HubSpot Playbook:

Configuring UTM Tracking for Attribution and Conversion

Objective

Implement a structured UTM tracking system in HubSpot to enhance marketing attribution, improve conversion insights, and ensure accurate data flow across contact and deal records.

Prerequisites

- Access
  - Super Admin Access
  - Alternatively, you can configure this if you have the following permissions:
    - **Marketing:** Forms access
    - **Automation:** Workflows Edit
    - **Account Settings access:** Edit property settings

- List of UTM parameters to track
  - The most common UTMs are:
    - **UTM_source** – Identifies where the traffic is coming from (e.g., LinkedIn, Google, Newsletter).
    - **UTM_medium** – Specifies the type of marketing channel (e.g., social, email, CPC).
    - **UTM_campaign** – Names the campaign associated with the link (e.g., "Spring_Webinar").
    - **UTM_term** – Typically used for paid search to track keywords (can also help categorize links within a campaign).
    - [Optional] **UTM_content** – Differentiates similar links within the same campaign (useful for A/B testing).

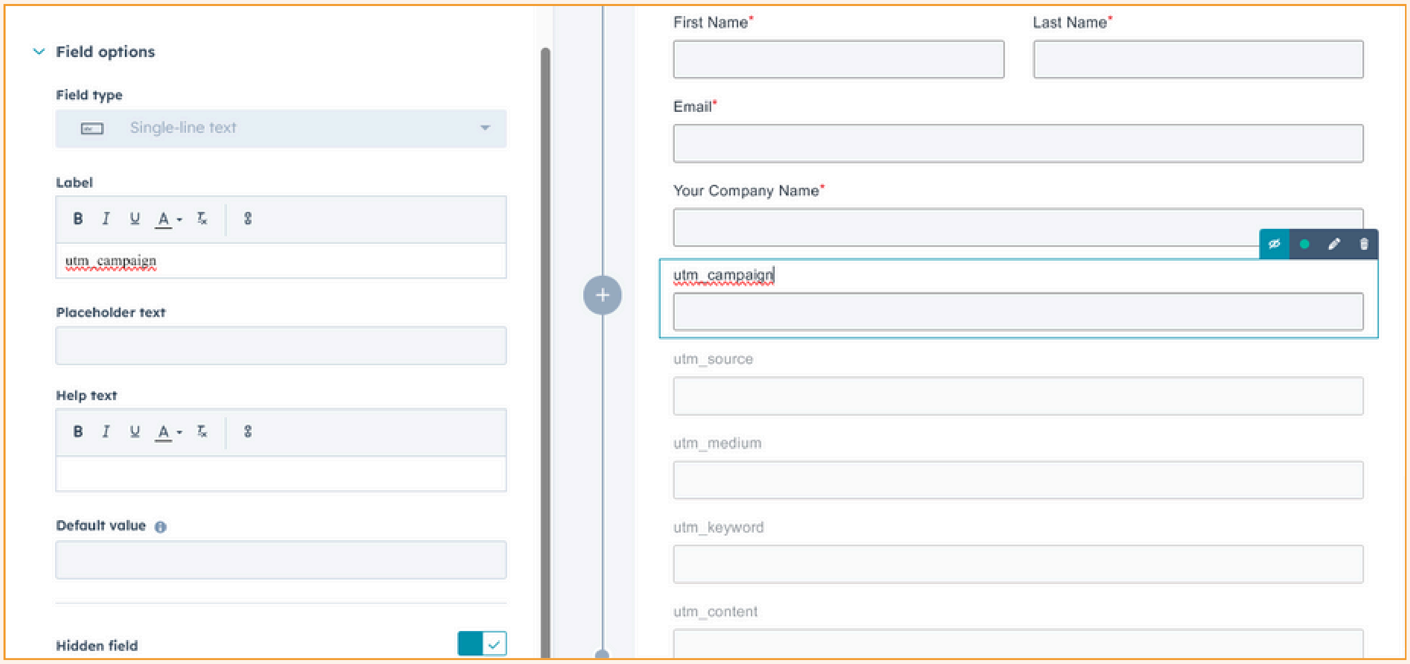
Step 1: Create UTM Contact Properties

1. Navigate to **Settings (Gear Icon) > Data Management > Properties**.
2. Click **Create Property** and configure the following:
   - **Object Type:** Contact
   - **Group:** Web Analytics History
   - **Field Type:** Single-line text
3. Properties to create:
   - **UTM_source**
   - **UTM_medium**
   - **UTM_campaign**
   - **UTM_term**
   - [Optional] **UTM_content**
4. Save each property.
5. Clone each to create **First Conversion (FC)** and **Last Conversion (LC)** properties:
   - **FC_utm_source, FC_utm_medium, FC_utm_campaign, FC_utm_term**
   - **LC_utm_source, LC_utm_medium, LC_utm_campaign, LC_utm_term**

Why? By creating these properties, we can track and analyze how contacts first interacted with our content (**First Conversion**) and what led to their most recent engagement (**Last Conversion**).

Step 2: Add Hidden UTM Fields to Forms

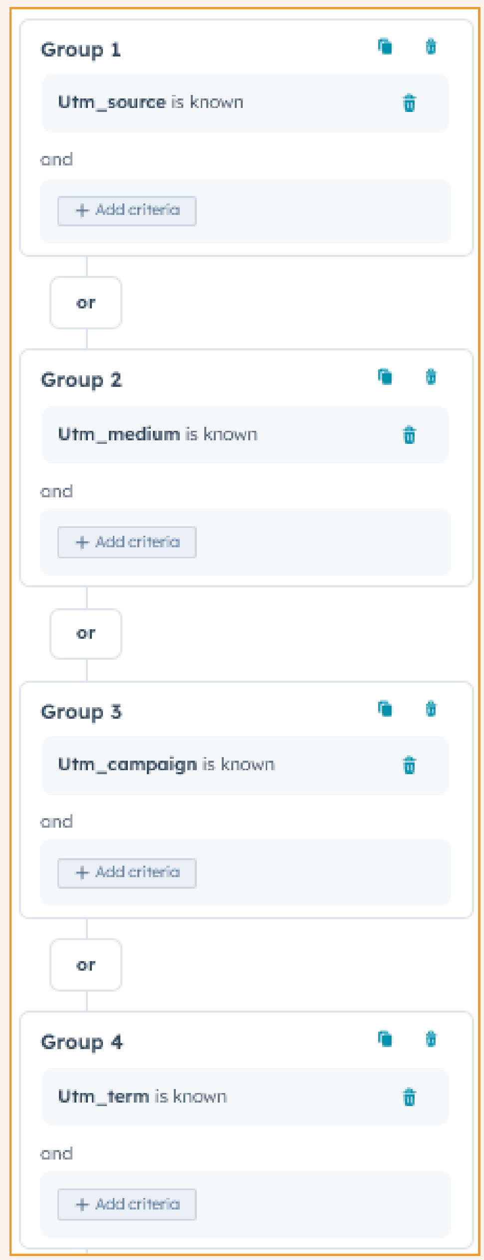
1. Go to **Marketing > Lead Capture > Forms**.
2. Select the form to edit.
3. Search for and add the UTM properties (**UTM_source**, **UTM_medium**, etc.).
4. Set them as **hidden fields** to capture data without user input.
5. Repeat for all relevant forms.



Step 3: Configure the UTM Tracking Workflow

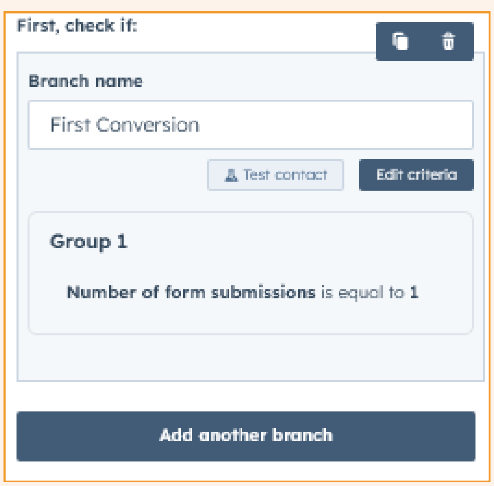
Enrollment Criteria

1. Navigate to **Automation > Workflows**.
2. Click **Create Workflow** and select **Contact-Based Workflow**.
3. Define enrollment triggers:
    - **UTM_source is known** OR
    - **UTM_medium is known** OR
    - **UTM_campaign is known** OR
    - **UTM_term is known**
4. Enable **re-enrollment** to allow repeat tracking.



Branch Logic for First & Last Conversion

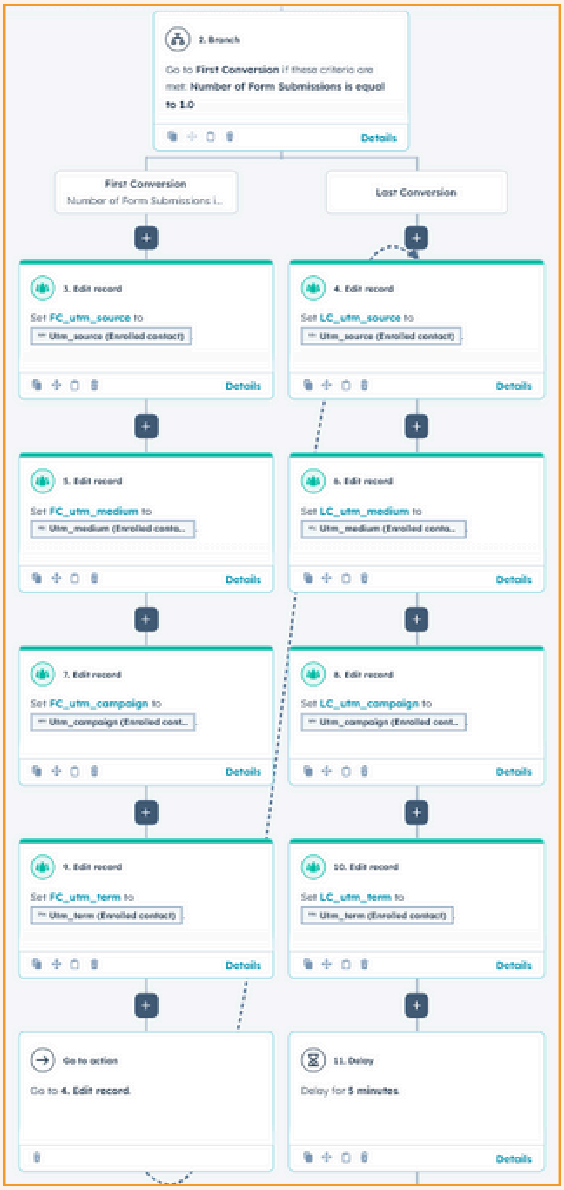
1. Add a **Branch Action**:
    - IF **Number of Form Submissions = 1**, categorize as **First Conversion**.
    - ELSE, categorize as **Last Conversion**.



Step 3: Configure the UTM Tracking Workflow (cont.)

Update Contact Properties

1. Under **First Conversion**:
   - **Edit Record → Update FC_utm_source with UTM_source**
   - Repeat for **medium**, **campaign**, and **term**
2. After updating the **First Conversion** properties, add a **Go to Action** step and direct it to update the **Last Conversion** properties as well. This ensures that after the first form submission, both **First Conversion** and **Last Conversion** fields hold the same values.
3. Under **Last Conversion**:
   - **Edit Record → Update LC_utm_source with UTM_source**
   - Repeat for **medium**, **campaign**, and **term**

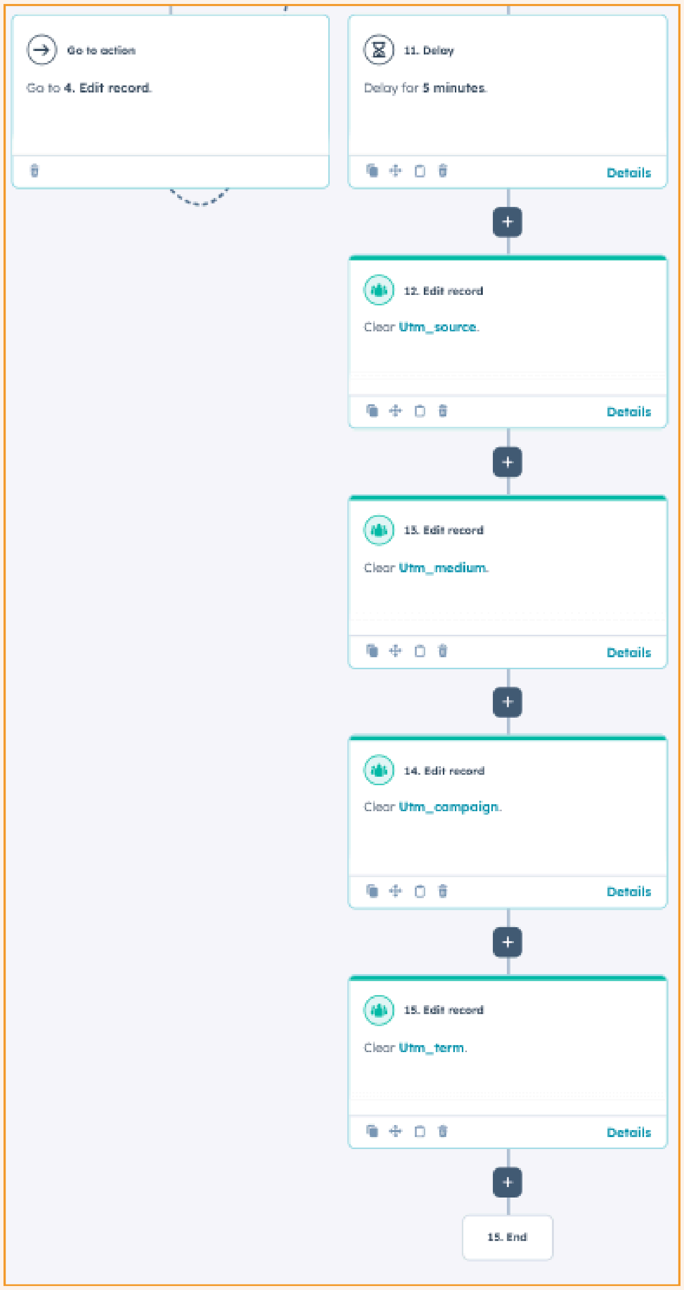


Why? This workflow automates the tracking process, ensuring that we retain first-touch attribution while also capturing ongoing engagement from returning leads.

Step 3: Configure the UTM Tracking Workflow (cont.)

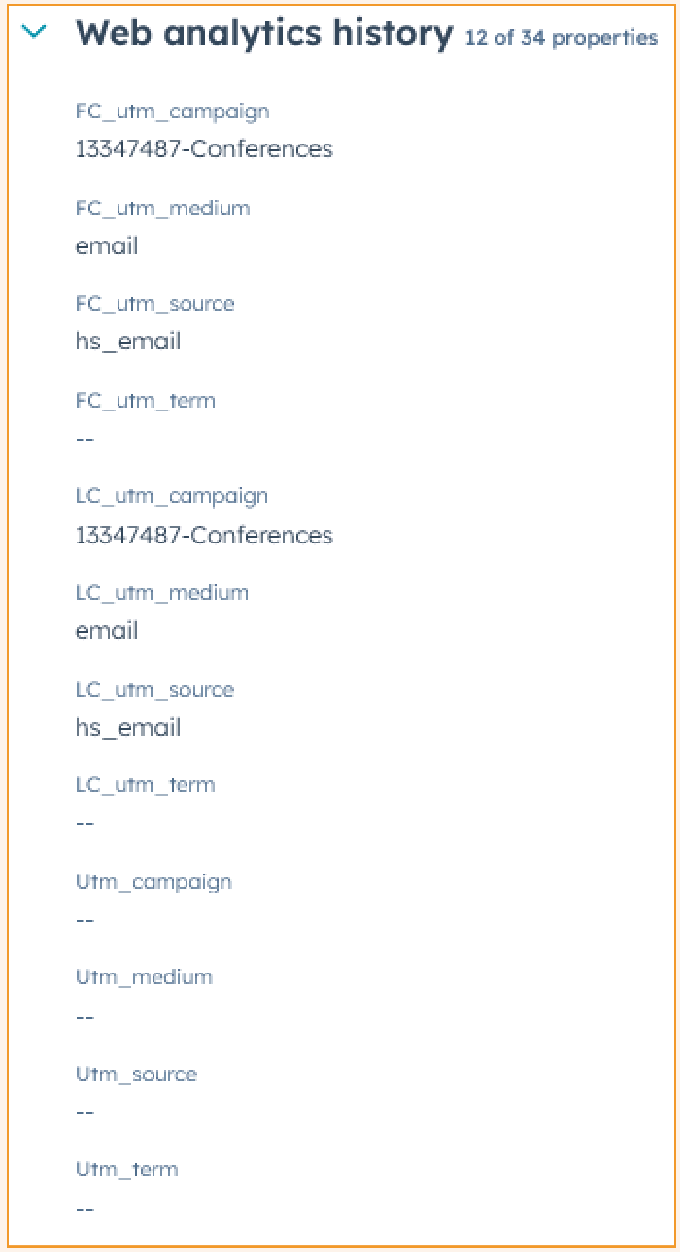
Clear UTM Fields

1. Add a **5-minute delay** before clearing data. (This ensures HubSpot has time to catch up and use the UTMs to enrich any other necessary properties in HubSpot)
2. Use **Edit Record** action to clear **UTM_source**, **UTM_medium**, **UTM_campaign**, **UTM_term**.



Step 4: Test & Activate

1. **Run test submissions** with UTM-tagged URLs.
2. **Verify** UTM properties populate in contact records.
3. **Check workflows** to ensure data flows correctly.
4. Activate workflows and monitor performance.



Ongoing Maintenance & Best Practices

- **Monitor UTM data** regularly for inconsistencies.
- **Ensure all new forms** include hidden UTM fields.
- **Review workflows** quarterly to optimize efficiency.
- **Train team members** on proper UTM tracking and reporting.
- **Marketing teams should use UTMs for all campaigns** to ensure proper attribution.
    - **Use this tool** to easily create UTM URLs: Google Campaign URL Builder

Why? Accurate and consistent UTM tracking enables reliable reporting, helping marketing and sales teams understand which channels and campaigns drive the most valuable leads.

With this setup, HubSpot will automatically track and attribute conversions based on UTM parameters, providing clear insights into campaign performance and lead sources. This structured data enables better decision-making and marketing ROI optimization.