

HubSpot Marketing Onboarding Checklist

24 checks from initial setup to your first measured campaign.

01 Account and tracking

Suggested owner: Marketing lead + CRM admin

Project / owner

Due

☐ 01 Agree on the first business outcome

Choose one audience, conversion event and pipeline goal. Record a baseline and the report that will measure the launch.

Evidence / initials

☐ 02 Confirm access and subscriptions

Give each person the permissions they need. Check which planned features your actual subscription supports before building.

Evidence / initials

☐ 03 Connect web and sending domains

Connect the domains you will use. Authenticate marketing email using the DNS records HubSpot provides and verify the status.

Evidence / initials

☐ 04 Install and test tracking

Check a known external website visit in HubSpot after the correct consent choice. Exclude internal traffic and verify cross-domain journeys.

Evidence / initials

☐ 05 Configure privacy and email preferences

Set subscription types and cookie behaviour for your markets. Test acceptance, refusal, preference changes and unsubscribe behaviour.

Evidence / initials

☐ 06 Set campaign and UTM conventions

Agree lowercase naming rules and store a sample tagged URL. Keep original acquisition data separate from the latest campaign touch.

Evidence / initials

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02 Data and audiences

Suggested owner: CRM admin + marketing operations

Project / owner

Due

☐ 07 Define the minimum data model

Document industry, country, job role, owner and source. Reuse existing properties and use controlled options where consistency matters.

Evidence / initials

☐ 08 Clean records before adding audiences

Choose matching keys for contacts and companies. Review duplicates and missing identifiers, then test an import on a small sample.

Evidence / initials

☐ 09 Assign marketing contact status deliberately

Select who should receive marketing and check the billing impact. A marketing contact designation does not establish permission to email.

Evidence / initials

☐ 10 Document lifecycle rules

Write entry criteria for Lead, MQL and SQL. Keep subscription preferences and the current sales follow-up status in separate properties.

Evidence / initials

☐ 11 Build active and static segments

Create dynamic audiences for qualification and suppression. Use a static segment for an approved campaign snapshot or a one-time review.

Evidence / initials

☐ 12 Create suppression rules

Exclude unsubscribed and bounced addresses, employees, test records and incompatible audiences. Re-check the exclusions before every send.

Evidence / initials

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03 Forms and automation

Suggested owner: Marketing operations + sales owner

Project / owner

Due

☐ 13 Build the first conversion path

Connect an offer, landing page, form and thank-you step. Test the download, notification, confirmation message and mobile experience.

Evidence / initials

☐ 14 Test form properties and defaults

Use only fields needed for the next action. Check missing values, repeat submissions, existing customers and hidden source fields.

Evidence / initials

☐ 15 Configure fit and engagement scoring

Use separate dimensions, capped repeated events and a recent activity window. Treat all suggested weights as hypotheses to calibrate.

Evidence / initials

☐ 16 Route direct sales requests

Assign an owner and due task when a valid prospect asks to speak. Add a fallback owner and avoid creating duplicate active leads.

Evidence / initials

☐ 17 Build one nurture workflow

Document enrollment, delays, branches, goals and removal rules. Stop messages when the audience no longer qualifies or an owner takes over.

Evidence / initials

☐ 18 Test workflow edge cases

Run a test contact through the happy path, missing data, unsubscribe, customer and reply cases. Inspect the actual record history.

Evidence / initials

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04 Reporting and launch

Suggested owner: Marketing lead + sales manager

Project / owner

Due

☐ 19 Define the campaign reporting cohort

Agree what counts as a submission, qualified lead and created opportunity. Deduplicate by contact or deal ID as appropriate.

Evidence / initials

☐ 20 Connect channels you will measure

Connect relevant ad and social accounts where available. Validate tagged traffic and separate platform conversions from CRM outcomes.

Evidence / initials

☐ 21 Create a shared launch dashboard

Show submissions, MQLs, accepted leads, created pipeline and won value. Label date filters and value basis on every report.

Evidence / initials

☐ 22 Agree the response commitment

Specify business hours, response time, fallback coverage and escalation. Sales accepts or returns a lead with a documented reason.

Evidence / initials

☐ 23 Complete the launch rehearsal

Submit a real test, receive the asset, inspect consent and assignment, then confirm the correct reporting result and suppression path.

Evidence / initials

☐ 24 Approve launch and the review date

Record unresolved issues with an owner and due date. Review audience quality, follow-up and conversions after the first full campaign cycle.

Evidence / initials