STRETCHLEARN · WORKBOOK

HubSpot Marketing Hub — Workbook

This workbook turns the course into a working HubSpot portal. You will audit and structure your contact data and lifecycle stages, build lead-capture forms and landing pages, design automated nurture workflows and lead scoring, and stand up campaigns with attribution dashboards. Work through one section per course module, then use the action plan and templates to keep your inbound system healthy and measurable.

The HubSpot Foundation: Contacts, Properties and Lifecycle

Get the contact data, lifecycle stages and lists right so every workflow, email and report that follows has a solid base.

Exercise: Audit your contact data and define your MQL

Open your contacts and review the state of the database. Then sit down with whoever owns sales and write a single, concrete definition of a Marketing Qualified Lead that both sides accept.

• What percentage of your contacts are missing a Lifecycle Stage, and what percentage are missing Original Source?

• List three custom properties your business needs that HubSpot does not provide by default, and the field type each should use.

• Write your one-sentence MQL definition (e.g. downloaded a bottom-of-funnel asset AND works at a company of 50+ employees).

• Which channel does Original Source say produces most of your contacts today, and does that match your gut?

Worksheet: Lifecycle stage and property map

Define what each lifecycle stage means for your business and document the key properties your reporting will depend on. Fill in the plain-language meaning, not just the stage name.

Subscriber — what action or signal puts a contact here

Lead — what action or signal puts a contact here

MQL — exact criteria (agreed with sales)

SQL — who decides and on what basis

Customer — how this stage gets set (manual, workflow, deal close)

Top 3 custom contact properties and their field types

Which property triggers your main nurture workflow

Rule confirmed: workflows never move a contact backward in lifecycle (Y/N)

Checklist: Foundation health check

[ ] Lifecycle Stage is populated on the large majority of contacts
[ ] Original Source is preserved and not overwritten by imports
[ ] Custom properties use dropdowns rather than free text where segmentation matters
[ ] MQL is defined in writing and agreed with sales
[ ] At least one engaged active list exists for safe sending
[ ] Stale, never-engaged contacts are marked non-marketing to protect tier and deliverability
[ ] Lifecycle-setting workflows are configured to never decrease a stage

Capturing Leads: Forms, CTAs and Landing Pages

Build the forms, CTAs and landing pages that convert anonymous traffic into known contacts with clean source data.

Exercise: Build one offer end to end

Pick a single content offer (a guide, checklist or webinar). Build the full capture path for it: a scoped form, a focused landing page, a relevant CTA to drive traffic, and a thank-you page with a next step. Then submit it yourself as a test and confirm the contact and source data land correctly.

• What is the offer, and how many form fields does its value justify?

• What single next step does your thank-you page offer now that intent is high?

• Where will the CTA for this offer live, and does the offer match that page's topic?

• After your test submission, did the contact record get created with the right Lifecycle Stage and Original Source?

Worksheet: Lead-capture asset specification

Document the capture path for your offer so it can be rebuilt or audited later. Complete one block per offer you run.

Offer name and funnel stage (top / middle / bottom)

Form fields requested (list each)

Progressive profiling fields queued for return visits

Lifecycle Stage the form sets on submission

Landing page headline (single offer + benefit)

Social proof element used on the page

Thank-you page next step

Kickback email delivers the asset? (Y/N)

Checklist: Capture launch checklist

[ ] Form length matches the value of the offer, no unnecessary fields
[ ] Each form field maps to the correct contact property
[ ] Progressive profiling is enabled so known contacts are not asked repeats
[ ] The landing page removes site navigation and has one CTA
[ ] The landing page includes at least one piece of social proof
[ ] The thank-you page delivers the asset and offers a logical next step
[ ] A kickback email sends the asset to the contact's inbox
[ ] A test submission confirmed the contact, lifecycle stage and source are correct

Nurturing with Email and Workflows

Turn captured contacts into qualified leads with marketing emails, branching nurture workflows and objective lead scoring.

Exercise: Design a branching nurture workflow

On paper, design a nurture workflow for the leads captured by your offer. Define the enrolment trigger, the goal, the email steps with delays, and at least one if/then branch that reacts to behaviour. Then build it in HubSpot from your sketch and turn it on.

- What is the enrolment trigger (which property and behaviour combination)?
- What is the goal that should remove a contact from the workflow when reached?
- After the first email, what behaviour does your if/then branch check, and how do the two paths differ?
- How long are the delays between emails, and why those intervals for your buying cycle?

Worksheet: Lead scoring model

Build your lead score by listing the signals that earn or lose points and the threshold that makes a contact an MQL. Leave the point totals for you to set and tune.

Positive fit signals (job title, company size, industry, country) and points each

Positive behaviour signals (visited pricing, requested demo, downloaded BOFU asset) and points each

Negative signals (free email domain, unsubscribed, long inactivity) and points each

MQL score threshold (agreed with sales)

What the workflow does at threshold (set stage, assign owner, create task, notify)

What context is passed to sales (asset, pages, score breakdown)

Review cadence for the threshold (monthly / quarterly)

Checklist: Email and workflow checklist

[ ] Marketing emails send only to engaged active lists with a suppression list applied
[ ] Personalisation tokens have fallback values set
[ ] Success is judged by click rate and conversions, not open rate alone
[ ] The nurture workflow has a clear enrolment trigger and a goal
[ ] The workflow includes at least one if/then branch on behaviour
[ ] Lead scoring combines fit and behaviour signals, with negatives for poor fit
[ ] Crossing the MQL threshold triggers an immediate, context-rich handoff to sales

Social, Campaigns and Attribution Reporting

Coordinate social and email under campaigns, then build dashboards and apply multi-touch attribution to measure real impact.

Exercise: Wrap your offer in a campaign and measure it

Create a HubSpot campaign and associate every asset behind your offer: the landing page, form, emails, workflow and social posts. Set a goal and, if you spend on promotion, a budget. After a couple of weeks, review the campaign as a whole.

• What is the campaign's goal in numbers (sessions, new contacts, or influenced revenue)?

• Which assets did you associate with the campaign?

• Looking at the campaign view, where is the weak link, traffic, conversion, or downstream movement?

• Which social posts actually drove tracked clicks versus only collecting impressions?

Worksheet: Attribution model decision

Decide which attribution model matches how your buyers really decide, and record why. Map a real recent deal's touches to test the model.

Typical number of touches before a contact converts

Chosen attribution model (first / last / linear / U-shaped / W-shaped)

Why this model fits your buying journey

A real deal's touch sequence (first touch through last touch)

How first-touch alone would credit that deal

How last-touch alone would credit that deal

How your chosen multi-touch model credits it differently

Primary metric for judging channels (influenced revenue / new contacts)

Worksheet: Marketing dashboard spec

List the reports your standing dashboard must answer at a glance, so you stop rebuilding reports every week.

New contacts by Original Source

MQLs over time

Contacts by lifecycle stage (funnel shape)

Email click rate trend

Landing-page conversion rate

Campaign influenced contacts / revenue

Who reviews this dashboard and how often

Checklist: Campaign and reporting checklist

[ ] Social posts use tracked links and are associated with a campaign
[ ] Every asset behind an initiative is associated with one campaign
[ ] The campaign has a goal in numbers and, where relevant, a budget
[ ] A standing marketing dashboard covers source, MQLs, lifecycle and conversion
[ ] An attribution model is chosen deliberately to match the buying journey
[ ] Channels are judged by influenced revenue, not just first or last touch
[ ] The campaign is reviewed end to end to find the weakest link

Your Action Plan

1. Audit contact data, preserve Original Source, and confirm Lifecycle Stage is populated across the database.
2. Write and agree a concrete MQL definition with sales, then create the custom properties your business needs.
3. Build engaged active lists for safe sending and mark never-engaged contacts as non-marketing.
4. Build one full capture path for a single offer: scoped form, focused landing page with social proof, CTA, and a thank-you page with a next step.
5. Set up progressive profiling and a kickback email so returning contacts deepen their profile and receive the asset.
6. Create a branching nurture workflow with an enrolment trigger, a goal, timed emails and at least one if/then branch.
7. Build a lead score from fit and behaviour signals, agree the MQL threshold, and trigger an immediate context-rich handoff to sales.
8. Connect social accounts, schedule a coordinated series with tracked links, and associate posts with a campaign.
9. Wrap the whole initiative in a HubSpot campaign with a goal and budget, and review its performance end to end.
10. Stand up a marketing dashboard and choose a multi-touch attribution model that matches your buyers, then judge channels by influenced revenue.