

HubSpot | Marketing Automation Planning Worksheet

Segment Name

Segment Conditions

Which characteristics / behaviors are typical of this segment?

Goal Drivers

What would trigger a lead to move to the next segment?

Tip: This is typically the same as the "segment conditions" for the next segment to the right.

Email Steps

What kind of targeted content do you want to email to this segment?

Tip: Your emails should be a mix of useful content and calls to action that push leads toward completing the goal.

Website Content

What targeted calls to action should this segment see on our website?

Tip: Your website CTAs should be focused around moving leads toward completing the goal.

Monitoring

What website actions or social media terms do you want to monitor for this segment?

The worksheet is a grid with three columns and six rows. Each cell contains a placeholder for user input, indicated by a small icon in the top-left corner of the cell. The icons are: a list icon for Segment Name, a horizontal line for Segment Conditions, a checkmark for Goal Drivers, an envelope for Email Steps, a document for Website Content, and an eye for Monitoring. Large grey arrows point from the first column to the second, and from the second to the third, indicating a sequential flow. The entire grid is set against a light grey background.

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