

Renewal-Winback-Payment Delinquency Campaigns via HubSpot-Cleverbridge custom integration

Overall Goal of the integration [🔗](#)

The setup is aimed to **increase customer retention and recover lost revenue** by syncing billing events from Cleverbridge (a subscription billing platform) into HubSpot (a marketing automation and CRM platform), enabling targeted campaigns based on customer payment behavior.

- **Cleverbridge** handles billing but lacks advanced marketing automation.
- **HubSpot** excels at segmentation, workflows, and email automation.
- A custom integration allows:
 - Real-time syncing of billing events (e.g., payment failed, renewal due)
 - Triggering automated workflows in HubSpot
 - Personalizing messages based on customer status

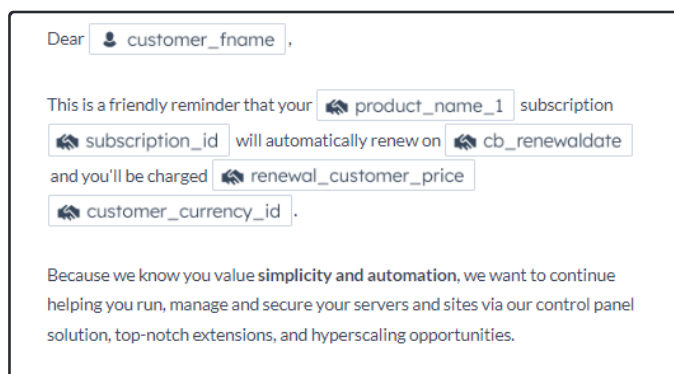
Campaign types [🔗](#)

- **Renewal Campaign** is a series of emails that are sent before the renewal of the customers license. 3 types of Renewals:
 - No Action Required: if the customer decided to renew their license automatically. In this case the customer will be informed twice about the automatic renewal that will happen.

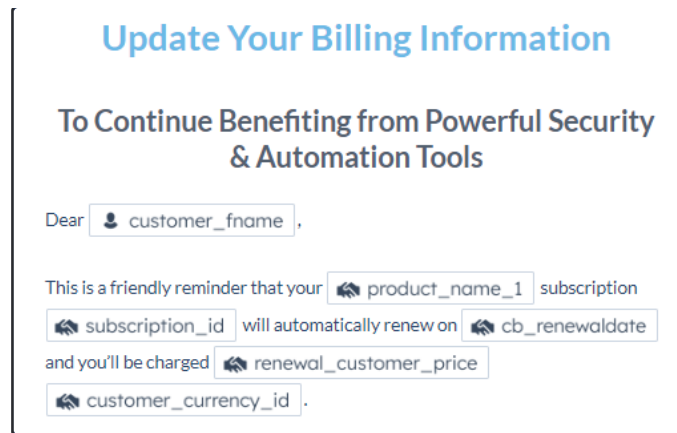
Trigger: Upcoming subscription renewal

Goal: Remind customers to renew, offer incentives, or provide upgrade options

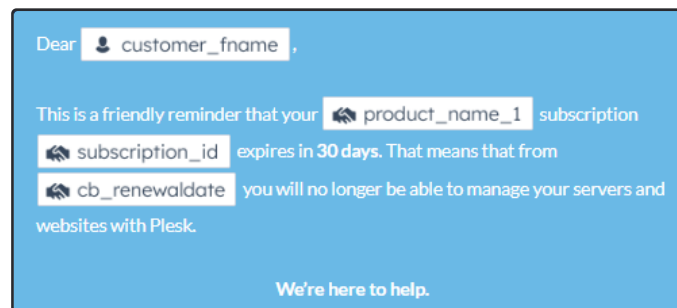
Benefit: Boost renewal rates and reduce churn



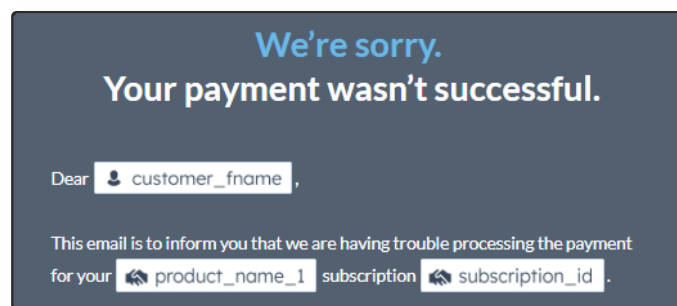
- Action Required: if the customer needs to update their billing information before the renewal date, the customer will receive 3 emails before the renewal date and 1 more after, as part of the winback campaign.



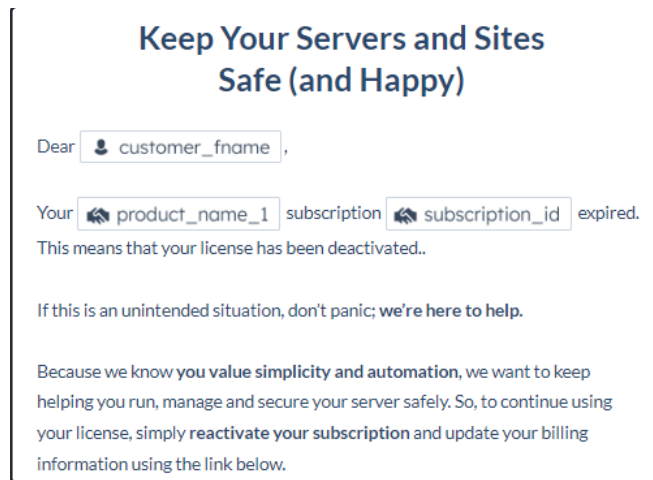
- **Manual Renewal:** if the customer decided to renew their license manually. In this case the customer will receive 3 emails before the renewal date and 1 more after, as part of the winback campaign.



- **Payment Delinquency Campaign** is a series of emails that will be sent if the customer couldn't renew their license because the payment method was not accepted. This case the customer will be notified to update their payment information as soon as we are aware of the issue, and then another email goes out after 23 hours.
 - **Trigger:** Failed payment or overdue invoice
 - **Goal:** Notify customers, provide payment options, or escalate to support
 - **Benefit:** Reduce involuntary churn and improve cash flow



- **Winback Campaign** is a series of emails that are sent after the renewal date of the customers license, when the renewal did not happen. About the series of emails see Renewal Campaign above.
 - **Trigger:** Subscription cancellation or non-renewal
 - **Goal:** Re-engage lapsed customers with personalized offers or content
 - **Benefit:** Recover lost customers and revenue



Deal based Automations [🔗](#)

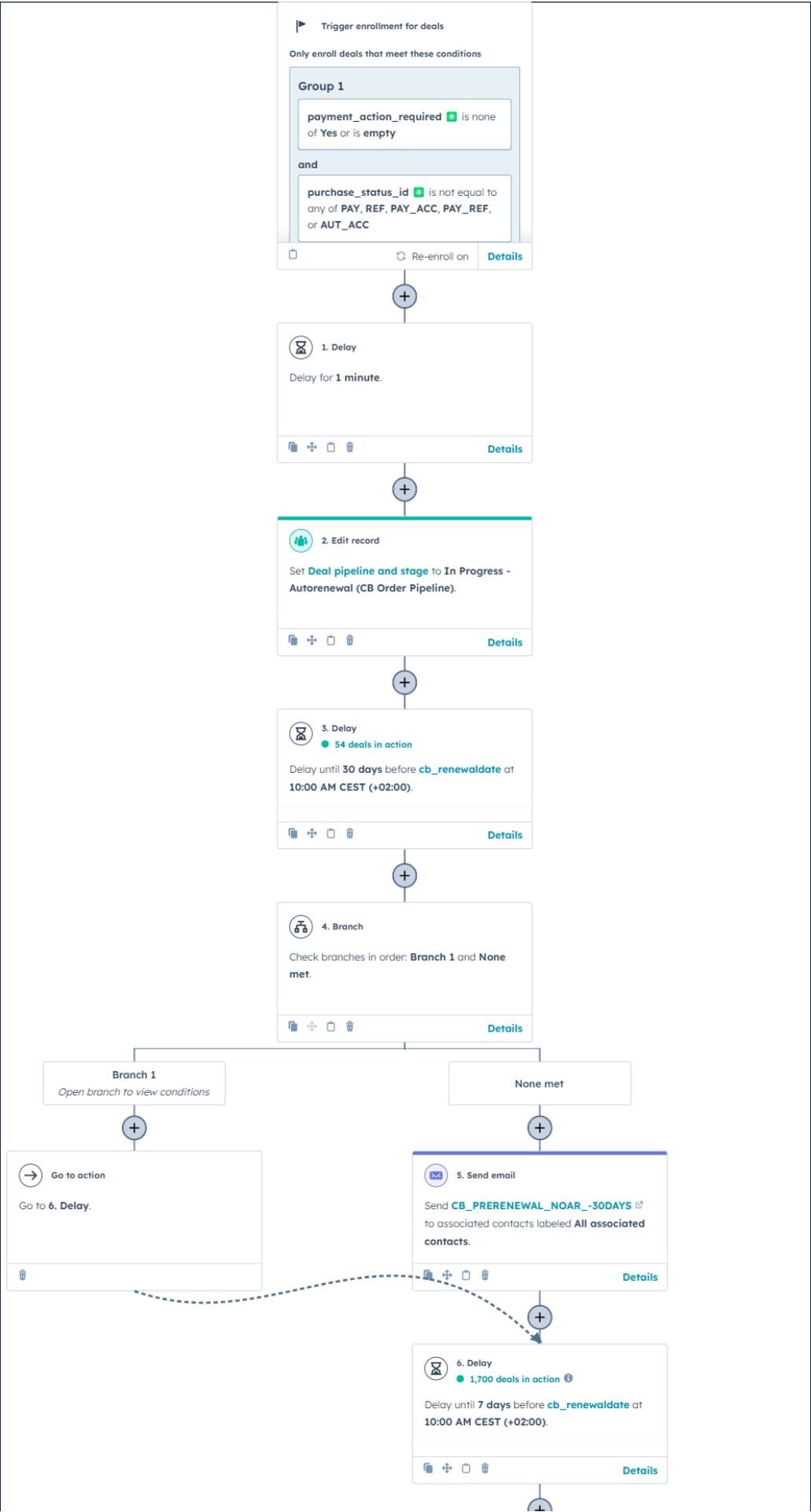
The data of licenses provided by Cleverbridge is stored in Deals that are associated to the contact that owns (pays for) the deal. The process is the following:

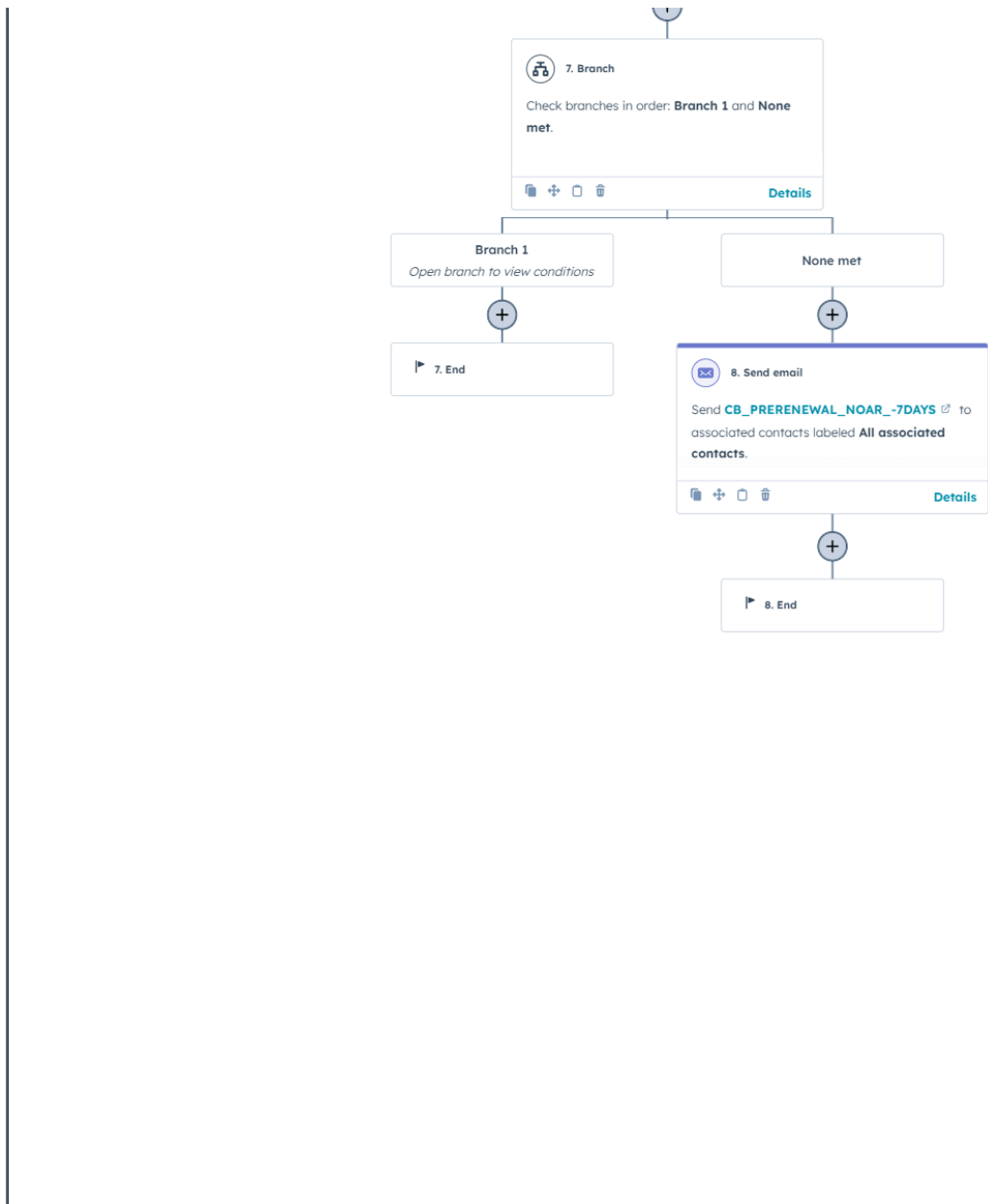
- If the customer is a new participant of these Campaigns, a contact record will be created, or, if the customer still exists in the database, the contact will be updated.
- A Deal will be created with an unique identifier, associated to the Contact.
- The Deal will enrol in the Campaign (workflows) and will exit with either success or lost.

Campaigns Workflow structure [🔗](#)

Renewal Campaign: No action required

1. Triggers when payment action is not required, but it hasn't been completed, the payment method is valid, the renewal date is in the future, the customer has a still active license and the values needed for the emails already arrived by the sync.
2. Sets Deal to the appropriate status of the Deal Pipeline
3. Waits until an exact date and time to send the first notification email. If the renewal date is less (joined originally later to the flow), the email will be skipped.
4. Waits until an exact date and time to send the second notification email. If the renewal date is less (joined originally later to the flow), the email will be skipped.

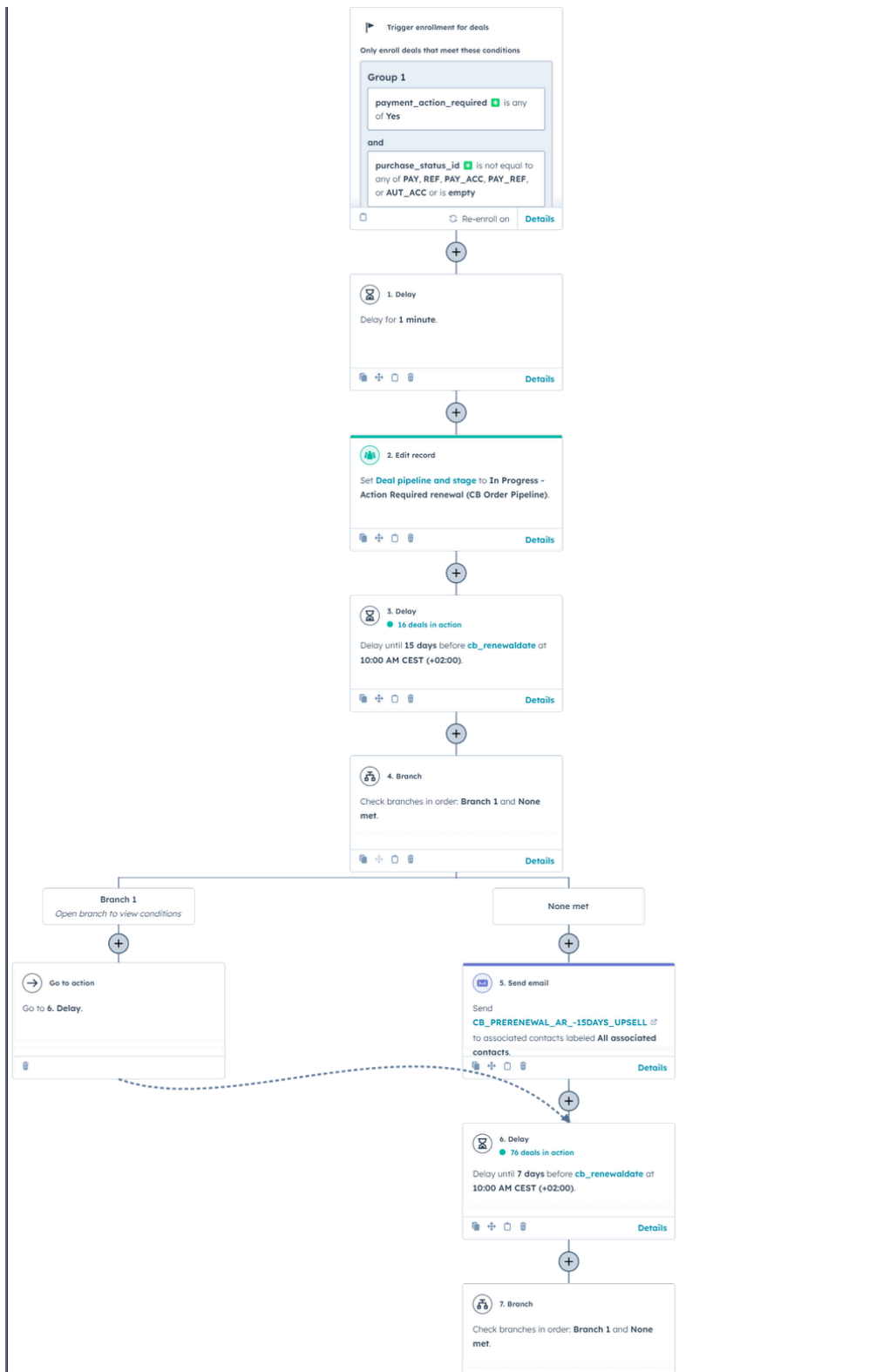




Renewal Campaign with Win-back email: Action required

1. Triggers when payment action is required, but it hasn't been completed, the payment method is valid, the renewal date is in the future, the customer has a still active license and the values needed for the emails already arrived by the sync.
2. Sets Deal to the appropriate status of the Deal Pipeline
3. Waits until an exact date and time to send the first notification email. If the renewal date is less (joined originally later to the flow), the email will be skipped.
4. Waits until an exact date and time to send the second notification email. If the renewal date is less (joined originally later to the flow), the email will be skipped.
5. Waits one day after the renewal date has been passed to send the win-back email.

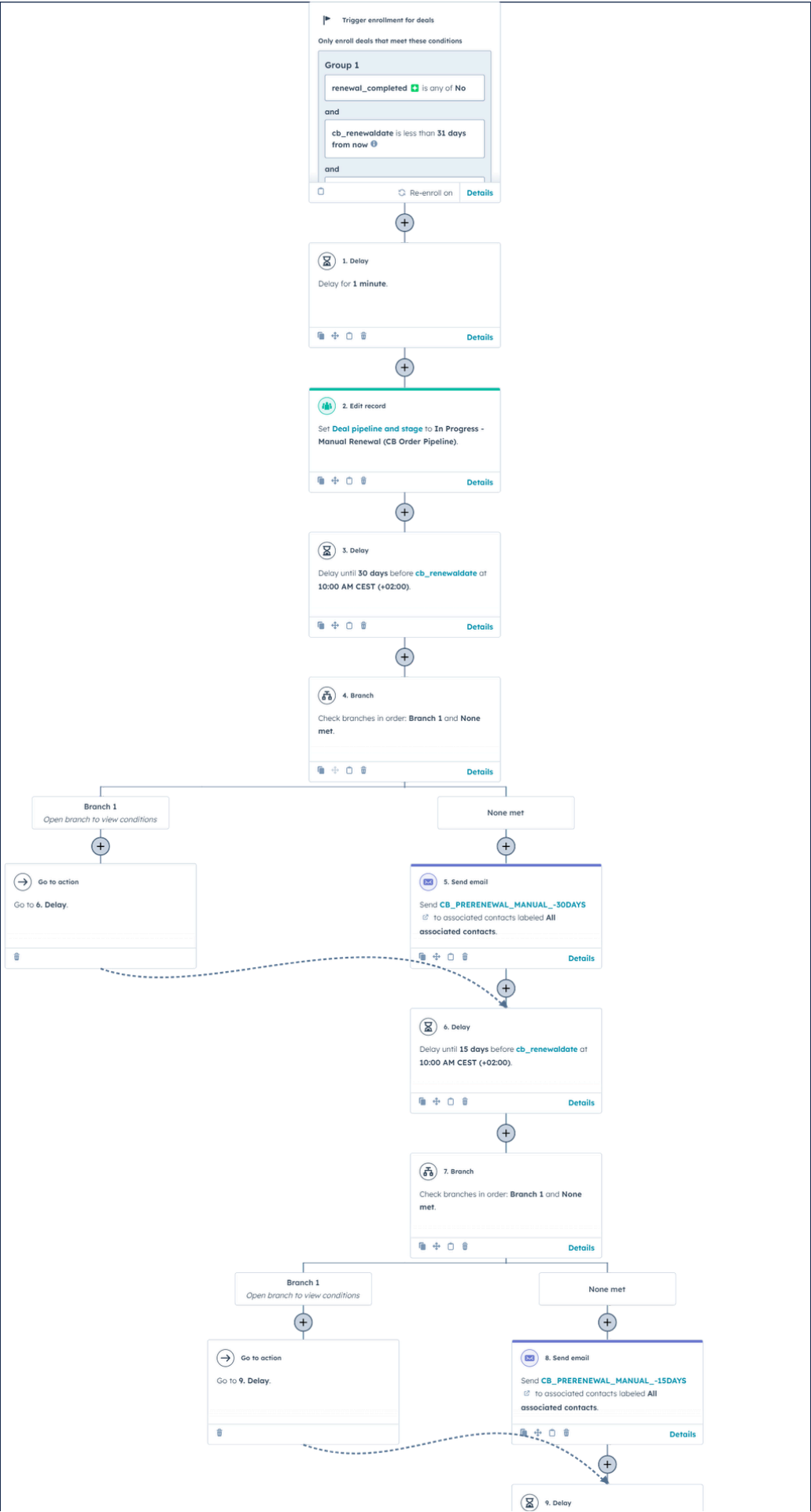


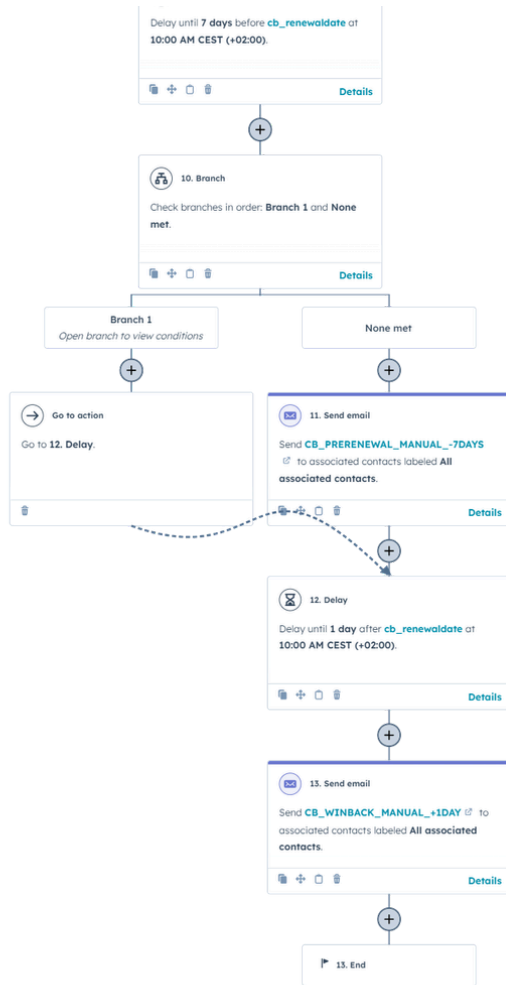


Manual Renewal Campaign with Win-back email

1. Triggers when the subscription status is not active, the renewal is logically hasn't been completed, the renewal date is in the future and the values needed for the emails already arrived by the sync.
2. Sets Deal to the appropriate status of the Deal Pipeline
3. Waits until an exact date and time to send the first notification email. If the renewal date is less (joined originally later to the flow), the email will be skipped.

4. Waits until an exact date and time to send the second notification email. If the renewal date is less (joined originally later to the flow), the email will be skipped.
5. Waits until an exact date and time to send the third notification email. If the renewal date is less (joined originally later to the flow), the email will be skipped.
6. Waits one day after the renewal date has been passed to send the win-back email.





Payment Delinquency Campaign

1. Triggers when the purchase (status) is declined and the values needed for the emails already arrived by the sync.
2. Sets Deal to the appropriate status of the Deal Pipeline
3. Sends the first notification email.
4. Waits a day to send the second notification email.

▶ Trigger enrollment for deals

Only enroll deals that meet these conditions

Group 1

product_name_1 is known

and

update_payment_link is known

and

purchase_status_id  is equal to any



Re-enroll on

[Details](#)



1. Delay

Delay for **1 minute**.



[Details](#)



2. Edit record

Set **Deal pipeline and stage** to **In Progress - Payment delinquency (CB Order Pipeline)**.



[Details](#)



3. Send email

Send **CB_PAYDEL_1HR**  to associated contacts labeled **All associated contacts**.



[Details](#)



4. Delay

Delay for **23 hours**.

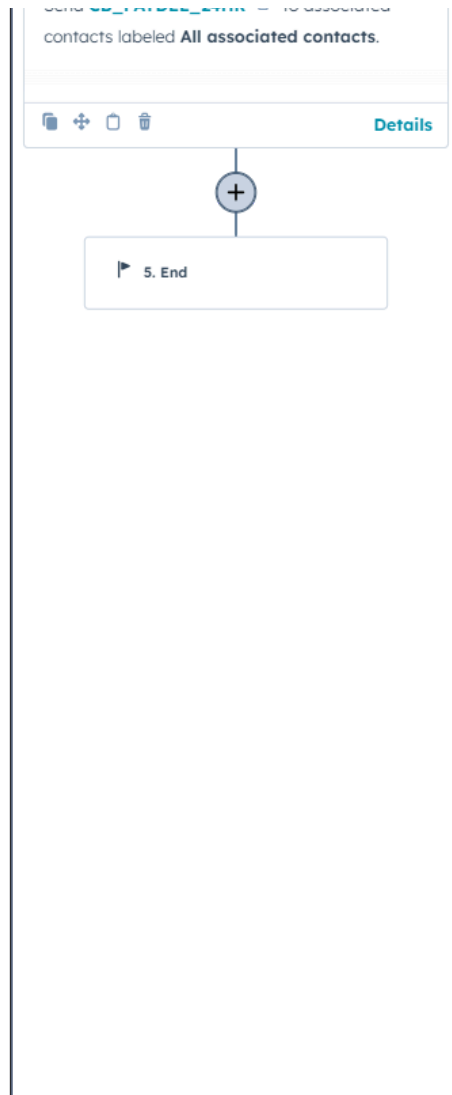


[Details](#)



5. Send email

Send **CB_PAYDEL_24HR**  to associated



Deal Pipeline Workflow

1. Triggers after the renewal date has passed and the payment status is valid, but the renewal is not yet completed.
2. Sets Deal to In Progress and waits a day.
3. Checks if renewal has been completed. If yes, it sets Deal stage to Closed Won - Renewal Completed. Otherwise it waits two more days as a puffer and rechecks conditions. If the renewal hasn't happened, it sets Deal Stage to Closed Lost - Renewal Failed.

