HUBSPOT BUYER INTENT FILTERS: SETUP CHECKLIST

☐ **ADD HUBSPOT TRACKING CODE TO ALL WEB PROPERTIES**

[ ] Installed on main website
[ ] Deployed on landing pages
[ ] Added to knowledge base, blog, and microsites
[ ] Tested code firing and proper data capture

☐ **DEFINE YOUR TARGET MARKET (ICP)**

[ ] Segmented by industry
[ ] Company size and region identified
[ ] Vertical or persona filters mapped
[ ] Stakeholder approval for ICP criteria

☐ **SET INTENT-BASED FILTERING CRITERIA**

[ ] Chosen key pages and engagement actions (e.g., product, pricing, etc.)
[ ] Selected frequency/recency parameters (e.g., repeat sessions)
[ ] Filtered out low-value or irrelevant signals
[ ] Saved custom filter views in HubSpot

☐ **BUILD SEGMENTED VIEWS FOR SALES & MARKETING**

[ ] "High-Intent Accounts" view created
[ ] Engagement dashboards set up for weekly review
[ ] Notification triggers or workflow enrollment configured
[ ] Share access permissions with GTM teams

☐ **ENSURE DATA PRIVACY AND INTEGRATION**

[ ] Compliance with GDPR/CCPA validated
[ ] Visitors informed about tracking (cookie banner, privacy page)
[ ] Data usage policy updated
[ ] Connected Buyer Intent insights to CRM workflows or ABM campaigns