

Campaign Taxonomy and UTM Governance Checklist

Domain Methods

Purpose: decide whether campaign source, UTM, CRM campaign, and warehouse reporting rules are trustworthy enough for attribution, CAC, budget pacing, and revenue conversations.

1. Name the decision this data must support

- Decision being reviewed:
- Reporting period:
- Team owner:
- Decision owner:
- One sentence rule: This campaign data is being used to decide _____.

2. Required field inventory

Mark whether each field is defined, captured, and visible downstream.

- Source: defined captured visible in CRM/warehouse
- Medium: defined captured visible in CRM/warehouse
- Campaign family: defined mapped visible in reporting
- Offer or asset: defined captured tied to response quality
- Audience/segment: defined captured tied to ICP or stage
- Region/market: defined captured useful for comparison
- Lifecycle stage: defined captured aligned with RevOps
- Owner/date: owner named launch date change date

3. Govern, map, or keep flexible

Controlled values: source, medium, campaign family, lifecycle stage, region, owner, and any field that affects spend, CAC, attribution, or revenue proof.

Mapped values: platform campaign names, ad sets, creative themes, and offer variants. Keep platform labels descriptive, but map them back to reporting fields the business can trust.

Flexible values: short-lived tests, internal notes, and creative descriptors that do not enter leadership reporting unless they graduate into governed fields.

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4. Source-precedence and handoff checks

For five real campaigns, trace the path from launch to revenue reporting.

- Launch naming matches governed values.
- Landing page, form, or event capture preserves the intended UTM values.
- CRM keeps original source and campaign family after conversion or routing.
- Account and opportunity joins keep campaign context visible.
- Reporting table uses the expected mapping and owner rule.
- Exceptions are documented somewhere reviewable, not buried in Slack.

Precedence rules to write down:

- Which field wins when UTM source and CRM campaign source conflict?
- Which system owns campaign family mapping?
- Which original-source field is immutable?
- How is opportunity source assigned when multiple contacts are involved?
- How are partner, paid, and sales-created touches separated?

5. Change-control and exception path

- Who can request a new governed value?
- Who approves it before launch?
- Where does the allowed-value list live?
- How are retroactive fixes logged?
- When is history frozen for board, spend, or CAC reporting?
- What happens when a campaign launches with a bad value?

6. Safe-use classification

Cleanup-first: use only to identify broken fields, owners, and handoffs.

Directional: use for learning and pattern-spotting with visible caveats.

Operating-grade: use for weekly channel review and campaign prioritization.

Spend-grade: use for budget pacing, CAC, attribution confidence, and leadership decisions for the named use.

Next step if the spend story still cannot be defended: Where Did the Money Go?

Next step if CRM, warehouse, or source precedence is the blocker: Data Foundation.

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