



CRM Marketing Campaign Attribution Checklist 2026

Pre-Campaign Tracking Setup

Define campaign parameters, UTM structure, and ensure all tracking pixels and-tags are correctly configured in the CRM before launch.

Campaign Name

Campaign Start Date

Primary Marketing Channel

- ☐ Email
- ☐ Paid Search (PPC)
- ☐ Social Media
- ☐ Organic Search (SEO)
- ☐ Display Advertising

Required Tracking Parameters

- ☐ utm_source
- ☐ utm_medium
- ☐ utm_campaign
- ☐ utm_term
- ☐ utm_content

UTM Naming Convention Documentation

Write something...

Tracking URL Configuration Template

 Upload File

Data Source & Integration Audit

Verify that all marketing channels (Email, Paid Social, PPC, Content) are communicating accurately with the CRM database.

Integrated Marketing Channels

- ☐ Google Ads
- ☐ Facebook/Meta Ads
- ☐ LinkedIn Ads
- ☐ Email Marketing (HubSpot/Mailchimp)
- ☐ Organic Search (SEO)
- ☐ Webinars/Events

API Connection Status

Write something...

Integration Health Status

- ☐ Operational
- ☐ Degraded Performance
- ☐ Critical Failure
- ☐ Needs Re-authentication

Last Integration Sync Date

Enter date...

Identified Data Discrepancies

Write something...

Integration Log Export

 Upload File

Attribution Model Selection

Validate the chosen attribution model (First-Touch, Last-Touch, Multi-Touch, or Linear) against your specific sales cycle and business goals.

Primary Attribution Model

- ☐ First-Touch Attribution
- ☐ Last-Touch Attribution
- ☐ Multi-Touch Attribution
- ☐ Linear Attribution
- ☐ Time Decay Attribution
- ☐ U-Shaped Attribution

Key Touchpoints to Track

- ☐ Paid Search (PPC)
- ☐ Organic Search (SEO)
- ☐ Social Media Ads
- ☐ Email Marketing
- ☐ Content Downloads
- ☐ Webinars/Events

Justification for Model Choice

Write something...

Model Implementation Date

Enter date...

Marketing Manager Approval

Lead Conversion Mapping

Map lead source transitions from initial marketing touchpoint to CRM Lead/Opportunity status changes to ensure continuity.

Initial Lead Source Identifier

Write something...

Lead Status Transition Path

- ☐ New → Marketing Qualified (MQL)
- ☐ MQL → Sales Qualified (SQL)
- ☐ SQL → Opportunity
- ☐ Opportunity → Closed Won

Touchpoint Channels Involved

- ☐ Email Marketing
- ☐ Paid Search (PPC)
- ☐ Social Media Ads
- ☐ Organic Search
- ☐ Webinar/Event

Conversion Date Validation

Enter date...

Mapping Discrepancy Notes

Write something...

UTM & Parameter Standardization

Audit the consistency of UTM parameters to prevent duplicate or fragmented campaign entries within the CRM reporting engine.

Standardized UTM Naming Convention

Write something...

Campaign Source Type

- ☐ Email
- ☐ Social Media
- ☐ Paid Search
- ☐ Organic Search
- ☐ Referral

Required UTM Parameters to Validate

- ☐ utm_source
- ☐ utm_medium
- ☐ utm_campaign
- ☐ utm_term
- ☐ utm_content

Master UTM Naming Template

 Upload File

Standardization Audit Date

Enter date...

Revenue & ROI Attribution Verification

Ensure that closed-won opportunities are correctly tied back to their original marketing campaign source for accurate ROI calculation.

Attribution Model Used

- ☐ First-Touch
- ☐ Last-Touch
- ☐ Multi-Touch
- ☐ U-Shaped
- ☐ Linear

Total Campaign Spend (\$)

Attributed Revenue Recognized (\$)

Calculated ROI Percentage

Audit Completion Date

Revenue Reconciliation Report

 Upload File

Marketing Manager Approval

Data Integrity & Duplicate Prevention

Implement rules to prevent campaign-driven lead influx from creating duplicate records or overwriting critical existing contact data.

Duplicate Detection Rule Applied

- ☐ Email Address Match
- ☐ Company Domain Match
- ☐ Phone Number Match
- ☐ Full Name & Email Match

Data Cleansing Steps Completed

- ☐ Removed Duplicate Leads
- ☐ Standardized Industry Fields
- ☐ Normalized Country/Region Names
- ☐ Validated Email Formats

Duplicate Matching Logic Summary

Write something...

Total Duplicate Records Merged

Enter a number...

Last Data Scrubbing Date

Enter date...

Data Steward Approval

Dashboard & Reporting Validation

Test the CRM marketing dashboard reports to ensure campaign performance metrics are real-time and visually accurate for stakeholders.

Report Accuracy Status

- ☐ Verified
- ☐ Discrepancies Found
- ☐ Requires Re-configuration

Identified Data Discrepancies

Write something...

Last Validation Date

Enter date...

Verified Report Modules

- ☐ Campaign ROI Dashboard
- ☐ Lead Source Distribution
- ☐ Conversion Rate by Channel
- ☐ Cost Per Acquisition (CPA) Report

Validation Screenshot/Evidence

 **Upload File**

Auditor Approval

Post-Campaign Performance Review

Final audit of campaign attribution accuracy after the campaign concludes to identify any gaps in the tracking lifecycle.

Review Completion Date

Total Campaign Leads Generated

Total Attributed Revenue (\$)

Campaign Success Rating

- ☐ Exceeded Targets
- ☐ Met Targets
- ☐ Below Targets
- ☐ Failed

Key Learnings and Optimization Insights

Write something...

Identified Tracking Issues

- ☐ Broken UTM Links
- ☐ Missing Lead Source Data
- ☐ Inaccurate Conversion Attribution
- ☐ Duplicate Contact Creation

Final Campaign Performance Report

 Upload File

Marketing Manager Approval

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👍 Finish

 Generate Sample Report