

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.

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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?

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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:
