

KRS HubSpot Lead Lifecycle & Routing Blueprint

Fictional HubSpot adapter validation package

Illustrative example — not a client result. Northstar Signal Labs is wholly fictional. No live portal was inspected.

Implementation-ready decision specification based on declared portal state and first-party documentation. Portal validation is required before activation.

Order	HUBSPOT-FIXTURE-001
Version	v1.0
Adapter	HubSpot v0.1.0
Declared tier	Sales Hub Professional
Object	Contact only
Shared rows	9 of 12
Required fields	12 of 12
QA cases	12 of 12

D1 - Lifecycle-stage definition and transition matrix

One Contact workflow, six ordered stages, five adjacent forward transitions, and one three-condition qualification gate. Automated backward movement is excluded.

ID	From	To	Condition 1	Condition 2	Condition 3	Action 1	Verify
LT-01	subscriber	lead	source_event equals Northstar Demo Request			set lifecyclestage lead	QA-01
LT-02	lead	marketingqualifiedlead	work_email true	employee_band known	consent true	set lifecyclestage marketingqualifiedlead	QA-01
LT-03	marketingqualifiedlead	salesqualifiedlead	route selected	owner assigned		set lifecyclestage salesqualifiedlead	QA-03 through QA-08
LT-04	salesqualifiedlead	opportunity	opportunity association declared			portal-validation hold	portal check only
LT-05	opportunity	customer	closed-won association declared			portal-validation hold	portal check only

D2 - Required-field and source-of-truth data contract

Twelve included Contact fields; the portal checklist must confirm internal names, types, options, and edit restrictions.

ID	Field	Internal	Purpose	Allowed	Source	Validation
F-01	Source event	source_event	Identify accepted entry	Northstar Demo Request form	form submission	must equal accepted form
F-02	Work email	work_email	Qualification completeness	true false	form validation	must be true to qualify
F-03	Consent	consent	Contact permission	true false	form submission	must be true to qualify
F-04	Lifecycle stage	lifecyclestage	Ordered lifecycle state	subscriber lead marketingqualifiedlead salesqualifiedlead opportunity customer	HubSpot lifecycle workflow	forward only
F-05	Qualification status	qualification_status	Gate result	qualified hold	qualification workflow	must match gate result
F-06	Region	region	Routing dimension one	NA EMEA	declared Contact property	must match allowed value
F-07	Employee band	employee_band	Routing dimension two	20-199 200+	declared Contact property	must match allowed band
F-08	Strategic account	strategic_account	Named-account exception	true false	approved account policy	must be explicit boolean
F-09	Contact owner	hubspot_owner_id	Routing outcome	approved active user IDs	Contact workflow	must match selected row
F-10	Assigned at	assigned_at	SLA start evidence	ISO-8601	Contact workflow	must be present after owner write
F-11	First action at	first_action_at	SLA stop evidence	ISO-8601	owner activity	must be after assigned_at
F-12	Route reason	krs_route_reason	Auditable route explanation	R-01 through R-09	Contact workflow	must equal applied immutable row

D3 - Routing decision table

Nine immutable rows use the shared twelve-row budget. First match wins and None met is explicit.

ID	Category	Predicate 1	Predicate 2	Extra	Owner	HubSpot action	Verify
R-01	standard	region equals NA	employee_band equals 200+		Enterprise SDR	set route reason and specific Contact owner	QA-03
R-02	standard	region equals NA	employee_band equals 20-199		Commercial SDR	set route reason and specific Contact owner	QA-04
R-03	standard	region equals EMEA	employee_band equals 200+		EMEA SDR	set route reason and specific Contact owner	QA-05
R-04	standard	region equals EMEA	employee_band equals 20-199		EMEA SDR	set route reason and specific Contact owner	QA-06
R-05	default	None met			Revenue Operations	set route reason and fallback specific Contact owner	QA-07
R-06	exception	strategic_account equals true			Enterprise SDR	set route reason and approved strategic owner	QA-08
R-07	fallback	declared_owner_available equals false			Revenue Operations	set route reason and fallback specific Contact owner	QA-09
R-08	reassignment	first_action_at unknown	assigned_at older than 4h		Revenue Operations	set route reason and replacement specific Contact owner	QA-10
R-09	sla escalation	first_action_at unknown	assigned_at older than 8h		Revenue Operations	set route reason and escalation owner plus internal notice	QA-12

D4 - Owner, fallback, reassignment, and SLA matrix

ID	Type	Trigger	Owner action	Notice	SLA	Requirement	Verify
O-01	owner group	R-01 match	set approved Enterprise SDR Contact owner	create first-action task	4h	specific active user confirmed	QA-03
O-02	owner group	R-02 match	set approved Commercial SDR Contact owner	create first-action task	4h	specific active user confirmed	QA-04
O-03	owner group	R-03 or R-04 match	set approved EMEA SDR Contact owner	create first-action task	4h	specific active user confirmed	QA-05 and QA-06
O-04	default	R-05 None met	set approved Revenue Operations Contact owner	create triage task	4h	specific active user confirmed	QA-07
O-05	exception	R-06 strategic	set approved Enterprise SDR Contact owner	notify enterprise lead	4h	overwrite policy confirmed	QA-08
O-06	fallback	R-07 declared unavailable	set approved Revenue Operations Contact owner	notify revenue operations	4h	availability property and owner confirmed	QA-09
O-07	reassignment	R-08 no first action	set approved Revenue Operations Contact owner	notify original owner group	4h	delay and overwrite policy confirmed	QA-10
O-08	sla notification	no first action at 2h	no owner change	notify current owner	2h	portal timezone and recipient confirmed	QA-11
O-09	sla escalation	R-09 no first action at 8h	set approved Revenue Operations Contact owner	notify sales operations	8h	delay and overwrite policy confirmed	QA-12

D5 - HubSpot adapter automation sequence

HubSpot v0.1.0; declared-state validation only. Rotation and live support remain unverified until portal checks pass.

Evidence

- HS-001
- HS-002
- HS-003
- HS-004
- HS-005
- HS-006
- HS-007
- HS-008
- HS-009
- HS-010
- HS-011
- HS-012
- HS-013

Object and field mappings

- {"neutral_object": "person", "platform_object": "Contact"}
- {"neutral_field": "lifecycle_stage", "platform_field": "lifecyclestage"}
- {"neutral_field": "owner", "platform_field": "hubspot_owner_id"}
- {"neutral_field": "route_reason", "platform_field": "krs_route_reason"}

Lifecycle and routing assumptions

- One Contact-based workflow and one accepted form event
- Default Lifecycle stage moves forward only
- Ordered mutually exclusive branches stop on first match
- None met is the explicit default path
- Re-enrollment is off unless a portal-eligible trigger is separately approved

Automation sequence

- Enroll a Contact after the declared form-submission event
- Check the three-condition qualification gate
- Set the forward lifecycle stage to marketingqualifiedlead on pass
- Evaluate R-01 through R-06 in immutable order
- Set route reason and a declared specific Contact owner
- Use R-07 only when the declared owner-availability input is false
- Create the first-action task and record assigned_at
- Send the two-hour internal notification
- Apply the four-hour reassignment and eight-hour ownership escalation only when the timestamps remain empty

Ownership constraints

- Specific owner IDs must be confirmed active in the portal
- Rotation is unsupported by default and requires Sales or Service Hub Professional or Enterprise plus activated paid users
- Team rotation considers primary team members only
- Existing ownership is not overwritten without explicit approval
- Salesforce owner sync pauses activation until precedence is resolved

D5 - HubSpot adapter automation sequence (continued)

SLA constraints

- SLA starts only after a successful owner assignment writes assigned_at
- One two-hour internal notification
- One four-hour reassignment
- One eight-hour ownership-changing escalation
- Portal timezone and workflow timing settings require validation

Reporting constraints

- One Contact single-object report
- Report filters use included Contact properties only
- Create-own and Edit report permissions are required
- No multi-object attribution or calculated-field claim

Portal-validation checks

- Confirm a Professional or Enterprise subscription exposes Contact workflows
- Confirm Workflow View Edit Publish and required Enroll permissions
- Confirm all twelve included Contact properties and their internal names
- Confirm branch order None met behavior and re-enrollment state
- Confirm each owner is active and the overwrite setting is correct
- Confirm any selected rotation user has an eligible paid seat and primary-team membership
- Confirm Salesforce or other connected systems will not restore ownership
- Confirm task internal-notification delay and report permissions
- Test all twelve synthetic cases without activating production enrollment

Unsupported or unresolved

- Generic queue ownership is not claimed
- Native contact-owner availability routing is not claimed
- Rotation is unsupported until portal eligibility is verified
- Backward automated lifecycle movement is excluded
- Cross-object routing custom code and nested Boolean logic are excluded
- Live portal support is unverified until the portal checklist passes

D6 - Synthetic QA pack

Twelve cases include normal, missing-data, exception, default, fallback, reassignment, SLA, unsupported entitlement, and portal-validation behavior.

ID	Category	Trigger/input	Lifecycle	Route	Owner	Pass condition
QA-01	normal	work_email=true;employee_band=200+;consent=true	marketingqualifiedlead	qualification pass	pending routing	qualification_status=qualified
QA-02	missing data	work_email=false;employee_band=200+;consent=true	lead	qualification hold	unassigned	qualification_status=hold and no route
QA-03	standard	region=NA;employee_band=200+;strategic_account=false	salesqualifiedlead	R-01	Enterprise SDR	route reason owner and assigned_at present
QA-04	standard	region=NA;employee_band=20-199;strategic_account=false	salesqualifiedlead	R-02	Commercial SDR	route reason owner and assigned_at present
QA-05	standard	region=EMEA;employee_band=200+;strategic_account=false	salesqualifiedlead	R-03	EMEA SDR	route reason owner and assigned_at present
QA-06	standard	region=EMEA;employee_band=20-199;strategic_account=false	salesqualifiedlead	R-04	EMEA SDR	route reason owner and assigned_at present
QA-07	default	region missing;employee_band=20-199;strategic_account=false	salesqualifiedlead	R-05	Revenue Operations	None met maps to explicit default owner
QA-08	exception	region=NA;employee_band=20-199;strategic_account=true	salesqualifiedlead	R-06	Enterprise SDR	exception evaluates before standard row
QA-09	fallback	declared selected owner unavailable	salesqualifiedlead	R-07	Revenue Operations	fallback owner and notice observed
QA-10	reassignment	first_action_at missing after 4h	salesqualifiedlead	R-08	Revenue Operations	reassignment and original-group notice observed
QA-11	sla notification	first_action_at missing after 2h	salesqualifiedlead	sla notification	current owner	current-owner notice with no owner change
QA-12	unsupported and escalation	rotation entitlement absent;first_action_at missing after 8h	salesqualifiedlead	R-09	Revenue Operations	rotation remains paused and ownership escalation is observable

D7 - Build order and portal-validation checklist

ID	#	Portal action	Role	Checkpoint
B-01	1	Confirm HubSpot hub tier and Contact workflow entitlement	Portal administrator	Professional or Enterprise entitlement recorded
B-02	2	Confirm Workflow View Edit Publish and Enroll permissions	Portal administrator	Operator permissions recorded
B-03	3	Confirm accepted form and Contact enrollment event	CRM owner	Exact event available in test mode
B-04	4	Confirm twelve included Contact properties and internal names	CRM owner	Property inventory matches data contract
B-05	5	Inspect lifecycle order and existing lifecycle automation	CRM owner	No conflicting backward or duplicate automation
B-06	6	Configure QG-01 with three atomic conditions	Marketing operations	Qualification pass and hold tests pass
B-07	7	Configure R-01 through R-06 and None met in order	Revenue operations	First-match order and default test pass
B-08	8	Confirm specific owners overwrite policy and connected-system precedence	Sales operations	Every owner active and Salesforce conflict absent
B-09	9	Configure R-07 fallback and R-08 reassignment	Revenue operations	Fallback and reassignment tests pass
B-10	10	Configure SLA delays task and internal notifications	Sales operations	Two four and eight hour test paths pass
B-11	11	Create one Contact single-object operating report	CRM owner	Required fields filters and permissions pass
B-12	12	Run QA-01 through QA-12 without production enrollment	QA owner	All cases pass and activation remains off

D8 - Client-ready lead-path diagram

Contact form -> Qualify -> Forward lifecycle -> Ordered route -> Specific owner -> SLA -> Contact report

CAPTURE	Northstar Demo Request form
QUALIFY	QG-01: work email + employee band + consent
LIFECYCLE	subscriber -> lead -> marketingqualifiedlead
ROUTE	R-01 to R-06; first match; None met default
OWNER	Specific active Contact owner; R-07 fallback
SLA	2h notification -> 4h reassignment -> 8h escalation
REPORTING	One Contact single-object operating view

D9 - Assumptions, exclusions, unresolved decisions, and change-order triggers

Assumptions

Sales Hub Professional and required workflow/report permissions are declared; all twelve Contact fields and specific owner users are subject to portal validation.

Exclusions

Live inspection, production activation, backward lifecycle automation, generic queues, unverified rotation, custom objects, multiple portals, custom code, scoring, and cross-object routing.

Unresolved portal checks

- Confirm a Professional or Enterprise subscription exposes Contact workflows
- Confirm Workflow View Edit Publish and required Enroll permissions
- Confirm all twelve included Contact properties and their internal names
- Confirm branch order None met behavior and re-enrollment state
- Confirm each owner is active and the overwrite setting is correct
- Confirm any selected rotation user has an eligible paid seat and primary-team membership
- Confirm Salesforce or other connected systems will not restore ownership
- Confirm task internal-notification delay and report permissions
- Test all twelve synthetic cases without activating production enrollment
- Generic queue ownership is not claimed
- Native contact-owner availability routing is not claimed
- Rotation is unsupported until portal eligibility is verified
- Backward automated lifecycle movement is excluded
- Cross-object routing custom code and nested Boolean logic are excluded
- Live portal support is unverified until the portal checklist passes

Change-order triggers

Any unavailable entitlement, second object, extra dimension, cap overage, ownership conflict, or changed platform fact pauses the build and requires revision.

END OF FICTIONAL HUBSPOT VALIDATION PACKAGE