The Executive Guide to Marketing Planning with HubSpot Best Practices

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MARKETING SOLUTIONS

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At Prism Global Marketing Solutions, we believe strong marketing planning honors the fundamentals that have guided high-performing organizations for decades while embracing modern tools that elevate execution. This checklist brings both perspectives together. It helps teams create clarity, strengthen alignment, and build confident momentum into the year ahead. Each section includes a practical HubSpot Best Practice, so your strategy translates into measurable action across your CRM, automation, reporting, and content systems.

Develop Strategic Alignment

- Align objectives with overall business goals such as revenue growth or brand visibility

- Define specific KPIs such as lead generation or conversion rates

- Set benchmarks for success using historical data

  HubSpot Best Practice: Use HubSpot Goals to formalize KPI targets and track progress across marketing, sales, and revenue pipelines

Analyze Recent Campaign Performance

- Review recent campaigns and identify high and low performers

- Assess ROI across channels and initiatives

- Determine customer acquisition cost and lifetime value

  HubSpot Best Practice: Use HubSpot Campaigns and Attribution Reporting to compare ROI, channel influence, and customer value in a single dashboard

Conduct Market Research

- Conduct competitor analysis to understand shifts in the landscape

- Identify emerging trends that could shape your strategy

- Analyze customer behaviors and preferences

  HubSpot Best Practice: Build competitor tracking dashboards and use SEO and social monitoring tools for trend and share-of-voice insights

Audience Segmentation Review

- Reassess target audience segments for new opportunities

- Validate or update buyer personas

- Segment by demographics, behaviors, and lifecycle stage

HubSpot Best Practice: Refine Smart Lists and persona records to strengthen segmentation across campaigns and automation

Budget Allocation

- Allocate budgets by channel based on historical performance

- Set aside contingency funds for testing

- Balance brand building and demand generation

HubSpot Best Practice: Use campaign-level budgeting and cost tracking to monitor spend against performance

Product or Service Launch Planning

- Understand the needs and pain points of your target audience

- Align timing with industry cycles and major events

- Ensure sales teams receive the right tools and training

HubSpot Best Practice: Create a Product Launch Campaign in HubSpot, including tasks, workflows, sales enablement assets, and sequences

Campaign Strategy

- Map seasonal and thematic campaigns

- Plan content and promotions for key milestones

- Allocate resources between ongoing and one-time campaigns

HubSpot Best Practice: Build HubSpot Campaigns for each initiative to connect assets, measure influence, and track performance

Channel Strategy

- Reevaluate your core channels

- Test new channels where your audience is growing

- Prioritize based on ROI and customer behavior

   HubSpot Best Practice: Use Channel Performance reports to compare engagement, conversions, and attributed revenue

Content Strategy

- Audit your existing content and identify gaps

- Develop annual or quarterly themes

- Align formats to audience preferences

   HubSpot Best Practice: Use Content Strategy tools and SEO Topic Clusters to organize themes and improve organic visibility

Promotional: Paid Media Strategy

- Set goals for PPC, display, and social ads

- Evaluate new bidding strategies

- Optimize creative for conversion

   HubSpot Best Practice: Integrate all ad accounts to track ROI, sync audiences, and measure conversions inside HubSpot

Promotional: Organic Search and SEO/AEO Planning

- Update keyword strategies

- Refresh technical SEO for site health

- Plan long-term content optimization

   HubSpot Best Practice: Use SEO Recommendations and Website Grader to prioritize improvements and monitor performance

Promotional: Social Media Planning

- Build a content calendar for all platforms

- Allocate spend to boost high-performing posts

- Plan influencer or UGC opportunities

  HubSpot Best Practice: Schedule posts through HubSpot Social and review engagement analytics to refine your approach

Promotional: Email Marketing Strategy

- Reassess nurturing and automation workflows

- Update lists and segmentation

- Plan promotional email cadence

  HubSpot Best Practice: Build and refine workflows using branching logic, send-time optimization, and personalization tokens

Lead Generation and Nurturing

- Plan webinars, gated assets, and events

- Implement or refine lead scoring

- Build nurturing workflows to move leads through the funnel

  HubSpot Best Practice: Use Lead Scoring, Forms, and automated triggers to create personalized conversion paths

Sales and Marketing Alignment

- Sync on target audiences and campaign goals

- Build a feedback loop for lead quality

- Collaborate on sales enablement content

  HubSpot Best Practice: Use Playbooks, Deal Stages, and shared dashboards to streamline visibility and accountability

MarTech Stack Evaluation

- Audit your CRM and automation tools

- Identify gaps or inefficiencies

- Evaluate opportunities for integration

  HubSpot Best Practice: Review the App Marketplace to consolidate systems, increase automation, and remove redundant tools

Data-Driven Decision Making

- Identify required reports for real-time performance

- Build automated dashboards

- Ensure alignment between marketing and finance

  HubSpot Best Practice: Use custom dashboards, attribution reporting, and revenue analytics for unified insights

Creative Asset Planning

- Plan new videos, graphics, and ad visuals

- Review creative budgets

- Schedule visual refreshes throughout the year

  HubSpot Best Practice: Store creative files inside Campaigns and attach them to the related assets for centralized tracking

Partnerships and Event Sponsorships

- Reevaluate partnerships and measure ROI

- Identify new sponsorship opportunities

- Negotiate media or co-branded content

  HubSpot Best Practice: Track partner and event-driven pipeline using Campaigns and custom properties

Testing and Experimentation

- Budget for A/B testing

- Test new formats, channels, or messages

- Conduct quarterly reviews of results

  HubSpot Best Practice: Use A/B testing tools for emails, CTAs, and landing pages to systematically improve conversion

Continuous Optimization

- Schedule quarterly strategy reviews

- Apply learnings from experiments

- Stay adaptable as trends evolve

  HubSpot Best Practice: Use lifecycle stage movement, conversion reports, and cohort data to guide ongoing optimization

Prism Global Marketing Solutions partners with organizations that want to blend proven marketing disciplines with modern systems that help teams move faster and smarter. This checklist provides a framework for building an aligned, scalable plan that your team can execute confidently within HubSpot. We invite you to connect with us to discuss how we can help your team develop and implement your marketing strategy and build a marketing operations program to drive long-term success.

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