

FULL HUBSPOT ONBOARDING & AUTOMATION

From Manual Operations to *Full Automation*

Mindweal · 2025

162

ACTIVE AUTOMATIONS

11K

CONTACTS STRUCTURED

7

TICKET PIPELINES

5

COMMS CHANNELS

A digital-first mental health platform managing thousands of patients, guardians, clinics, and providers went from 100% manual operations to a fully automated system — bidirectionally connected to their own custom portal.

— THE CHALLENGE

A growing operation with no digital infrastructure.

Mindweal had the clinical expertise — but their operations were entirely manual. Growth had a ceiling because every patient interaction required human intervention.

100% manual reminders

Appointment reminders, follow-ups, and onboarding communications were sent by hand — bottlenecks and inconsistency at every step.

No scalable onboarding

Every new patient required direct staff involvement throughout the entire intake process. No capacity to grow without adding headcount.

No visibility or reporting

Without a CRM, there was no way to identify patients aging out of the system, track progress, or spot gaps in the care journey.

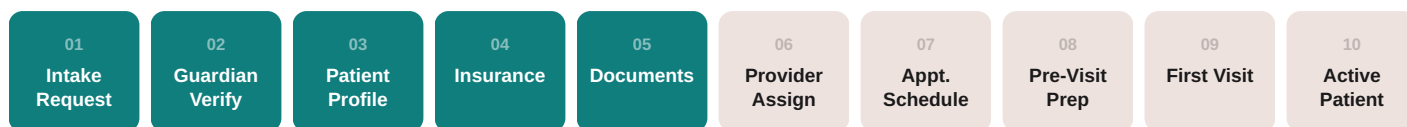
— THE INTEGRATION

HubSpot + Mindweal portal, bidirectional and always in sync.



— PATIENT ONBOARDING PIPELINE

10 stages. Zero staff intervention required.



Automations in each stage evaluate data completeness in real time and trigger personalized email + SMS sequences until the patient advances — eliminating manual follow-up entirely.

— BY THE NUMBERS

The infrastructure behind Mindweal's automation.

11K

TOTAL CONTACTS

4K+

ACTIVE PATIENTS

162

AUTOMATIONS

205

CUSTOM PROPERTIES

10

ONBOARDING STAGES

2

DEAL PIPELINES

7

TICKET PIPELINES

5

COMMS CHANNELS

— AUTOMATION INTELLIGENCE

162 automations that think, evaluate, and act.

WHAT THE AUTOMATIONS DO

- Evaluate data completeness per patient at each stage
- Send personalized email + SMS when info is missing
- Advance pipeline stages automatically on completion
- Trigger appointment reminders across all channels
- Flag patients aging out of the system (e.g. turning 18)
- Route support tickets to the right team automatically

PERSONALIZATION AT SCALE

- 205 custom properties feed dynamic content tokens
- Emails reference patient name, condition, doctor, next steps
- SMS messages timed to appointment proximity
- Guardian-specific comms separate from patient flows
- Condition-relevant educational content sent post-visit

— RESULTS

A fully digitized operation — built to scale.

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FROM ZERO TO FULL AUTOMATION

Mindweal went from an entirely manual operation to a **fully automated patient communication and onboarding system** — connected to their own platform and ready to scale without proportional headcount growth.

- Entire onboarding process automated — patients advance through 10 stages without staff involvement
- Appointment reminders eliminated manual follow-up across 5 channels for all patient types
- Reporting now surfaces patients aging out of the system or needing condition-specific follow-up
- 11K contacts structured with proper types, roles, and associations (guardians, providers, clinics)
- Help desk and service ticket pipelines formalized support operations with multi-channel intake
- Capacity to grow patient volume without proportional headcount growth — bottleneck removed