Simple Strat

Checklist for Setting Up HubSpot Campaigns

Campaigns measure the success of your KPIs and company goals, identifying what drives results. We often get asked “What does a successful campaign look like?” but this is relative to the company. HubSpot is the tool, not the strategy, so don’t overthink the setup or what campaigns you “should” be doing.

1. Campaign Planning and Setup

- **Create Your Campaign** — Navigate to Marketing → Campaigns in HubSpot and click Create campaign. Consider starting from a template for guidance.
- **Naming Conventions** — Good naming conventions should be consistent, descriptive, short, and identifiable. Use goals, dates, or themes for clarity (e.g., “2024-Q1_NewLeads”).
- **Set Campaign Goals** — Define clear objectives for what you want to achieve with your campaign to guide your strategy and measure success.
- **Set Campaign Status** — Clearly define and regularly update the status of your campaign (e.g., planning, active, completed) to keep track of its lifecycle and relevance.
- **Define Target Audiences** — Identify and document the specific audiences for your campaign to ensure targeted messaging and effective segmentation.

2. Campaign Assets and Tools Integration

- **Add All Relevant Marketing Assets** — Emails, blogs, forms, CTAs, landing pages, and marketing events like webinars. Tag each asset to the campaign for tracking purposes.
- **Integrate Social Media** — Publish social media posts directly in HubSpot and tag them to your campaign to track performance within the campaign tool.
- **Leverage HubSpot Tools** — Use HubSpot’s email, landing pages, CTAs, workflows, and internal emails as part of your campaign setup.

3. Campaign Tracking and Management

- **Track Campaign Performance** — Use the campaign dashboard analytics to monitor sessions, new contacts, influenced contacts, closed deals, and revenue. Adjust your strategy based on performance data.
- **Review and Manage Templates** — Regularly review and manage your saved campaign templates for efficiency. Edit, clone, or delete templates as needed.
- **Use Reporting Tools** — Set up HubSpot reports and dashboards to comprehensively monitor your campaign’s impact.

4. Optimization and Other Best Practices

- **Integrate Your Tech Stack** — Ensure your CRM is customized with the tools you’re already using for a seamless transition and enhanced campaign performance.
- **Establish Processes** — Establish standard operating procedures (SOPs) for your team to follow during the campaign creation and management process.
- **Leverage Folders** — Organize your assets using folders and subfolders to make sorting and finding specific files easier.
- **Set Up a Knowledge Base** — Use HubSpot’s knowledge base feature to provide additional support and information to your website visitors.