HubSpot segment planner

Choose the right segment type, set naming and exclusion rules, and document every segment.

Companion to the article “HubSpot Segments: When to Use Active vs. Static Segments” · English version · Status: 24 November 2026

1. Active or static?

Situation	Segment type	Note
Group should always reflect current data (newsletter, lifecycle-based nurturing, call lists)	**Active**	Records join and leave automatically based on the criteria.
Suppression segment that keeps workflows clean (e.g. all customers)	**Active**	A static suppression segment lets every new customer slip through.
One-time send, rarely used campaign, event or trade-show attendees	**Static**	Snapshot when processed; later matches are not added.
Records without shared attributes, or a batch for bulk deletion	**Static**	Add and remove records manually.
You need today's matches of an older static segment	**New segment**	Create a new segment with the same filters instead of reusing the old one.

2. Naming and structure rules (agree with your team)

Rule	Your convention
Prefix for type (e.g. ACT / STA)	
Order of name parts (type – use – audience)	
Folders by team or use case	
What the description must contain	
Central building-block segments (e.g. all customers)	

3. Segment inventory (to be completed by your team)

Segment name	Object	Type	Purpose	Used in (email, workflow, report)	Exclusions	Owner	Next review

4. Test before use

Check	Expected result	OK	Notes
Record that should be included (Test matches)	Included	☐	
Record that should be excluded	Not included	☐	
Borderline case, e.g. associated company only partly matches	Behaviour is intended	☐	
AND/OR logic between filter groups	Segment is not larger than planned	☐	
Exclusions of a static segment	Re-saved before use, or switched to active	☐	
Record count after processing	Plausible compared to expectation	☐	

5. Review questions

- Which segments have no current use in an email, workflow or report?
- Which segments repeat criteria that a central building-block segment could provide?
- Are non-marketing and unsubscribed contacts excluded where marketing emails are sent?
- Who reviews the segment structure, and how often?

Sources (checked 24 November 2026): HubSpot Knowledge Base – “Create segments” (last updated 10 November 2026) and “Exclude records from segments” (last updated 8 September 2026). Features and limits can change; confirm them in your portal. Empty fields are working fields for your team, not results.