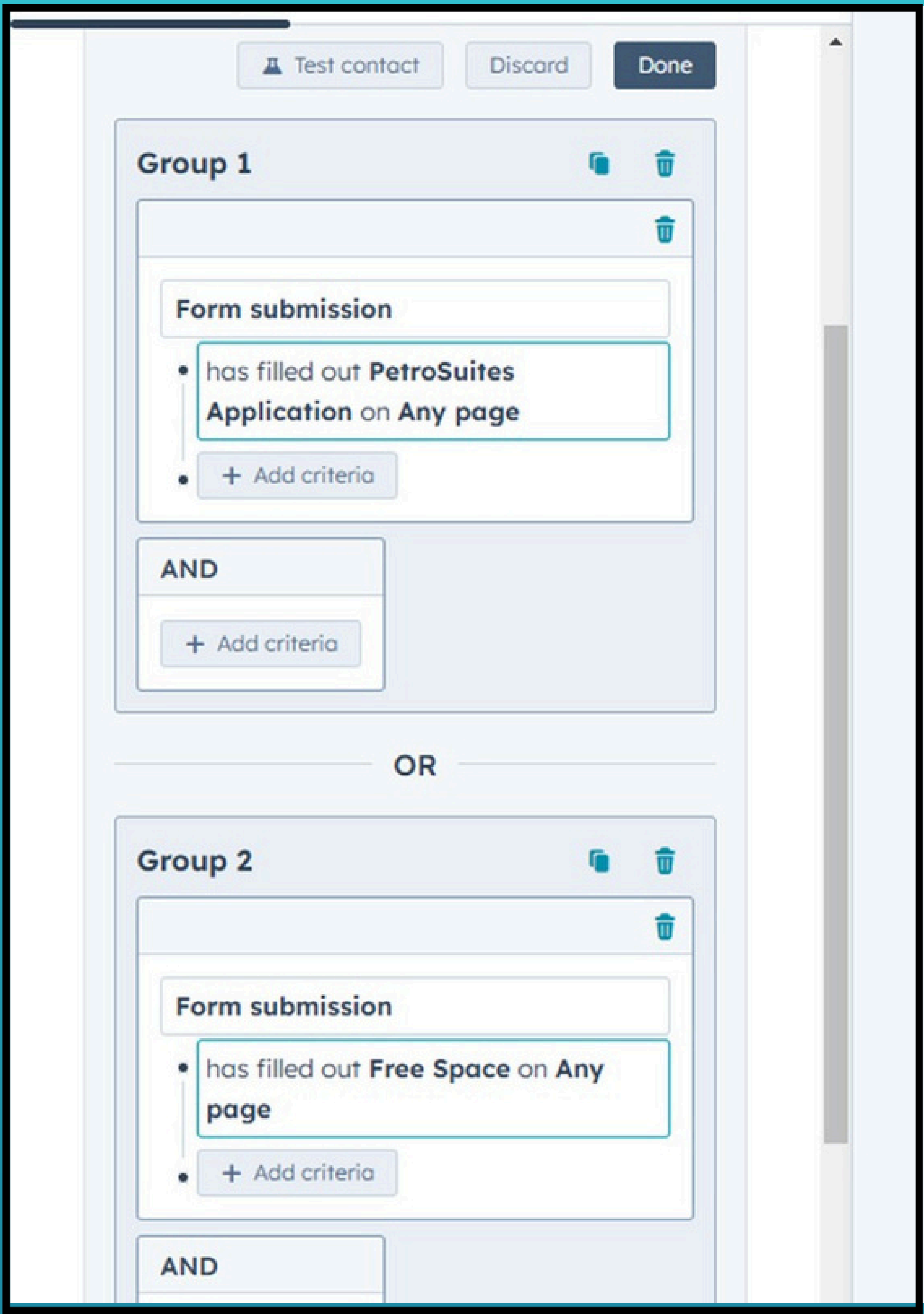
When the associated contact with the deal completes the form, the DealStage is updated from "Application Sent" to "Application Returned."



After filling out the form [2] then trigger the workflow.

Workflow 7: 7 - PS | Create and Associate Reference Contacts after Form Submission

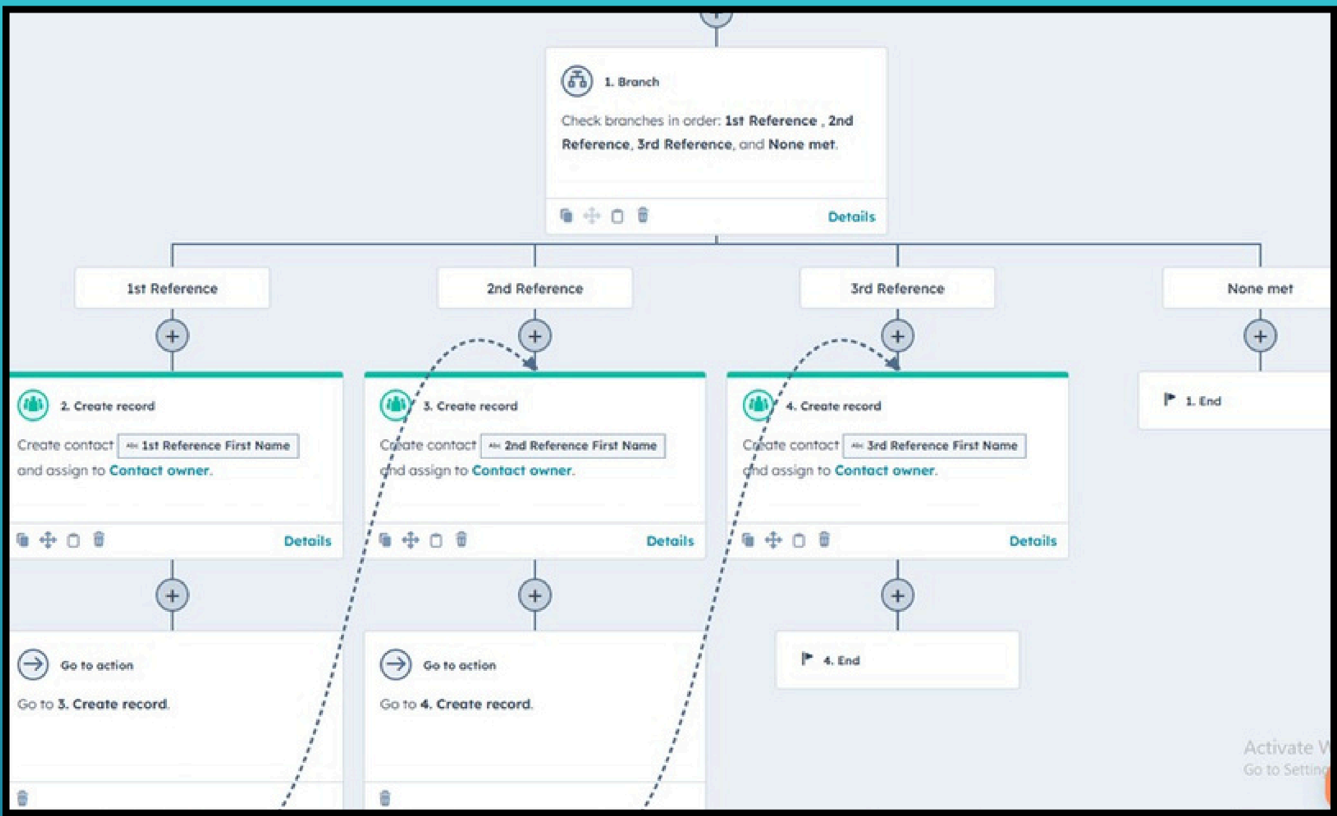
In this workflow, we have used Two Forms



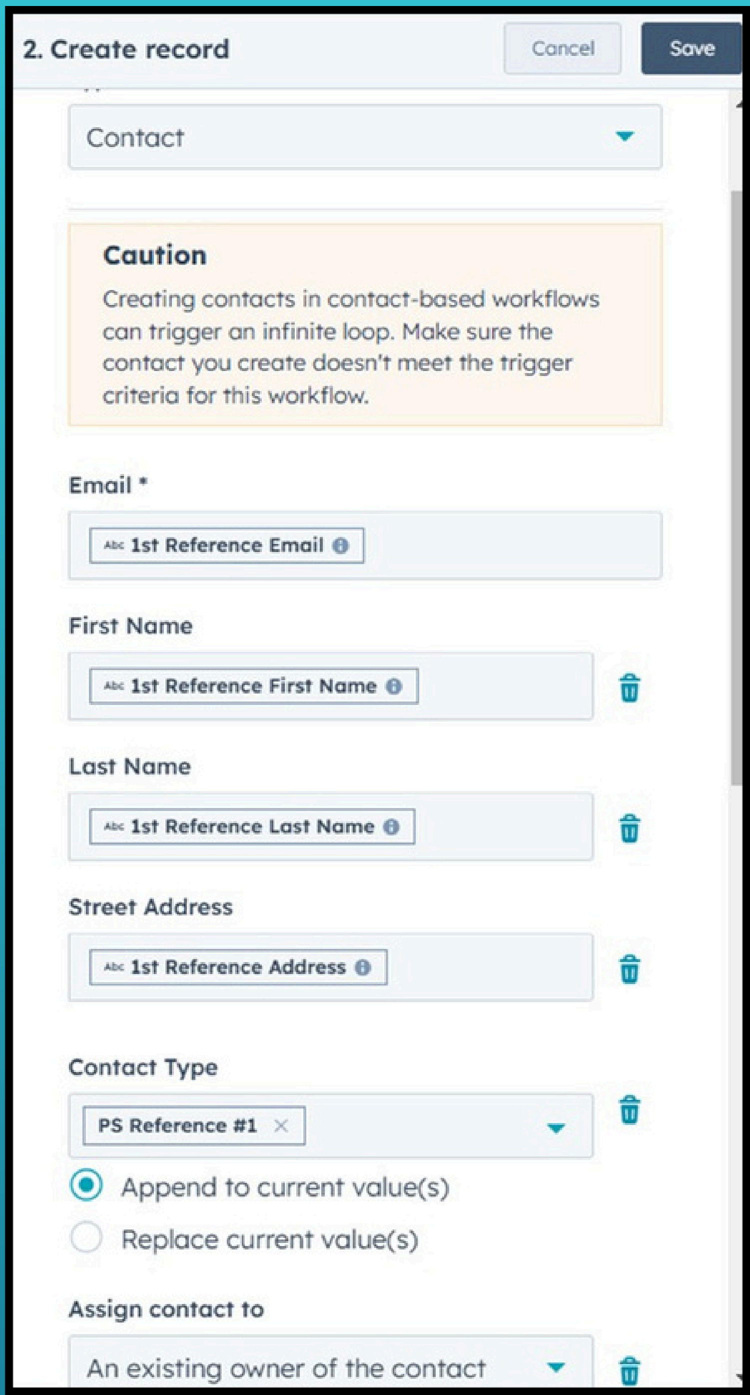
1. Petrosuite Application

2. Free Space

When the user fills out the forms, a contact is created based on the reference properties.

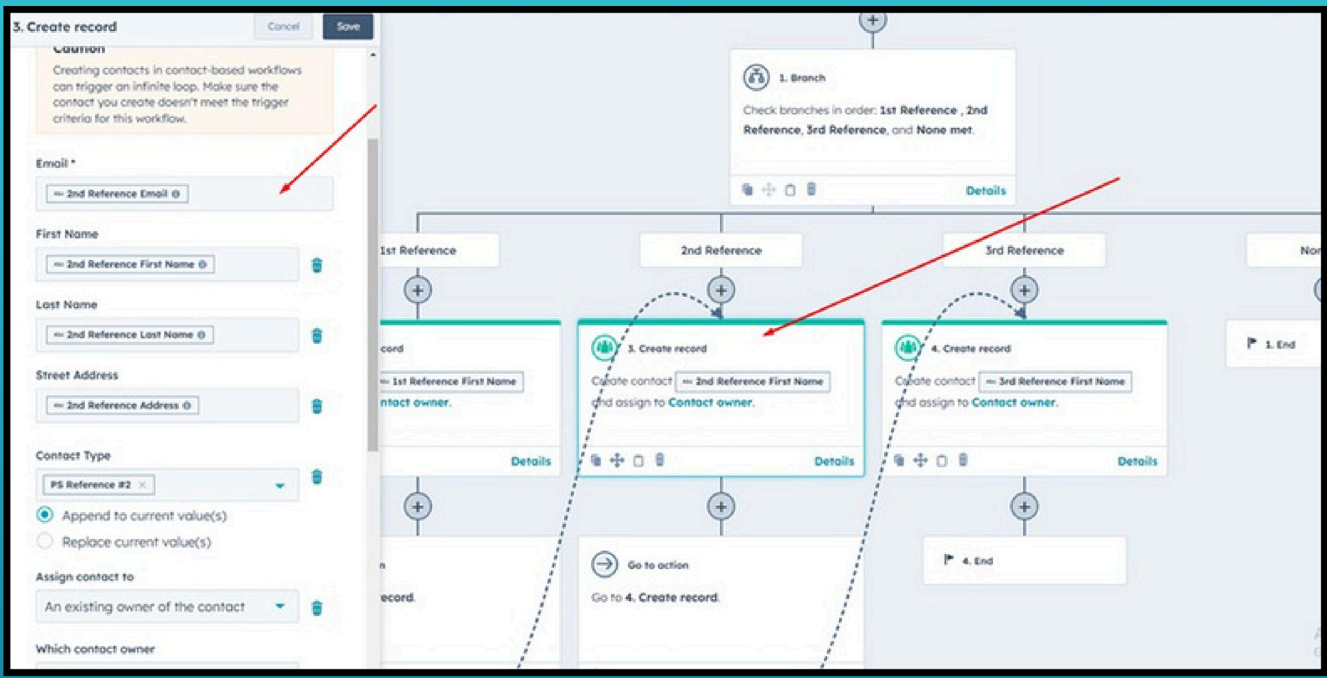


Please see the below screenshot for contact creation and assigning values

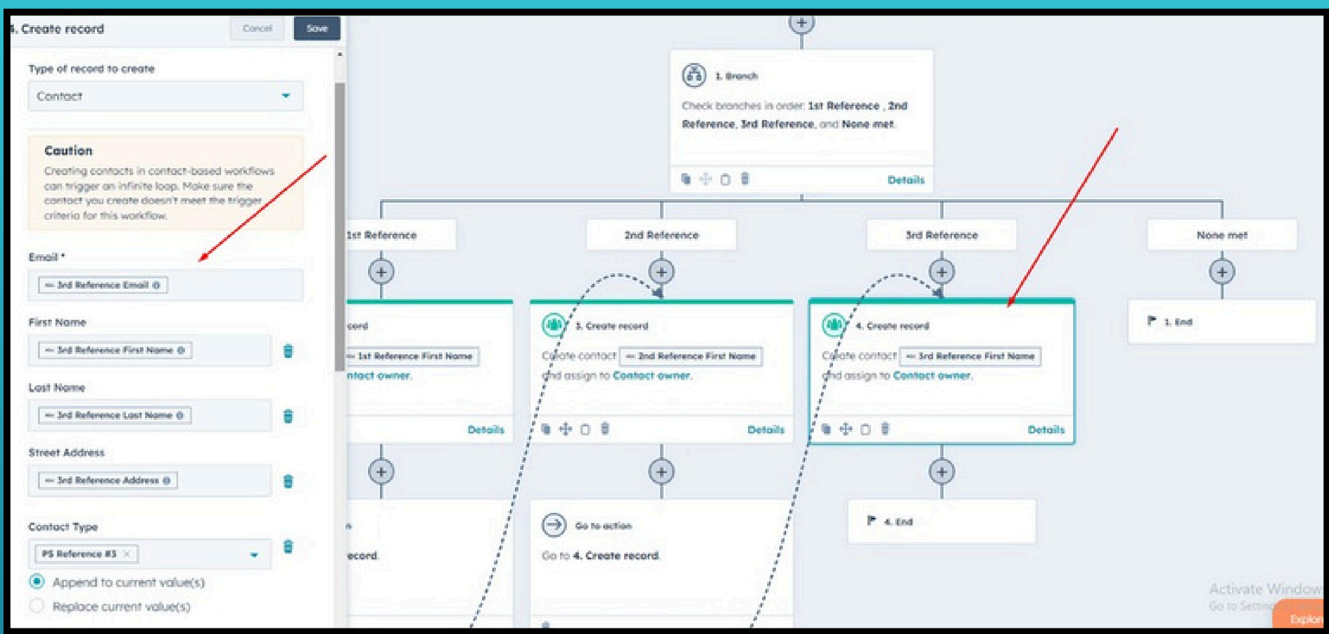


The reference email is assigned to the contact's email, the reference first name is assigned to the contact's first name, the reference last name is assigned to the contact's last name, and the reference address is assigned to the contact's street address.

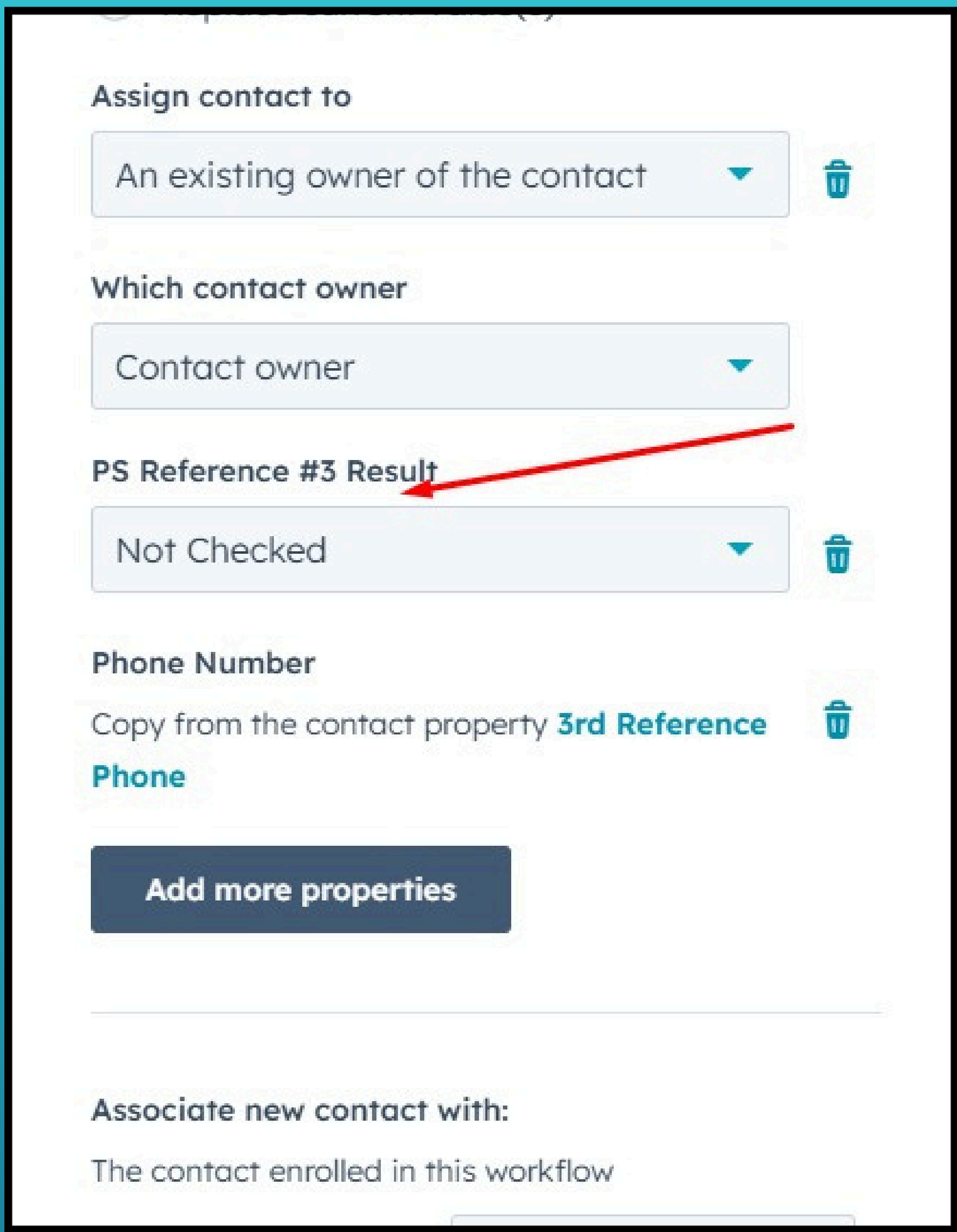
For the 2nd Reference Value please check the below Screenshot



For the 3rd Reference Value please check the below Screenshot

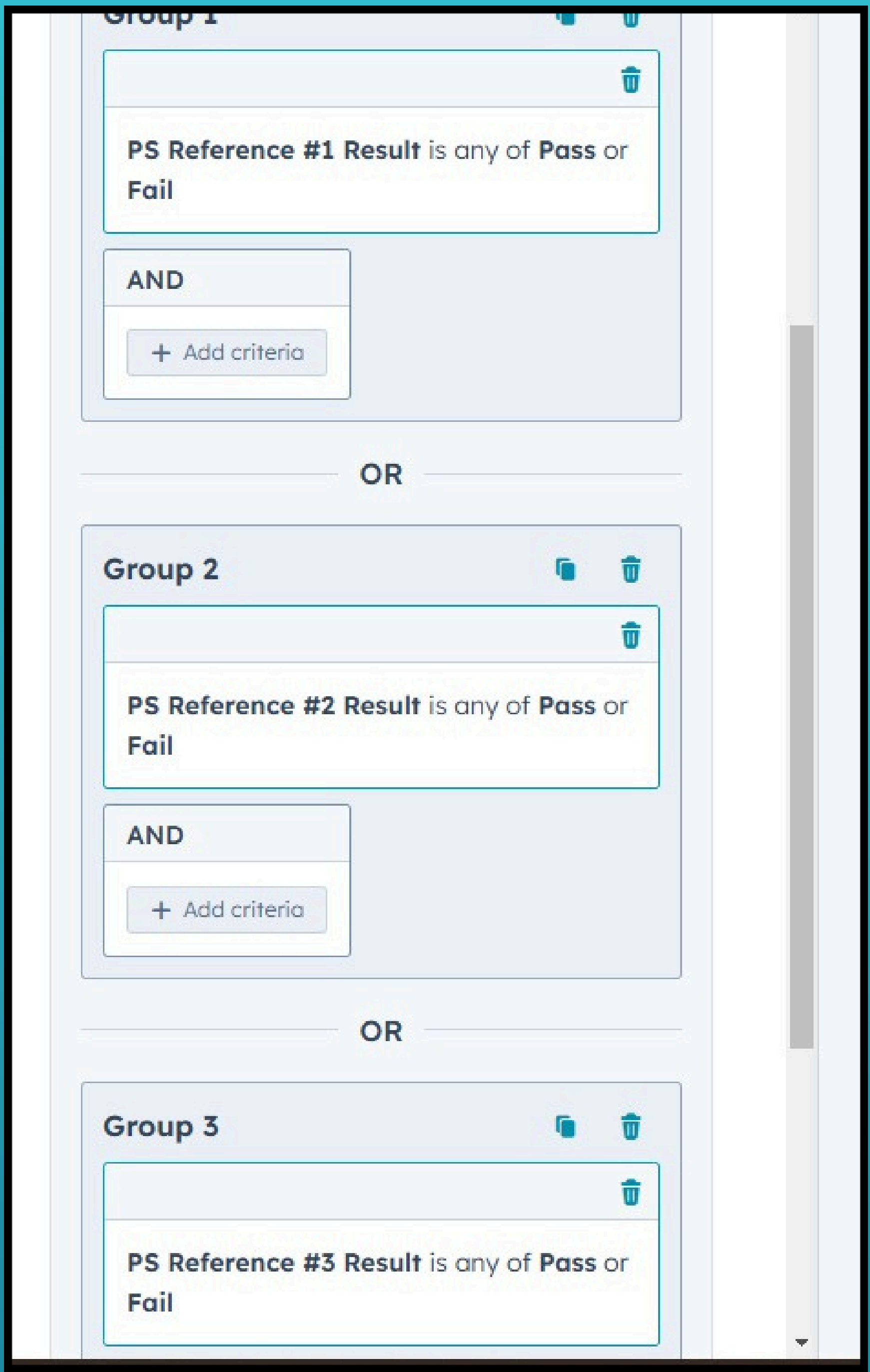


These contacts are also associated with the enrolled contacts in the previous workflows. The "Set PS Reference Result" is not checked for any of the three references. After this process, the owner reviews the contact and updates the reference property to indicate whether the reference process passed or failed.

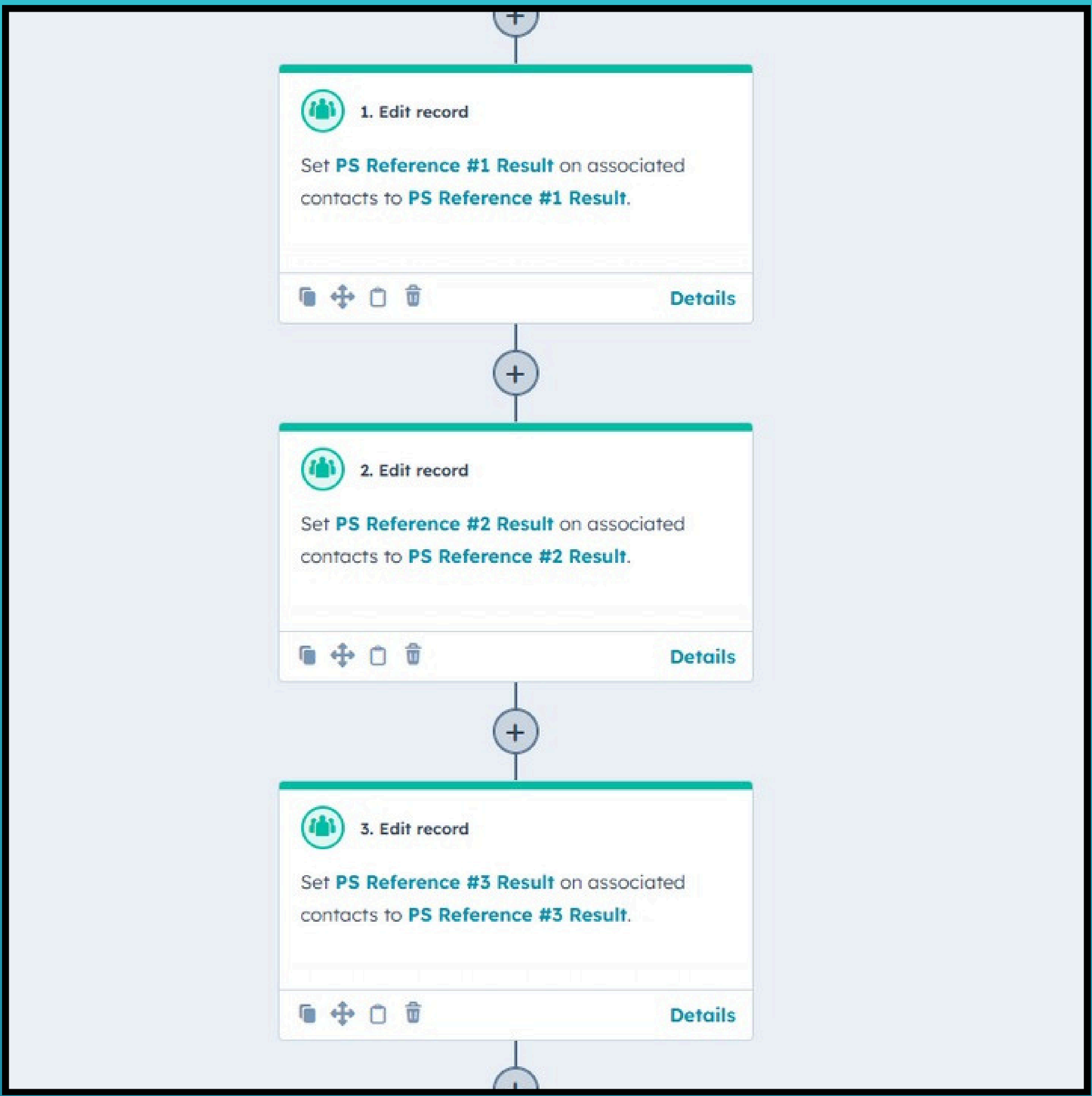


Workflow 8: PS | Reference Approval Copy to Applicant

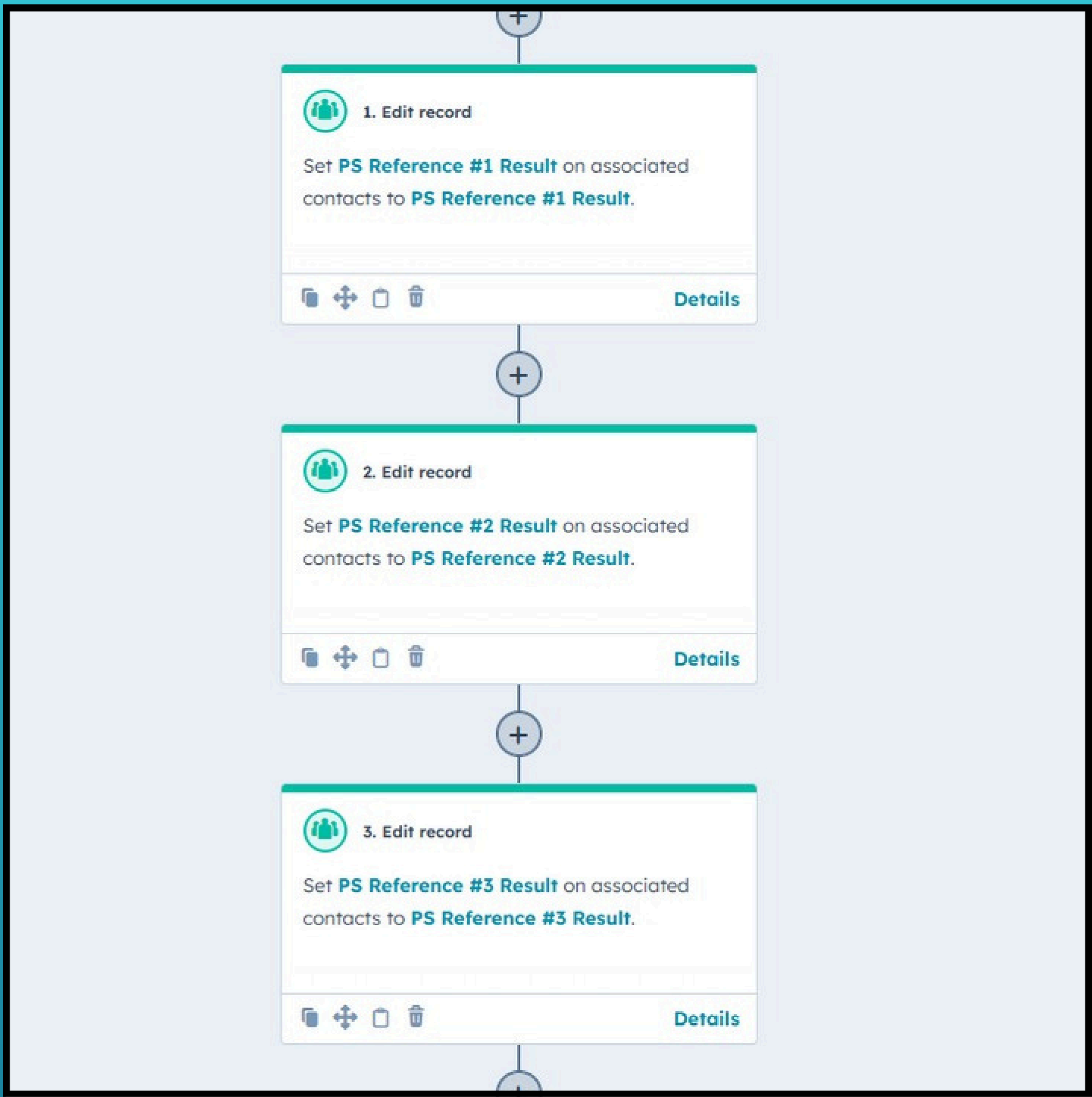
This workflow is triggered when the owner updates the reference property, and it depends on the completion of the previous workflow.



This workflow is triggered when the owner updates the reference property, and it depends on the completion of the previous workflow.

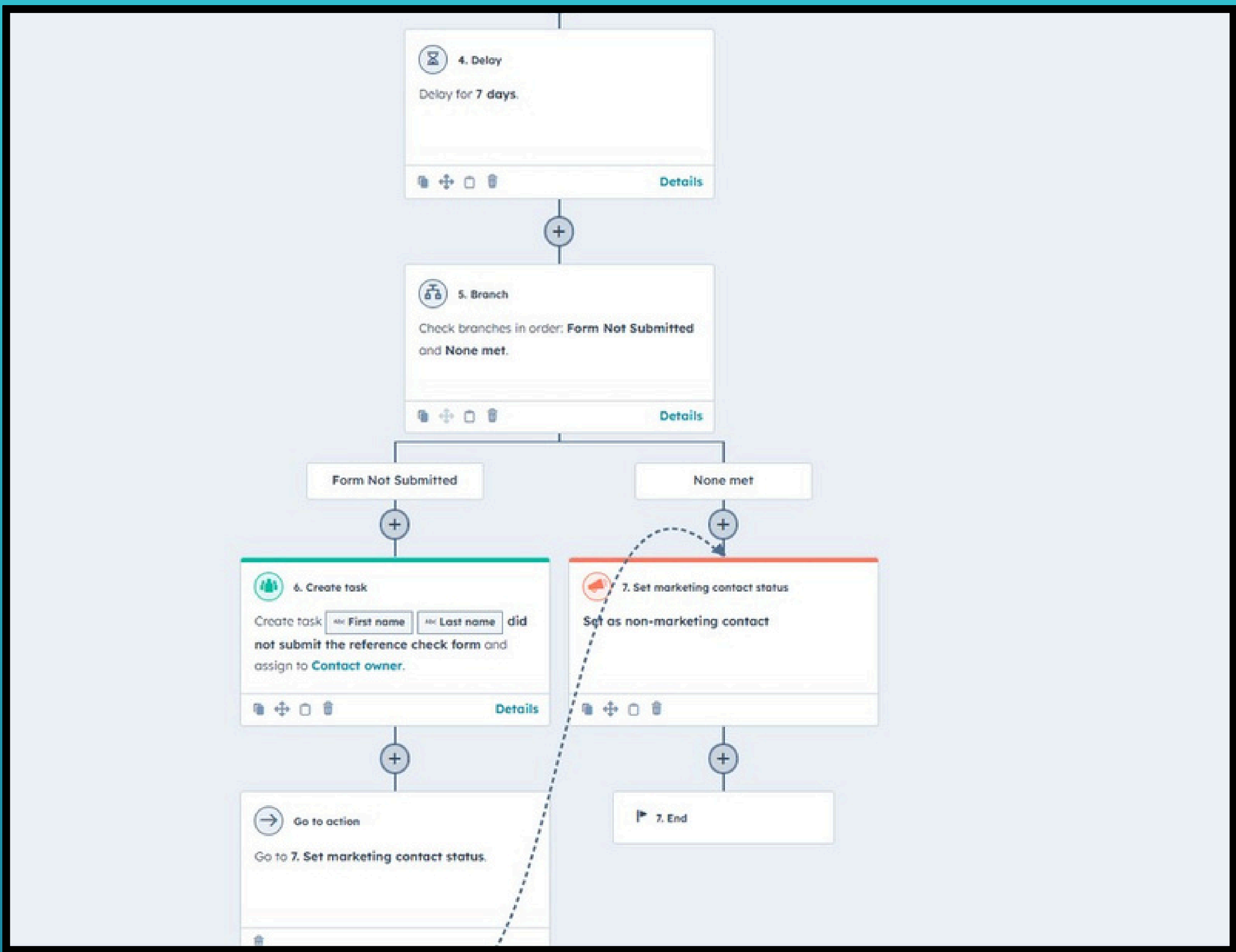


Workflow 9: PS | Send Reference Check Questions



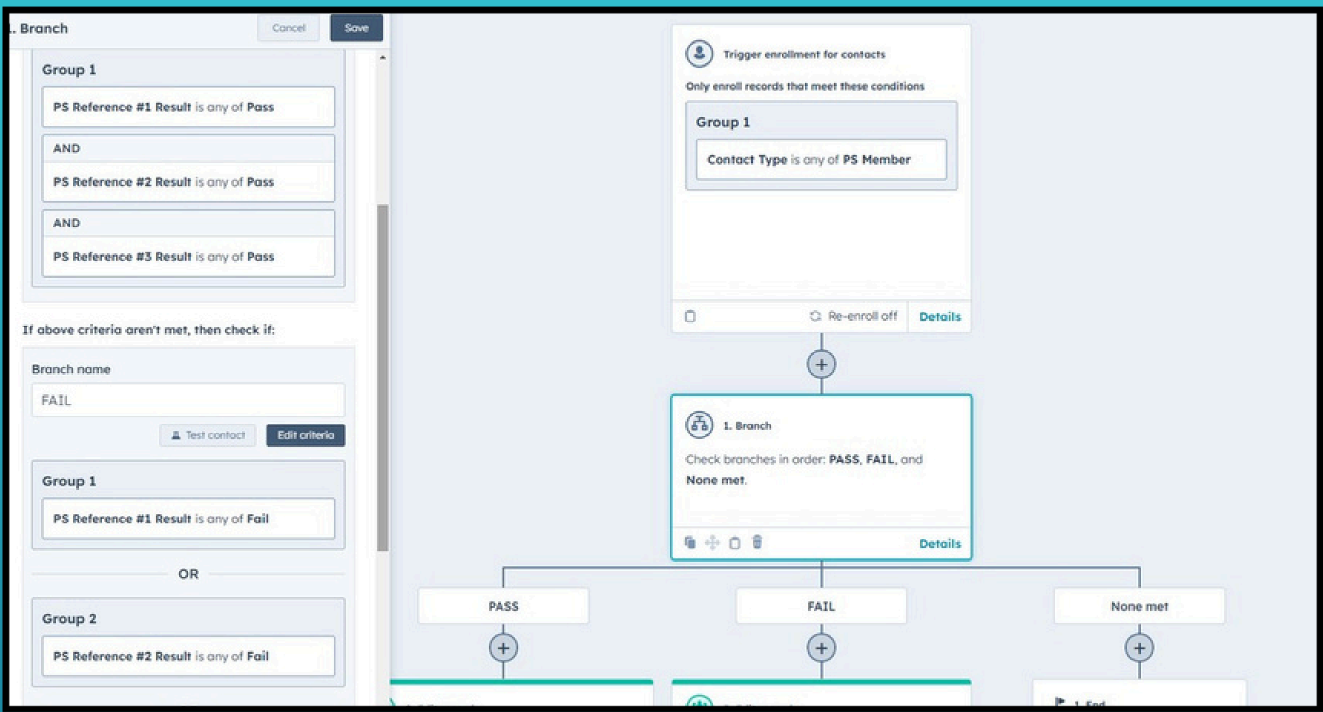
After a 15-minute delay, the sequence (Reference Check - PetroSuites) sends reference check questions from Bennita Clark to contacts listed as "PS Reference #1," "PS Reference #2," or "PS Reference #3." Before sending the sequence (Reference Check - PetroSuites), the contact is set as a marketing contact, and the email, including the form (PetrosSuites Reference Check Form), is sent to the contact in the form there are some questions regarding the reference based on those questions owner decide the Reference Result pass or Fail.

After sending the email, a 7-day delay is added to check if the form (PetrosSuites Reference Check Form) is submitted. If the contact submits the form, they are set as a non-marketing contact. If the form is not submitted, a task is created and assigned to the owner, and the contact is then set as a non-marketing contact.



Workflow 10: PS | Reference Approval

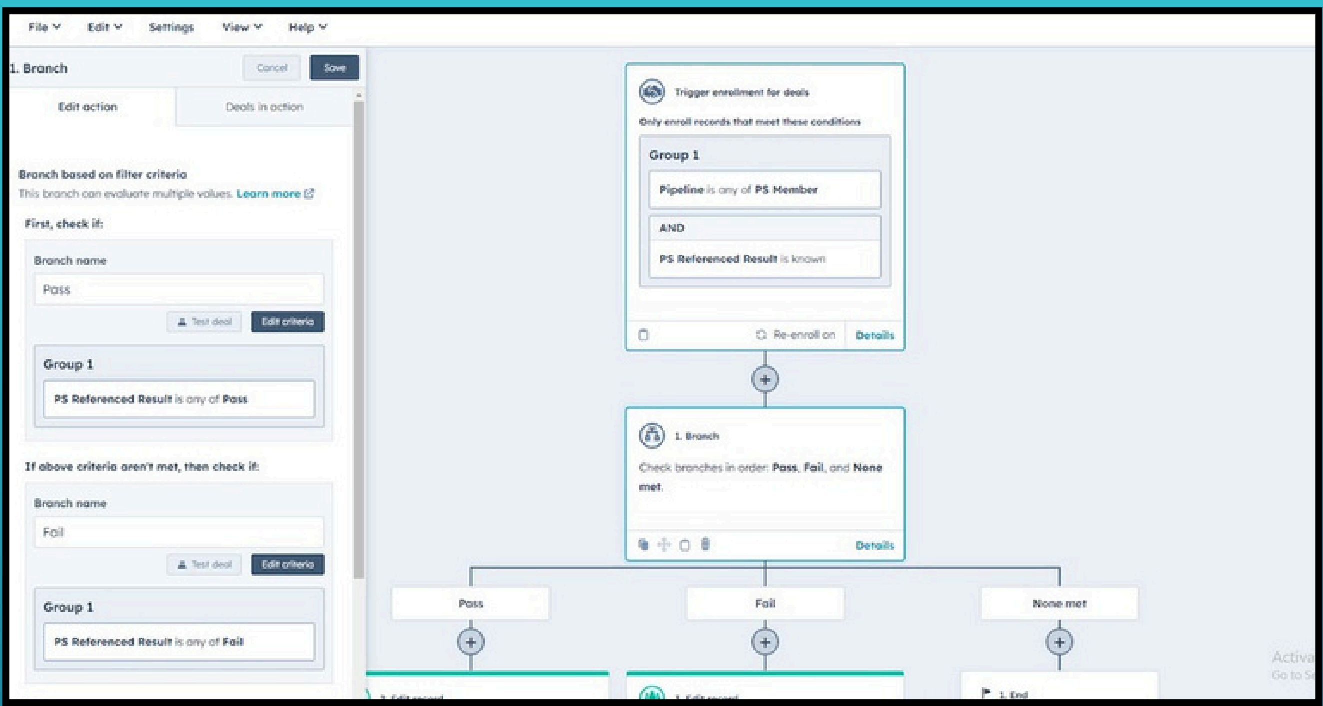
Owner Updates the "PS Referenced Result" to "Pass" or "Fail" based on feedback received from the reference checks form. This workflow determines if the deal is ready to move to the "Qualified to Buy" stage.



If all the "PS Reference Results" properties are marked as "pass," the contact is enrolled in a sequence (Reference Pass - PetroSuites). If any one of the properties is marked as "fail," the contact is directed to the failed condition and enrolled in the sequence (Reference Fail - PetroSuites) for failed "PS Reference Results."

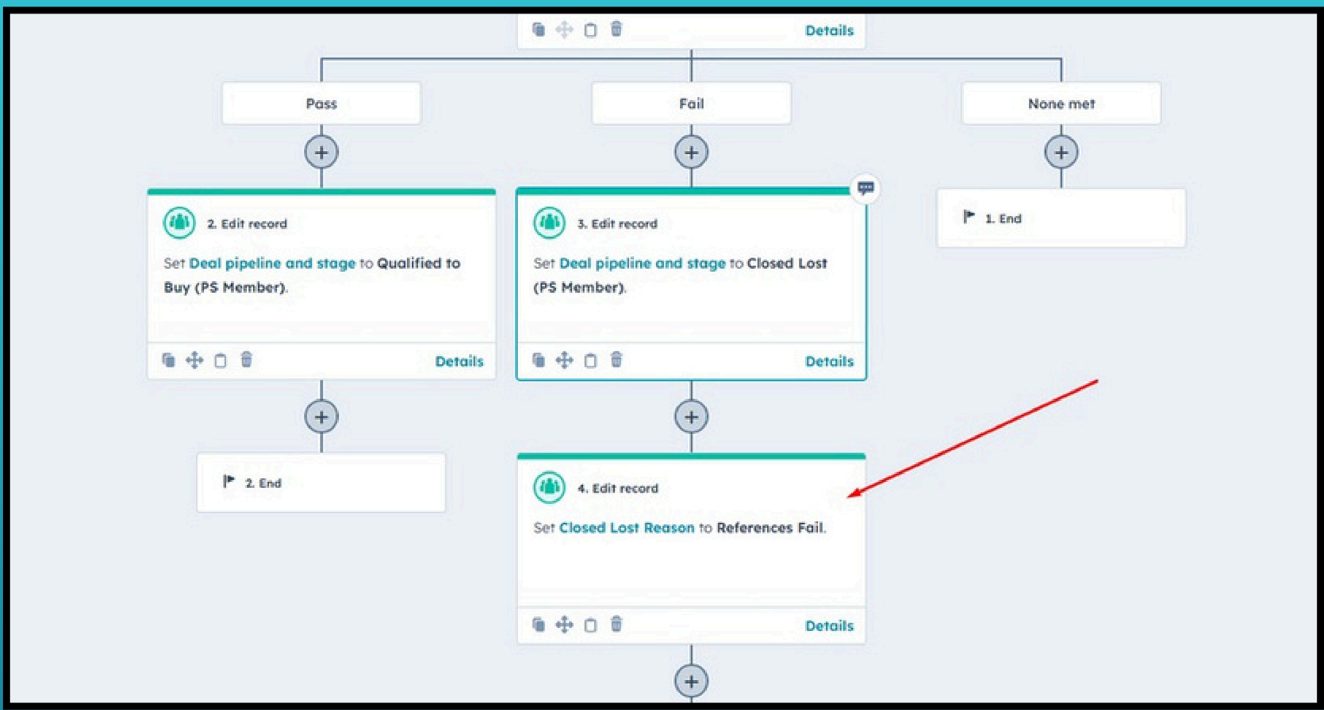
Workflow 11: PS | Move Deal to Qualified to Buy / Lost

Update the "Deal Stage" to "Qualified to Buy" if the "PS Reference Result" is marked as "Pass." Otherwise, set the stage to "Closed Lost" if the result is marked as "Fail," indicating that the reference checks did not meet the required criteria.



Workflow 12: PS I Move Deal to Qualified to Buy / Lost

The "Deal Stage" is updated to "Qualified to Buy" if the "PS Reference Result" is marked as "Pass." Alternatively, it is set to "Closed Lost" if the result is marked as "Fail." then update the property closed lost Readon is References Fail.

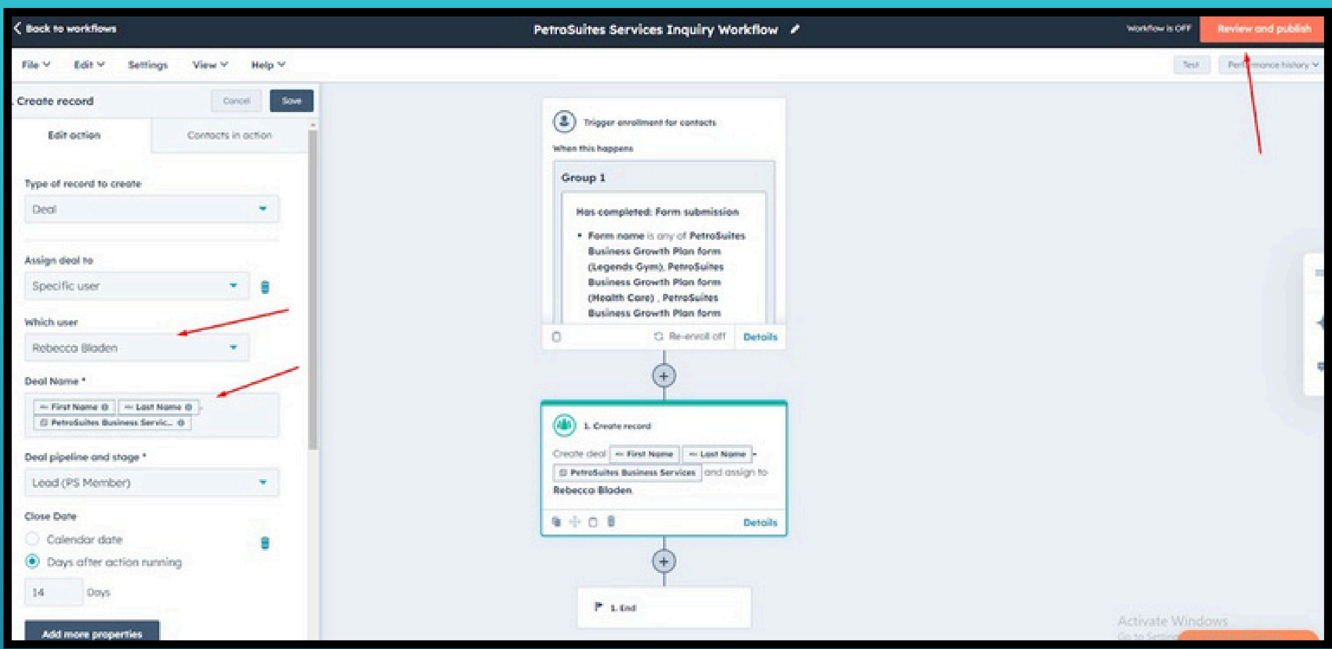


Form Name: Free Trial membership - PetroSuites
Not utilized anywhere.

Form Name: PetroSuites Business Growth Plan form (Separate page).

This form is used on a website page (https://www.petrosuites.com/petrosuites-business-growth-plan-form) and in a workflow (PetroSuites Services Inquiry Workflow).

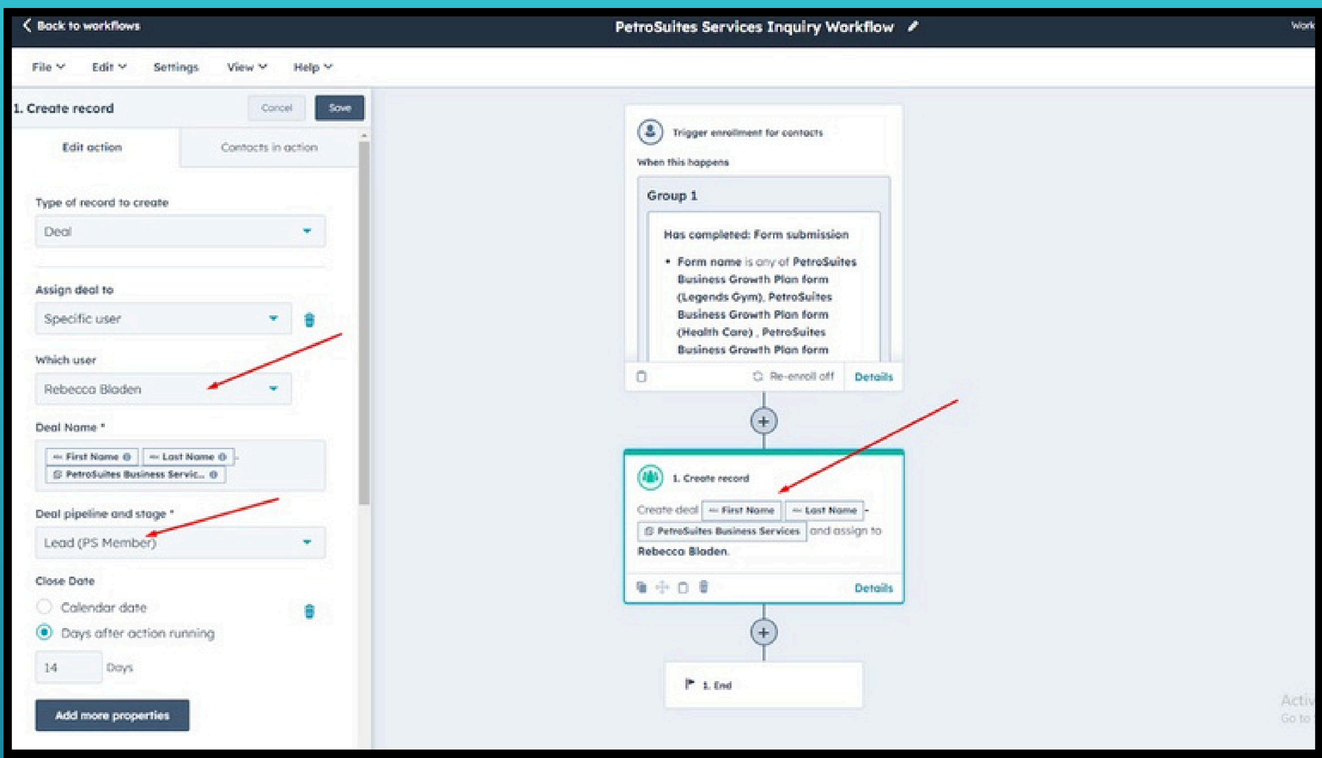
Upon form submission, contact and a deal are created in the Lead stage of the PS Member pipeline and assigned to Rebecca Bladen. But the workflow is off.



Form Name: (PetroSuites Business Growth Plan form (Accounting)

This form is used on the website (https://www.petrosuites.com/accounting -form) & in the workflow (PetroSuites Services Inquiry Workflow), although the workflow is currently turned off.

Upon form submission, contact and a deal are created in the Lead stage of the PS Member pipeline and assigned to Rebecca Bladen. but the workflow is off.



Form Name: PetroSuites - NPS Test Form

This form is available on the webpage (https://hjpetro-1230608.hs-sites.com /petrosuites-nps) and is used to collect feedback from users.

Form Name: Schedule A Virtual Tour - PetroSuites

This form is not used anywhere.

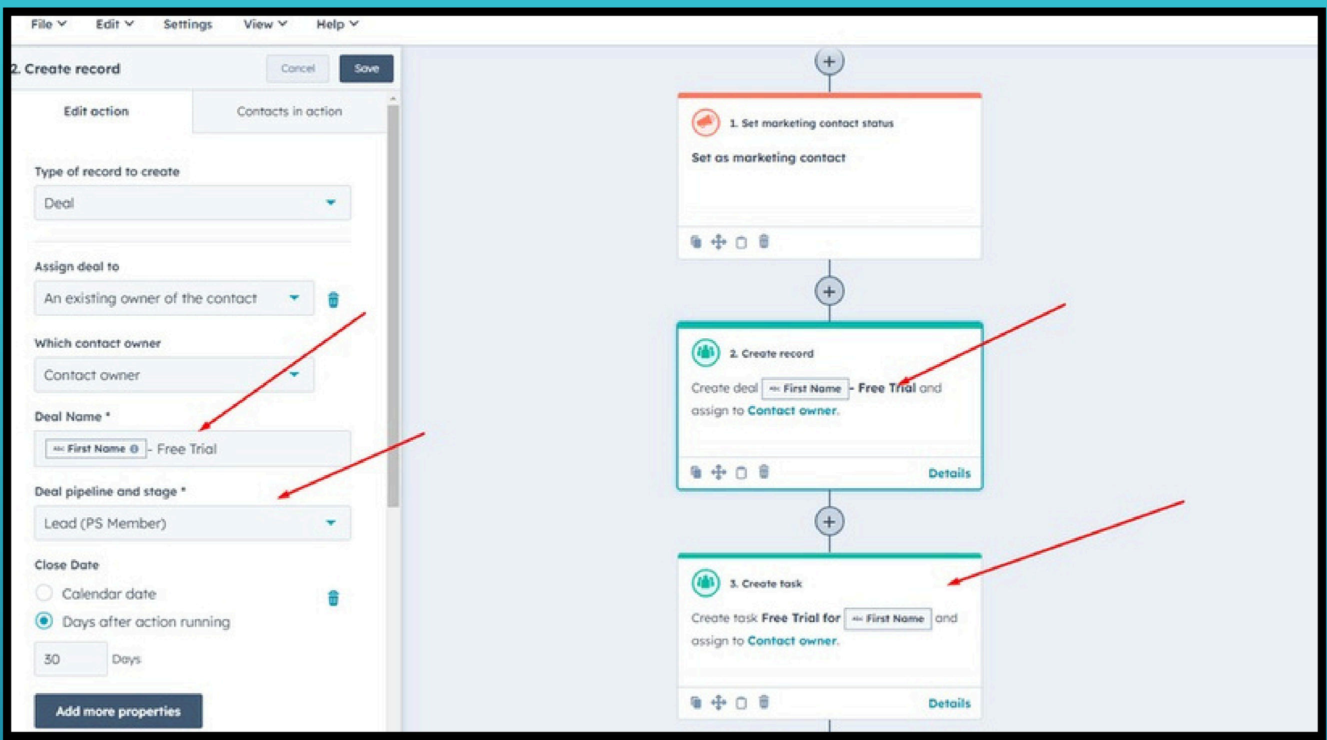
Form Name: Newsletter Sign up - PetroSuites

This form is not used anywhere.

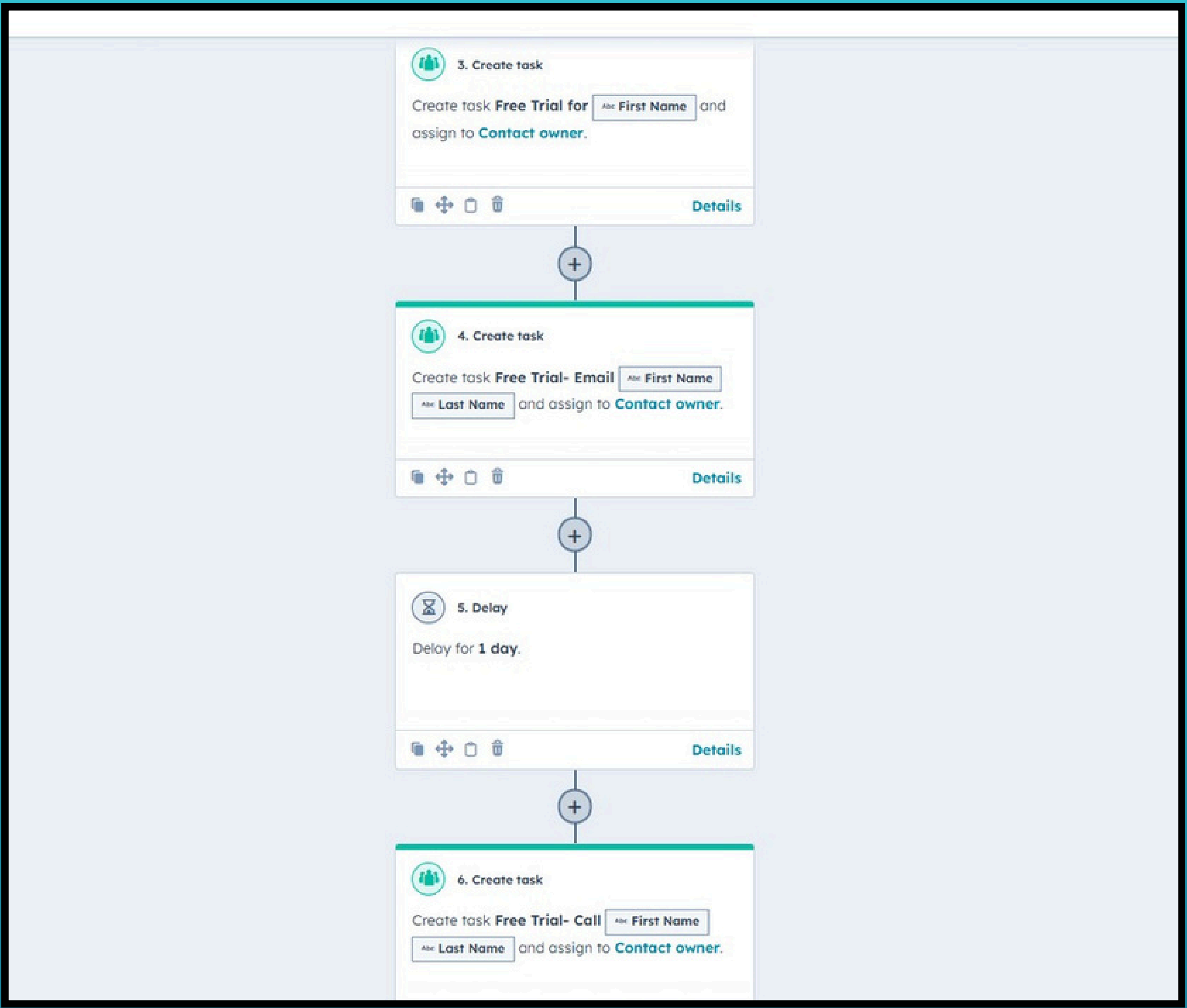
Form Name: Free Trial PetroSuites (Conference room)

This form is used on the website (www.petrosuites.com/meeting-rooms) & in the workflow (PetroSuites Free Trial Workflow), although the workflow is currently turned off.

Upon form submission, set contact as marketing contact, and a deal is created in the Lead stage of the PS Member pipeline and assigned to the Contact Owner.



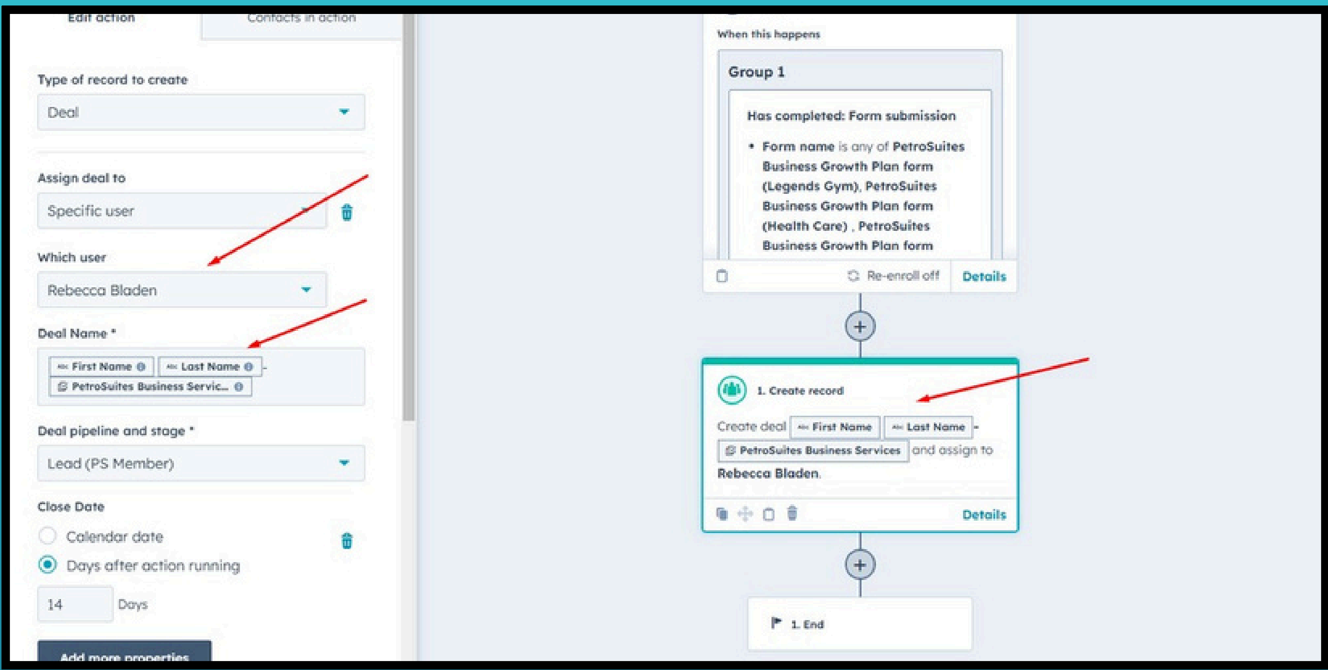
After creating a deal create a task for the owner using contact info please see in below Image



Form Name: PetroSuites Business Growth Plan form (Services page)

This form is used on the website (https://www.petrosuites.com/services) and in the workflow (PetroSuites Services Inquiry Workflow), although the workflow is currently turned off.

- Upon form submission, contact and a deal are created in the Lead stage of the PS Member pipeline and assigned to Rebecca Bladen.



Form Name: PetroSuites Temp Survey

This form is used in survey emails, which are sent to contacts in the "Petr oSuites Downtown Members" list. A workflow is triggered based on this list, and survey emails are sent with delays added within the workflow.

I have written the email names below:

Email List:

Temp Survey #1
Temp Survey #2
Temp Survey #3
Temp Survey #4
Temp Survey #5
Temp Survey #6
Temp Survey #7

Form Name: PetroSuites Business Growth Plan form (Legends Gym)

This form is used on the website page (www.petrosuites.com/gym-form) and in the workflow. I have already described the workflow functionality please check it here
Form Name: PetroSuites Business Growth Plan form (IT Helpdesk)

This form is used on website pages.

www.petrosuites.com/petrosuites-business-growth-plan-form
www.petrosuites.com/it-helpdesk-form
And also used in the workflow. I have already described the workflow functionality please check it here

Form Name: Virtual Office Virtual Tour - PetroSuites

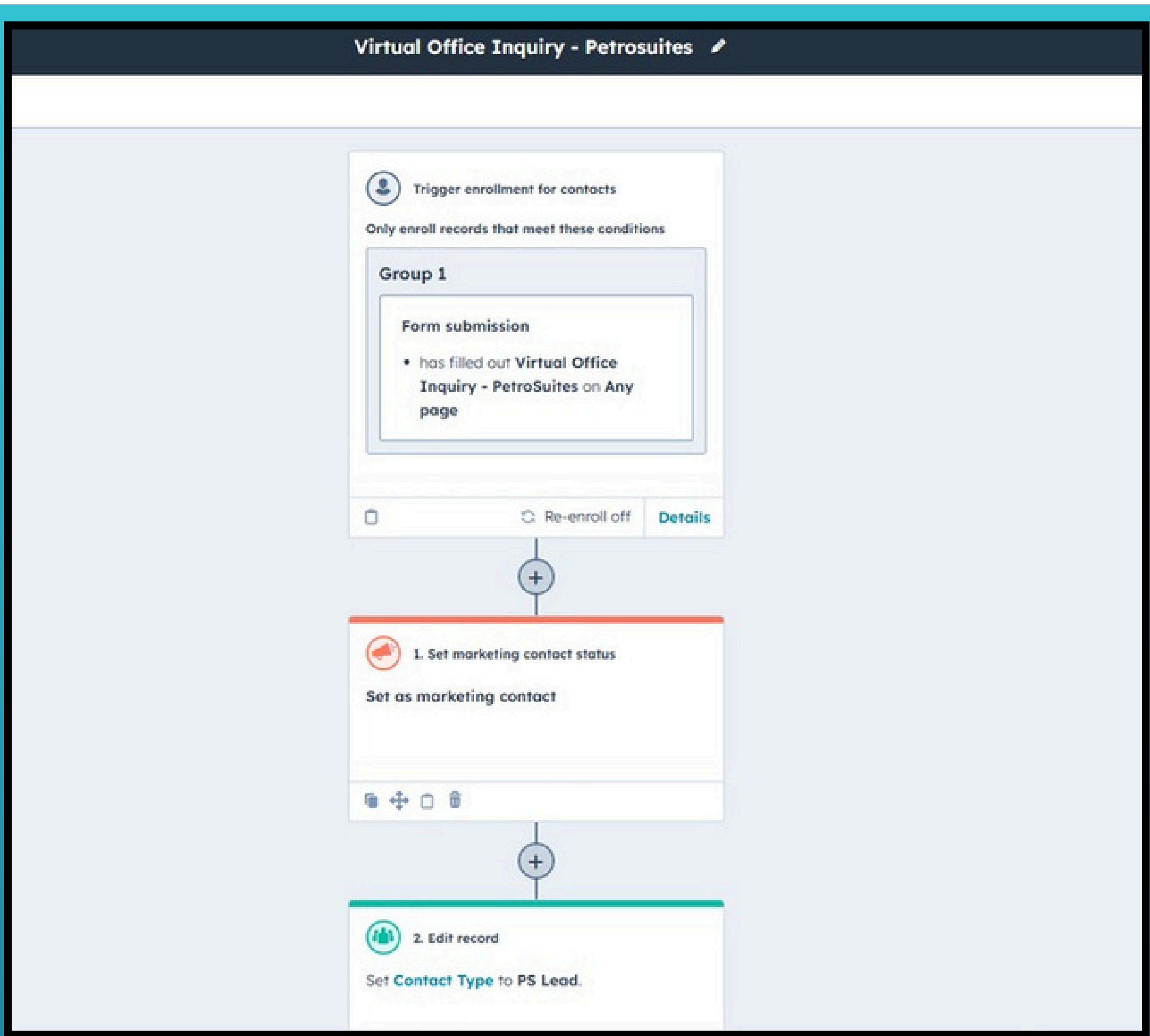
This form is used on the website page (www.petrosuites.com/virtual-tour-form). On form submission, contact is created in Hubspot.

Form Name: Virtual Office Inquiry - PetroSuites

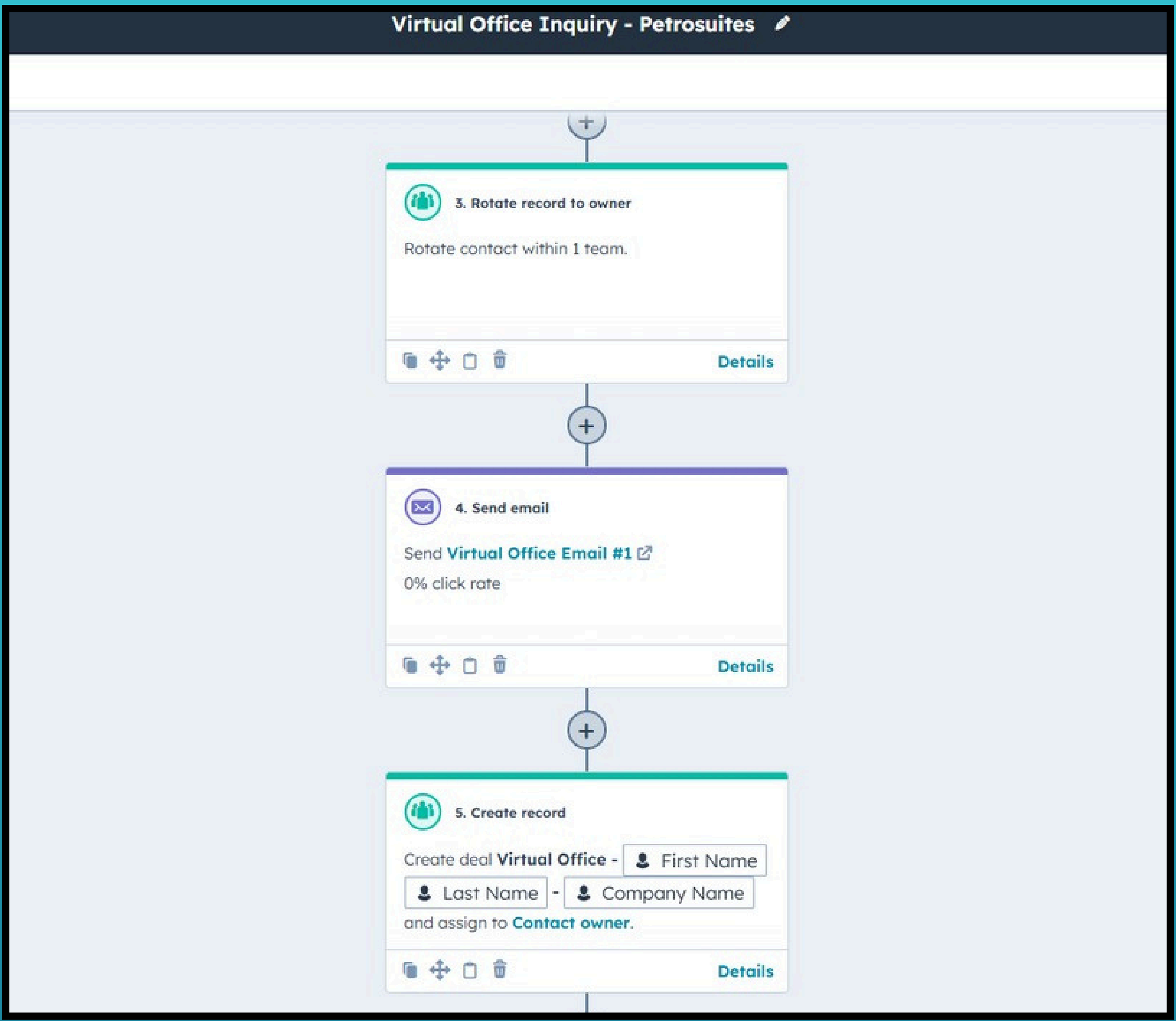
This form is used on website pages.
www.petrosuites.com/virtual-office
www.petrosuites.com/virtualofficeinquiry

And also used in the workflow (Virtual Office Inquiry - Petrosuites).

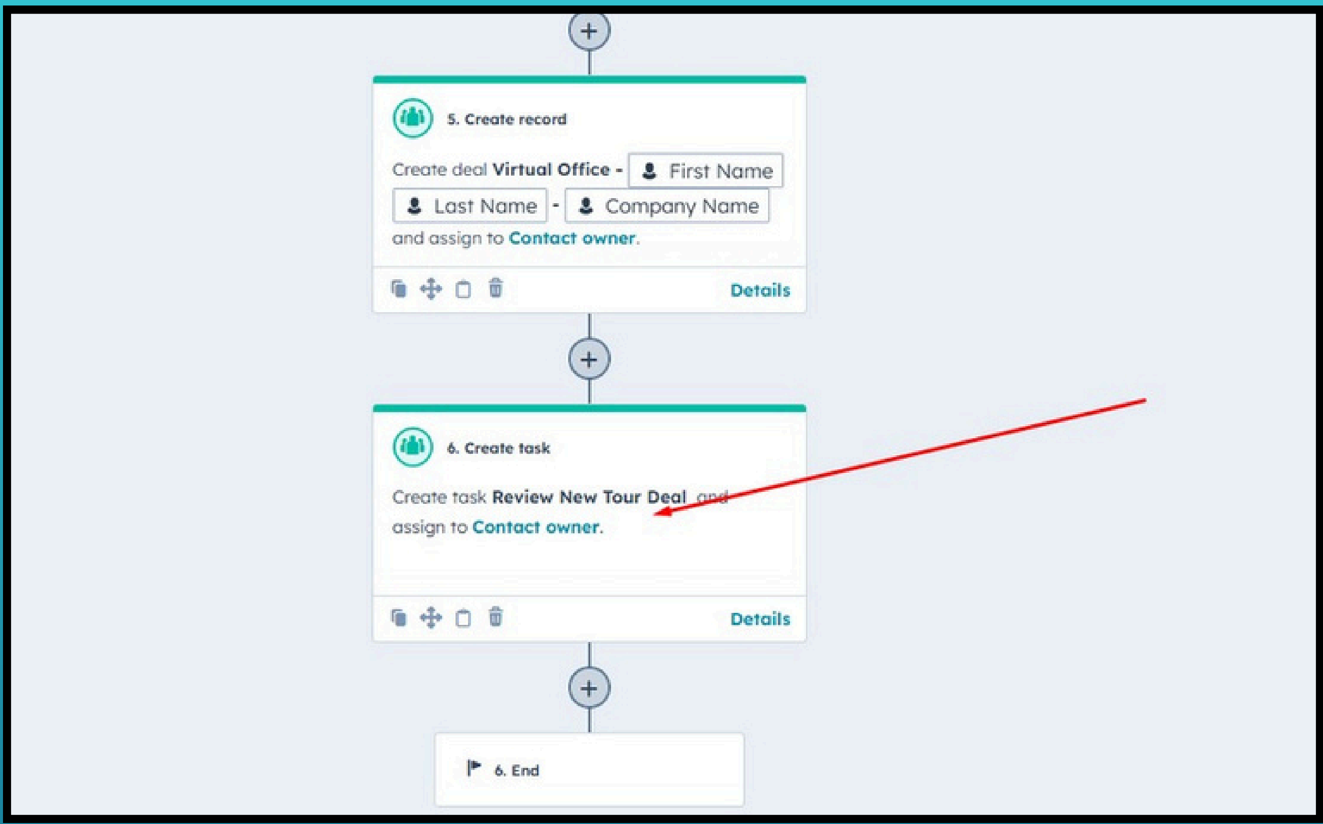
When the form is submitted, a workflow is triggered that sets the contact as a Marketing Contact and assigns the value "PS Lead" to the Contact Type property.



After this process Owner is assigned to contact & send an email (Virtual Office Email #1) to the contact then create a deal with the **Lead** stage in the **PS member Pipeline** assigned to the owner.



And then create a task and assign it to the owner



Form Name: Free Trial PetroSuites (Office for a day)

This form is used on the website page (www.petrosuites.com/office-for-a-day) & in the workflow. I have already described the workflow functionality please check it here

Form Name: Free Trial PetroSuites (Home page)

This form is used on the website Home page (www.petrosuites.com) & in the workflow. I have already described the workflow functionality please check it here

Form Name: Director of Operations - PetroSuites Application Form1

This form is manually sent to the user by the owner

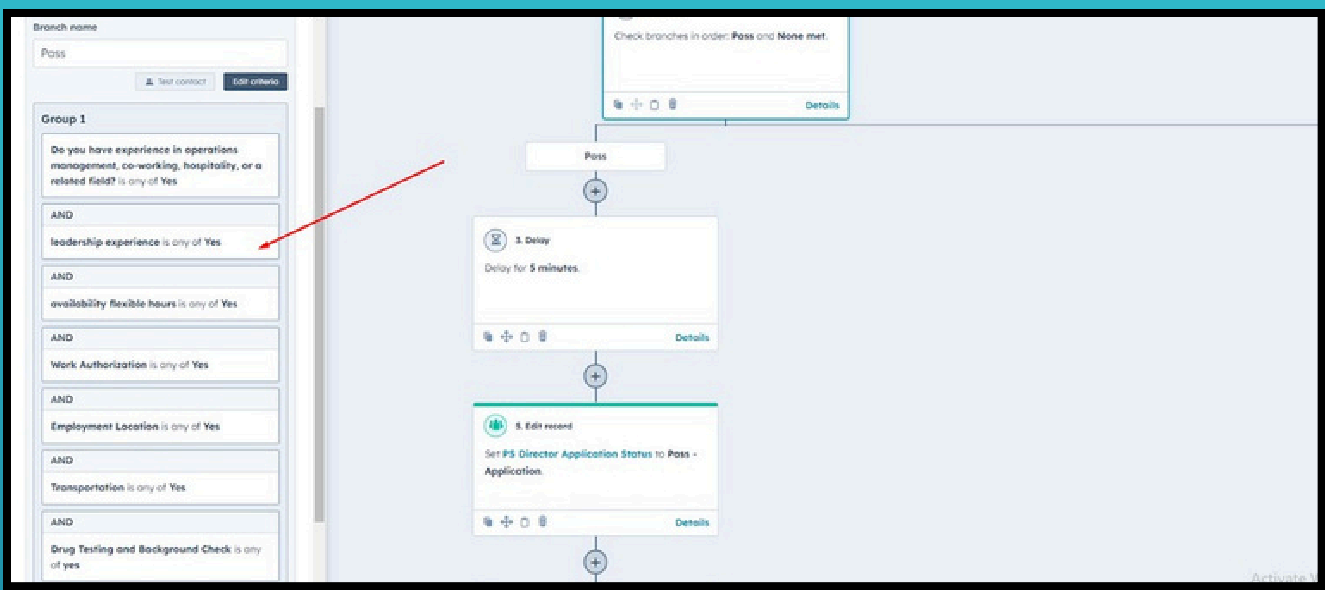
This workflow is used in Two Workflows 1) PS - Director Applicant to Short List 2) PS - Director Create and Associate Reference Contacts after Form Submission (cloned)

We triggered this workflow upon form submission.

1)Workflow: PS - Director Applicant to Short List

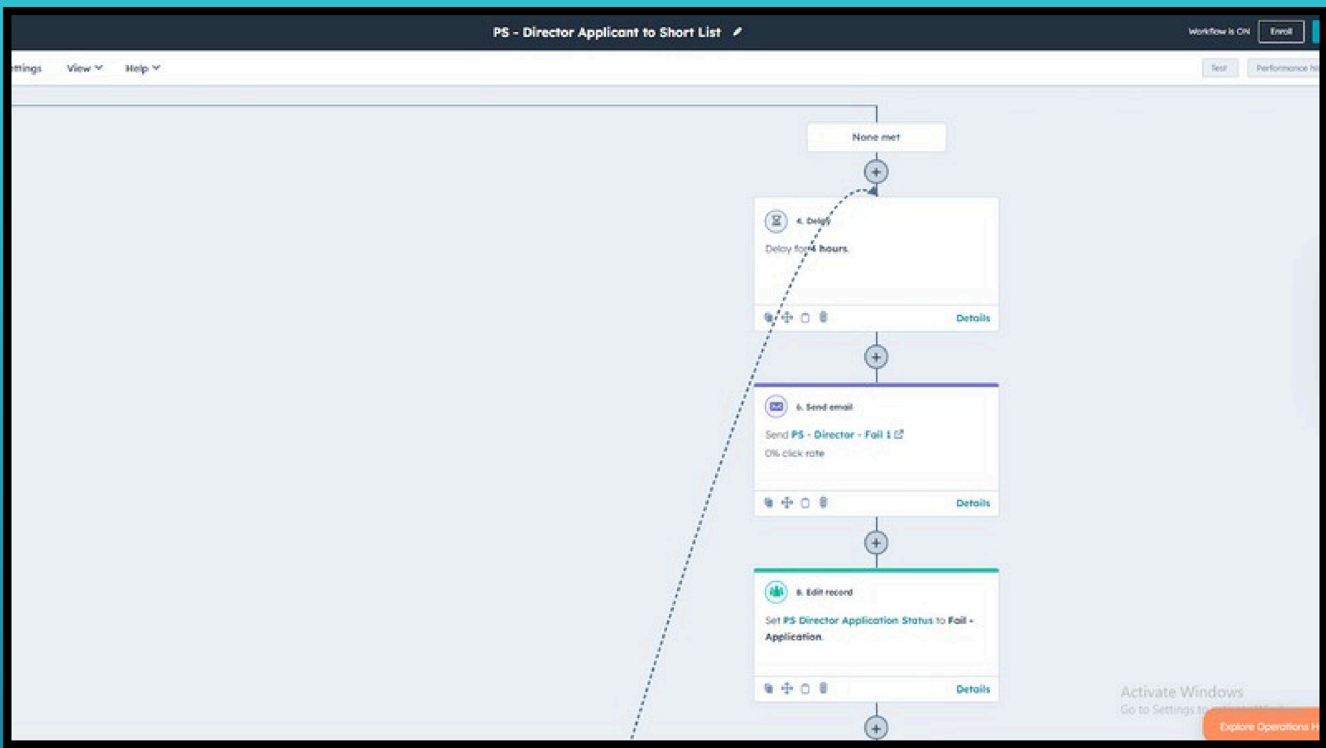
In this workflow We will:

When anyone fills out the form, a deal is created in the Lead stage within the PetroSuites Internal Application pipeline and assign to owner. Then, a branch is created based on the form properties.



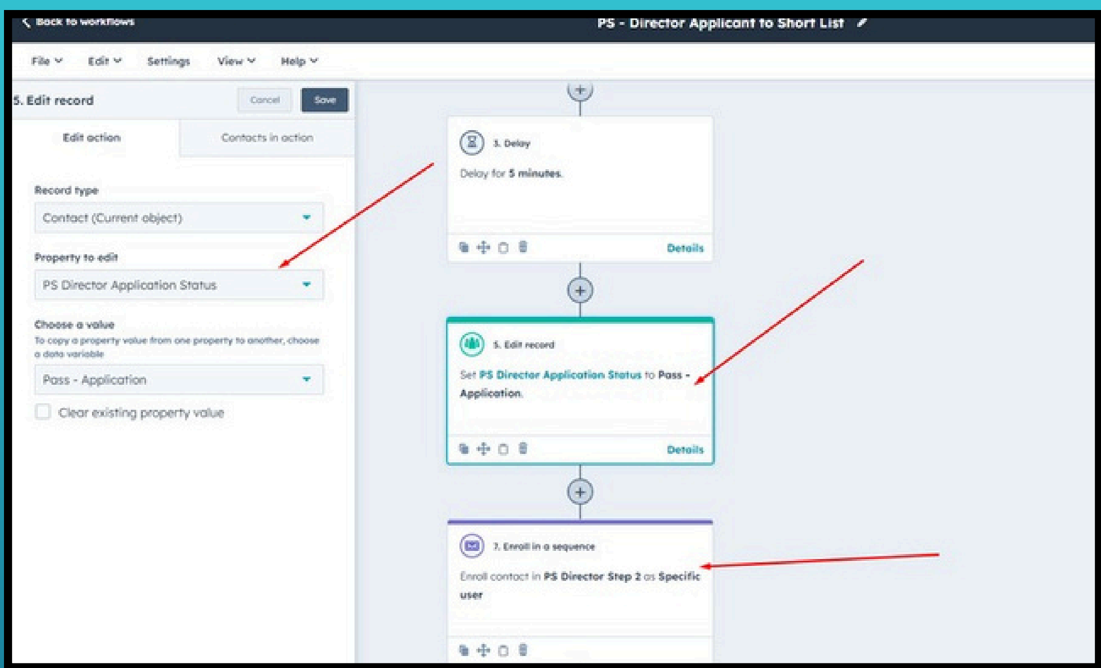
False Scenario

If the user meets the condition, they proceed to the "Pass" action & continue with the next steps. If they do not meet the condition, they are directed to an alternate action.



True Scenario:

If user pass the action then edit the contact property PS Director Application Status

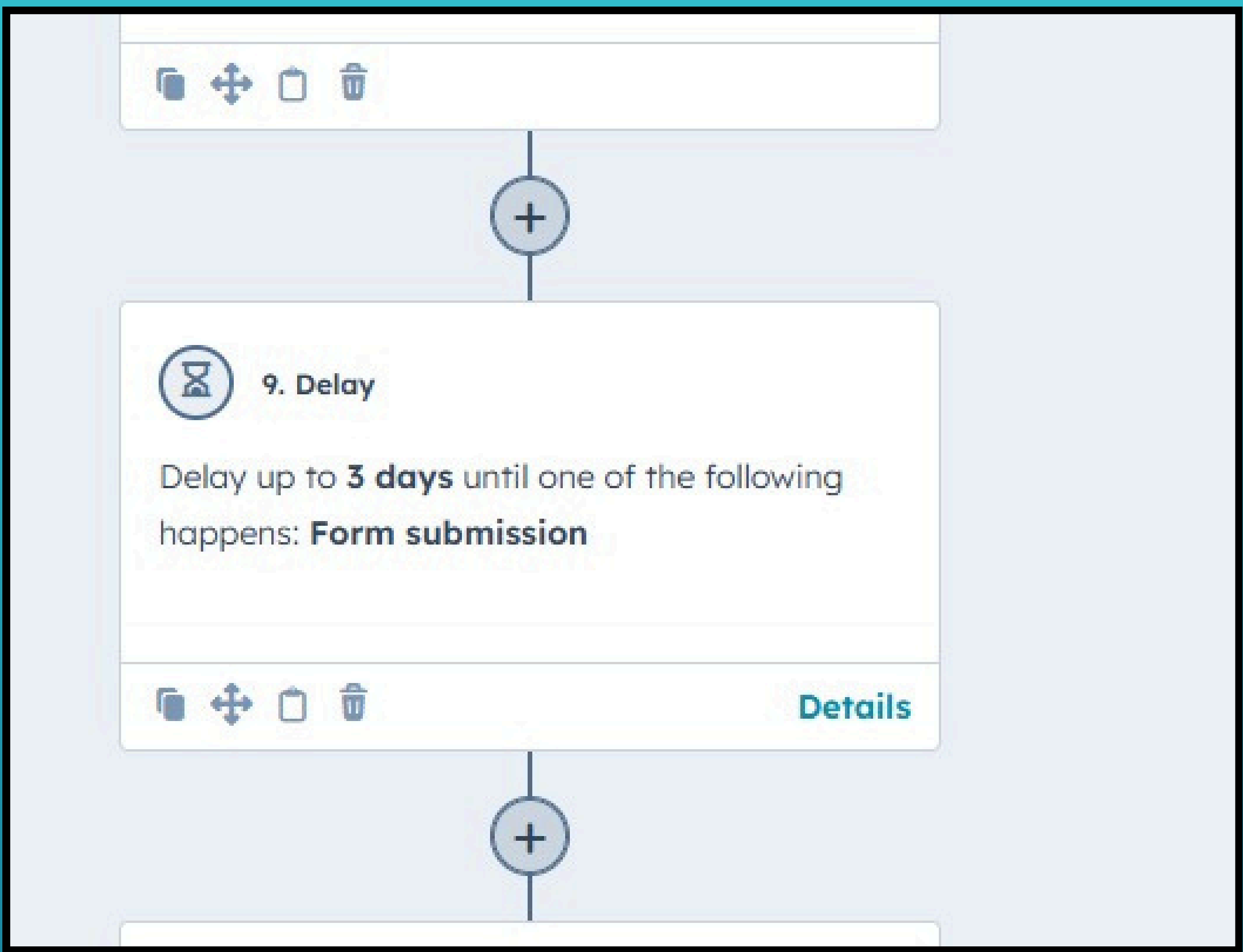


If the user meets the condition, they proceed to the "Pass" action and continue with the next steps. As part of this process, they are enrolled in the PS Director Step 2 sequence, where they receive the PS - Director Application - Form 2. Form Name: PS - Director Application - Form 2

We Used this form in two workflows

1) PS - Director Applicant to Short List 2) PS - Director Applicant - Test (this workflow is like same PS - Director Applicant to Short List But its trigger manually)

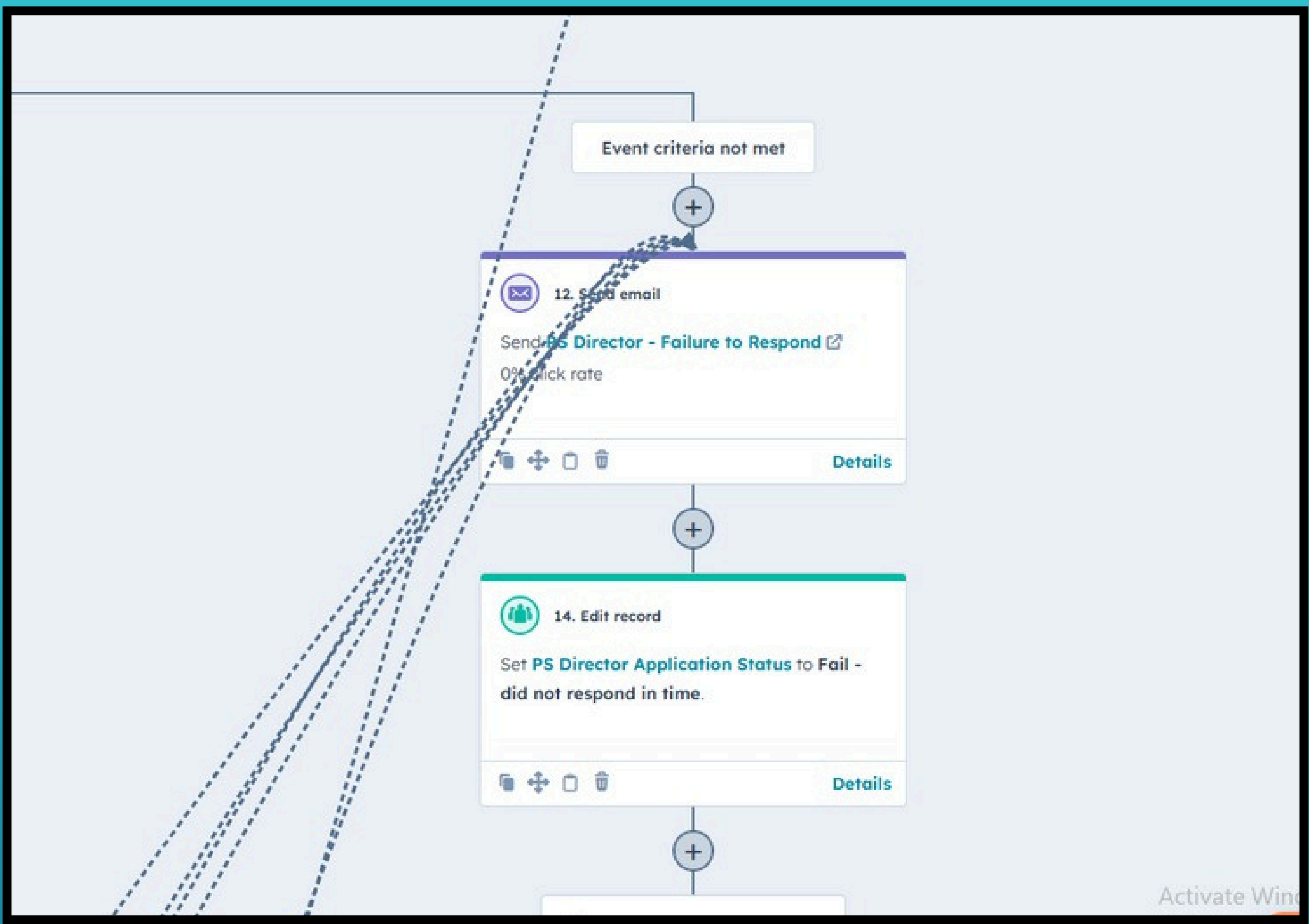
After enrolling in the sequence, we add a 3-day delay from the form submission.



Then, we add a branch: if the user fills out the form and meets the criteria, they proceed to the next step; otherwise, they follow the false criteria path.

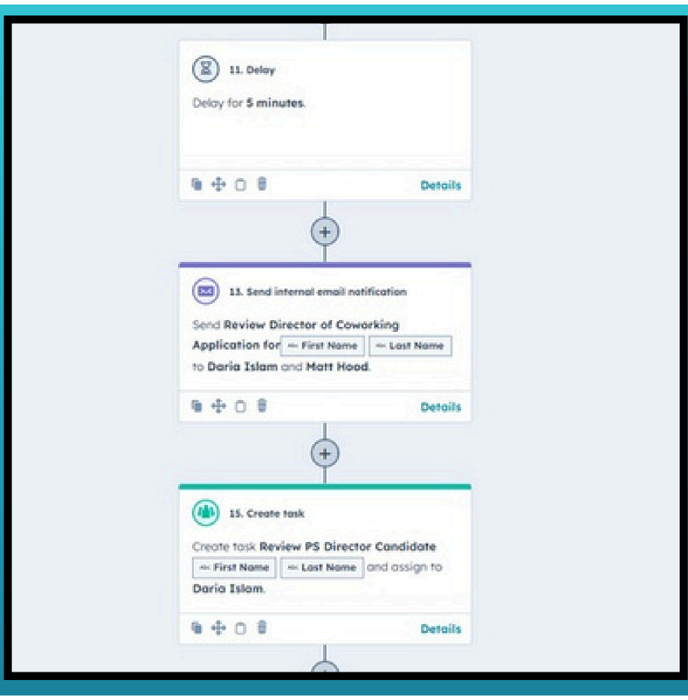
Criteria Not Met:

We send an email ("PS Director - Failure to Respond") to the user and update the property "PS Director Application Status" to "Fail."

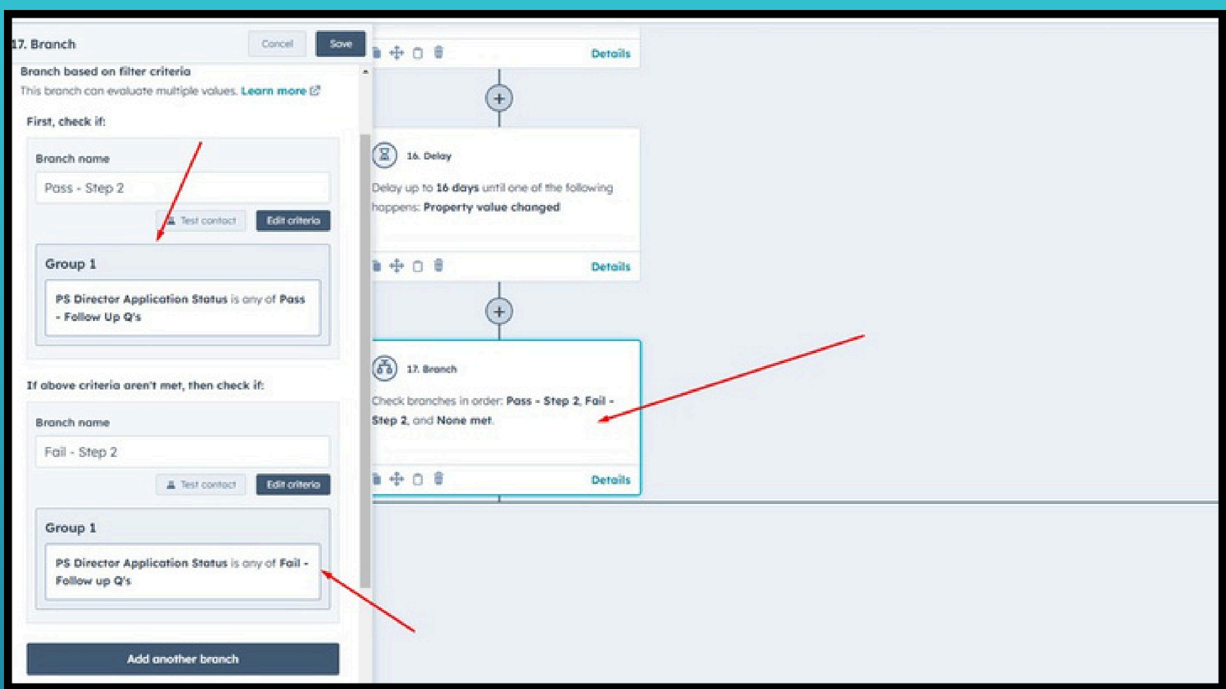


Criteria is Met:

Add a 5-minute delay, then send an internal email to “**Daria Islam**” & “**Matt Hood**.” After that, create a task and assign it to “**Daria Islam**.”

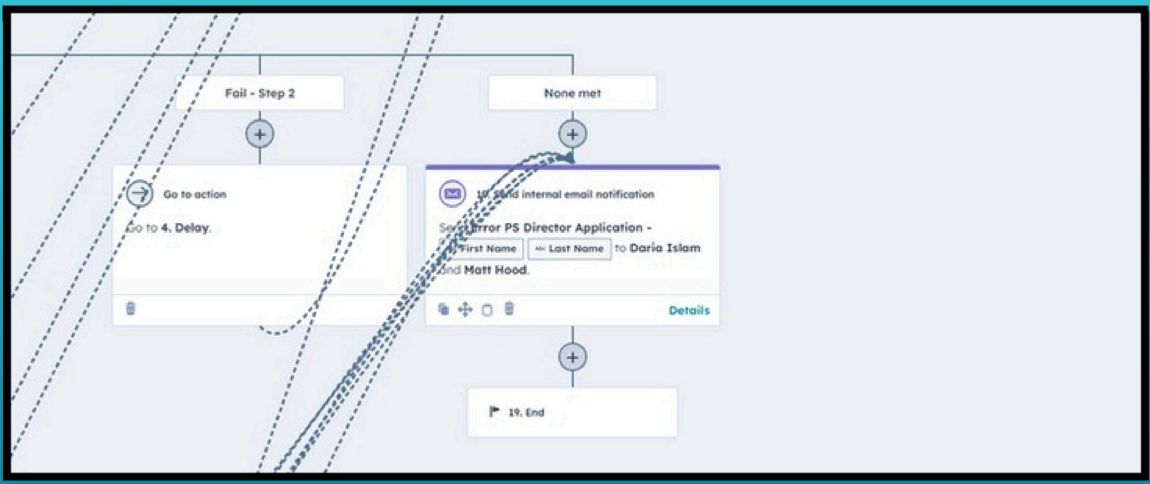


Then, Daria reviews the application and updates the property **"PS Director Application Status"** to either **"Pass - Follow up Q’s"** or **"Fail - Follow up Q’s."After this, we add a branch to check whether the "PS Director Application Status" is Pass, Fail, or None Met.**



Criteria Not Met:

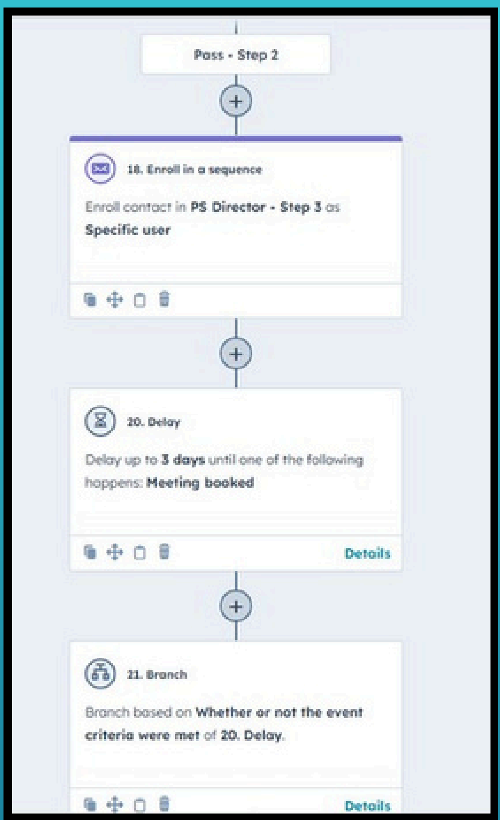
Send an internal email to “**Daria Islam**” and “**Matt Hood**.”



PS Director Application Status is Fail: If the status is **Fail**, follow the previously described fail action.

PS Director Application Status is Pass:

If the status is Pass, we enroll the user in the sequence "PS Director - Step 3",where we send a meeting link with **Daria Islam.**



We are adding a 3-day delay until the user books the meeting.

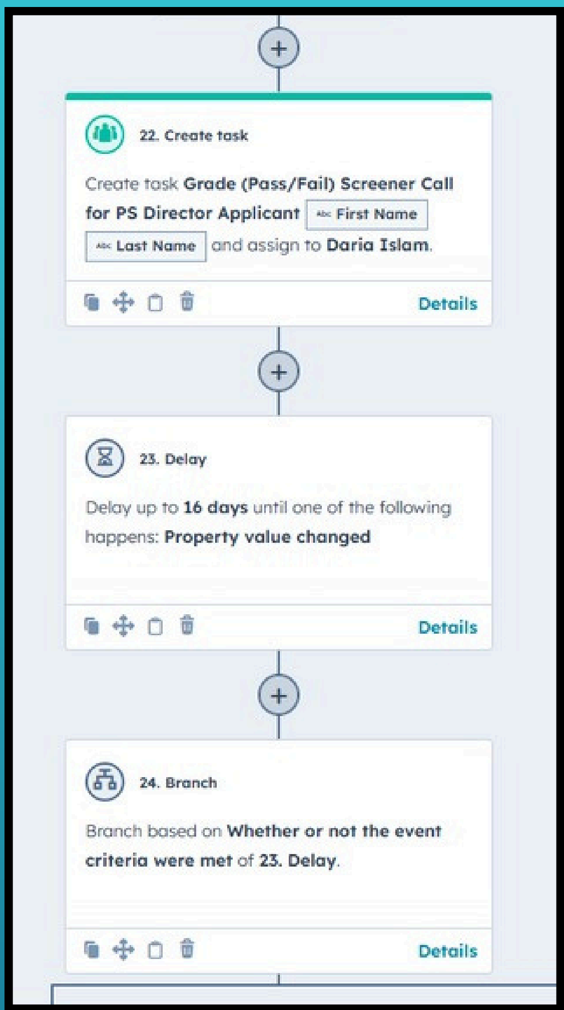
Then, we add a branch to check whether the criteria for the enrolled sequence are met or not.

Criteria Not Met:

If the criteria are not met, follow the fail action I previously described.

Criteria Met:

Create a task named **"Grade (Pass/Fail) Screener Call for PS Director Applicant"** and assign it to **Daria Islam.**



Then, Daria reviews the application and updates the property **"PSDirector Application Status"** to either **"Pass - Screener"** or **"Fail - Screener."** **After this, we add a branch to check whether the "PS Director Application Status" is Pass, Fail, or None Met.**

Criteria Not Met:

If the status is **none met**, follow the previously described action.

PS Director Application Status is Fail - Screener.:

If the status is **Fail**, follow the previously described fail action.

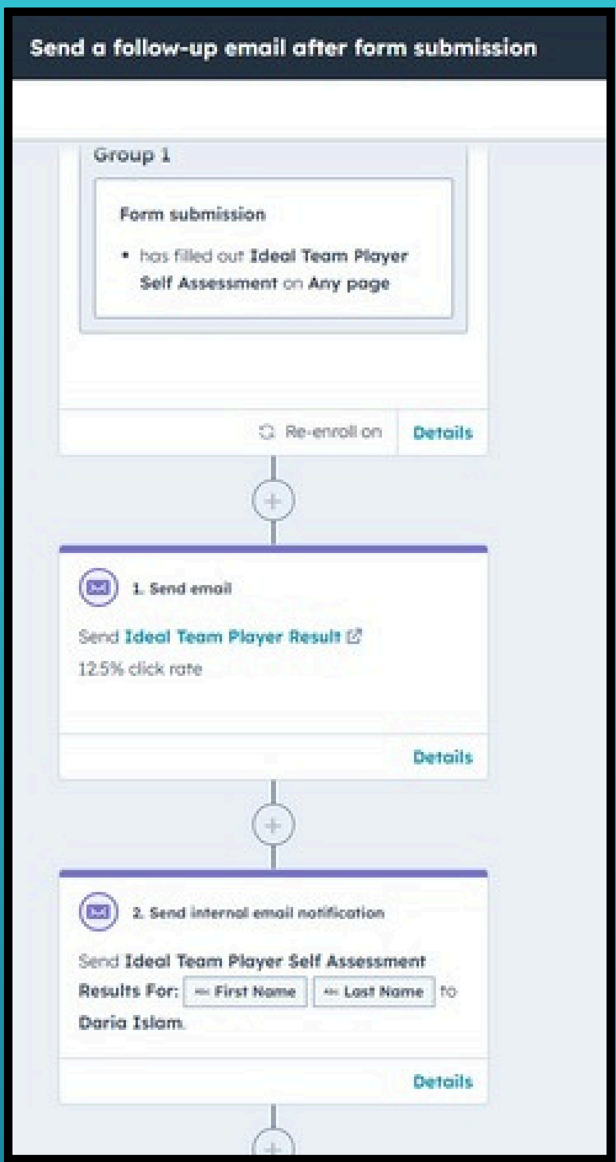
PS Director Application Status is Pass - Screener:

If the status is Pass, we enroll the user in the sequence "PS Director - Step 4 ", where we send a Form (Ideal Team Player Self Assessment).
Form Name: Ideal Team Player Self Assessment

We Used this form in workflow:

1. Send a follow-up email after form submission

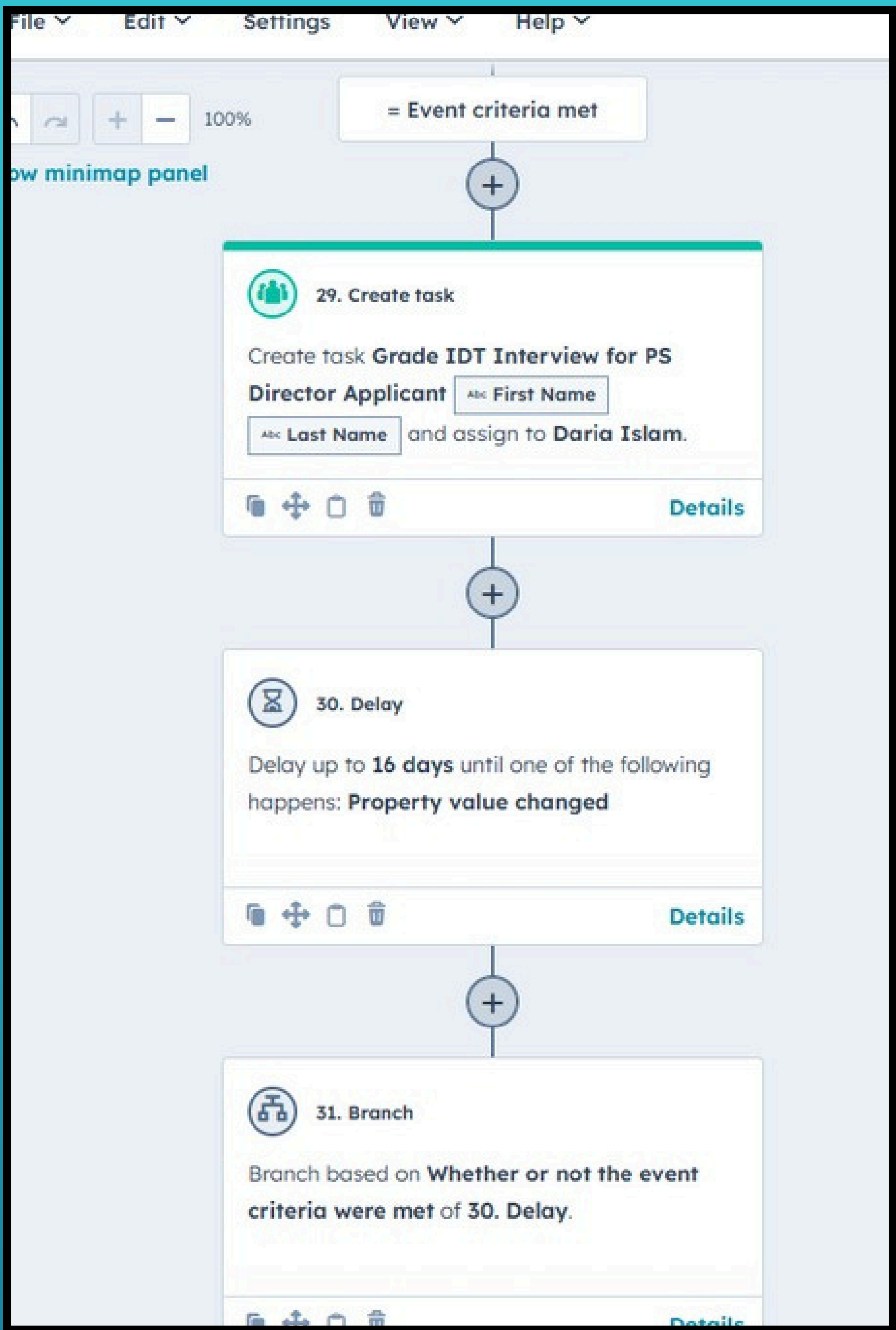
Upon form submission, we send an email (Ideal Team Player Result) to the user and also send an internal email to **Daria Islam.**



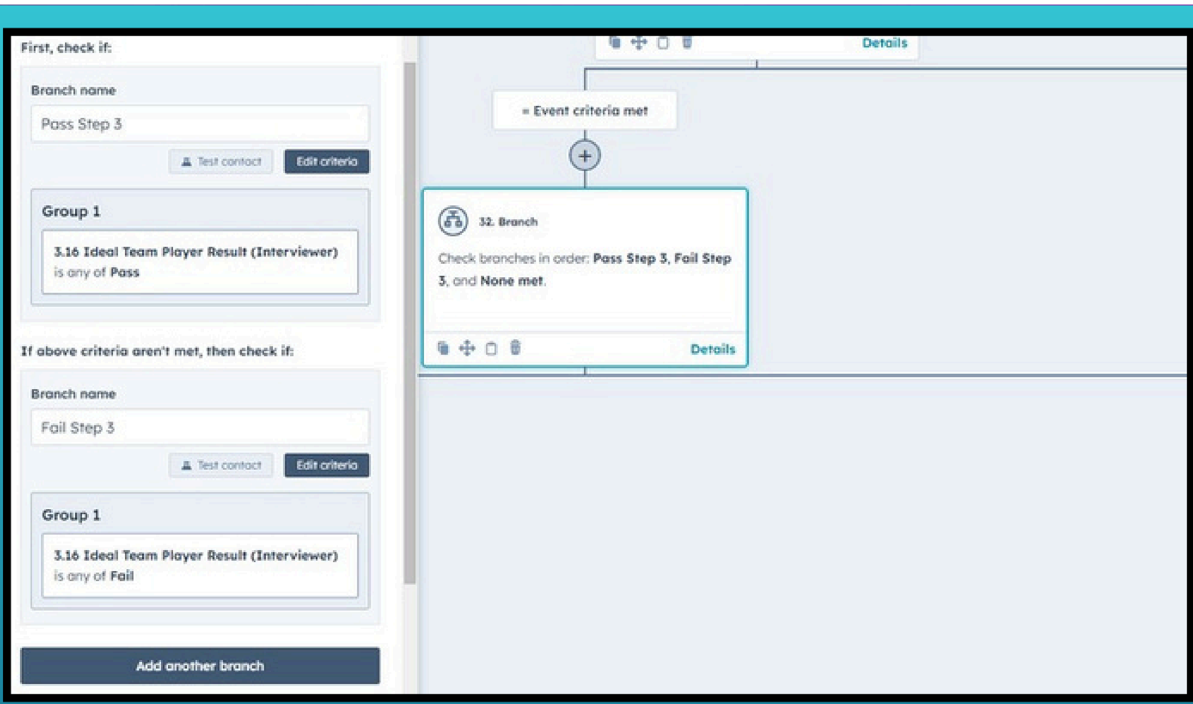
Then, we add a branch to check whether the criteria for theenrolled sequence are met or not.

Criteria Not Met:
If the criteria are not met, follow the fail action I previously described.
Criteria Met:

Create a task named **"Grade IDT Interview for PS Director Applicant"** and assign it to **Daria Islam.**



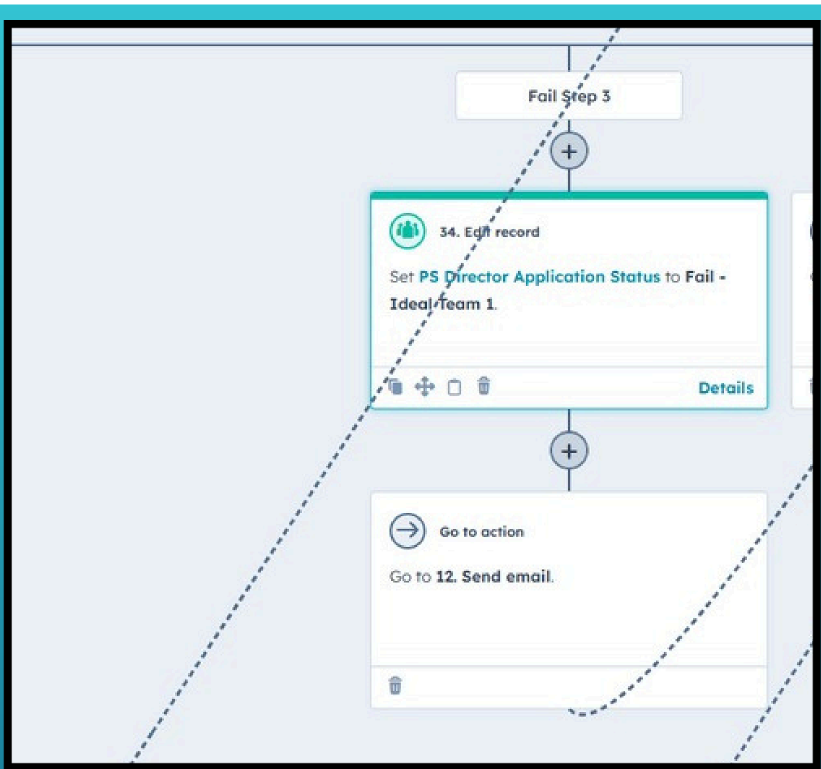
After this, we add a branch to check whether the "3.6 Ideal Team Player" is Pass, Fail, or None Met.



Criteria Not Met: If the criteria are not met, follow the fail action I previously described.

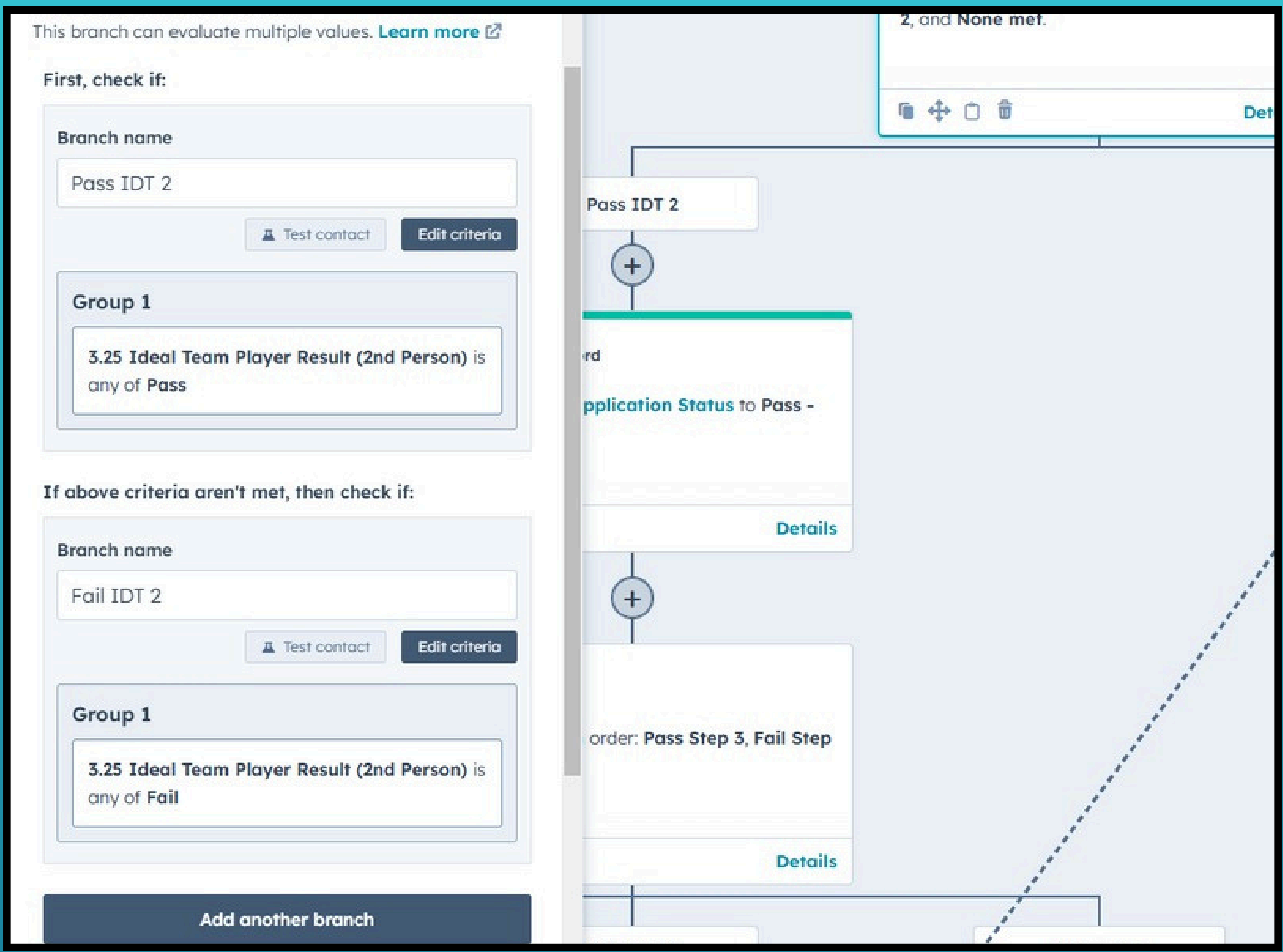
3.6 Ideal Team Player Status is Fail:

Update the **PS Director Application Status** to **Fail - Ideal Team 1**, & then follow the action previously described.



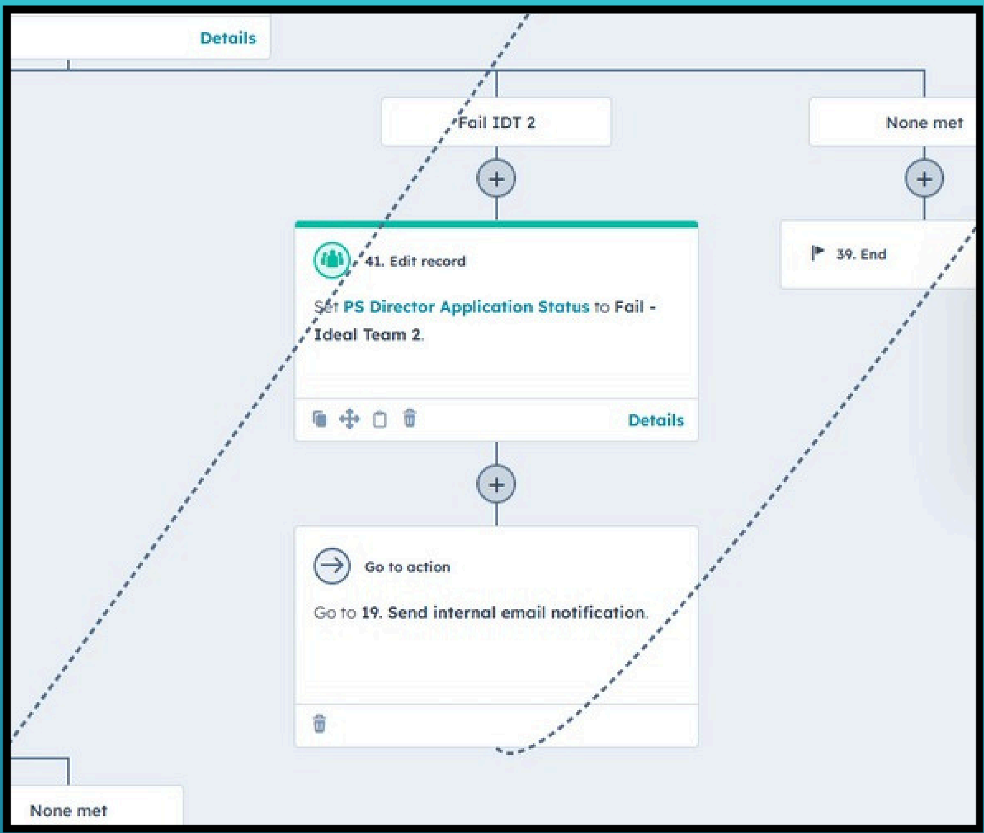
3.6 Ideal Team Player Status is Pass:

Update the **PS Director Application** Status to **Pass - Ideal Team 1** after a 2- minute delay. Then, create a task named **"Grade IDT Interview for PS Director Applicant"** and assign it to Matt Hood. Then Matt check the Task and update the property **“3.25 Ideal Team Player Result (2nd Person)”** Pass or Fail before 14 days.
After this, we add a branch to check whether the "3.25 Ideal Team Player Result (2nd Person)" is Pass, Fail, or None Met.

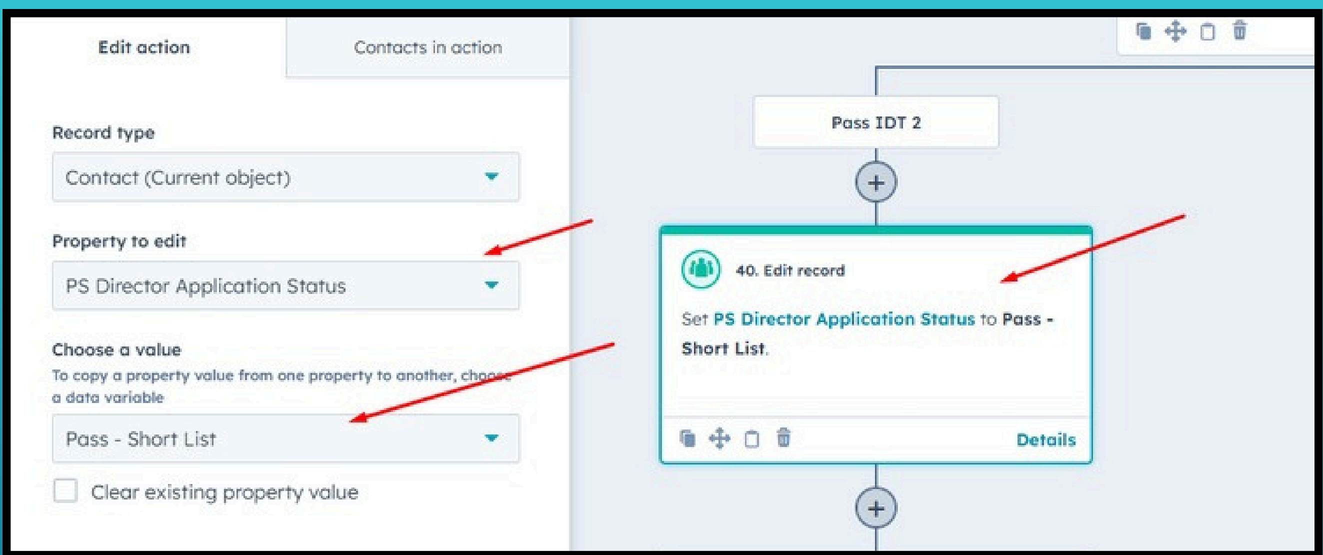


Criteria none met: blank

3.25 Ideal Team Player Result (2nd Person) is Fail: Update the **PS Director Application Status** to **Fail - Ideal Team 2**, and then follow the action previously described.



3.25 Ideal Team Player Result (2nd Person) is Pass:
Update the **PS Director Application** Status to **Pass - Short List**.



Form Name: PetroSuites - NPS Test Form (horizontal test)

This form is used on website pages for feedback

1. www.petrosuites.com/feedback
2. hjpetro-1230608.hs-sites.com/petrosuites-nps

Form Name : Director of Operations - PetroSuites Application Form 1O Ga

This Form is used in workflows

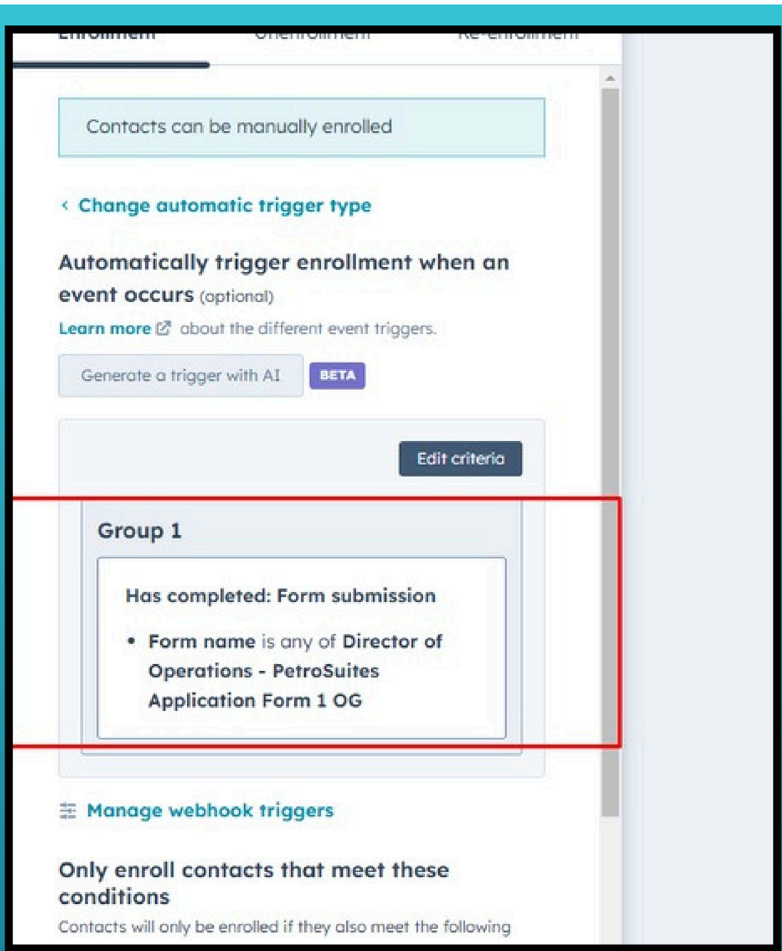
1. Send a follow-up email after form submission
2. PetroSuites Director of Co-working Initial Applicants

Workflow Name : Send a follow-up email after form submission

On form Submission we send a follow up email (PS - Director - Pass 1). But the workflow is off.

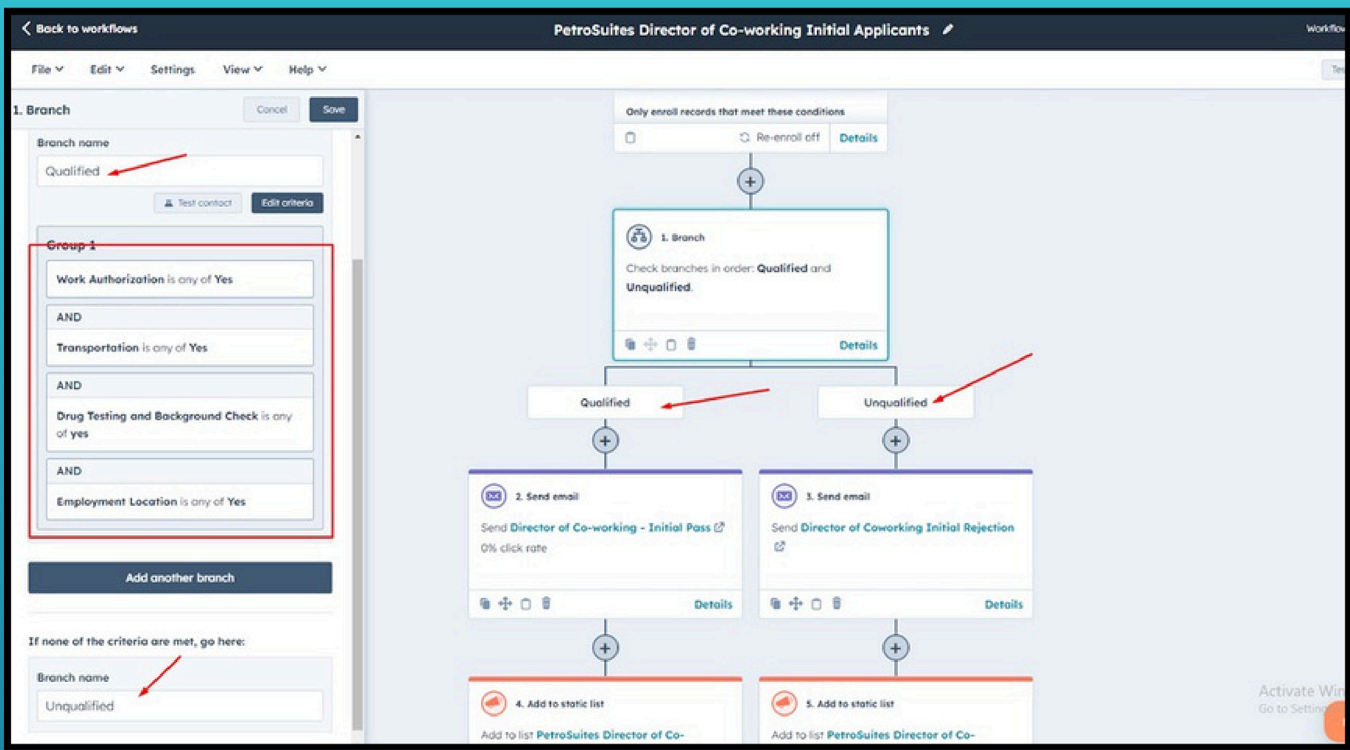
Workflow Name : PetroSuites Director of Co-working Initial Applicants

Upon form submission, Workflow ("PetroSuites Director of Co-working Initial Applicants") is triggered.



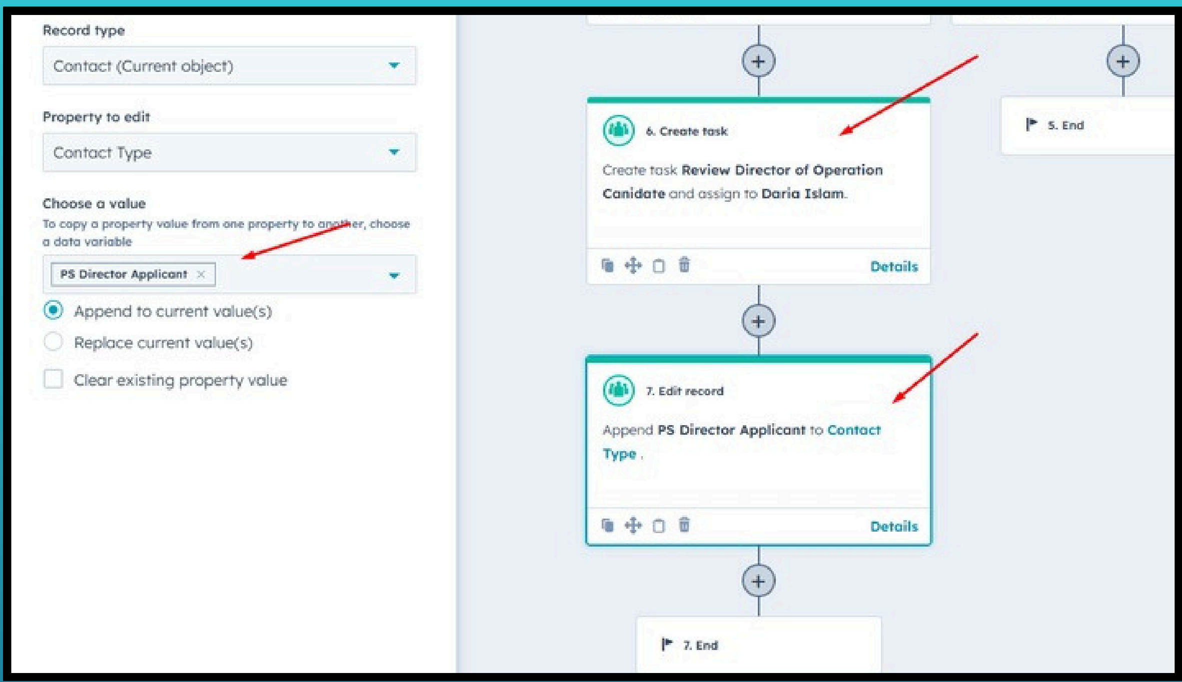
After this, we add a branch to check whether the Properties **"Work Authorization** , **Transportation** , **Drug Testing & Background Check** , **Employment Location"** is **Yes or No.**

If all these property values are Yes, it moves to the Qualified condition; otherwise, it moves to Unqualified.



Qualified Criteria

We send an email **("Director of Co-working - Initial Pass")** to the user and add them to the list **"PetroSuites Director of Co-working Candidates."** Then, we create a task named **"Review Director of Operations Candidate"** and assign it to Daria Islam.



Then, update the contact property **"Contact Type"** to **"PS Director Applicant."**

Unqualified Criteria:

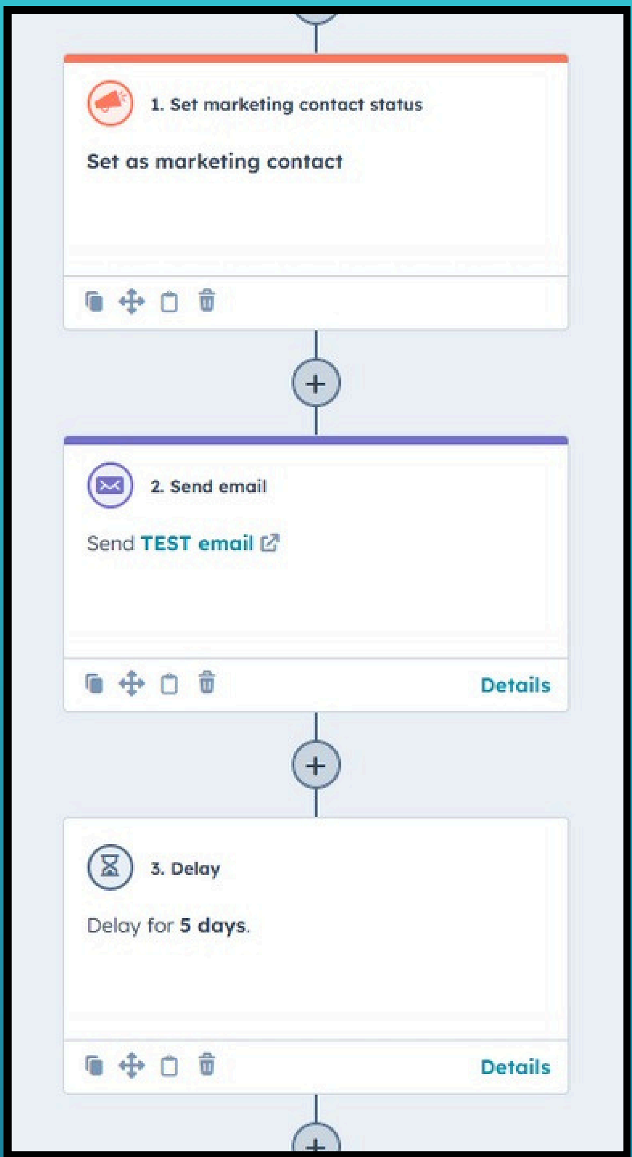
We send an email **("Director of Coworking Initial Rejection")** to the user & add them to the list **"PetroSuites Director of Co-Working Rejections".**

Form Name : PS Referral Form
This form is used in workflows and websites.

Workflow:
PS Referral - Make a Referral Submitted (Workflow is off)

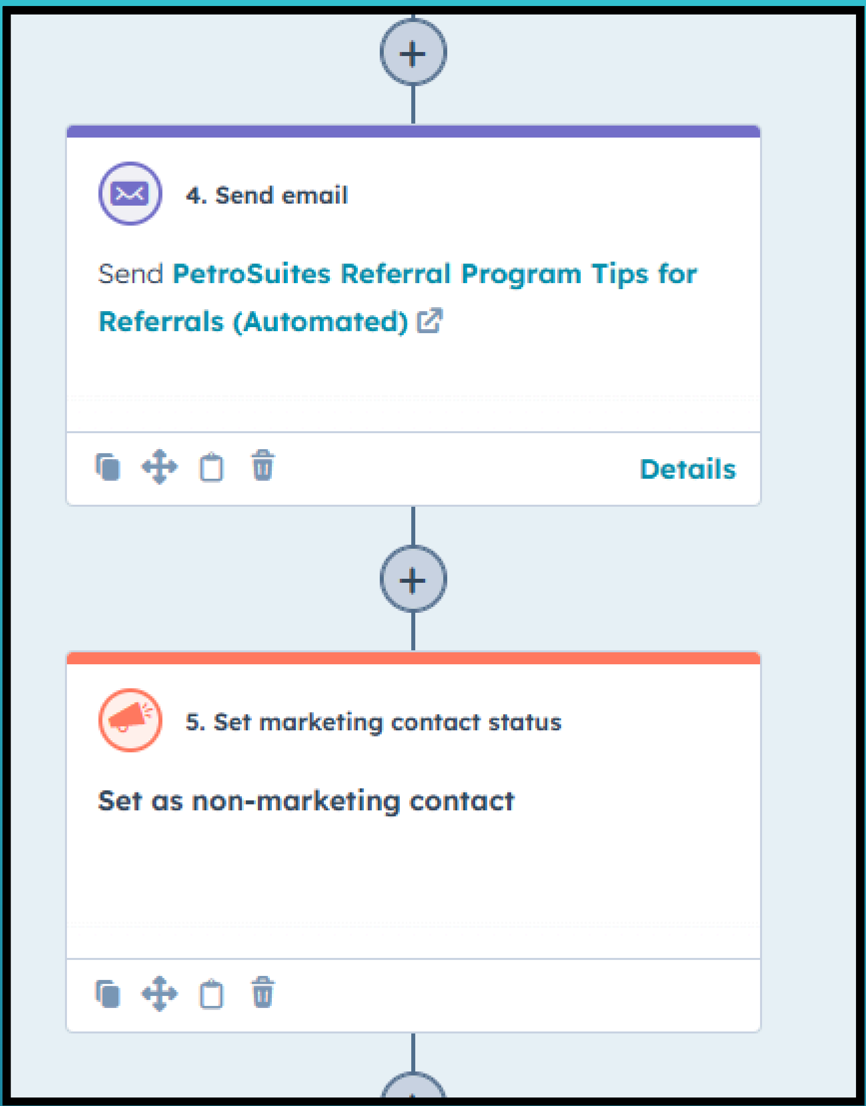
Website:
www.petrosuites.com/referral

When a form is submitted, a workflow is triggered to create a contact in HubSpot, set them as a marketing contact, send an email, & add a 5-day delay.



Form Name: Free Trial membership - PetroSuites

Then again send the email (PetroSuites Referral Program Tips for Referrals (Automated))
and then set a contact as a non-marketing contact.



Form Name: Free Trial membership - PetroSuites

Contact Us

(+91) 708 723 3361

provider@webguruz.in

https://webguruz.in

4th Floor, SM Heights,
C-205, Phase 8 B,
Sector 74 Mohali