

HubSpot for Marketing Teams

UNDERSTAND AND ASSESS

TIME: 45 minutes | OUTPUT: A shared operating plan for one marketing process.

Name / team: _____ Date: _____

Choose one process, such as a campaign launch or inquiry follow-up. Complete this with the people who create records, run campaigns, and use the reports. Focus on your current tools and available account features.

Key idea

A record stores information about a person or business. Properties hold individual facts. An agreed process explains who changes those facts, when, and why. Document the process before adding automation.

Example: A webinar inquiry has a campaign source, a named owner, and a documented next step. Marketing checks registration data; sales owns requested consultations. Success means each consultation request has an owner and a recorded follow-up.

Which process will we improve, and who experiences the problem?

What measurable result should change within 30 days? Record the baseline and target.

Which tools hold the same information? Identify the source of truth and any manual copying.

HubSpot for Marketing Teams

BUILD YOUR WORKING PLAN

Map the operating process

For each row, name one accountable person or role, the required fields, and proof that the step is complete. Add a deadline wherever another person depends on the work.

Step / trigger	Tool or record	Accountable owner	Required evidence
Capture inquiry			
Validate information			
Assign next action			
Complete follow-up			
Review outcome			

Which fields must be complete before the next step?

Who covers absences and handles unassigned records?

Where will the team find the process guide and training example?

HubSpot for Marketing Teams

VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Each step has an owner and a clear completion condition.
- ☐ Required information has a documented meaning and source.
- ☐ One teammate can follow the guide without verbal instructions.
- ☐ A sample record passes through the process with no lost handoff.
- ☐ A review date and measurable 30-day result are agreed.

Measure what changes

Example measure: inquiries with an assigned owner / total eligible inquiries. Use the same reporting period for both counts.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Week 1: observe the process and agree definitions.

Week 2: document and test with sample records.

Weeks 3 and 4: train the team, review exceptions, and compare results.

First action / accountable owner / due date:

Open issue / decision needed / approver:

Clean Contact Import

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A documented import plan, field map, and reconciliation checklist.

Name / team: _____ Date: _____

Use a working copy of your source file. Keep the original unchanged and confirm that you are authorized to use the data. This worksheet plans the import; verify the current requirements and available controls in your CRM before executing it.

Key idea

Decide whether you are creating records, updating existing records, or both. A matching identifier connects a row to the correct existing record. Never assume that matching names identify the same person.

Example: The source column Company size contains Small, Mid, and Large. The destination uses different approved options. Create an explicit mapping and review ambiguous values instead of silently replacing them.

What is the source, collection date, business purpose, and authorized use?

Are we creating, updating, or both? Which identifier will match records?

How many source rows exist? Record blank identifiers, possible duplicates, and rejected rows.

Clean Contact Import

BUILD YOUR WORKING PLAN

Map and validate each field

Add rows for your actual columns. Confirm dates, country values, phone formats, and dropdown options. Preserve leading zeros where meaningful. Do not infer consent, lifecycle stage, or ownership from missing data.

Source column	Destination / type	Cleaning or allowed values	Blank / overwrite rule
Email or record identifier			
First and last name			
Company / association			
Owner / lifecycle stage			
Source / consent evidence			

How will suspected duplicates be reviewed without losing valid records?

What sample covers new records, updates, blanks, and unusual values?

What export or record of prior values will support recovery if updates are wrong?

Clean Contact Import

VALIDATE AND TAKE ACTION

Completion checklist

- ☐ The original file is retained and the working copy has a version.
- ☐ Identifiers and duplicate rules are reviewed by an accountable owner.
- ☐ Destination properties, allowed values, and overwrite behavior are confirmed.
- ☐ A small approved sample has been checked in the destination.
- ☐ Unexpected automation, assignments, and notifications have been considered.
- ☐ Created, updated, skipped, and failed counts reconcile to the submitted rows.

Measure what changes

Reconcile counts using the import result categories provided by your CRM. Investigate unmatched totals; do not equate every submitted row with a newly created contact.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Before import: approve mapping, sample, and recovery approach.

Immediately after: inspect values, associations, and triggered activity.

Next business day: resolve exceptions and retain the import log.

First action / accountable owner / due date:

Open issue / decision needed / approver:

Practical B2B Lead Scoring

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A small, explainable scoring model ready for historical review.

Name / team: _____ Date: _____

Work with sales to identify signals that indicate a good fit and meaningful interest. Begin with a few reliable signals. This is a planning worksheet, not a guarantee of conversion or a preconfigured CRM calculator.

Key idea

Fit describes whether an account or person matches your intended customer. Engagement describes what they do. Keep these dimensions visible separately so frequent activity does not hide poor fit. Treat missing information as unknown.

Illustrative model only: target industry +10 fit; relevant role +10 fit; consultation request +20 engagement; attended product session +5 engagement. Example review gate: fit at least 10 and engagement at least 20, with no explicit exclusion. Validate before adopting.

Who is our intended customer, and which needs can we reliably serve?

Which historical outcomes will we use to assess usefulness?

Which data is reliable enough to score, and which remains unknown?

Practical B2B Lead Scoring

BUILD YOUR WORKING PLAN

Define a first scoring model

For each signal, specify the data source, points, maximum repetition, and expiration where appropriate. Separate a true exclusion from a negative signal. A personal email address or missing job title alone is not proof of poor fit.

Signal / definition	Fit or engagement	Points / cap	Expiry / evidence
Target industry			
Relevant buying role			
Consultation request			
Meaningful event activity			
Explicit exclusion			

What combination triggers human review, and who reviews it?

When should old activity stop contributing? How do repeat actions avoid inflation?

What happens when sales rejects a scored lead or later changes its outcome?

Practical B2B Lead Scoring

VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Sales and marketing agree on each signal and its definition.
- ☐ Fit and engagement can be explained independently.
- ☐ Repeated activity is capped and stale activity is addressed.
- ☐ Explicit exclusions have evidence and a review process.
- ☐ Won, lost, accepted, and rejected examples have been reviewed.
- ☐ A pilot owner, sample period, and review date are recorded.

Measure what changes

Track sales acceptance: accepted scored leads / reviewed scored leads. Also inspect missed good leads below the threshold; acceptance alone can hide low coverage.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Review a representative historical sample, including weak and strong outcomes.

Pilot with human review before automatic high-volume routing.

Compare outcomes by score band, then adjust one assumption at a time.

First action / accountable owner / due date:

Open issue / decision needed / approver:

Workflow Design and QA

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A workflow brief, test plan, and launch decision.

Name / team: _____ Date: _____

Choose one automation. Document the intended behavior before building it. Use a safe test environment or approved test records, and prevent unintended customer messages or production changes during testing.

Key idea

Enrollment determines who enters. Re-enrollment determines whether someone can enter again. Branches and delays change the path. Exit and suppression rules prevent inappropriate actions. Inspect related automations for conflicts.

Example: Route a consultation request only when the request is valid and an owner can be assigned. Missing territory follows an exception route to an operations owner. A repeat submission follows an explicit duplicate-handling rule.

What event starts this workflow, and what result should it produce?

Which records are eligible, excluded, or allowed to re-enter?

Who owns approval, ongoing monitoring, and incident response?

Workflow Design and QA

BUILD YOUR WORKING PLAN

Write expected outcomes before testing

Add one case for every branch and external action. Include timing, time zone, owner availability, and failure handling. Verify final record values and notifications, not just whether the workflow ran.

Test scenario	Input / starting state	Expected action / exit	Actual result / evidence
Eligible record			
Ineligible record			
Missing required value			
Each branch / delay			
Repeat entry / update			
Suppressed record			

What other workflows or integrations write to these same fields?

What happens if an action fails, an owner is unavailable, or a record changes during a delay?

How will we pause the process and repair affected records if behavior is wrong?

Workflow Design and QA

VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Enrollment, re-entry, exclusions, and exits are written clearly.
- ☐ Every branch and external action has passed an approved test.
- ☐ Test sends and changes cannot reach unintended recipients.
- ☐ Circular updates and conflicting automations have been checked.
- ☐ Evidence, unresolved defects, approval, and launch time are recorded.
- ☐ A monitoring owner and a practical recovery plan are assigned.

Measure what changes

Track exceptions and incorrect actions / eligible executions during the pilot. Review actual affected records. Pausing automation does not undo actions already completed.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Before launch: resolve critical defects and record the approver.

At launch: use a limited approved cohort and inspect results.

After launch: review the first cycle and schedule recurring checks.

First action / accountable owner / due date:

Open issue / decision needed / approver:

Marketing Operations Fundamentals

UNDERSTAND AND ASSESS

TIME: 45 minutes | OUTPUT: A current-state assessment and a focused 30-day improvement plan.

Name / team: _____ Date: _____

Assess how work actually happens, not how the process is supposed to happen. Invite one person who requests work, one who delivers it, and one who uses the results. Choose a manageable improvement before adding tools.

Key idea

Marketing operations connects people, process, data, technology, and measurement. A healthy process can be repeated, has an owner, and produces evidence. A new tool does not fix an unclear decision or missing handoff.

Example: Campaign requests arrive in several channels and lack deadlines. A focused improvement is a single intake form with required brief fields, one triage owner, and an agreed response window. Measure incomplete requests before and after.

Where does work most often wait, repeat, or fail? Give one recent example.

What does that problem cost in time, missed follow-up, or unreliable reporting?

Which improvement can the team realistically complete in 30 days?

Marketing Operations Fundamentals

BUILD YOUR WORKING PLAN

Assess your operating foundation

Score 1 = unclear or ad hoc; 2 = occasional consistency; 3 = documented but uneven; 4 = repeatable and owned; 5 = measured and improved. Use N/A when truly outside scope. Record evidence instead of averaging away serious gaps.

Area	Score 1 to 5	Evidence / friction	Owner / next action
Strategy and planning			
Campaign intake			
CRM and automation			
Data quality			
Lead handoffs			
Reporting			
Documentation / training			

Which gap has the strongest combination of impact and feasibility?

What is in scope, and what will wait until the next cycle?

Which dependency or decision could block delivery?

Marketing Operations Fundamentals

VALIDATE AND TAKE ACTION

Completion checklist

- ☐ The assessment includes evidence from real work.
- ☐ One priority has a named owner and a clear boundary.
- ☐ A baseline, target, and measurement source are recorded.
- ☐ Dependencies and required approvals have owners.
- ☐ The team has time allocated to implement and review.

Measure what changes

Choose one measure tied to the problem: turnaround time, incomplete briefs, unassigned leads, or reporting rework. Record the unit, source, baseline period, and target date.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Days 1 to 7: observe, measure, and agree the problem.

Days 8 to 21: implement a small process change and test it.

Days 22 to 30: compare results, document the standard, and select the next gap.

First action / accountable owner / due date:

Open issue / decision needed / approver:

CRM Data Governance

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A starter data dictionary and a practical ownership routine.

Name / team: _____ Date: _____

Start with five fields that affect routing, reporting, segmentation, or customer experience. Include the people who enter the data and the people who rely on it. Expand the standards after the first review cycle.

Key idea

A data owner decides what a field means and how it should be used. A steward maintains quality day to day. A source of truth resolves conflicts when more than one system stores the same fact.

Example: Lead source records the agreed origin of an inquiry. The dictionary defines its allowed values and update rule. Campaign interaction history is tracked separately so later activity does not silently replace the original source.

Which decisions fail when CRM data is missing or inconsistent?

Which five fields should we standardize first, and why?

Which connected systems can create or overwrite these values?

CRM Data Governance

BUILD YOUR WORKING PLAN

Build a critical-field dictionary

For each property, also record its type, permitted users, retention or review requirement, and quality test in a copy of this worksheet. Avoid storing unnecessary sensitive information. Confirm applicable retention and consent rules with your responsible team.

Property / object	Definition / valid values	Owner / source of truth	Required when / update rule
Lead source			
Lifecycle stage			
Assigned owner			
Country / territory			
Consent evidence			

Who approves new properties, renamed values, and changes to definitions?

How are duplicates reviewed, and how is merge evidence retained?

How will access and integration changes be reviewed when staff or systems change?

CRM Data Governance

VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Critical fields have clear definitions and accountable owners.
- ☐ Allowed values and required stages are documented.
- ☐ Integration precedence and overwrite rules are understood.
- ☐ Access is limited to the needs of each role.
- ☐ Duplicate review and correction procedures preserve useful history.
- ☐ A recurring quality review and issue log are assigned.

Measure what changes

Completeness: eligible records with a valid required value / eligible records reviewed. Track validity and duplicate issues separately so a populated but wrong value does not count as clean.

Our baseline / target / data source / review date:

Suggested implementation rhythm

This week: approve the first five property definitions.

This month: review a sample and fix root causes before bulk changes.

Each quarter: review access, integrations, unused fields, and policy changes.

First action / accountable owner / due date:

Open issue / decision needed / approver:

Marketing and Sales Lead Handoffs

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A draft service agreement and a clear exception path.

Name / team: _____ Date: _____

Complete this with marketing and sales together. Define a lead as ready only when both teams understand the evidence and expected next step. Start with one lead type or market to keep the agreement testable.

Key idea

Routing assigns responsibility. Acceptance confirms that sales will work the lead. Disposition records what happened. An effective handoff includes all three, plus a return path when the lead is not ready.

Illustrative agreement: Consultation requests with required contact and context fields route to the territory owner. Sales reviews within one business day in the agreed time zone. Missing territory goes to a named queue owner. Confirm staffing before adopting this timing.

Which exact lead type is covered, and what makes it ready for sales?

What information must accompany the lead: need, source, history, and contact details?

Which business hours, time zone, coverage, and exceptions apply?

Marketing and Sales Lead Handoffs

BUILD YOUR WORKING PLAN

Agree the handoff rules

Specify when each clock starts and stops. Distinguish a first attempt from a meaningful response. Define rejection reasons such as duplicate, outside scope, or insufficient information, and require a next step rather than a silent status change.

Decision point	Rule / deadline	Accountable owner	Evidence / escalation
Ready for handoff			
Assignment / backup			
Acceptance or rejection			
First follow-up			
No response / overdue			
Return to nurture			

What happens when no owner is available or assignment is ambiguous?

Which statuses and reasons will both teams use consistently?

When can a returned lead re-enter, and how will prior activity remain visible?

Marketing and Sales Lead Handoffs

VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Readiness criteria and required fields are agreed by both teams.
- ☐ Ownership, backup coverage, and response clocks are explicit.
- ☐ Rejection and nurture paths preserve context and consent rules.
- ☐ Overdue leads have a named escalation owner.
- ☐ A sample lead can be traced from submission through disposition.
- ☐ Both teams have approved a review date and reporting definitions.

Measure what changes

Review acceptance rate, time to first attempt, overdue leads, and downstream opportunities separately. Define each denominator and distinguish business-hour timing from elapsed time.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Pilot one lead type and review exceptions together.

Inspect rejected and overdue examples to find process gaps.

Revise the agreement based on outcomes, then expand coverage.

First action / accountable owner / due date:

Open issue / decision needed / approver:

Social Planning for Churches and Nonprofits

UNDERSTAND AND ASSESS

TIME: 45 minutes | OUTPUT: A four-week content plan with permissions, ownership, and a review rhythm.

Name / team: _____ Date: _____

Choose one audience and one useful action for the month. Plan at a pace your team can maintain. Use the example themes as prompts; replace every event detail with verified information before publishing.

Key idea

A content theme is a repeatable reason to post. Mix mission, community, useful information, and invitations. Every post needs a clear audience, useful message, appropriate asset, and one primary call to action.

Example post: Want to help at our next community service day? Visit [verified registration link] for the date, location, access information, and volunteer roles. Replace the bracketed detail before publishing; do not invent an event or beneficiary story.

Who are we trying to serve, and what question or need do they have?

What one action matters this month: learn, attend, volunteer, give, or share?

Who can draft, approve, publish, and respond within our available time?

Social Planning for Churches and Nonprofits

BUILD YOUR WORKING PLAN

Build a four-week starter calendar

Draft one post per week, then add more only if capacity allows. Mission: explain a practical impact. Community: share an approved story. Helpful: answer a recurring question. Invitation: offer a specific, verified next step.

Week / theme	Message / audience	Asset / channel	CTA / owner / date
1: Mission and purpose			
2: Community story			
3: Helpful information			
4: Invitation / next step			

What is the permission process for stories, photos, children, and vulnerable people?

Who checks event details, links, image descriptions, captions, and readability?

How will comments, private questions, and sensitive requests reach the right person?

Social Planning for Churches and Nonprofits

VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Each post serves a specific audience and has one clear action.
- ☐ Names, dates, locations, links, and accessibility details are verified.
- ☐ Photo and story permissions are documented before publication.
- ☐ Images have useful descriptions and videos have accurate captions.
- ☐ No private or sensitive details are shared without appropriate permission.
- ☐ A publisher, responder, and monthly review date are assigned.

Measure what changes

Measure the action you asked for: registrations, inquiries, volunteer signups, or useful conversations. Compare posts with the same objective; likes alone do not show mission impact.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Week 1: gather approved assets and draft the calendar.

Each week: verify details, publish, and respond to the community.

Month end: note what helped people act and reuse the strongest themes.

First action / accountable owner / due date:

Open issue / decision needed / approver:
