

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.

The screenshot displays a form editor interface. On the left, a sidebar titled 'Field options' is visible, containing the following sections:

- Field type:** A dropdown menu set to 'Single-line text'.
- Label:** A text input field containing 'utm\_campaign' with a red squiggly underline.
- Placeholder text:** An empty text input field.
- Help text:** A text input field with a rich text editor toolbar (bold, italic, underline, link, unlink, list, list-item, help).
- Default value:** An empty text input field.
- Hidden field:** A checkbox that is checked.

On the right, the main form preview area shows several input fields. The 'utm\_campaign' field is highlighted with a blue border and a '+' icon, indicating it is being added or edited. Below it, the following UTM fields are listed:

- utm\_source
- utm\_medium
- utm\_keyword
- utm\_content

Other visible fields in the form include 'First Name\*', 'Last Name\*', 'Email\*', and 'Your Company Name\*'.

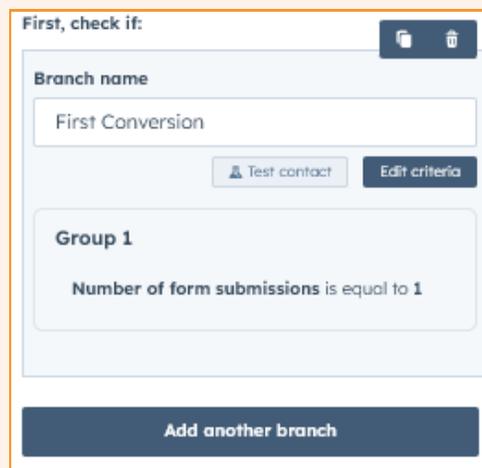
# Step 3: Configure the UTM Tracking Workflow

## 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**.



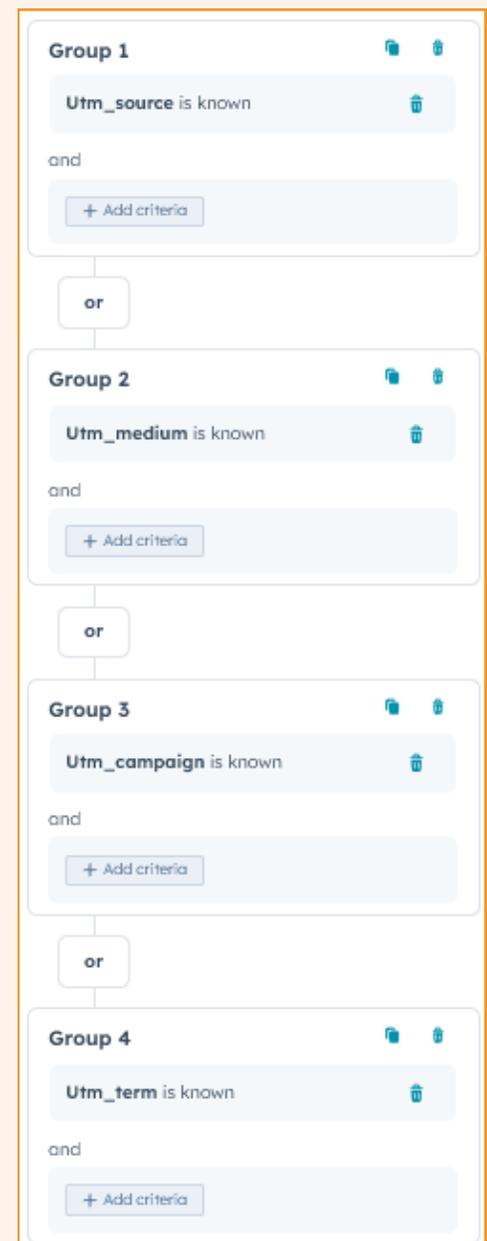
First, check if:

Branch name  
First Conversion

Test contact Edit criteria

Group 1  
Number of form submissions is equal to 1

Add another branch



Group 1  
Utm\_source is known

and  
+ Add criteria

or

Group 2  
Utm\_medium is known

and  
+ Add criteria

or

Group 3  
Utm\_campaign is known

and  
+ Add criteria

or

Group 4  
Utm\_term is known

and  
+ Add criteria

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

## Update Contact Properties

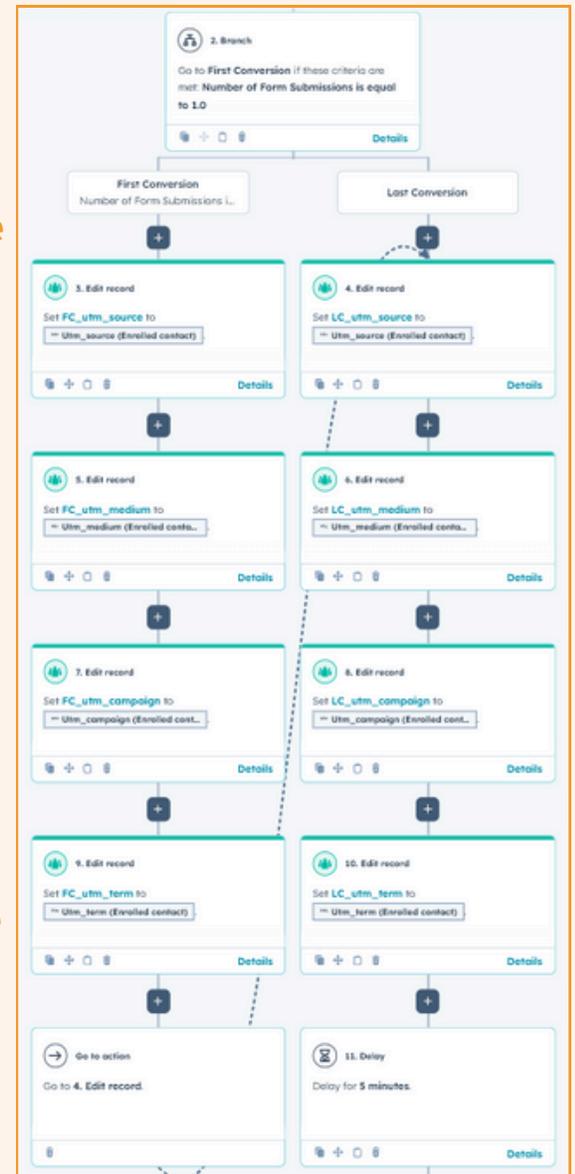
### 1. Under **First Conversion**:

- **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**

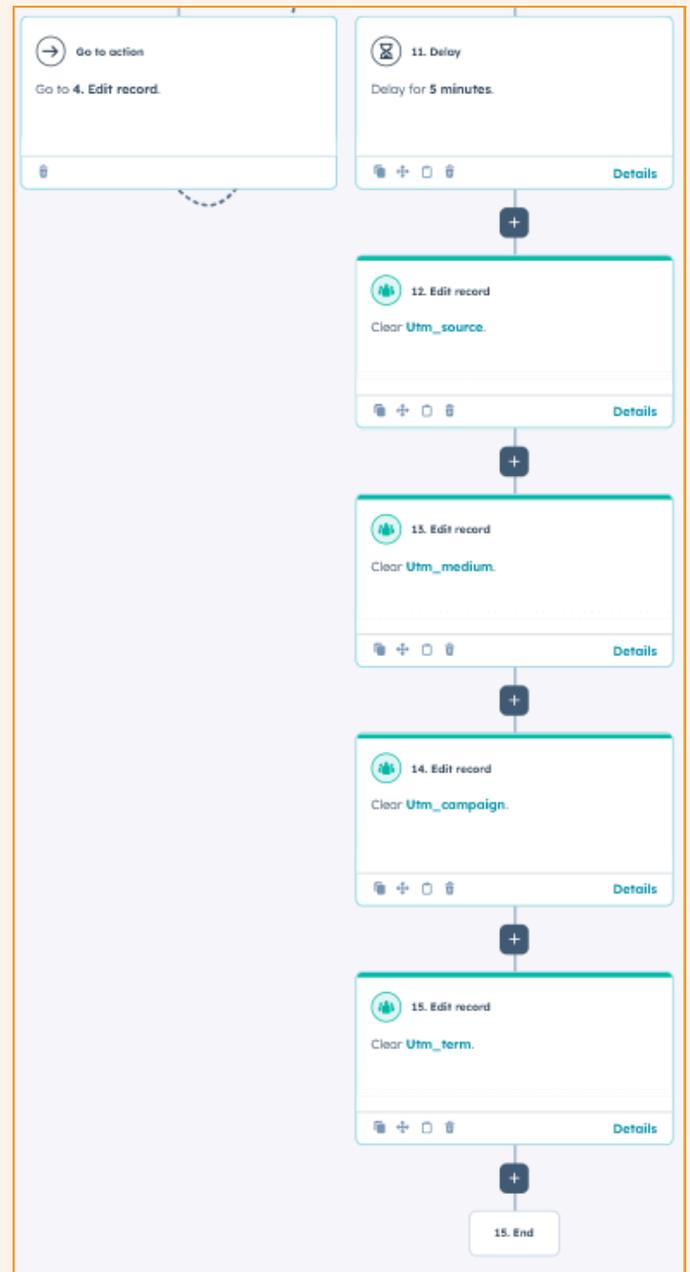


Why? This workflow automates the tracking process, ensuring that we retain first-touch attribution while also capturing ongoing engagement from returning leads.

# 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.

## ✓ Web analytics history 12 of 34 properties

FC\_utm\_campaign  
13347487-Conferences

FC\_utm\_medium  
email

FC\_utm\_source  
hs\_email

FC\_utm\_term  
--

LC\_utm\_campaign  
13347487-Conferences

LC\_utm\_medium  
email

LC\_utm\_source  
hs\_email

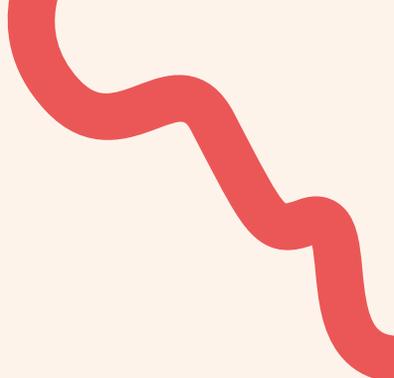
LC\_utm\_term  
--

Utm\_campaign  
--

Utm\_medium  
--

Utm\_source  
--

Utm\_term  
--



# 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.

