Simplify Your Process

My Five Non-Negotiable Criteria for Non-Marketing Contacts

Intro

Managing your HubSpot marketing contacts effectively is crucial for cost control.

Click through and walk through the process of identifying and automatically setting non-marketing contacts to help you stay within your plan limits and optimize your marketing efforts.

Why should I care?

Properly categorizing contacts as marketing or non-marketing can:

- Prevent costly overages on your HubSpot subscription
- Maintain a cleaner, more effective marketing database
- Improve deliverability and engagement metrics
- Ensure compliance with email marketing best practices

Lets get Started

You'll need to create a contact list with all of your non-marketing criteria to capture all of the contacts whose status should be changed.

Email Bounces

Filter out contacts with hard bounces, quarantined emails, or repeated soft bounces.
Contacts whose emails have hard bounces will never receive your emails—keeping them as marketing contacts wastes your limit.

Also consider filtering out contacts with multiple soft bounces (typically 3–5), depending on your personal risk tolerance. Repeated soft bounces often signal ongoing delivery issues and can drag down your email performance.

Group 1

Email hard bounce reason is known

AND

Marketing contact status is any of Marketing contact

Group 8

Marketing contact status is any of Marketing contact

AND

Marketing emails bounced is greater than 3

Invalid Email Address

Filters out contacts with structurally incorrect or suspicious email addresses. These addresses won't receive marketing communications and may harm your sender's reputation.

Examples: Emails missing @ symbols, containing obvious fake patterns (test@test.com), or system addresses (noreply@, donotreply@)

Group 2

Marketing contact status is any of **Marketing contact**

AND

Invalid email address is equal to **True**

Email Address Quarantined

Filters out emails that HubSpot has automatically quarantined. These are addresses that have consistently bounced or failed verification checks. HubSpot's system prevents sending to these addresses to protect your sender's reputation.

Group 3

Marketing contact status is any of **Marketing contact**

AND

Email address quarantined is equal to **True**

Unsubscribed Contacts

Filters out contacts who have explicitly opted out of all email communications. These contacts have legally withdrawn consent to receive marketing materials.

Group 4

> **Marketing contact status** is any of **Marketing contact**

> AND

> **Unsubscribed from all email** is equal to **True**

Non-Marketing Contact Criteria #5:

Unengaged Contacts

HubSpot considers a contact "unengaged" if they haven't opened the last 11 emails you've sent them, or if they haven't opened any of your last 16 emails total.

Keeping these contacts marked as marketing contacts can hurt your email engagement rates and waste your limited contact allotment.

Group 5

Marketing contact status is any of Marketing contact

AND

Sends since last engagement is greater than **11**

This filter is affected by Apple's new privacy features ⓘ

AND

Marketing emails opened is equal to **0**

This filter is affected by Apple's new privacy features ⓘ

Group 6

Marketing contact status is any of Marketing contact

AND

Sends since last engagement is greater than **11**

This filter is affected by Apple's new privacy features ⓘ

AND

Marketing emails opened is unknown

This filter is affected by Apple's new privacy features ⓘ

Group 7

Marketing contact status is any of Marketing contact

AND

Sends since last engagement is greater than **16**

This filter is affected by Apple's new privacy features ⓘ

Creating a Workflow To Automate Non-Marketing Status

Once your list is set up, you'll need to create a workflow to automatically update contact statuses:
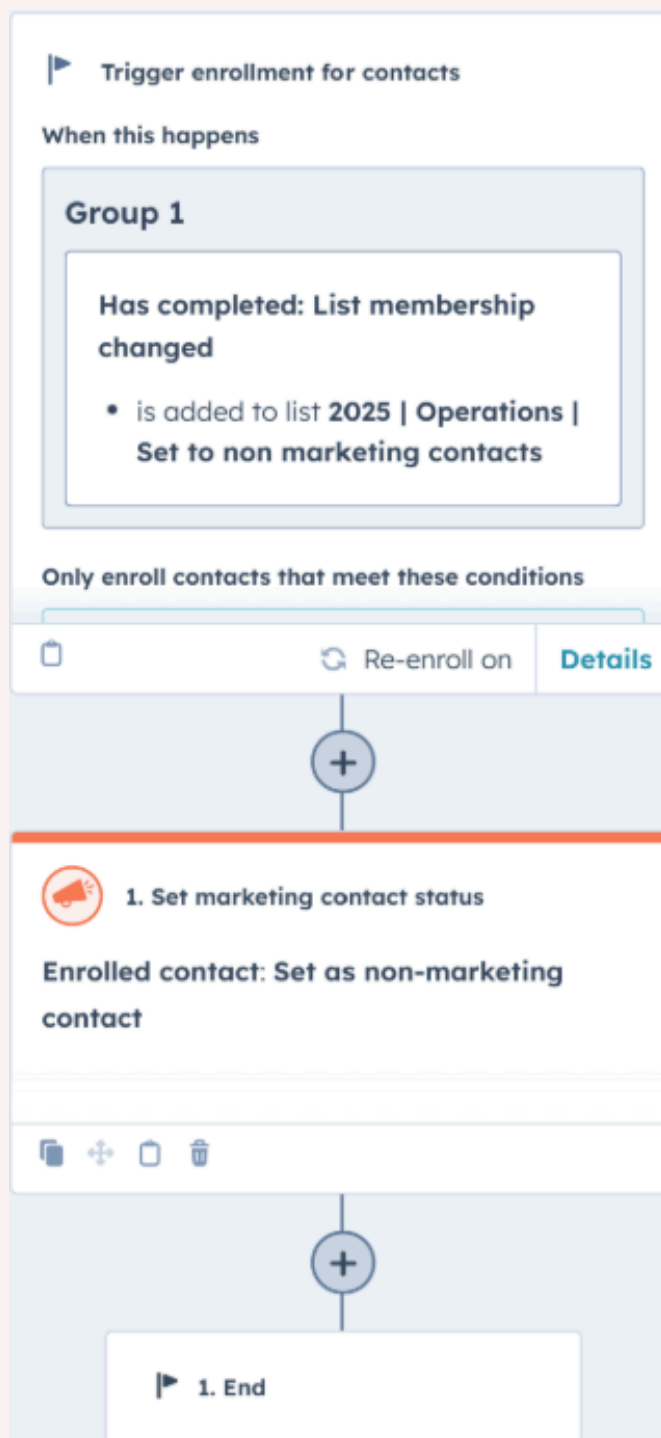
1. Go to Automation > Workflows
2. Create a new workflow
3. Set enrollment trigger to "Event occurs" > "List membership has changed"
4. Select your non-marketing contact list and "is added to list"
5. Go to the Reenrollment tab and turn reenrollment ON
6. Add an action and select "Set marketing status"
7. Choose "Set as non-marketing contact"
8. Save and activate your workflow

Final Thoughts

- Changes to marketing status typically go into effect at the end of the billing month

- Know your plan's marketing contact threshold to avoid overages

- Regularly review your criteria to ensure you're properly categorizing contacts

This automation system will continuously monitor your database and ensure contacts that should be classified as non-marketing remain that way, helping you maintain compliance and control costs.