UTM Setup Checklist

Use this checklist to ensure your UTM strategy stays consistent, accurate, and delivers actionable insights:

1. Foundation

- [ ] Define clear campaign goals (awareness, lead gen, conversions, etc.).
- [ ] Identify all channels that will use UTM-tagged URLs (e.g., email, paid ads, social).
- [ ] Establish a naming convention (e.g., lowercase, hyphen-separated values).
- [ ] Document all UTM components and rules in an internal guide or spreadsheet.

2. UTM Parameters

- [ ] utm_source – Identify the platform or referrer (e.g., Facebook, google, newsletter).
- [ ] utm_medium – Define the channel type (e.g., cpc, email, referral, social).
- [ ] utm_campaign – Name the marketing initiative (e.g., spring_sale_2025).
- [ ] utm_term – (Optional) Use for paid search keyword tracking.
- [ ] utm_content – (Optional) Use for creative or link variation (e.g., banner_top, text_link).

3. Implementation

- [ ] Use a centralized UTM builder (Pear's UTM Builder).
- [ ] Apply UTM tags consistently across all platforms and ad creatives.
- [ ] Use URL shorteners (Bitly, Rebrandly) for long UTM links, especially on social or print.
- [ ] Validate URLs after tagging to ensure they resolve correctly and parameters pass.

4. Quality Control

- [ ] Test each UTM-tagged link manually in incognito mode.
- [ ] Monitor for typos, inconsistent naming, or duplicated values.
- [ ] Periodically audit analytics data for fragmentation (e.g., utm_medium=email vs e-mail).

5. Reporting

- [ ] Create Pear Vision segments or views based on UTM parameters.
- [ ] Review UTM data monthly to adjust naming structures and uncover optimization opportunities.