Value-First Marketing Email

Marketing email in HubSpot

How the Value-First Team sets up its own HubSpot portal, for HubSpot users.

One record holds a message we write once and send to many, with its results (opens, clicks, unsubscribes).

We use it as HubSpot ships it, with no fields of our own. Ours are reminders and recaps for member meetups, a weekly client update, and notices that send on their own.

Try it in your portal

Split by subscription type. One subscription type per kind of email, such as members' updates or events, lets readers opt out of one and keep the rest. Settings › Marketing › Email › Subscription Types tab. Marketing Hub Starter, Professional or Enterprise.

Personalize the subject. Click Personalize in the subject line, pick a Company (our Account) property, set a fallback. Ours names the week each client's update covers. Marketing › Email › Subject line. All plans; automated emails need Starter or above.

Put emails in a campaign. Create a campaign, then choose it in the email's setup, so results sit with the posts and pages that share its purpose. Marketing › Campaigns › Create campaign. Marketing Hub Professional or Enterprise.

What do we keep about a Marketing Email?

What is ours is how we fill HubSpot's fields:

A person as the sender. Most of what we sent this year went out under a named person's name, not the team's.

Whose value does it serve?

Value for the Community

This serves the whole team and the community around it. The record shows everyone what we send, what is still a draft, and what goes out on its own without anyone pressing send.



What links to a Marketing Email?



No record link to the contacts who got it. Also connected, not drawn: test versions, feedback surveys, HubSpot's reporting records.

How does a Marketing Email change?

It has no stages. Draft, scheduled or sent is a status, not a path, and an automated email sends whenever its trigger fires. After it goes out, it keeps what came back: deliveries, opens, clicks, replies and unsubscribes.

What is a Marketing Email not?

Not a one-to-one email. HubSpot keeps the emails one person sends another as a separate object. A marketing email is one message sent to many.

Not proof that value landed. An open or a click does not show the reader received anything of worth. Value counts when the one who received it accepts it.

Not a campaign. A campaign gathers the emails, posts and pages that share one purpose. The email is one piece inside it.