PipelineSync

FREE TEMPLATE · MARKETING

HubSpot Campaign Brief Template

Plan a campaign on one page, track every asset and link, check each email and landing page before launch, and judge the results against the goal. Reference pages, a worked example and fillable worksheets.

One-page brief | Asset and UTM logs | Email and page QA | Weekly results

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Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

A campaign report is only as good as the plan behind it. Agree the goal and audience first, give every asset an owner, check each email and page before it goes live, and log results weekly.

1 Check your plan
Confirm which campaign, email and page features you have (pages 3 and 4).

2 Write the brief
Fill in the brief and the audience and offer worksheet, then get it approved (pages 6 and 7).

3 Plan channels and dates
Choose channels, split the budget and work back from launch day (pages 8 and 10).

4 Track assets and links
Give every asset an owner and log every tagged link (pages 9 and 11).

5 QA before launch
Run the checklist for each email and each landing page (pages 12 and 13).

6 Log and review
Enter results weekly, then review against the goal (pages 14 and 15).

What is inside

Page	Section	Use it to
03	**Reference: campaigns**	Check plans, UTMs, budget and what each campaign metric counts
04	**Reference: email and landing pages**	Deliverability rules and the landing page settings that matter
05	**Worked example**	See a complete brief for an illustrative checklist download campaign
06	**Campaign brief**	Agree goal, audience, offer, dates, owner, budget and UTM value on one page
07	**Audience and offer**	Define segments and exclusions, then the offer and message for each segment
08	**Channel plan and budget**	Decide what each channel is for and track spend against budget
09	**Asset tracker**	Give every asset an owner, due date and status
10	**Launch calendar**	Work back from launch day so nothing is built in the last 48 hours
11	**UTM builder log**	Record every tagged link outside HubSpot and test it
12	**Email QA checklist**	Check each marketing email before it is sent
13	**Landing page QA checklist**	Check each landing page and thank-you step before it is published
14	**Weekly results**	Log sessions, submissions, clicks, contacts and meetings each week
15	**Post-campaign review**	Compare results with the goal, wrap up assets and record lessons

Tip: Every worksheet is fillable: type into the boxes in Adobe Acrobat Reader, Preview or your browser, or print it. Print page 12 once per email and page 13 once per landing page. The same template is also available as a spreadsheet on the template page at pipelinesync.net.

REFERENCE · CHECKED OCTOBER 2026

Campaigns: plans, UTMs, budget, metrics

A HubSpot campaign is a record that groups the assets of one marketing effort, such as landing pages, forms, emails, workflows, segments, social posts and ads, so you can report them together. The campaigns tool needs Marketing Hub Professional or Enterprise; HubSpot provides 12 campaign templates.

Which plan includes what

Feature	Plan, when we checked in October 2026
Campaigns tool	Marketing Hub Professional or Enterprise; some HubSpot pages also list Legacy Marketing Hub Basic
Campaign assistant (AI content drafting)	Free and Starter too; a separate tool, maximum of 10 campaigns
Multiple forms per campaign	Marketing Hub Professional or Enterprise
Custom properties, budget, calendar, tasks	Marketing Hub Professional or Enterprise
Approvals in Marketing Studio (a beta)	Marketing Hub Enterprise

HubSpot also sells flexible seats-and-credits pricing, and these pages name Hub tiers: confirm what your account includes. Without the tool, collect numbers by hand on page 14.



UTMs

HubSpot generates a unique campaign UTM value automatically (on by default) and keeps old values as secondary ones. Sessions from links with that utm_campaign count toward the campaign: use it on ads, partner emails and social posts.

Budget and spend

Remaining budget is the budget total minus the spend total. Connected ad spend can sync, taking up to 24 hours, only for lifetime budgets; enter daily-budget ad spend by hand.

What each campaign metric counts

Metric	What HubSpot counts	Plan
Sessions	Visits to campaign website assets via utm_campaign or associated content. Excludes sessions from workflows, CTAs and ad campaigns.	Professional
New contacts	Contacts created, shown by first touch and by last touch	Professional
Influenced contacts	New and existing contacts who engaged with a campaign asset. Once marked, they stay marked.	Professional
Revenue	Closed-won deal revenue, spread evenly across the interactions before the deal closed	Professional
Attributed revenue	Credit from HubSpot's attribution models, including deal create attribution	Enterprise

REFERENCE · CHECKED OCTOBER 2026

Email deliverability and landing page essentials

Authenticate your sending domain, send only to opted-in marketing contacts, and keep bounces and spam reports well under HubSpot's thresholds. Build each landing page around one offer and one form, publish it on your own domain with title, meta description and HTTPS set, and keep thank-you pages out of search.

Marketing email

01 **Domain** Starter+ → 02 **Auth** DKIM, SPF, DMARC → 03 **Test** Links, size

- **Plans:** marketing email is on all plans; automated workflow emails need Marketing Hub Professional.
- **Who receives it:** on paid Marketing Hub plans, only marketing contacts. Only they count toward your contact tier.
- **Consent:** HubSpot requires opt-in consent and doesn't allow purchased lists.
- **Subscription types** (Starter and up) let contacts opt out of one kind of email without leaving everything.
- **Sending domain** needs Starter: two CNAME records for DKIM, a TXT record each for SPF and DMARC. Without DKIM you can't use your own domain in the From address; DKIM alone shows as partially authenticated. HubSpot recommends a subdomain such as news.example.com.
- **Send limit:** a monthly limit resets each calendar month and counts marketing, workflow and form follow-up emails. Check your plan's number in your account.

Monthly suspension thresholds

Hard bounce rate	5 percent
Spam report rate	0.1 percent (1 per 1,000)
Unsubscribe rate	3 percent

- **Graymail suppression** is on by default. A contact is unengaged if they never engaged and ignored the last 11 emails, or engaged before but ignored the last 16.
- Hard-bounced contacts are excluded automatically; soft-bounced contacts stay eligible. Free account suspensions can't be lifted.
- **Gmail clips** emails over 102 KB. HubSpot creates a plain-text version automatically. The footer needs your physical address and an unsubscribe or preferences link, which HubSpot ties to CAN-SPAM.
- **Metrics:** an open counts when images load or someone clicks; bot filtering (on by default) removes scanner and privacy-tool activity. Judge sends by clicks.

Landing pages

01 **Offer** One form → 02 **SEO, domain** Title, HTTPS → 03 **Measure** Submit rate

Feature	Plan (Oct 2026)
Build and publish pages	All plans; free uses a HubSpot-branded domain
Remove HubSpot branding	Content Hub Starter or higher
Page count	Content Hub Starter: up to 30 landing pages
A/B, adaptive tests, smart content	Content Hub Professional or Enterprise
Analyze tab (view to submission rate)	Marketing Hub or Content Hub Professional
Manual redirects	Marketing Hub Professional or Content Hub Starter or higher

- **Build:** start from a theme template. The form module needs a theme template or a coded template with a drag-and-drop area.
- **SEO settings:** page title, URL slug and meta description are in the page settings. The page's own URL is its canonical by default.
- **Thank-you pages:** there is no noindex toggle. Add a robots noindex meta tag to the head HTML, and don't also block the page in robots.txt. HubSpot advises against smart content on thank-you pages.
- **Domains:** hs-sites system domains are always noindex. Connect a subdomain (CNAME) or root domain (A records); SSL turns on automatically, within up to four hours.
- **URL changes** create an automatic redirect on all plans but reset the page's view data. Manual redirects can take up to 48 hours.
- **Analytics** report views, submissions, new contacts and bounce rate, updated every 20 to 30 minutes. **Adaptive tests** run up to five variations, each with a form.

WORKED EXAMPLE · ILLUSTRATIVE

2026-Q4 | RevOps audit | Free checklist

An illustrative brief for a gated checklist download. The numbers, segments and dates are made up; the point is how much is agreed before anything is built.

Goal	New contacts from the target segment who download the checklist
Success measure	150 new contacts and 12 meetings booked by 15 December 2026
Audience	Segment: Operations leaders, Region EMEA and Americas, marketing contacts, subscribed to the Newsletter type
Exclusions	Customers; contacts with an open deal; unsubscribed from Newsletter; unengaged contacts (graymail suppression left on)
Offer	A free 20-point CRM audit checklist (PDF)
Key message	Find the ten-minute fixes in your CRM before the new year planning cycle.
Dates	Launch 3 November 2026, end 15 December 2026, review 22 December 2026
Owner	Marketing ops lead (accountable); Content, Design and Sales ops as asset owners
Budget	Split 60% paid social, 25% partner newsletter, 15% design. Spend entered weekly in the campaign.
UTM campaign value	The value HubSpot generated for the campaign, copied into the UTM log before any link was built
Channels	Email (2 sends), landing page, organic and paid social, partner newsletter, sales follow-up
Handoff to sales	Downloaders with Job function = Operations and company size over 50 become MQLs and are routed to the regional team

Assets and launch path



Asset	Name	URL or location	Owner	Status
Landing page	RevOps audit checklist | LP	offers.example.com/audit-checklist	Content	Live
Form	Checklist download	On the landing page	Marketing ops	Live
Marketing email	Checklist | Email 1 | Launch	Newsletter subscription type	Content	Sent
Workflow	Contact | Deliver offer | Checklist	Form submission trigger	Marketing ops	Live

Week 1 example: 820 sessions, 640 page views, 58 form submissions (9.1% page conversion), 4,200 emails delivered, 168 clicks (4.0% click rate), 41 new contacts, 6 meetings booked. All figures illustrative.

WORKSHEET · ONE PAGE PER CAMPAIGN

Campaign brief

Fill this in and agree it with everyone who owns an asset before anything is built.

Campaign name Year-Quarter | Theme | Offer	
Goal (one measurable outcome)	
Success measure and date	
Audience (segment)	
Exclusions	
Offer	
Key message (one sentence)	
Dates	Start _____ End _____ Review _____
Owner (accountable)	
Budget	Total _____ Tracked in HubSpot? ☐ Yes ☐ No
UTM campaign value	
Channels	☐ Email ☐ Landing page ☐ Social ☐ Ads ☐ Blog ☐ Partner ☐ Sales outreach ☐ Event
Handoff to sales	
HubSpot campaign created	☐ Yes ☐ Not on our plan: results collected by hand on page 14

Why this campaign, why now

Assumptions and risks

Approver	Role	Date	Approved
			☐
			☐
			☐

WORKSHEET

Audience, segments and offer

Segments

Segment name	Criteria (filters, AND / OR)	Size	Use	Owner
Ops leaders | Q4	*Job function = Operations AND marketing contact AND Region is EMEA or Americas*	*3,900*	*Send and target*	*Marketing ops*

Use: Send, Target (ads), Exclude, Report only. On paid Marketing Hub plans only marketing contacts receive marketing email.

Exclude

- ☐ Current customers, unless the offer is for them
- ☐ Contacts with an open deal (ask sales)
- ☐ Unsubscribed from this subscription type
- ☐ Unengaged contacts
  Graymail suppression is on by default
- ☐ Competitors and partners
- ☐ Employees and test contacts
- ☐ Audiences of other active campaigns
- ☐ Other: _____

Subscription type	
Consent basis	

Offer and messaging

Offer and format	☐ Guide ☐ Template ☐ Webinar ☐ Demo ☐ Assessment ☐ Other: _____
The problem it solves	
Call to action	
Proof points Only facts you can show	

Segment	Message angle	Likely objection	Answer
Ops leaders | Q4	*Ten-minute CRM fixes before planning*	*No time this quarter*	*Checklist takes 30 minutes*

WORKSHEET

Channel plan and budget

One row per channel. Every channel needs a job in the campaign and a utm_source and utm_medium pair you will reuse in the UTM log.

Channel	Job in this campaign	Segment	utm_source / medium	Dates	Owner	Budget
Paid social	*Reach ops leaders not yet in the CRM*	*Ad audience*	*linkedin / paid-social*	*3 Nov–5 Dec*	*Demand gen*	*60%*

Budget and spend tracker

If you use HubSpot campaign budgets (Marketing Hub Professional or Enterprise, checked Oct 2026), enter the same items there. Ad spend sync works only for lifetime budgets, so enter daily-budget ad spend by hand.

Budget item	Channel	Planned	Committed	Spent to date	In HubSpot	Notes
Paid social ads	*Paid social*	*60% of total*	*Booked*	*Week 2 figure*	*Synced*	*Lifetime budget*
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	

Budget total		Spend total		Remaining	

Remaining = budget total minus spend total, the same way HubSpot calculates it.

WORKSHEET

Asset tracker

One row per asset: every landing page, form, email, workflow, segment, social post, ad, CTA and blog post. Tick "In campaign" when it has been added to the HubSpot campaign, so reporting stays complete.

Asset type	Name	URL or location	Owner	Due	Status	QA done	In campaign	Notes
Landing page	*RevOps audit checklist | LP*	*/audit-checklist*	*Content*	*2026-11-03*	*In review*	*Yes*	*Yes*	*Form: Checklist download*
						☐	☐	
						☐	☐	
						☐	☐	
						☐	☐	
						☐	☐	
						☐	☐	
						☐	☐	
						☐	☐	
						☐	☐	
						☐	☐	
						☐	☐	
						☐	☐	

Asset type: Landing page, Form, Marketing email, Workflow, Segment, Social post, Ad, CTA, Blog post, Other. Status: Planned, In progress, In review, Live, Done. Multiple forms in one campaign need Marketing Hub Professional or Enterprise (checked Oct 2026).

WORKSHEET

Launch calendar

Write the launch date first, then work back. The suggested timings are a starting point; change them to suit the campaign.

When	Milestone	Owner	Due date	Done	Notes
Week -4	Brief approved; HubSpot campaign created; UTM value recorded			☐	
Week -3	Segments built and sizes checked; exclusions agreed			☐	
Week -3	Offer asset written and designed			☐	
Week -2	Landing page, form and thank-you step built; added to campaign			☐	
Week -2	Emails, follow-up workflow and social posts built; added to campaign			☐	
Week -1	Email QA and landing page QA passed			☐	
Week -1	Every link in the UTM log tested; sales handoff briefed			☐	
Launch	First send, page live, ads and posts start			☐	
Week +1	First weekly results logged; bounces and unsubscribes checked			☐	
End date	Ads stopped; final send done; spend entered			☐	
End +1 week	Post-campaign review held			☐	
				☐	
				☐	

Launch date	**Freeze date (no new assets)**

DONE FOR YOU

Rather have the campaign set up for you?

We set up campaigns, assets, UTMs and reporting in HubSpot, and connect campaign results to pipeline and revenue.

Book a free consultation

WORKSHEET

UTM builder log

Log every link that sits outside HubSpot: ads, partner emails, social posts, signatures. Use the campaign's UTM value as utm_campaign so the sessions count toward the campaign. Use lowercase and the same source and medium pairs as the channel plan.

#	Where the link appears	Destination URL	utm_source	utm_medium	utm_campaign	utm_content	Tested	Notes
1	*Partner newsletter, Nov issue*	*offers.example.com/audit-checklist*	*partner-news*	*email*	*Value from campaign*	*banner-top*	*Yes*	*Short link in body*
2							☐	
3							☐	
4							☐	
5							☐	
6							☐	
7							☐	
8							☐	
9							☐	
10							☐	
11							☐	
12							☐	
13							☐	

Tested: open the full URL, confirm the page loads and the visit shows in HubSpot. Sessions from workflows, CTAs and ad campaigns aren't counted in campaign sessions (checked Oct 2026). If the campaign's UTM value changes, HubSpot keeps the old one as a secondary value.

CHECKLIST · PRINT ONE PER EMAIL

Email QA checklist

Email name		**Send date and time**	
Segment and exclusions		**Subscription type**	

Sending and recipients

- [ ] Sending domain connected and authenticated
  DKIM, SPF and DMARC; without DKIM you can't send from your own domain
- [ ] Recipients are marketing contacts in the right segment
  Paid Marketing Hub accounts only email marketing contacts
- [ ] Exclusions from the brief applied
- [ ] Subscription type matches the content
  Recipients unsubscribe per type
- [ ] Graymail suppression decision made
  On by default; skips contacts who stopped engaging
- [ ] From name, from address and reply-to checked
  Use a monitored reply-to

Content

- [ ] Subject line and preview text written
  Check both on mobile
- [ ] Personalization tokens have fallbacks
  Empty values otherwise look broken
- [ ] One clear call to action, matching the landing page
- [ ] Images have alt text

Links and tracking

- [ ] Every link works
  Including the landing page and any PDF
- [ ] Links outside HubSpot carry UTMs
  From the UTM log
- [ ] Email added to the campaign
  Keeps campaign reporting complete

Compliance and size

- [ ] Email size under 102 KB
  Gmail clips larger emails
- [ ] Footer address and unsubscribe or preferences link
  HubSpot ties these to CAN-SPAM
- [ ] Plain text version reviewed
  HubSpot creates one automatically

Test

- [ ] Test email sent and checked
  Images, tokens, dark mode, mobile
- [ ] A second person has read it
- [ ] A/B test set up, if used
  Marketing Hub Professional; HubSpot recommends 1,000+ contacts

After the send (within 48 hours)

Delivered	Clicks	Hard bounces	Spam reports	Unsubscribes	Checked by

HubSpot can suspend sending if, in a month, hard bounces reach 5%, spam reports 0.1% or unsubscribes 3% (checked Oct 2026). Judge the send by clicks, not opens.

QA by		**Date**		**Approved**	☐

CHECKLIST · PRINT ONE PER LANDING PAGE

Landing page QA checklist

Page name		URL	
Form		Thank-you URL	

Offer and form

- [ ] One clear offer and one form
  Keeps the page focused on a single action
- [ ] Headline names the offer; copy says what the visitor gets
- [ ] Form follows the form field plan
  Only ask what you will use
- [ ] Built on a theme template
  The form module needs a drag-and-drop area
- [ ] Thank-you page or message delivers the offer
  Test the full path on mobile
- [ ] Follow-up email or workflow fires after submission

SEO settings

- [ ] Page title, URL slug and meta description set
  Under the page settings
- [ ] Canonical URL correct
  By default the page URL is canonical
- [ ] Thank-you page kept out of search
  Robots noindex meta tag in head HTML; not also blocked in robots.txt

Domain and branding

- [ ] Page on your connected domain, HTTPS working
  SSL turns on automatically after connecting
- [ ] Not on an hs-sites system domain
  Those pages are always noindex
- [ ] HubSpot branding requirement checked
  Removal needs a paid Content Hub plan

Tracking

- [ ] Page and form added to the campaign
  Keeps campaign reporting complete
- [ ] Tagged links from the UTM log land here
- [ ] Test submission shows in page analytics
  Updated every 20 to 30 minutes

Device and end of campaign

- [ ] Checked on mobile and desktop
- [ ] No smart content on the thank-you page
  HubSpot advises against it
- [ ] Redirect planned for when the campaign ends
  Unpublish with a redirect so links keep working

Test submissions

Test contact	Device	What happened	Pass	Fix needed
Test contact, Region EMEA	*Mobile*	*Thank-you page, PDF opened, email sent*	*Pass*	
			☐	
			☐	

QA by		Date		Approved	☐

WORKSHEET · EVERY WEEK

Weekly results tracker

Use the same weekly dates as the HubSpot campaign report. Page conversion rate = form submissions ÷ page views. Click rate = clicks ÷ emails delivered. Add a note for anything you changed, such as a new subject line.

Week starting	Sessions	Page views	Form subm.	Page conv. rate	Emails delivered	Clicks	Click rate	New contacts	Meetings booked	Notes
2026-11-03	*820*	*640*	*58*	*9.1%*	*4,200*	*168*	*4.0%*	*41*	*6*	*Example row. Email 1 sent Tuesday.*
Total										

Campaign sessions count visits via utm_campaign or associated content and exclude workflows, CTAs and ad campaigns, so they won't match Google Analytics. Opens are left out on purpose: privacy tools and scanners can trigger them (checked Oct 2026).

WORKSHEET · ONE WEEK AFTER THE END DATE

Post-campaign review

Result against the goal

Measure	Target	Actual	Met	Why
Primary goal			☐	
New contacts			☐	
Meetings booked			☐	
Deals created / pipeline			☐	
Budget spent vs planned			☐	

What worked

What didn't

Check the report before sharing it

- ☐ Every asset is in the campaign
  Compare with the asset tracker
- ☐ Influenced contacts not reported as created
  New and existing contacts, and they stay marked
- ☐ Session gaps with Google Analytics explained
  Different counting rules
- ☐ All spend entered, including daily-budget ads

Wrap up

- ☐ Landing page unpublished with a redirect, or kept live on purpose
- ☐ Ads stopped and workflows turned off or updated
- ☐ Campaign archived or renamed, not deleted
- ☐ Results shared with sales and leadership

Lessons for the next campaign

Lesson	Change next time	Owner	By when
Email 2 clicks were half of Email 1	*Shorter follow-up with one link*	*Content*	*Next brief*

Reviewed by		Date	

PipelineSync

HUBSPOT GOLD SOLUTIONS PARTNER

Want campaigns planned and reported for you?

We set up campaigns, assets, UTMs and reporting in HubSpot, and connect campaign results to pipeline, so every review starts from numbers you can trust.

RevOps infrastructure

Lifecycle stages, lead scoring and routing with SLAs, sales and marketing automation, attribution reporting and executive dashboards.

HubSpot implementation and onboarding

Forms, workflows, lifecycle stages and dashboards designed and built, with SOPs and team training.

HubSpot audit

A structured review of your portal, data, automation and reporting, with prioritized recommendations.

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