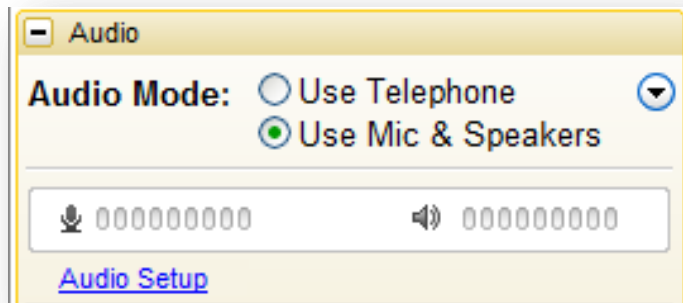


Marketing Analytics & Reporting Workshop



We will be starting at 3:03pm EST.

Use the Chat Pane in GoToTraining
to Ask Questions!





Alan Perlman
@AlanPerlman
#HubSpotting

Marketing Analytics & Reporting Workshop Archive Page

HubSpot Analytics Workshop

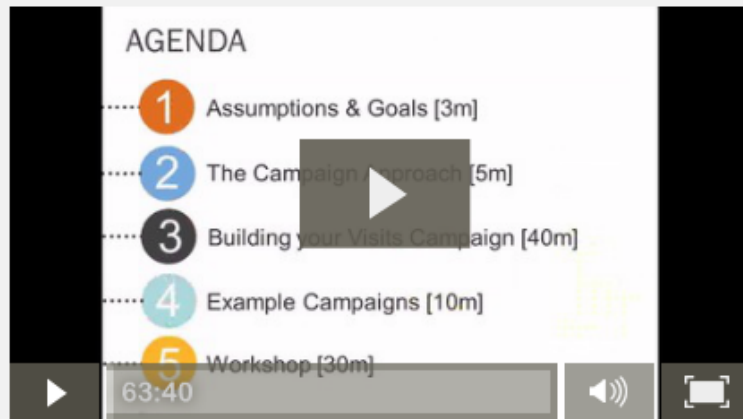
[Go Back to HubSpot](#)

Watch the Class

Length: 63:40 | Airdate: 11/15/12

AGENDA

- 1 Assumptions & Goals [3m]
- 2 The Campaign Approach [5m]
- 3 Building your Visits Campaign [40m]
- 4 Example Campaigns [10m]
- 5 Workshop [30m]



Want to attend this workshop again? [See upcoming times.](#)

Want to review your work?

[Participate in Open Office Hours](#)

Class Presentation Deck

- [Download the presentation](#)

Class Resources

- [Download your campaign PDF](#)

Additional Links

[An Introduction to Inbound Marketing Analytics](#)

[How to Unlock the ROI of Your Marketing with Analytics](#)

Need software help?



[Find answers to your technical questions](#)

Post to the forums.



[Ask questions to the HubSpot community](#)

Have a question?



[Ask Professor Periman](#)

[@AlanPeriman | LinkedIn](#)

Review your work!



AGENDA

- 1 Assumptions & Goals [3m]
- 2 Analytics & Reporting Methodologies [5m]
- 3 Tool by Tool [30m]
- 4 Goal & Timeline [15m]
- 5 Marketing Report [15m]

1

ASSUMPTIONS
& GOALS

My Assumptions

.....
1

You've attended our HubSpot Training Classes

.....
2

You understand your marketing assets, resources & goals

.....
3

You spend 5-10 hours a week on inbound marketing

Our Goal:

To learn how to analyze
your marketing efforts
& to make smarter
decisions.



2

ANALYTICS
METHODOLOGIES

How to **Analyze?**

.....
1

Tool by Tool: day-to-day analysis of HubSpot's moving parts

.....
2

Against a Goal & Timeline: stringing together strategies and syncing with particular analytics

.....
3

Create a Marketing Report: taking a step back to assess how your strategy is panning out



TOOL
BY TOOL

Tool by Tool

Content

- Page Manager
- Landing Pages
- Blog
- Keywords
- Email
- Calls to Action
- Social Media

Contacts

- Contacts
- Prospects
- Lists
- Workflows
- Forms

Reports

- Sources
- Page Performance
- Conversion Assists
- Competitors

You should always think critically about how you're using each of HubSpot's moving parts.

Tool by Tool

Content

- Page Manager
- Landing Pages
- Blog
- Keywords
- Email
- Calls to Action
- Social Media

Contacts

- Contacts
- Prospects
- Lists
- Workflows
- Forms

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- Sources
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You should always think critically about how you're using each of HubSpot's moving parts.



WHAT **QUICK WINS**
CAN I IDENTIFY & FIX
IN THE **SHORT-TERM?**



AGAINST A
GOAL &
TIMELINE

Against a Goal & Timeline

Research: Identify your Goals and Timeline

Goal: 50% Growth in Traffic, from 5000 to 7500 visits/month

Timeline: 3 months, from Jan 1 to Mar 31, 2013

Research: Identify your Goals and Timeline

Goal: 25% customer growth, from 20 to 25 customers a month

Timeline: 6 months, starting January 1st, 2013

Research: Identify your Goals and Timeline

Goal: 50% More Visits to /Services page, from 600 to 900/month

Timeline: 1 month > January 2013

Are you trying to hit a particular goal in a particular timeline? You should be.

SMART Goal Setting

..... 1

Specific: Significant, Simple

..... 2

Measurable: Meaningful, Manageable

..... 3

Attainable: Appropriate, Achievable

..... 4

Relevant: Results-oriented, Realistic

..... 5

Timely: Time-oriented, Time-based



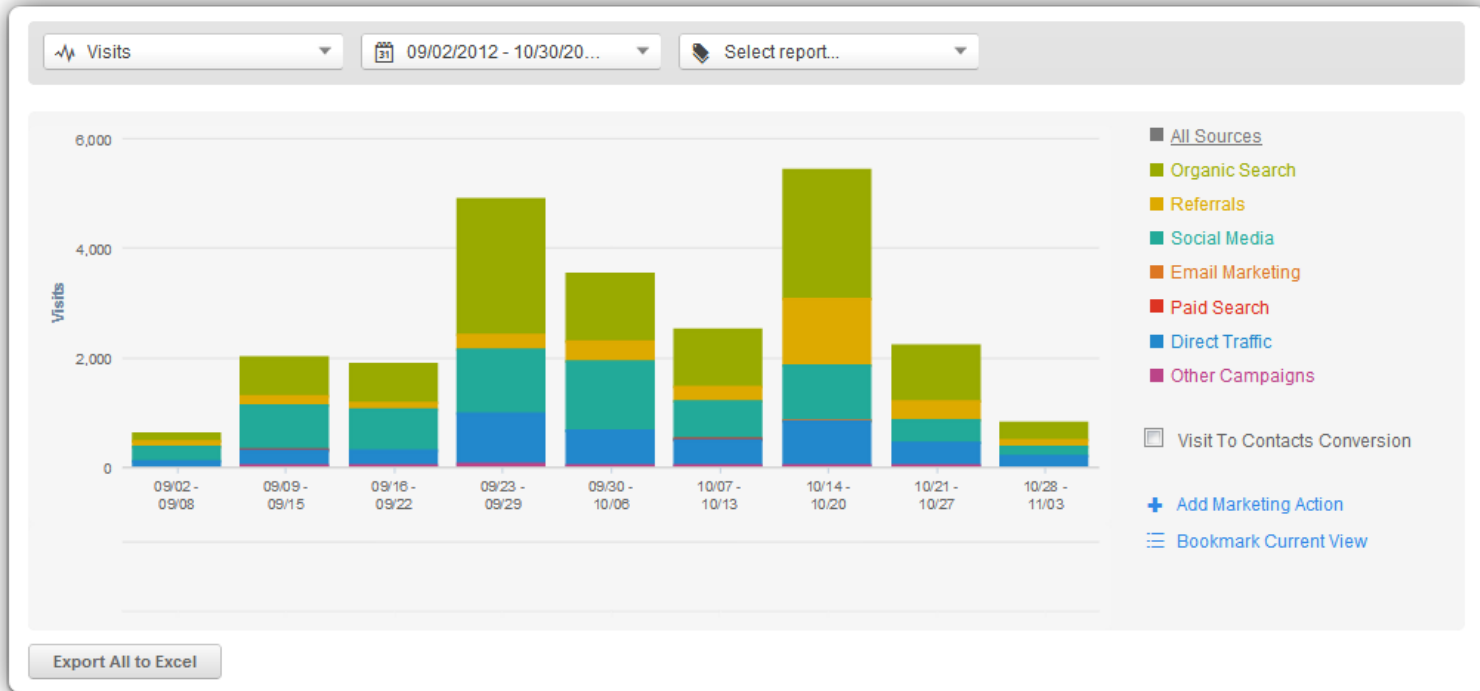
AM I HITTING
MY **CAMPAIGN GOALS**
ON A REGULAR BASIS?



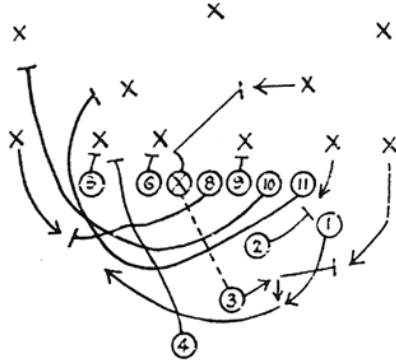
3

CREATING A MARKETING REPORT

Create a Marketing Report



What kind of monthly, quarterly or annual reporting do you do as a marketer? Where does HubSpot fit in?



HOW IS MY MARKETING STRATEGY PANNING OUT?

WHERE CAN I IMPROVE?

3

ANALYTICS
METHODOLOGY:
TOOL BY TOOL

Tool by Tool

Content

- Page Manager
- Landing Pages
- Blog
- Keywords
- Email
- Calls to Action
- Social Media

Contacts

- Contacts
- Prospects
- Lists
- Workflows
- Forms

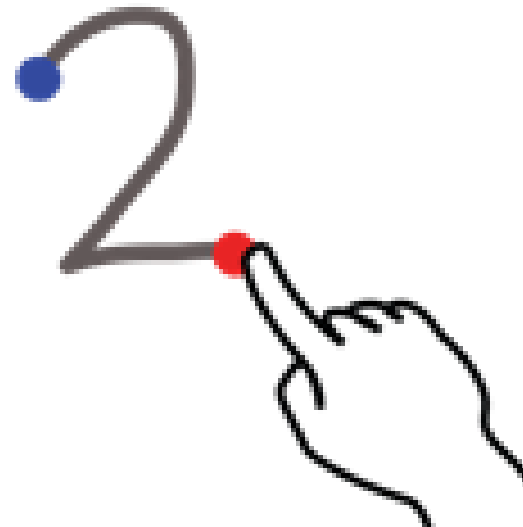
Reports

- Sources
- Page Performance
- Conversion Assists
- Competitors

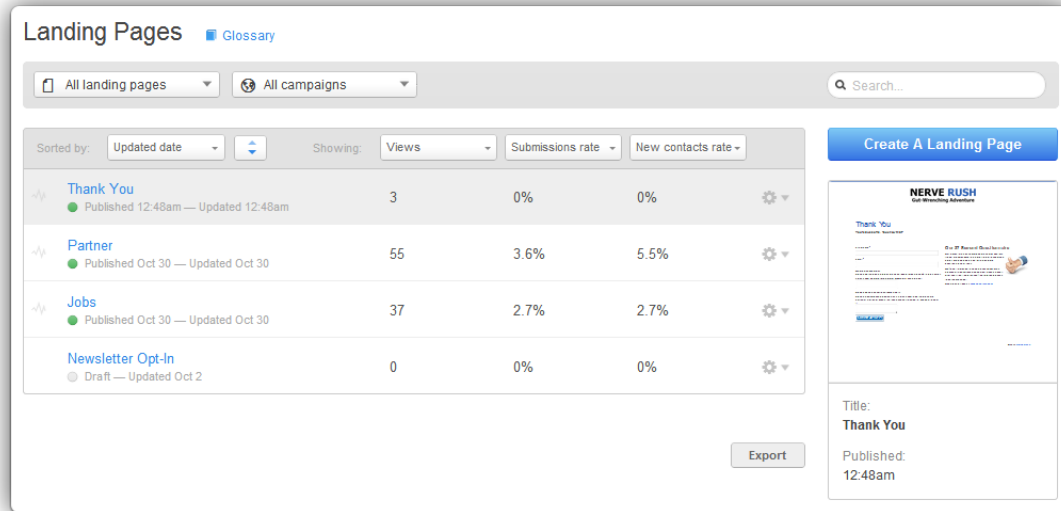
You should always think critically about how you're using each of HubSpot's moving parts.

..... 1 Analyzing Numbers

..... 2 Analyzing Strategy



Content: Landing Pages



The screenshot shows a dashboard for managing landing pages. At the top, there are filters for 'All landing pages' and 'All campaigns', and a search bar. Below this is a table with columns for 'Updated date', 'Showing', 'Views', 'Submissions rate', and 'New contacts rate'. The table lists four landing pages: 'Thank You', 'Partner', 'Jobs', and 'Newsletter Opt-In'. The 'Thank You' page is highlighted, and a preview of its content is shown on the right. The preview includes the NERVE RUSH logo, a 'Thank you' message, and a form for a 'Partner' or 'Jobs' application. Below the preview, the title 'Thank You' and the published date '12:48am' are visible.

Updated date	Showing	Views	Submissions rate	New contacts rate
Published 12:48am — Updated 12:48am		3	0%	0%
Published Oct 30 — Updated Oct 30		55	3.6%	5.5%
Published Oct 30 — Updated Oct 30		37	2.7%	2.7%
Draft — Updated Oct 2		0	0%	0%

What **Questions** Should I Ask Myself?

- Am I getting enough eyeballs to these pages?
- What is my submission rate? Shoot for 30-50%.
- What is my new contact rate?
- Do I have landing pages that match each stage in the buying process?

Content: Keywords

The screenshot shows a dashboard for keyword management. At the top, there are tabs for 'Your Keywords', 'Add Keywords', and 'Recommendations'. Below the tabs, there are four summary cards: 'Keywords 16 ranked in top 3', 'Keywords 25 ranked in top 10', 'Impressions 4,411 from first-page search results', and 'Savings \$1,486.24 total'. Below the summary cards, there is a search bar and a table of keywords. The table has columns for Keyword, Visits, Contacts, Rank, Searches, Difficulty, CPC, Campaigns, Date Added, and Actions. The visible rows are:

Keyword	Visits	Contacts	Rank	Searches	Difficulty	CPC	Campaigns	Date Added	Actions
<input type="checkbox"/> felix baumgartner	1,149	0	100+	4,400	94	\$0.70	0	15-Oct-2012	Delete
<input type="checkbox"/> david goggins	362	0	8	2,900	73	\$0.10	0	24-Sep-2012	Delete
<input type="checkbox"/> extreme sports list	201	0	2	720	31	\$0.93	0	15-Sep-2012	Delete

What **Questions** Should I Ask Myself?

- Do I have a list of target keywords?
- What keywords are bringing me traffic each month?
- What keywords are being recommended to me?
- Do I understand the ideal ratio of high search volume & low difficulty score?

Content: Email

The left screenshot shows a campaign summary for 'Newsletter_Nov 2012' with the following statistics:

96	94	92	32	7
selected	sent	delivered	opened	clicks

The 'Filter by status' dropdown menu is open, showing the following options:

- Engagement
 - Sent
 - Delivered
 - Opened
 - Clicked
 - Unsubscribed
 - Marked as Spam
- Deliverability
 - Ineligible
 - Soft Bounce (pending)
 - Hard Bounce

The right screenshot shows a detailed view of the 'Email' dashboard with the following table:

Sorted by:	Updated date	Showing:	Delivered	Open rate	Click rate	
Newsletter_Nov 2012	Sent 11:00am — Updated Oct 31	92	34.8%	7.6%		
Breaking News_Red Bull Stratos Launch	Sent Oct 9 — Updated Oct 9	52	46.2%	15.4%		
Newsletter_Oct 2012	Sent Oct 1 — Updated Oct 1	51	33.3%	11.8%		

The right screenshot also shows a preview of an email titled 'NERVE RUSH' with a 'Create A New Email' button and an 'Export' button.

What **Questions** Should I Ask Myself?

- How do my click-through rates look? [3-5% average]
- How do my unsubscribe rates look? [under 1%]
- What links are the most clicked in each email?
- If I have a recurring email, like a newsletter, how do my trending stats look, email by email?

Content: Calls to Action

The screenshot shows a dashboard for 'Calls to Action'. At the top, there are filters for 'All CTAs' and 'All activity', and a search bar. Below the filters is a table with columns: Status, Preview, Views, Views → clicks, Clicks, Clicks → subs., Subs., and Updated. The table lists several CTAs, including 'Services PDF - Standard Training', 'Blog - Intro to PPC Ebook', and 'Blog - Marketing Surveys Ebook'. To the right of the table, there are summary statistics: 334 CTAs, 5.5m Views, and 130.2k Clicks. Below the statistics are links for 'Create a Landing Page', 'Send an Email', and 'Manage Content Settings'.

Status	Preview	Views	Views → clicks	Clicks	Clicks → subs.	Subs.	Updated
●		365	7.4%	27	0%	0	Sep 17
●		110	0%	0	0%	0	11:02am
●		1,772	2.9%	51	72.5%	37	11:02am
●		2,037	4.1%	84	0%	0	Oct 31
●		146	0%	0	0%	0	Oct 31

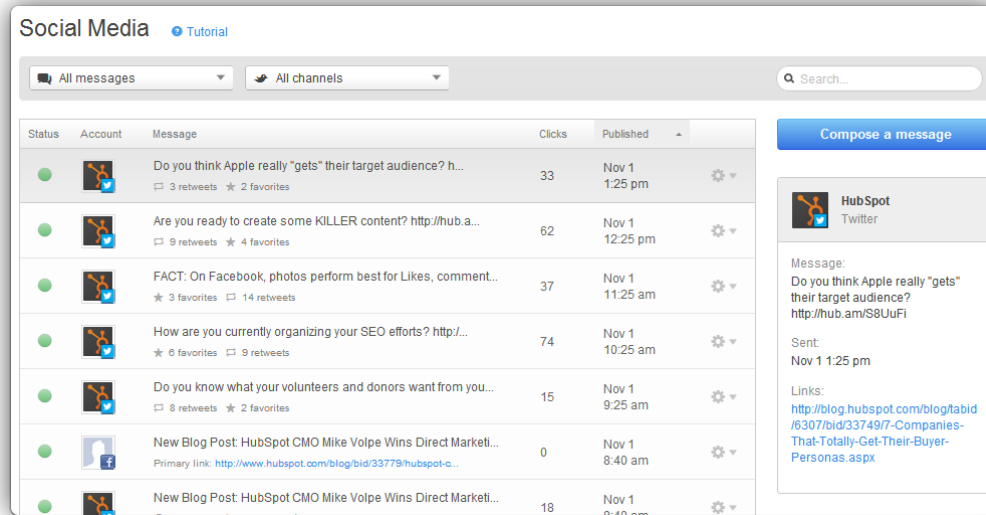
Summary Statistics:
334 CTAs
5.5m Views
130.2k Clicks

Actions:
[Create a Landing Page](#)
[Send an Email](#)
[Manage Content Settings](#)

What **Questions** Should I Ask Myself?

- Are enough eyeballs seeing my CTAs?
- How does my data look?
- Do I have CTAs for each of my landing pages?
- Am I running any A/B tests?
- Do I need to set up any “smart” CTAs?

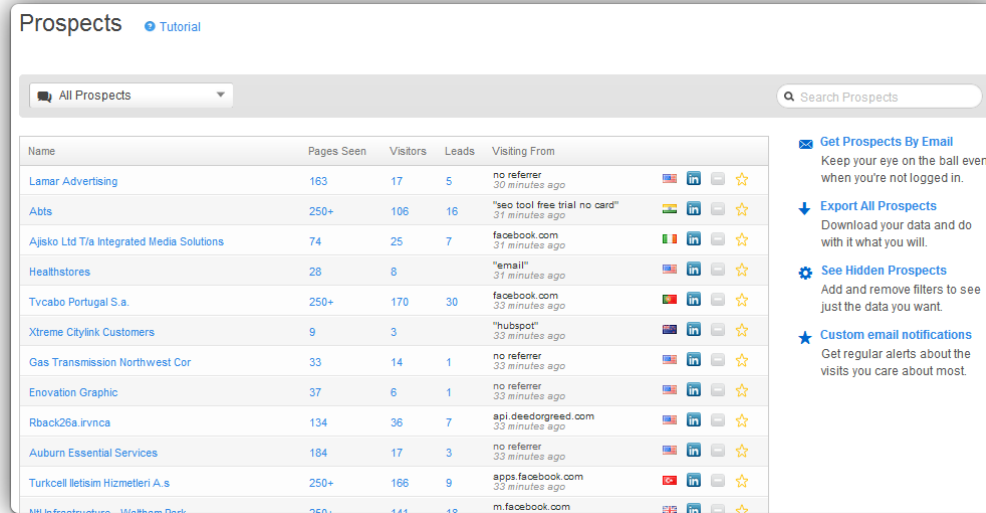
Content: Social Media



What **Questions** Should I Ask Myself?

- How big is my social media street team?
- How many people are engaging with my messages?
- How often am I updating?
- Am I scheduling out social media messages in advance? Am I using HubSpot to suggest times?

Contacts: Prospects



The screenshot shows the 'Prospects' interface with a table of prospect data and a sidebar with action items.

Name	Pages Seen	Visitors	Leads	Visiting From
Lamar Advertising	163	17	5	no referrer 30 minutes ago
Abts	250+	106	16	"seo tool free trial no card" 31 minutes ago
Ajisko Ltd T/a Integrated Media Solutions	74	25	7	facebook.com 31 minutes ago
Healthstores	28	8		"email" 31 minutes ago
Tvcabo Portugal S.a.	250+	170	30	facebook.com 33 minutes ago
Xtreme Citylink Customers	9	3		"hubspot" 33 minutes ago
Gas Transmission Northwest Cor	33	14	1	no referrer 33 minutes ago
Enovation Graphic	37	6	1	no referrer 33 minutes ago
Rback26a.irvnca	134	36	7	api.deedogreed.com 33 minutes ago
Auburn Essential Services	184	17	3	no referrer 33 minutes ago
Turkcell İletişim Hizmetleri A.Ş.	250+	166	9	apps.facebook.com 33 minutes ago
...	m.facebook.com

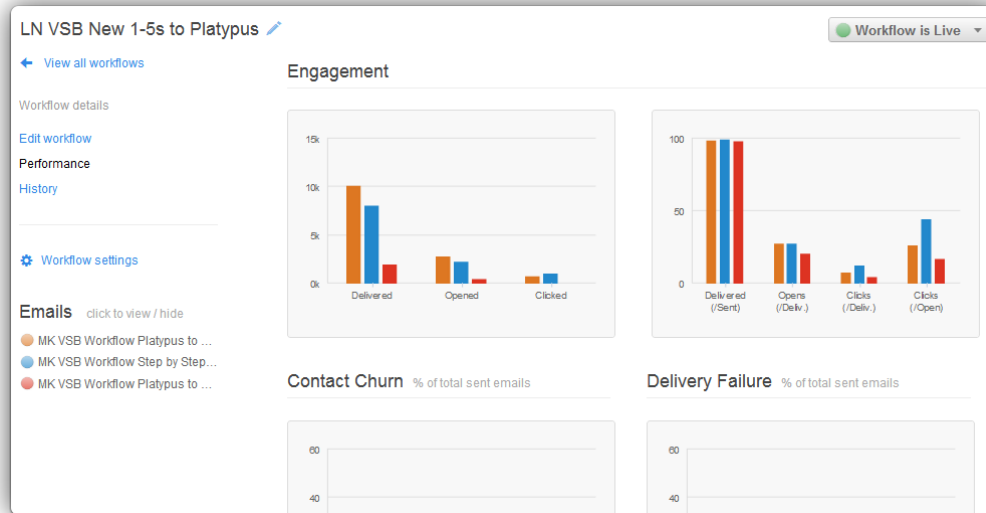
Right sidebar actions:

- Get Prospects By Email**
Keep your eye on the ball even when you're not logged in.
- Export All Prospects**
Download your data and do with it what you will.
- See Hidden Prospects**
Add and remove filters to see just the data you want.
- Custom email notifications**
Get regular alerts about the visits you care about most.

What **Questions** Should I Ask Myself?

- Are there irrelevant Prospects that I need to clean up?
- How are Prospects reaching my website?
- Is my sales team using Prospects?
- Am I using ProspectMAX to create custom reports?

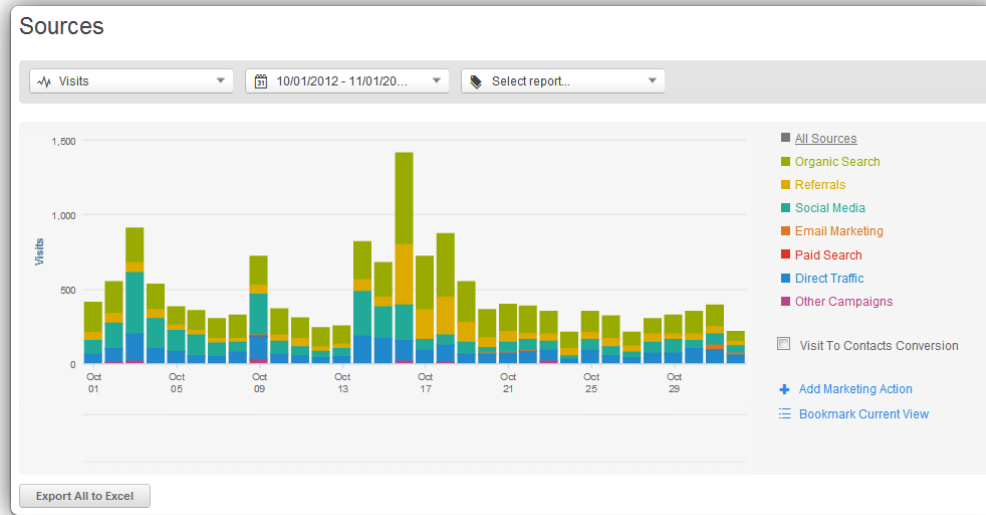
Contacts: Workflows



What **Questions** Should I Ask Myself?

- Am I hitting my Workflow goals?
- Taking a look at my Workflow emails, how does engagement change as a contact is sent each subsequent email?
- On an email-by-email basis, how are my CTRs?

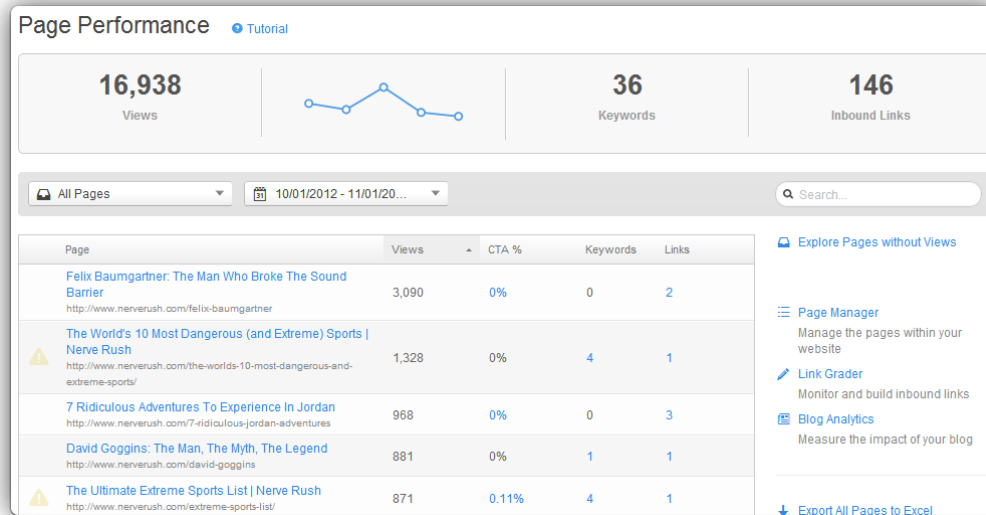
Reports: Sources



What **Questions** Should I Ask Myself?

- Do I have bookmark reports set up?
- What is the ROI of my marketing efforts – in organic search, email, social media, paid search, etc.?
- Am I closing my customers?
- What specific keywords are bringing me visits?

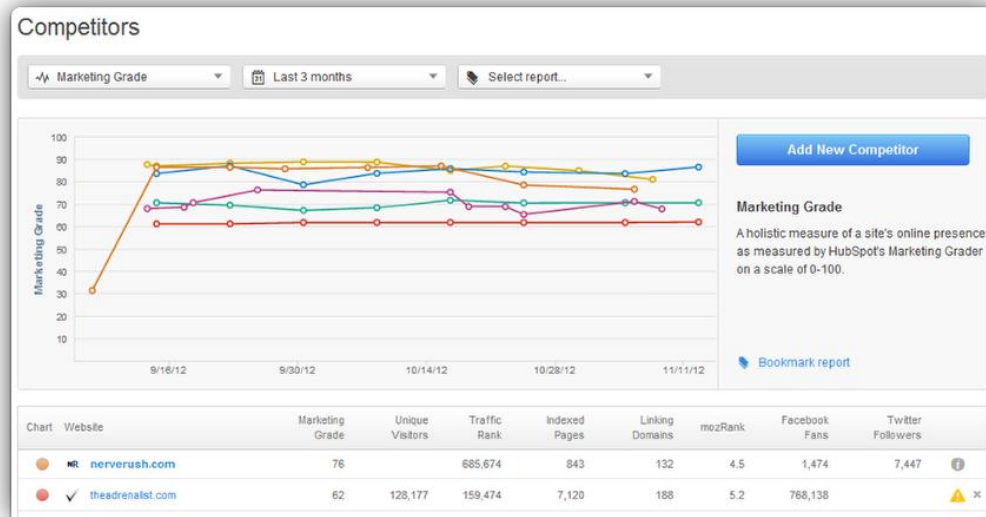
Reports: Page Performance



What **Questions** Should I Ask Myself?

- What are the most visited pages on my website?
- Am I tackling on-page SEO? What needs to be fixed?
- Do I have CTA buttons on the most visited pages of my website?
- How is my social media activity, page by page?

Reports: Competitors



What **Questions** Should I Ask Myself?

- What is my Marketing Grade? Is it improving?
- How do I stack up against my competitors in key metrics like Indexed Pages & Linking Domains?
- Do I need to add any new competitors, or edit the information of current competitors?



WHAT **QUICK WINS**
CAN I IDENTIFY & FIX
IN THE **SHORT-TERM?**

4

ANALYTICS
METHODOLOGY:
AGAINST A GOAL
& TIMEFRAME



Inbound Campaign Framework

Create and execute your inbound marketing campaign within the specified timeline to reach your goal.

Research: Identify your Goals and Timeline

Goal: 50% Traffic Growth, from 3000 to 4500 visits/month

Timeline: Jan 1st - Mar 31st, 2013 [3 month window]

Design: Identify your Campaign Assets

Take stock of what assets will be built. e.g. landing pages, emails, blog posts?

1 new TOFU offer

blog editorial calendar/guideline for intern

1 landing page that matches TOFU offer

1 thank you page

15 blog posts (2+ per week)

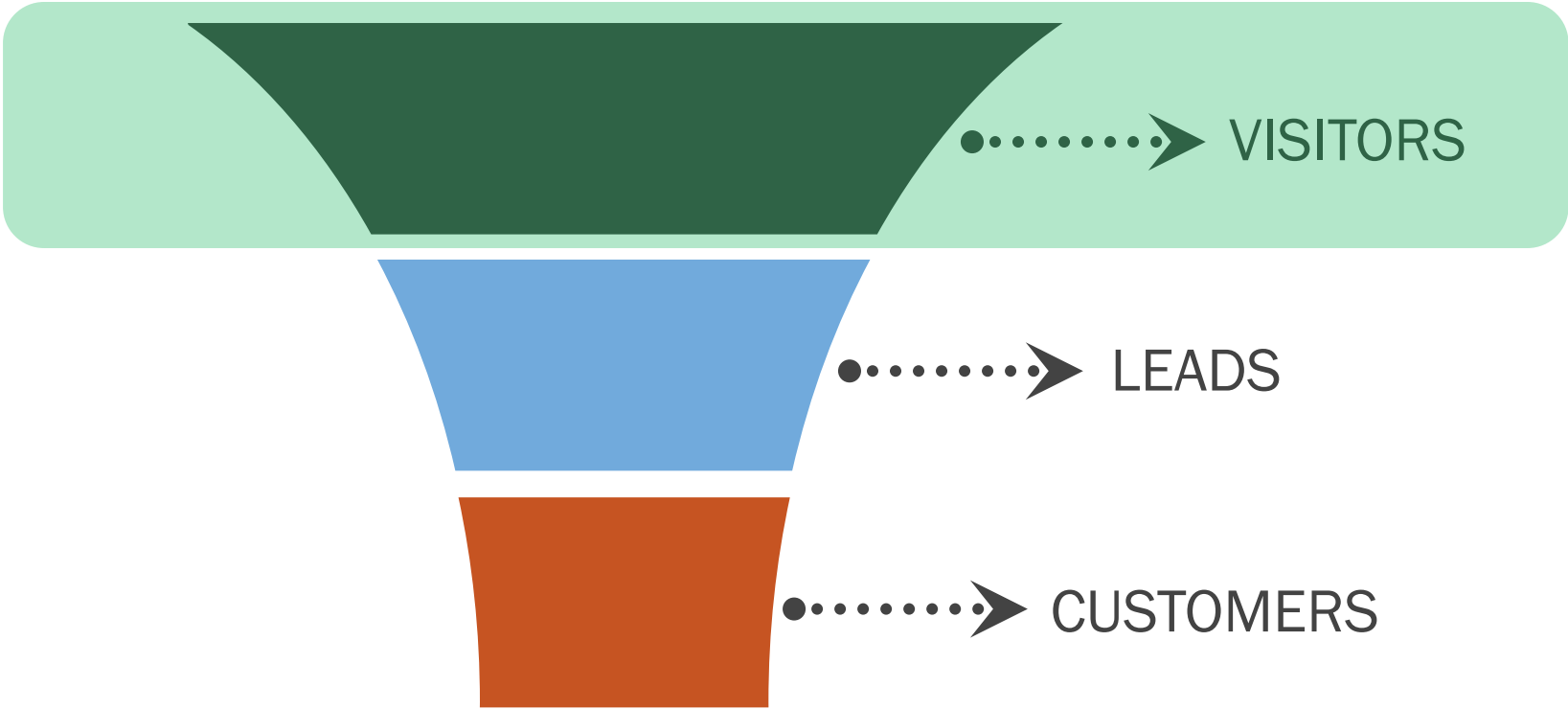
Execute: Delegate Action Items

Date	Person	Action
1/25	Sarah	new TOFU offer - 5 page whitepaper PDF
every week	Chris	2+ SEO-optimized blog posts
1/31	Mark	landing page + thank you page
2/15	Rachel	blog editorial calendar/guideline (work with Chris)
3/31	Mark	curate list of target keywords + on-page SEO for all 23 pages

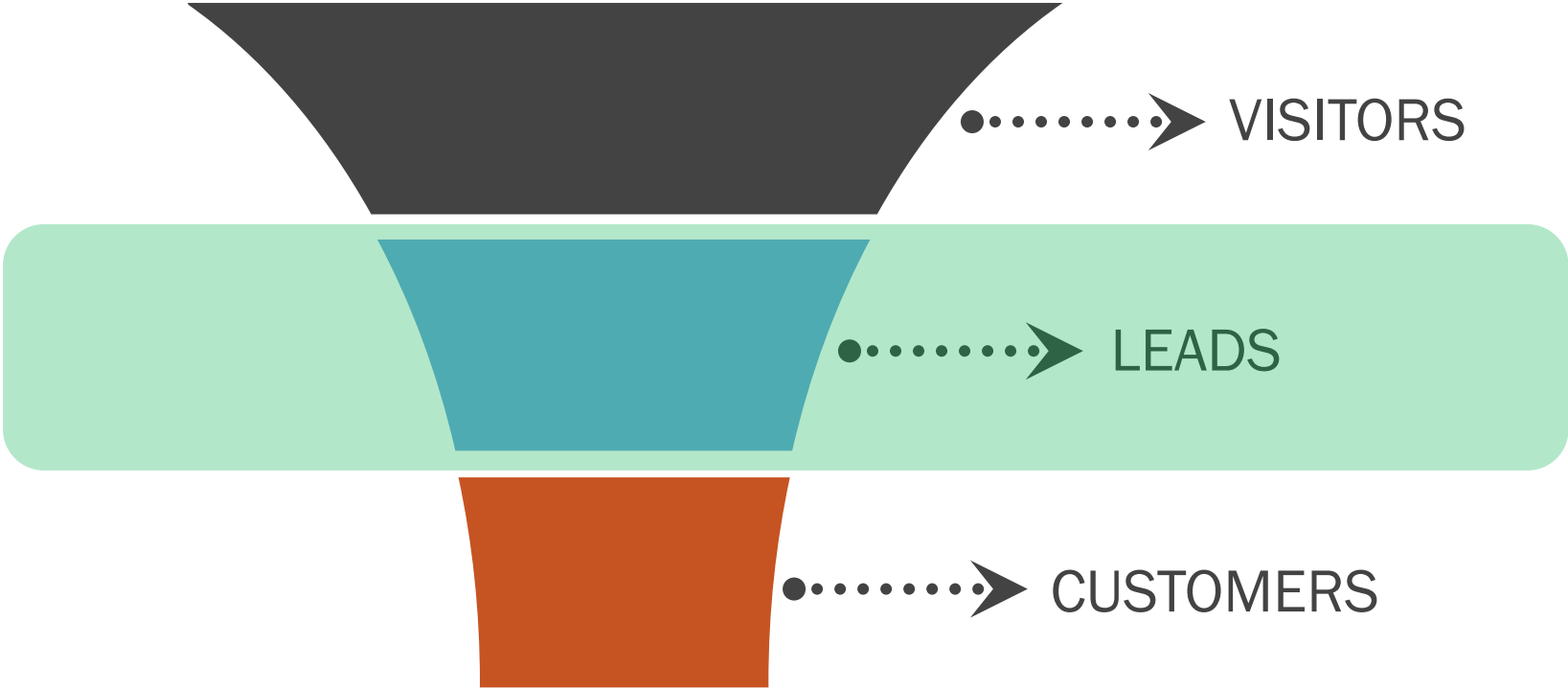
Questions? ✉ academy@hubspot.com

WHAT
IS YOUR GOAL
& TIMELINE?

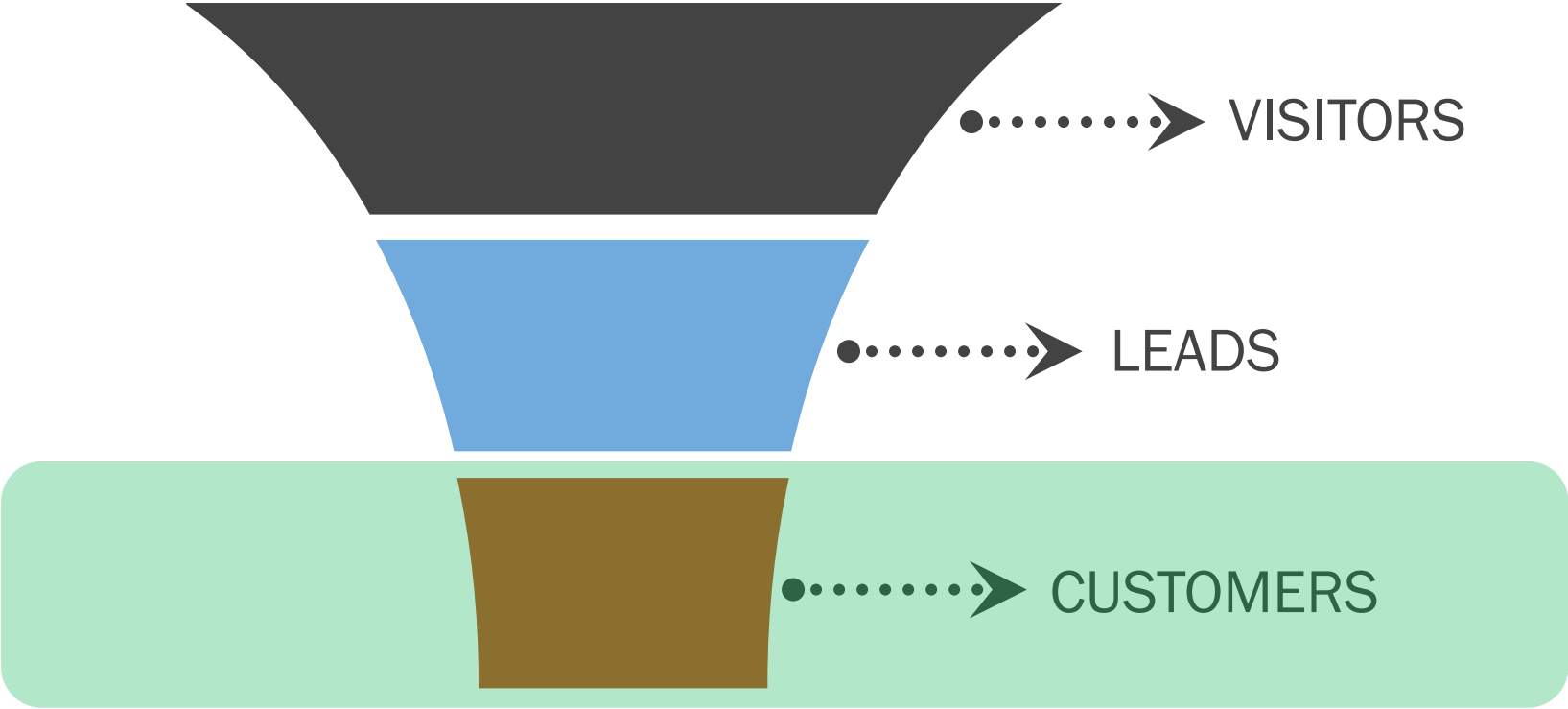
Inbound Marketing Funnel



Inbound Marketing Funnel



Inbound Marketing Funnel





SMART Goal Setting

SMART Goal Setting

..... 1

Specific: Significant, Simple

..... 2

Measurable: Meaningful, Manageable

..... 3

Attainable: Appropriate, Achievable

..... 4

Relevant: Results-oriented, Realistic

..... 5

Timely: Time-oriented, Time-based

Research: Identify your Goals and Timeline

Goal: 50% Growth in Traffic, from 5000 to 7500 visits/month

Timeline: 3 months, from Jan 1 to Mar 31, 2013

Research: Identify your Goals and Timeline

Goal: Increase Traffic 800%, from 1000 to 8000 visits/month

Timeline: 6 months > November to end of April

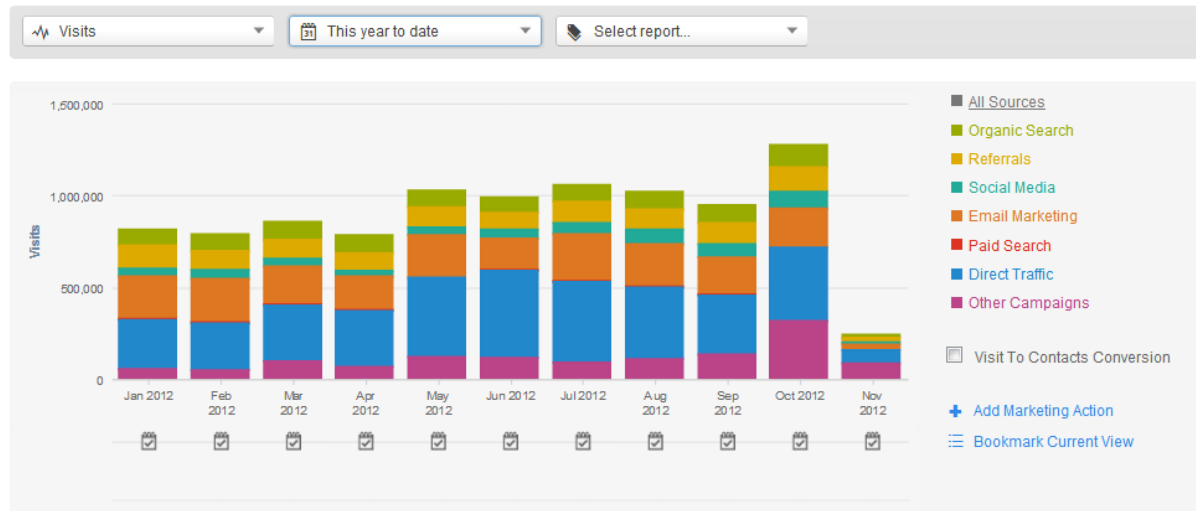
Research: Identify your Goals and Timeline

Goal: 50% More Visits to /Services page, from 600 to 900/month

Timeline: 1 month > January 2013

Sources, the “Hub” of HubSpot

Sources



Export All to Excel

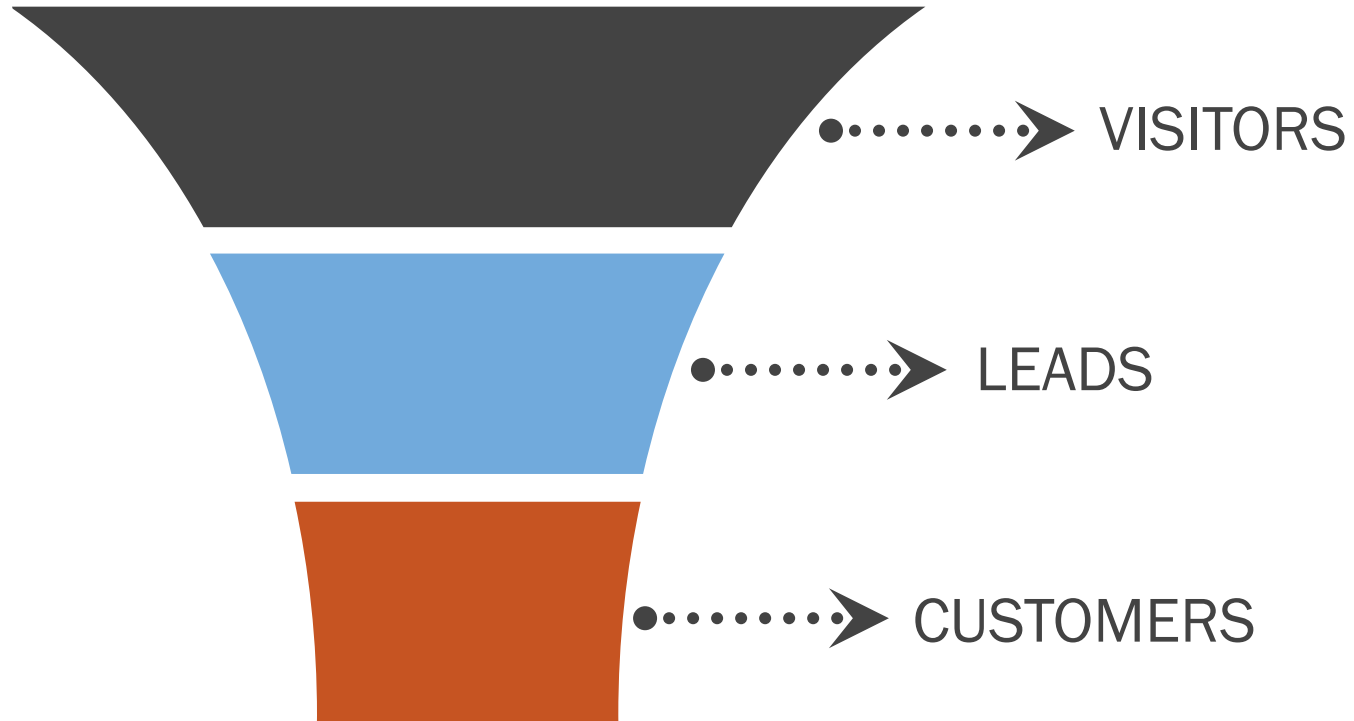
Source	Visits	Conversion	Contacts	Conversion	Customers	Conversion
Organic Search	965,576	3.6%	34,945	1.3%	453	0.1%
Referrals	1,135,026	7.1%	80,505	0.3%	276	0.0%
Social Media	572,047	7.0%	40,067	0.3%	131	0.0%
Email Marketing	2,179,214	4.5%	99,244	0.3%	329	0.0%
Paid Search	52,293	7.0%	3,658	1.0%	36	0.1%
Direct Traffic	3,663,107	2.0%	71,844	4.9%	3,540	0.1%

Check Sources at least once per month.

Use Sources to Create New Goals

- 1 Drop in Organic Search? → More Visits
- 2 Low Visit-to-Contact Ratio? → More Leads
- 3 Increase in Contacts, but Contact-to-Customer ratio is low? → More Customers

Inbound Marketing Funnel



Source	Visits	Conversion	Contacts	Conversion	Customers	Conversion
Organic Search	52,681	2.9%	1,521	0.0%	0	0.0%
Referrals	54,657	6.4%	3,510	0.0%	0	0.0%
Social Media	36,731	7.5%	2,758	0.0%	1	0.0%
Email Marketing	96,579	1.7%	1,649	0.0%	0	0.0%
Paid Search	1,784	3.4%	60	0.0%	0	0.0%



AM I HITTING MY
CAMPAIGN GOALS
ON A REGULAR BASIS?

Targeted, Goal-Focused Workshops

HubSpot Marketing Workshops

Comfortable with the basics?

Group workshops take your inbound marketing to the next level.

Each workshop focuses on one part of inbound marketing strategy. From generating more traffic to nurturing more customers, we'll examine different strategies based on your budget, goals and timeline. By the end of each workshop, you will have created your own strategy roadmap - and you'll know exactly what it takes to hit your goals.

Workshops are offered at varying times so that you can fit strategy into your busy schedule. Each participant will have the opportunity to ask questions and have them answered live during each workshop. Each workshop will also provide you with the resources you'll need to apply what you've learned.

Education Level: ● INTERMEDIATE

HubSpot's Marketing Workshops are designed for marketers who are familiar with inbound marketing and HubSpot's software but have only basic experience in executing strategies. After attending each workshop, you will have the knowledge and roadmap necessary to use HubSpot to execute intermediate campaign strategies related to the workshop topic.



Customer Training Team

Visits Campaign Workshop

Get more traffic to your website using HubSpot's campaign methodology. Create a custom strategy roadmap based on your own goals, resources and timeline.

Leads Campaign Workshop

Convert more traffic into leads from your website using HubSpot's campaign methodology. Create a custom strategy roadmap based on your own goals, resources and timeline.

Customers Campaign Workshop

Nurture more leads into customers from your website and email marketing. Create a custom strategy roadmap based on your own goals, resources and timeline.

5

ANALYTICS
METHODOLOGY:
MARKETING
REPORT



**PINPOINT
MARKETING ROI**

Primary Questions to Revisit Each Month

- 1 How are my website **visits**, source by source?
- 2 How is my **contact** database growing, source by source?
- 3 How are my **customers** growing, source by source?

Other Questions to Revisit Each Month

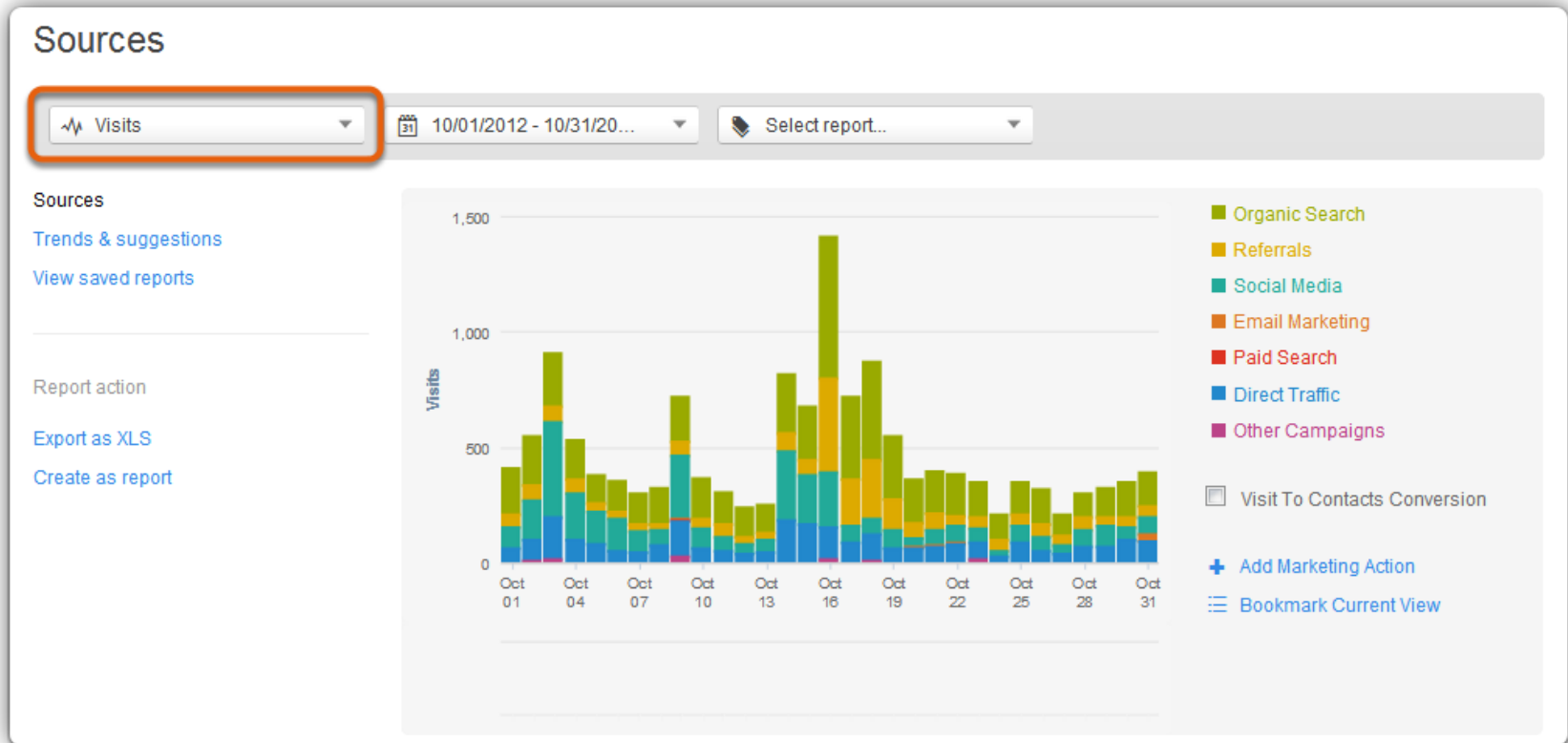
- 1 How is my target keyword list?
- 2 Do I have landing pages mapped to each stage of the buying process?
- 3 What are my Visit-to-Contact and Contact-to-Customer ratios?
- 4 How big is my social media street team?
- 5 Are the most popular pages on my website optimized for both the users and search engines?

BUILDING A MARKETING REPORT

7 NUMBERS TO PULL

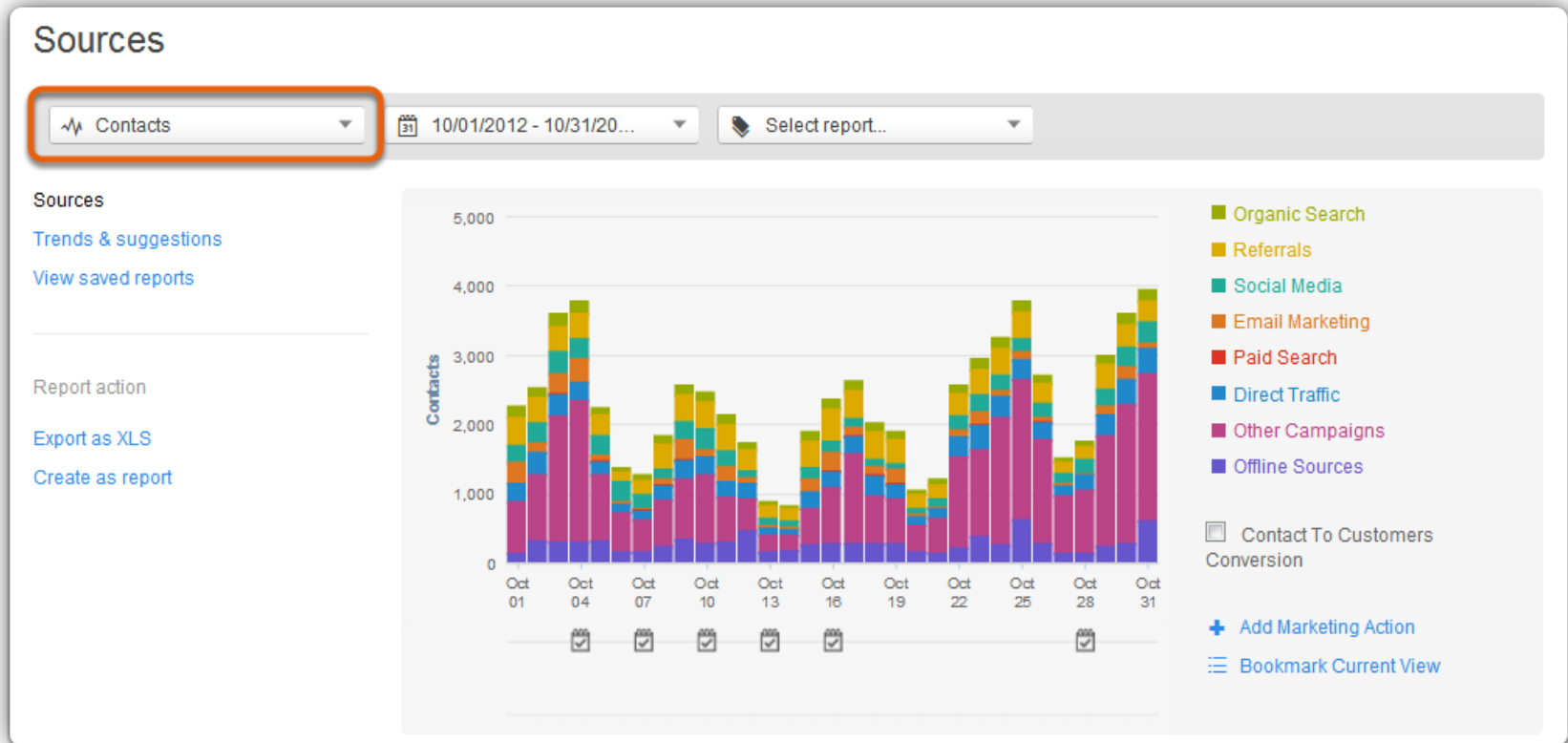


1: Visits by Source



.....➔ Reports: Sources

2: Leads by Source



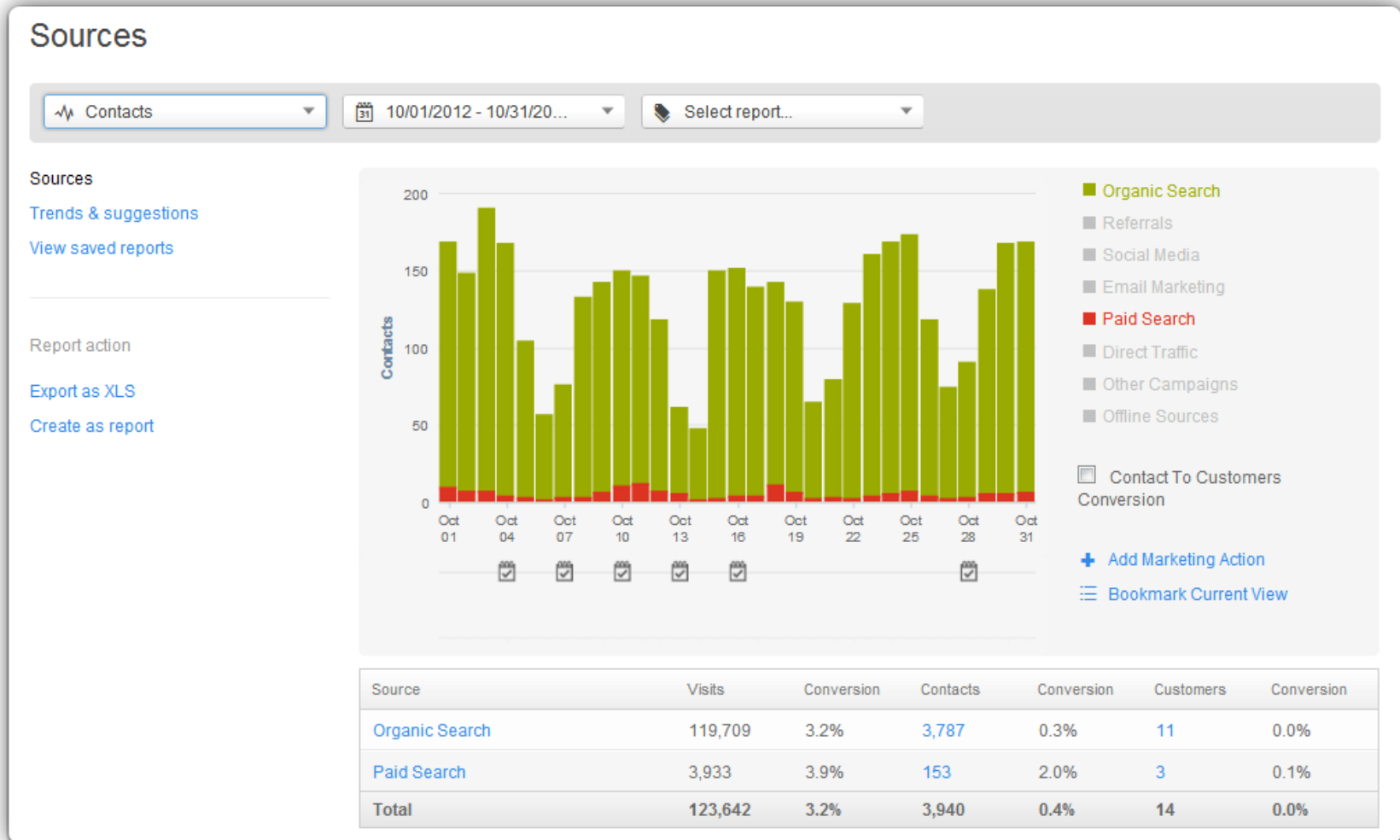
.....➔ Reports: Sources

3: Funnel Summary

All Channels	May 2011	Jun 2011	Jul 2011	Aug 2011	Sept 2011	Oct 2011	Nov 2011	Dec 2011
Visits to YourSite.com	14,932	17,918	21,502	25,802	30,963	37,156	44,587	53,504
Total Leads	941	1,451	1,570	1,729	2,013	2,266	2,809	2,996
Customers	5	7	9	10	8	9	6	6
Visitor to Leads %	6.3	8.1	7.3	6.7	6.5	6.1	6.3	5.6
Lead to Customer %	0.5	0.5	0.6	0.6	0.4	0.4	0.2	0.2

.....➤ Reports: Sources (compiled in Excel)

4: Paid vs. Organic Leads



●●●●●●●●➔ Reports: Sources

5: Top Blog Posts (by Page View)

	A	B	C	D
1	Blog Post	Views	Keywords	Links
2	The World's 10 Most Dangerous (and Extreme) Sports	1316	4	1
3	7 Ridiculous Adventures To Experience In Jordan	968	0	3
4	David Goggins: The Man, The Myth, The Legend	864	1	1
5	The Ultimate Extreme Sports List	842	4	2
6	22-Mile Supersonic World Record Stratos Skydive	766	0	1
7	David Goggins Attempts 24 Hour Pull Up World Record	670	0	19
8	The Definitive Guide To Obstacle Races	548	7	3
9	Introducing, the AirKick Human Water Catapult	394	0	0
10	The Best Place to Skydive on Every Continent	349	4	13

.....➔ Reports: Page Performance (compiled in Excel)

6: Top Landing Pages (by Lead)

Landing Pages [Glossary](#)

Live All campaigns Add filter Search...

Sorted by: **Submissions** Showing: Submissions Submissions rate New contacts rate

Page Title	Submissions	Submissions rate	New contacts rate
Learning SEO from the Experts Published 10:11am — Updated 10:11am	19,397	59.8%	3.5%
SEO Template Guide Published 10:14am — Updated 10:14am	18,985	51.8%	3.6%
LinkedIn's New Company Pages Ebook Published 10:13am — Updated 10:13am	17,526	31.4%	4.7%
Future of Social Media Lead Management Published 10:12am — Updated 10:12am	16,042	45.3%	7.5%
100 Ideas That Changed Marketing Published Nov 6 — Updated Nov 6	10,975	55.7%	4.5%
The Internet Marketing Written Style Guide Published Sep 14 — Updated Sep 14	9,489	40%	2.3%
Advanced Business Blogging Ebook: Blog Ma... Published Oct 10 — Updated Oct 10	8,389	54.6%	3.8%
How to Make Marketing People Love - Respo... Published — Updated 10:15am	8,190	15.2%	3.6%

[Create A Landing Page](#)

HubSpot

Title:
Learning SEO from the Experts

Published:
10:11am

[Manage Settings](#)
Bend the universe to your will. Start with your software.

[Template Builder](#)
Create and manage the templates

.....➔ Content: Landing Pages (sort by Submissions)

7: Lead Quality (MQL Count)

Marketing Qualified Lead

Marketing Qualified Leads, commonly known as *MQLs* are those people who have raised their hands (metaphorically speaking) and identified themselves as more deeply engaged, sales-ready contacts than your usual leads, but who have not yet become fully fledged opportunities. Ideally, you should only allow certain, designated forms to trigger the promotion of a lead to the MQL stage, specifically those that gate *bottom of the funnel* offers like demo requests, buying guides, and other sales-ready calls to action.

Lists

Organize and segment your contacts [Tutorial](#)

Name your list

Should HubSpot update this list over time?

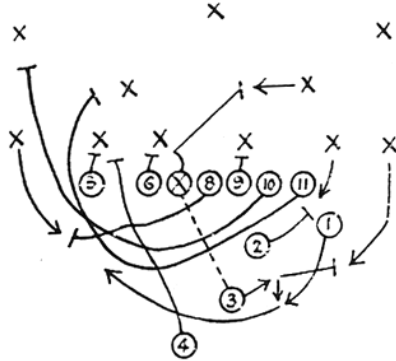
Yes, make a *smart list* No, make a *static list*

Describe the contacts who should be in this list

<input type="button" value="⊖"/>	Lifecycle Stage	contains any of	Marketing Qualified Lead	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
AND					
<input type="button" value="⊖"/>	Time First Seen	is later than	09/30/2012	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
AND					
<input type="button" value="⊖"/>	Time Last Seen	is earlier than	11/01/2012	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>

CREATE AWESOME MARKETING REPORTS

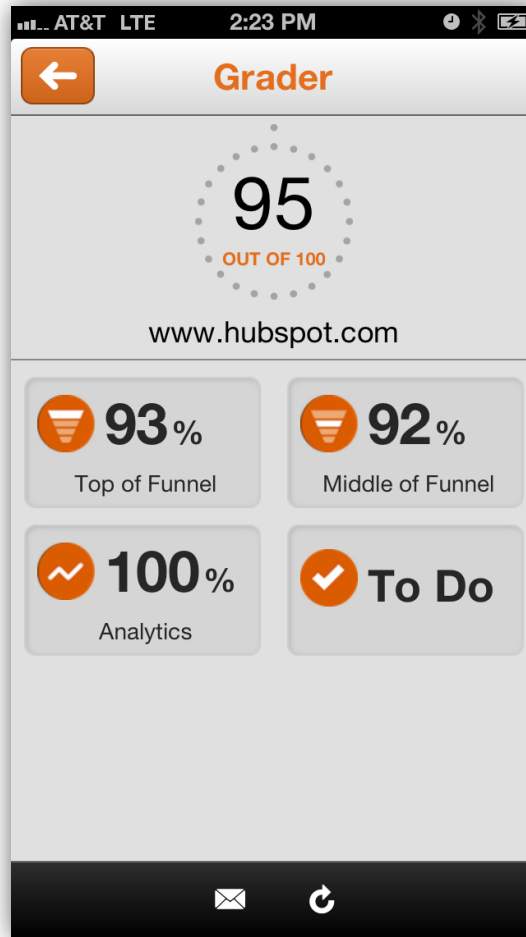
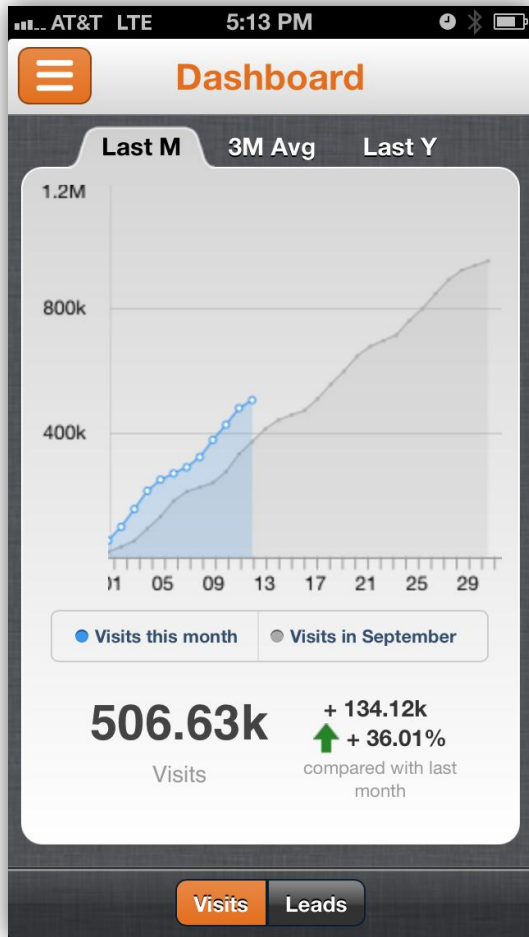




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WHERE CAN I IMPROVE?

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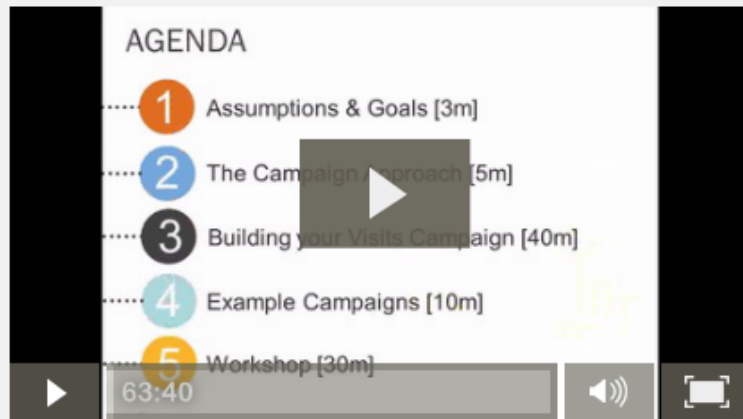
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Watch the Class

Length: 63:40 | Airdate: 11/15/12

AGENDA

- 1 Assumptions & Goals [3m]
- 2 The Campaign Approach [5m]
- 3 Building your Visits Campaign [40m]
- 4 Example Campaigns [10m]
- 5 Workshop [30m]



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QUESTIONS?





**THANK
YOU.**