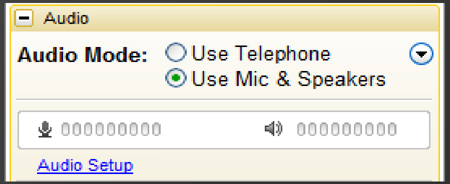
HUBSPOT ENTERPRISE REPORTING: REPORTS CUSTOMERS LOVE

ADVANCED



We will be starting at 2:00 pm ET.

Use the Question Pane in GoToWebinar to Ask Questions!

1 Use the hashtag #InboundLearning on Twitter

2 Question of the day

HubSpot Academy

#INBOUNDLEARNING


HubSpot
Mark Kilens
@MarkKilens
#InboundLearning

Blake Toder | @btoder
Senior Inbound Marketing Consultant

Sarah Phillips | @sarahgphillips
Senior Inbound Marketing Consultant

Try HubSpot Enterprise for yourself!

http://bit.ly/academy-trial

AGENDA

1 Why use HubSpot's enterprise reporting tools?

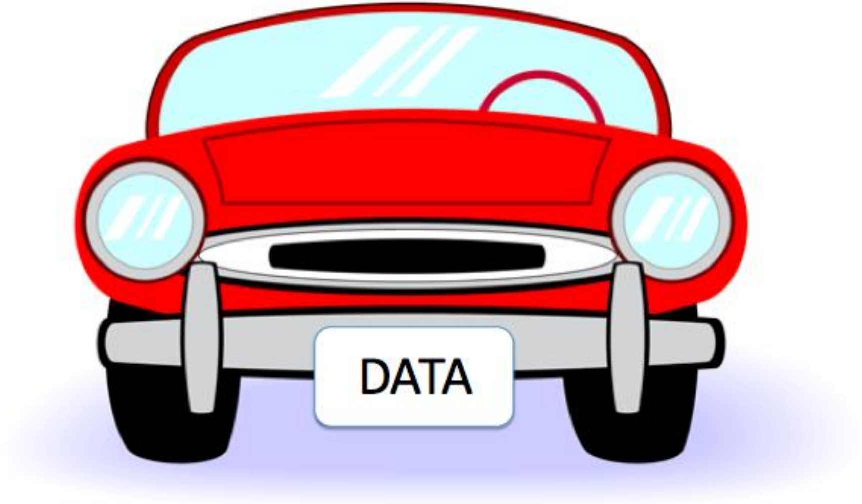
2 How to use the Contacts report

3 How to use the Companies report

4 How to use the Attribution Report

1 WHY USE HUBSPOT'S ENTERPRISE REPORTING TOOLS?

Marketing is a data driven job.



We are constantly asked why a particular marketing effort worked or didn't.


Photo credit: dann o_O / Foter / CC BY-SA
Marketing rarely has the reports to do so on a **granular** level.

Enterprise reporting helps us solve this problem

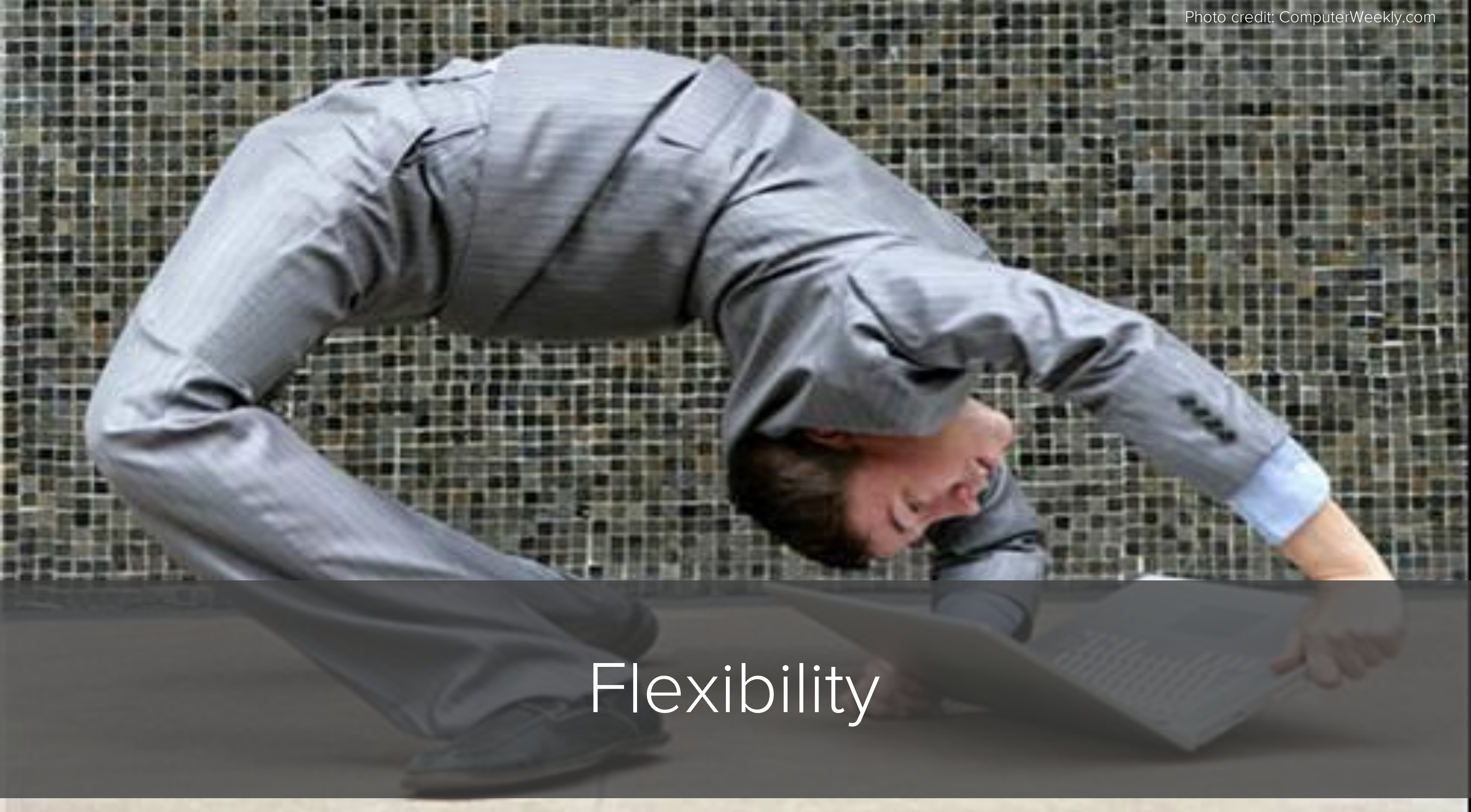


Photo credit: ComputerWeekly.com

Flexibility

Context

Targeting

HubSpot **Enterprise** Reports.

Contacts Reports | Attribution Reports | Companies Reports

2 HOW TO USE THE CONTACTS REPORT.

View your entire contact database, or a certain segment, based on the information that is most important to you.

CONTACTS REPORT

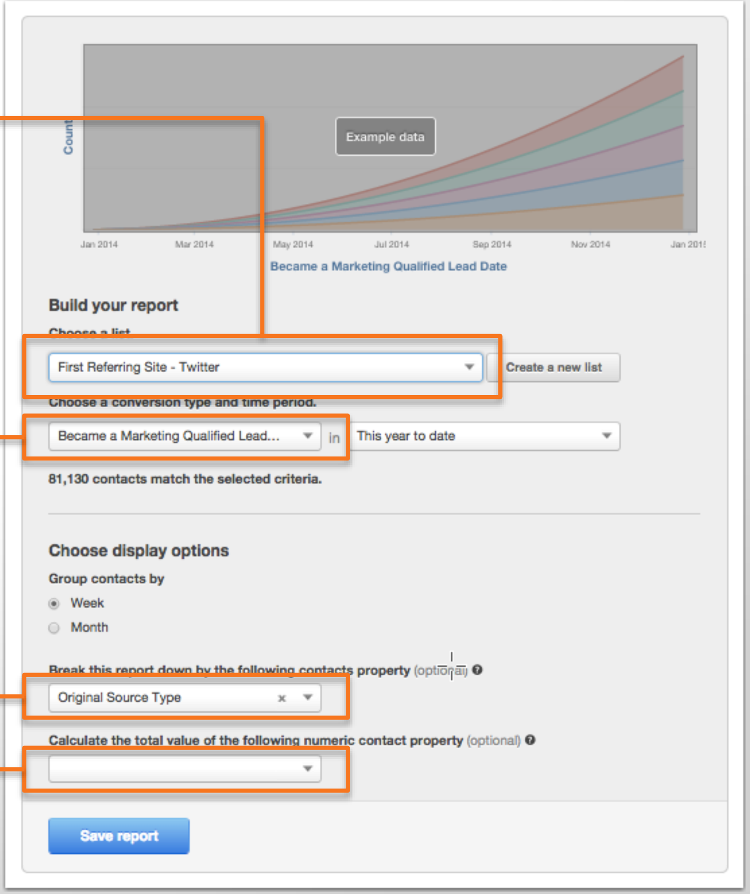
HOW TO CREATE A CONTACTS REPORT

Choose the **conversion event** that your contact list completed.

Report on a **list of contacts** that you want to learn more about.

Break the report down by a **contact property** to see how this property contributed to the conversion event.

Attach a **revenue number** to the property by which you are breaking down the report.



USE CASE #1

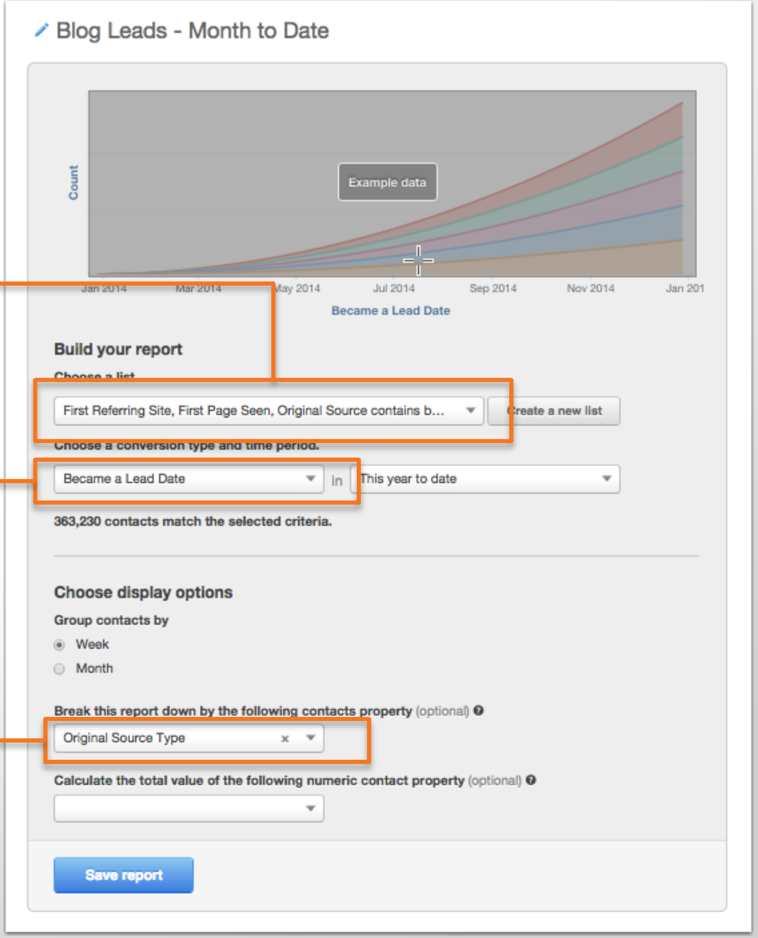
“I want to see all the leads generated whose first visit was through my blog”

HOW TO CREATE THIS CONTACTS REPORT

List of **leads who saw our blog before any other page** on our site

Show only contacts who **became leads**, and in the order they did so

Break the report down by the **source of the leads first visit** to our site



TAKEAWAYS

How effective is our blog in driving leads?

Which channel was most effective at driving people to the blog AND converting them to a lead.

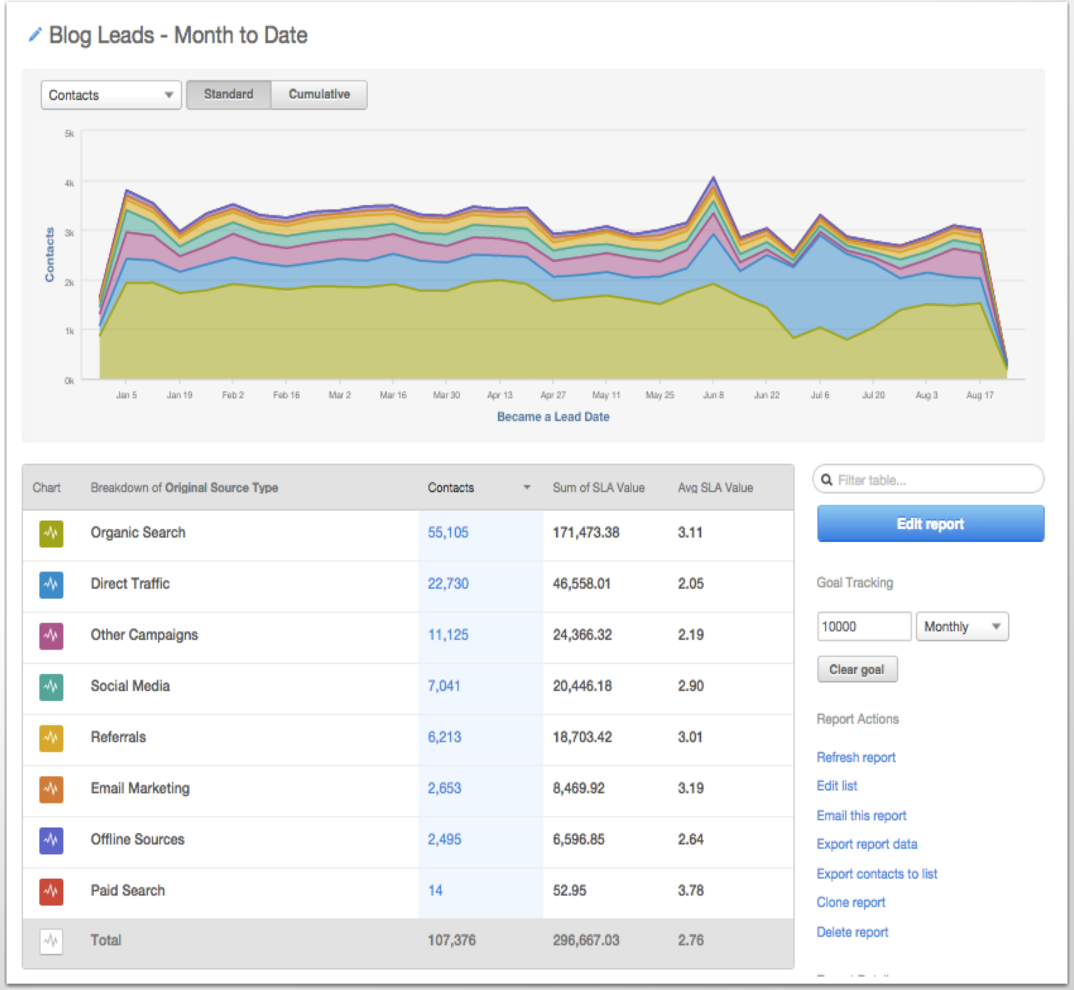


Chart	Breakdown of Original Source Type	Contacts	Sum of SLA Value	Avg SLA Value
	Organic Search	55,105	171,473.38	3.11
	Direct Traffic	22,730	46,558.01	2.05
	Other Campaigns	11,125	24,366.32	2.19
	Social Media	7,041	20,446.18	2.90
	Referrals	6,213	18,703.42	3.01
	Email Marketing	2,653	8,469.92	3.19
	Offline Sources	2,495	6,596.85	2.64
	Paid Search	14	52.95	3.78
	Total	107,376	296,667.03	2.76

ACTION ITEM

Based on this information you should be able to decide what channels to use to promote your blog for better lead generation.

Blog Leads - Month to Date

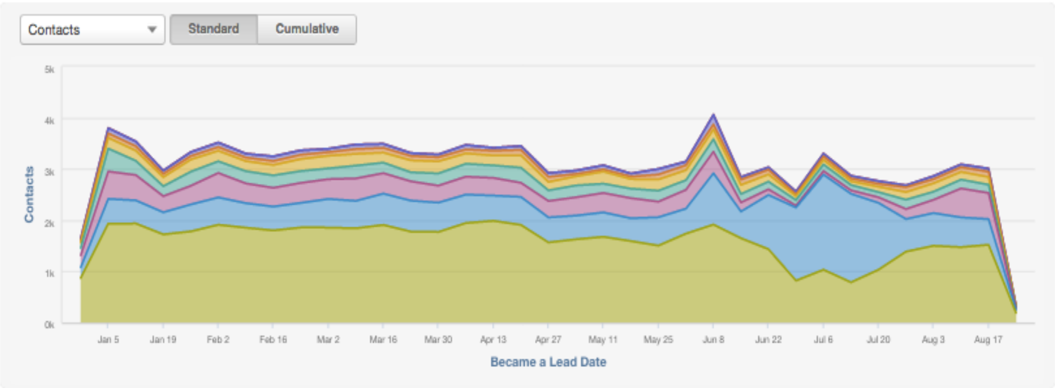


Chart	Breakdown of **Original Source Type**	Contacts	Sum of SLA Value	Avg SLA Value
	Organic Search	55,105	171,473.38	3.11
	Direct Traffic	22,730	46,558.01	2.05
	Other Campaigns	11,125	24,366.32	2.19
	Social Media	7,041	20,446.18	2.90
	Referrals	6,213	18,703.42	3.01
	Email Marketing	2,653	8,469.92	3.19
	Offline Sources	2,495	6,596.85	2.64
	Paid Search	14	52.95	3.78
	Total	107,376	296,667.03	2.76

Filter table...

Edit report

Goal Tracking

10000 Monthly

Clear goal

Report Actions

- Refresh report
- Edit list
- Email this report
- Export report data
- Export contacts to list
- Clone report
- Delete report

USE CASE #2

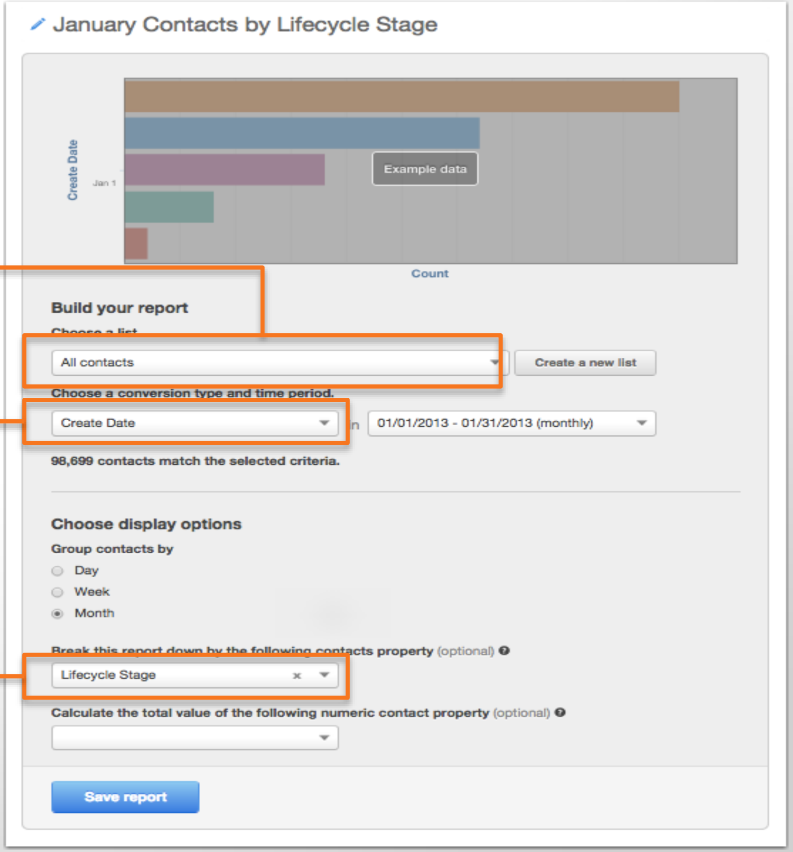
"I want to see where my contacts are in the funnel "

HOW TO CREATE THIS CONTACTS REPORT

Build the report using a **list of all the contacts** in your HubSpot account.

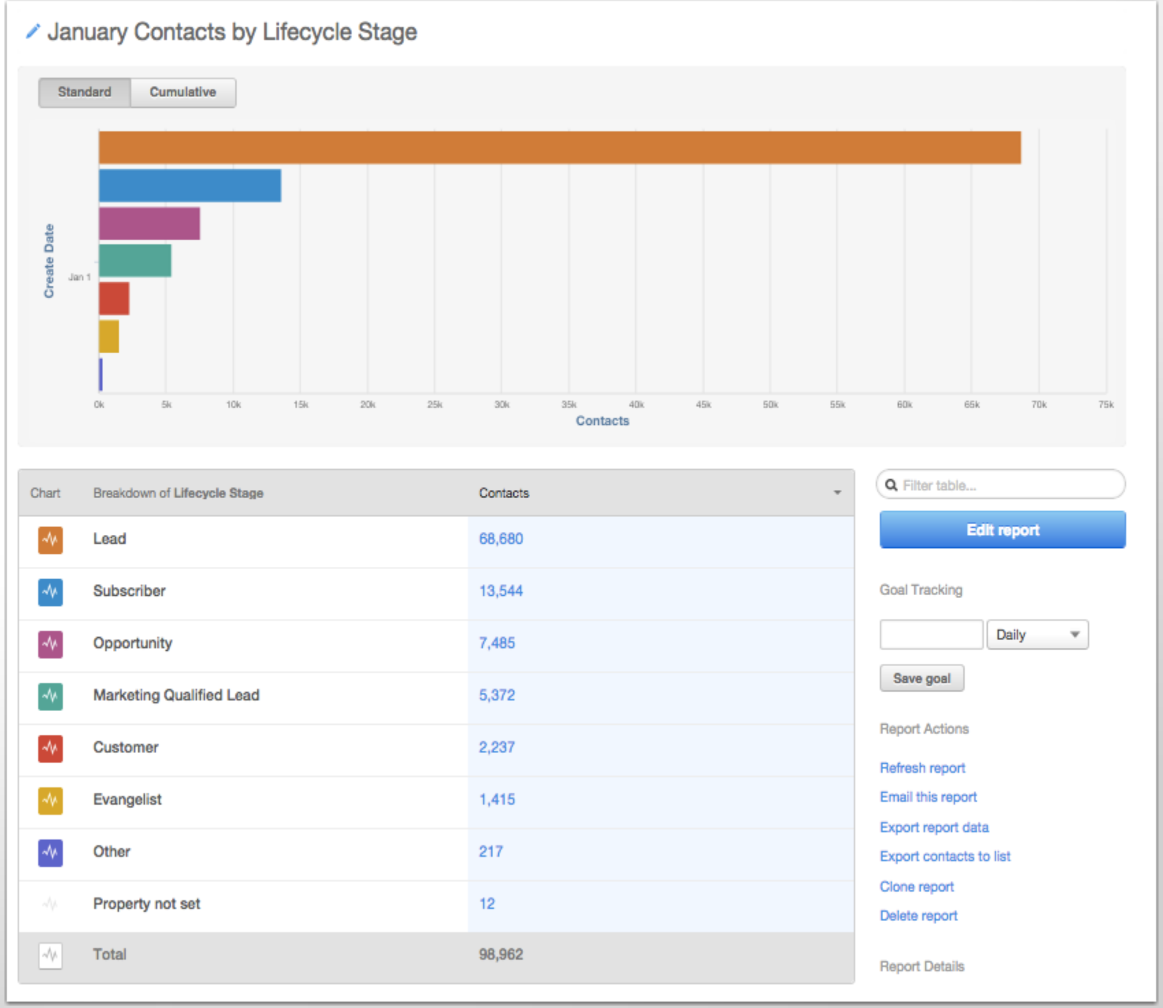
Show all contacts by **when they were created** in HubSpot.

Break down the report by the **lifecycle stage** of the contacts.



TAKEAWAYS

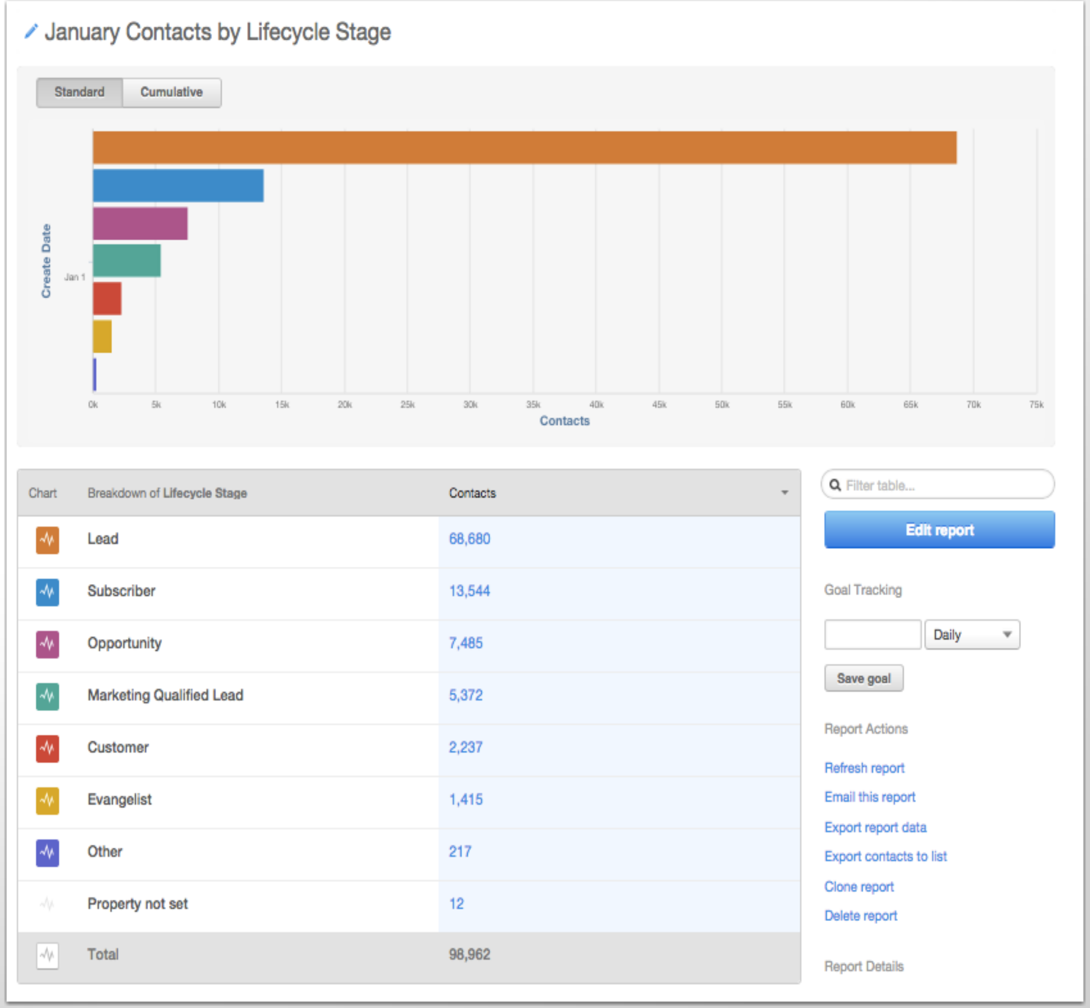
Find the deficiencies in your buyer's journey



ACTION ITEMS:

Focus your time on building out a nurturing campaign that is focused on driving conversion to the lifecycle stage that is underperforming.

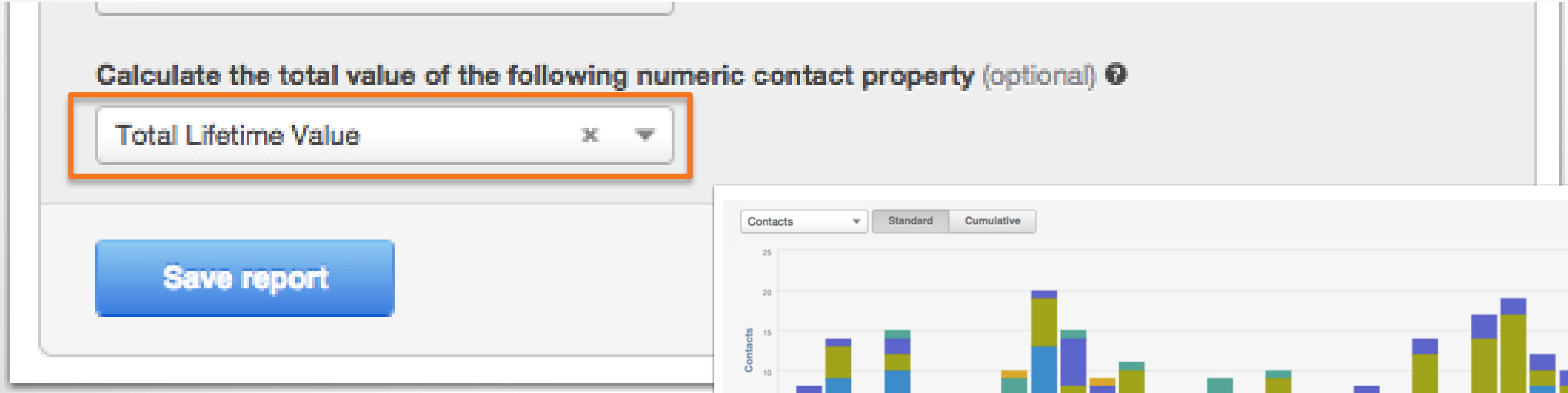
Evaluate if you have sufficient content to engage contacts at stages where you are deficient.

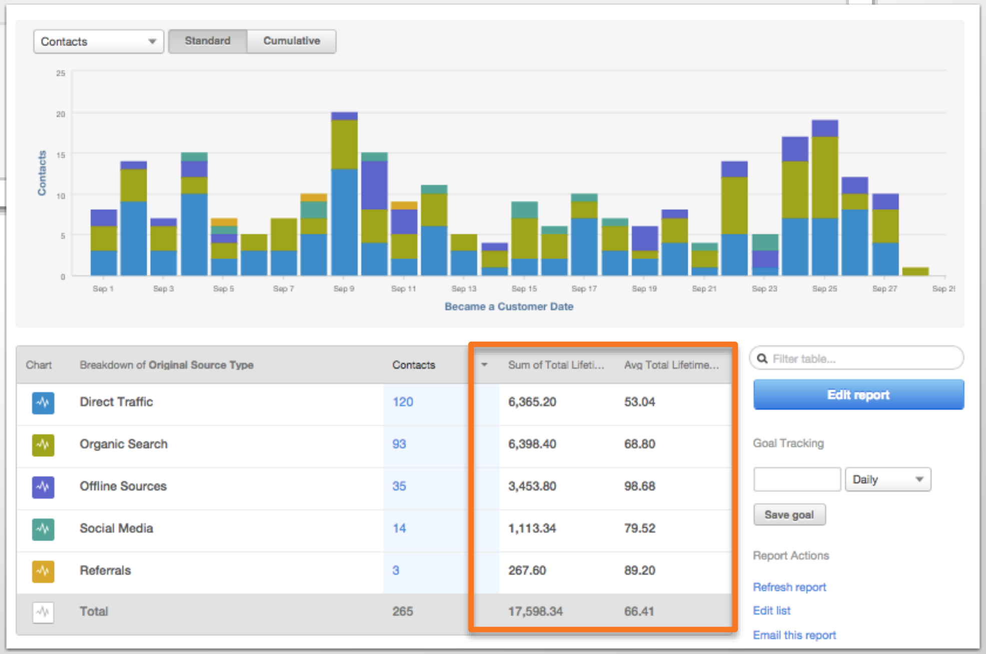


IF YOU STORE FINANCIAL DATA IN HUBSPOT….

…YOU CAN BUILD REPORTS WITH IT.

INCLUDING REVENUE IN REPORTS





Salesforce & HubSpot CRM

- Total revenue
- Recent deal amount
- Associated deals

PRO TIPS.

- Goals: If you're in the cumulative view, you can set a goal line (like in the dashboard).

- Contacts reports need to be refreshed either manually or on a schedule.

3 HOW TO USE THE COMPANIES REPORT.

COMPANIES REPORT

Like the contacts report but developed for B2B

Figure out exactly how many companies in your database segmented by any data stored in HubSpot.

Do you store company data in HubSpot?

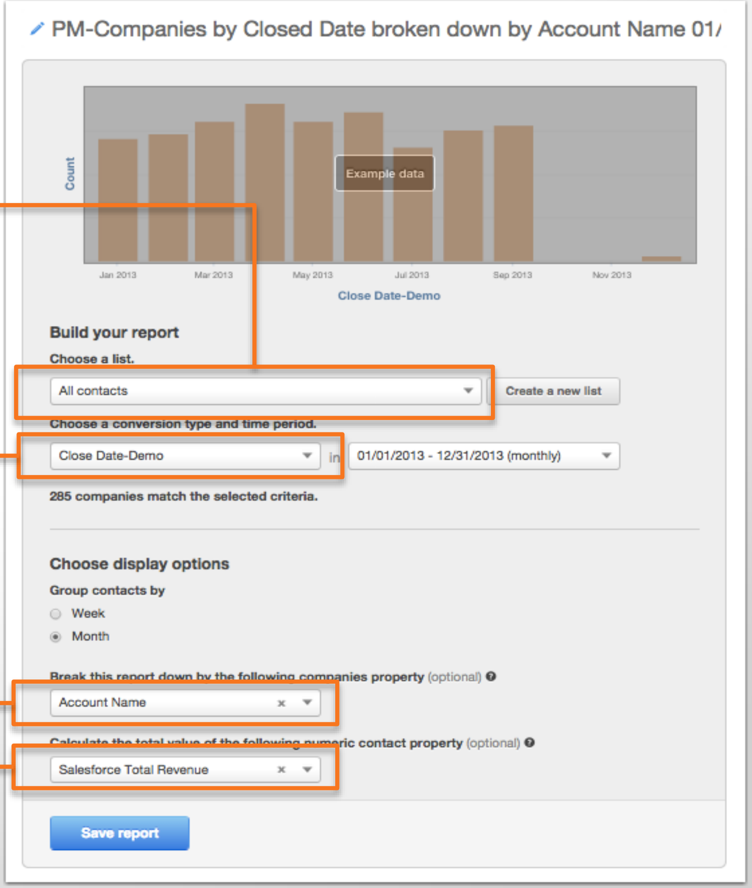
HOW TO CREATE A COMPANIES REPORT

Report on the respective “companies” for a **list of “contacts”**

Report on contacts who have completed a specific conversion event

Break down the report by any property on the company record

For each breakdown, calculate the **total revenue.**



USE CASE #1

"I want to report on the number of companies generated from my marketing instead of individual contacts"

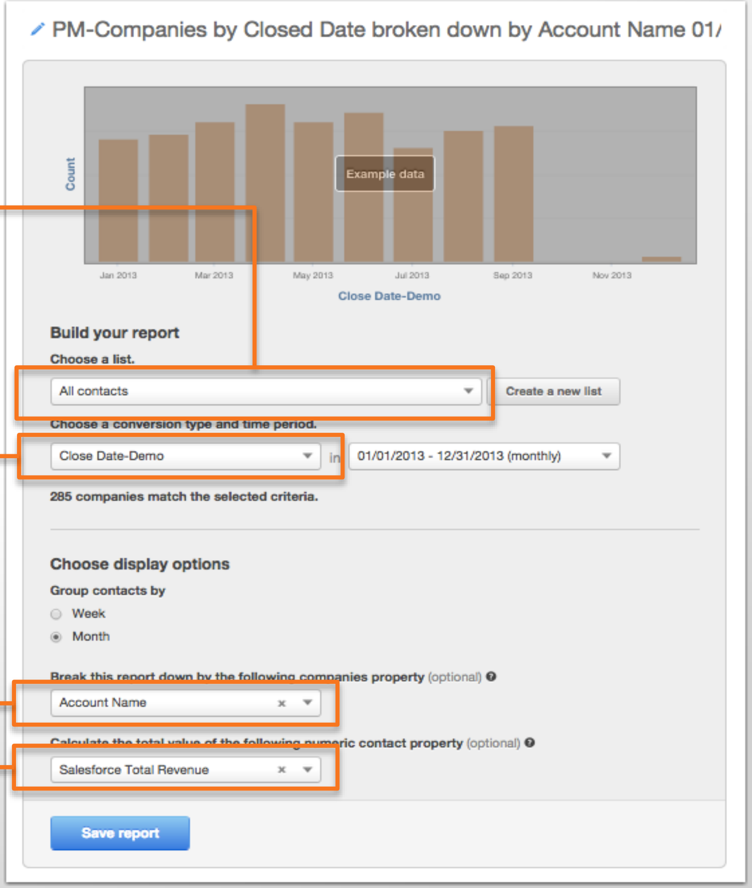
HOW TO CREATE THIS COMPANIES REPORT

List of all contacts in your HubSpot database

Plot only contacts by the property **“close date”**

Break down the report by the **name of the account** associated with the contact

For each company calculate the **“total revenue”**



TAKEAWAYS:

Avoid a situation where a company with multiple contacts skews the perceived dollar value

As a marketer stay on top of your largest accounts

PM-Companies by Closed Date broken down by Account Name 01/01/2013 - 12/31/2013 (Demo)

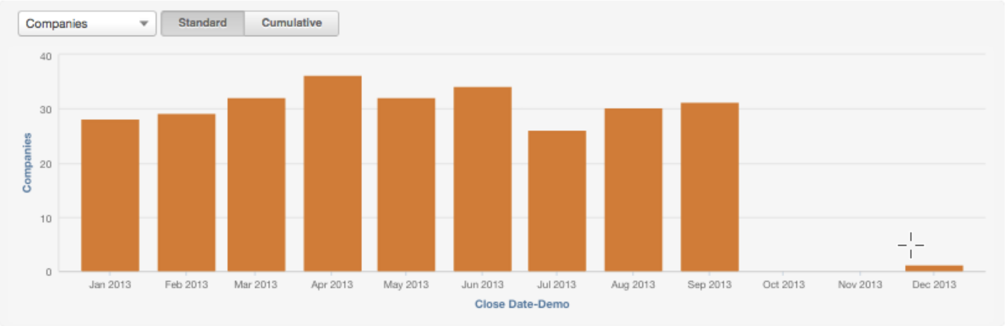


Chart	Breakdown of Account Name	Companies	Sum of Salesforce...	Avg Salesforce To...
	SpinWeb	2	11,895.00	5,947.50
	Bluetrain Mobile	2	5,149.00	2,574.50
	e-profit	1	7,917.00	7,917.00
	Horizon Display	1	7,363.00	7,363.00
	Prince Global Sports	1	3,526.00	3,526.00
	Kyle & Irving	1	5,077.00	5,077.00
	Big Thinkery	1	5,458.00	5,458.00
	ACE Data Group, LLC	1	7,871.00	7,871.00
	new breed marketing	1	2,654.00	2,654.00
	Seon	1	9,960.00	9,960.00
	Total	279	1,695,980.00	6,078.78

Filter table...

Edit report

Goal Tracking

Daily

Save goal

Report Actions

Refresh report
Email this report
Export report data
Clone report
Delete report

Report Details

List: All companies
Date property: Close Date-Demo
Time range: 01/01/2013 to 12/31/2013
Last updated: Apr 22 2014 2:34 PM

ACTION ITEMS:

Consider reaching out to these companies for potential case studies

Run a referral program for some of your top performing companies

Run a campaign to encourage evangelism

PM-Companies by Closed Date broken down by Account Name 01/01/2013 - 12/31/2013 (Demo)

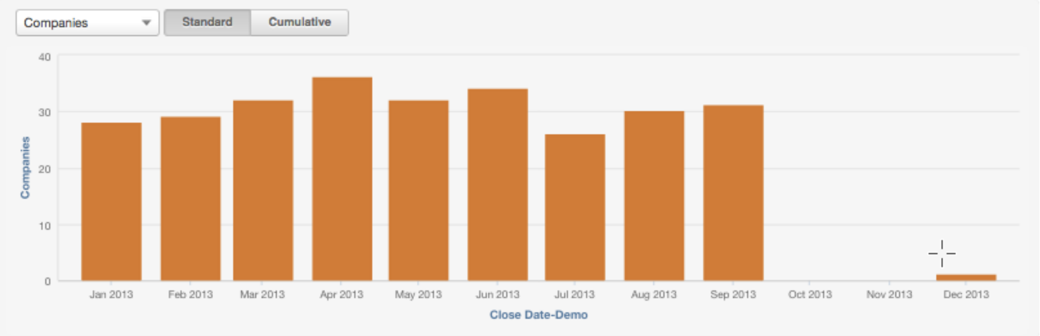


Chart	Breakdown of Account Name	Companies	Sum of Salesforce...	Avg Salesforce To...
	SpinWeb	2	11,895.00	5,947.50
	Bluetrain Mobile	2	5,149.00	2,574.50
	e-profit	1	7,917.00	7,917.00
	Horizon Display	1	7,363.00	7,363.00
	Prince Global Sports	1	3,526.00	3,526.00
	Kyle & Irving	1	5,077.00	5,077.00
	Big Thinkery	1	5,458.00	5,458.00
	ACE Data Group, LLC	1	7,871.00	7,871.00
	new breed marketing	1	2,654.00	2,654.00
	Seon	1	9,960.00	9,960.00
	Total	279	1,695,980.00	6,078.78

Filter table...

Edit report

Goal Tracking

Daily

Save goal

Report Actions

Refresh report

Email this report

Export report data

Clone report

Delete report

Report Details

List: All companies

Date property: Close Date-Demo

Time range: 01/01/2013 to 12/31/2013

Last updated: Apr 22 2014 2:34 PM

USE CASE #2

“I want to evaluate what channel brought in the most revenue or the most companies”

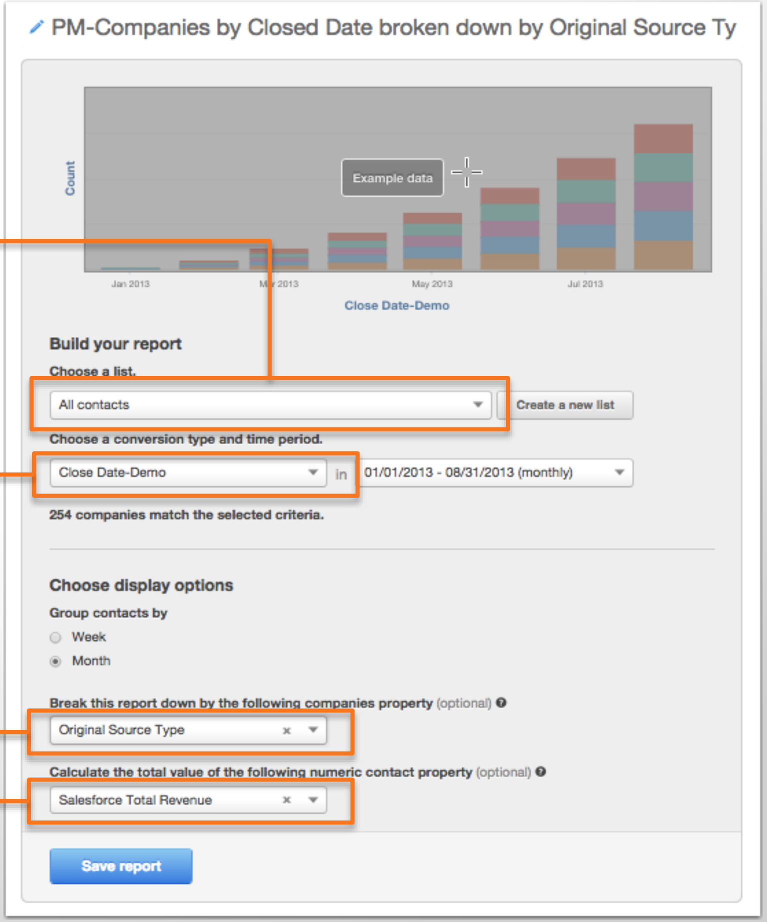
HOW TO CREATE THIS COMPANIES REPORT

List of all contacts in your HubSpot database

Plot only contacts by the property **“close date”**

Break down the report by the source of the **original visit** of the first contact associated with your account

For each source calculate the **“total revenue”**



TAKEAWAYS:

Understand which sources are best at acquiring new companies.

Understand if quantity of companies driven by a source matches the total financial value.

PM-Companies by Closed Date broken down by Original Source Type 01/01/2013 - 12/31/2013 (Demo)

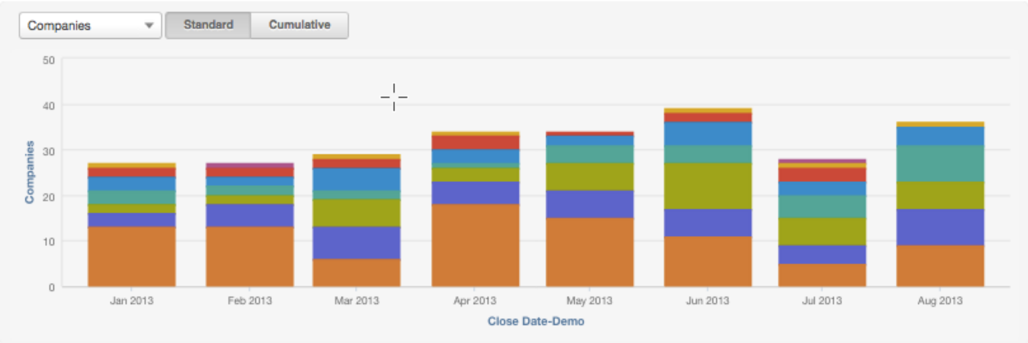


Chart	Breakdown of Original Source Type	Companies	Sum of Salesforce...	Avg Salesforce To...
	Email Marketing	90	515,639.00	5,729.32
	Offline Sources	44	260,000.00	5,909.09
	Organic Search	41	316,104.00	7,709.85
	Social Media	29	163,367.00	5,633.34
	Direct Traffic	27	168,149.00	6,227.74
	Paid Search	15	100,425.00	6,695.00
	Referrals	6	30,886.00	5,147.67
	Other Campaigns	2	14,626.00	7,313.00
	Total	254	1,569,196.00	6,177.94

Filter table...

Edit report

Goal Tracking

Daily

Save goal

Report Actions

Refresh report

Email this report

Export report data

Clone report

Delete report

Report Details

List: All companies

ACTION ITEMS:

Plan to invest your time and money as a marketer in the source(s) that is yielding the highest financial reward.

PM-Companies by Closed Date broken down by Original Source Type 01/01/2013 - 12/31/2013 (Demo)

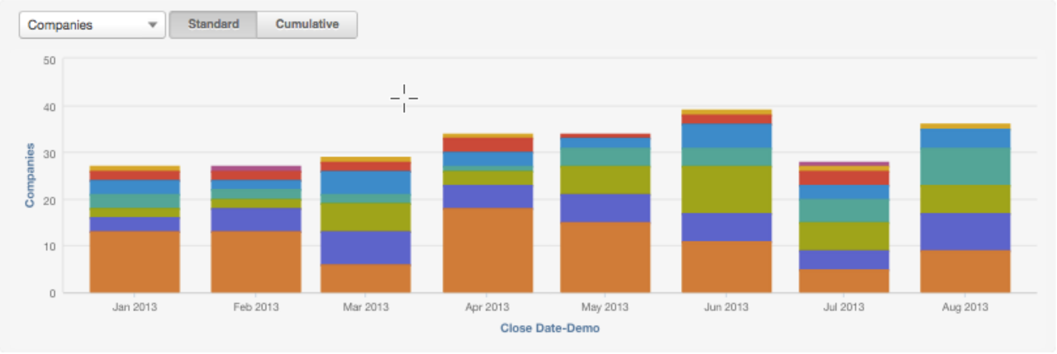


Chart	Breakdown of Original Source Type	Companies	Sum of Salesforce...	Avg Salesforce To...
	Email Marketing	90	515,639.00	5,729.32
	Offline Sources	44	260,000.00	5,909.09
	Organic Search	41	316,104.00	7,709.85
	Social Media	29	163,367.00	5,633.34
	Direct Traffic	27	168,149.00	6,227.74
	Paid Search	15	100,425.00	6,695.00
	Referrals	6	30,886.00	5,147.67
	Other Campaigns	2	14,626.00	7,313.00
	Total	254	1,569,196.00	6,177.94

Filter table...

Edit report

Goal Tracking

Daily

Save goal

Report Actions

Refresh report

Email this report

Export report data

Clone report

Delete report

Report Details

List: All companies

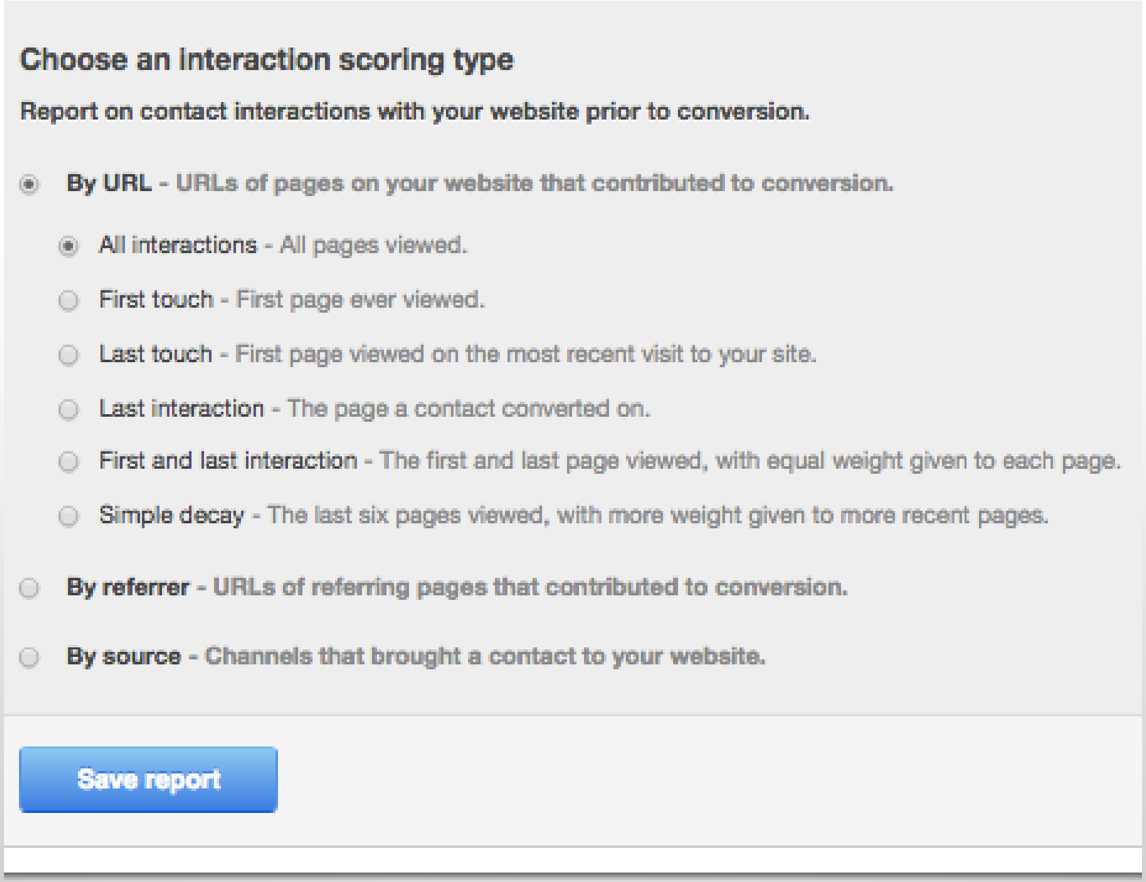
4 HOW TO USE THE ATTRIBUTION REPORT.

ATTRIBUTION REPORT

Enterprise Attribution Reports

Report on contact interaction with your website prior to a conversion event.

TYPES OF ATTRIBUTIONS



USE CASE #1

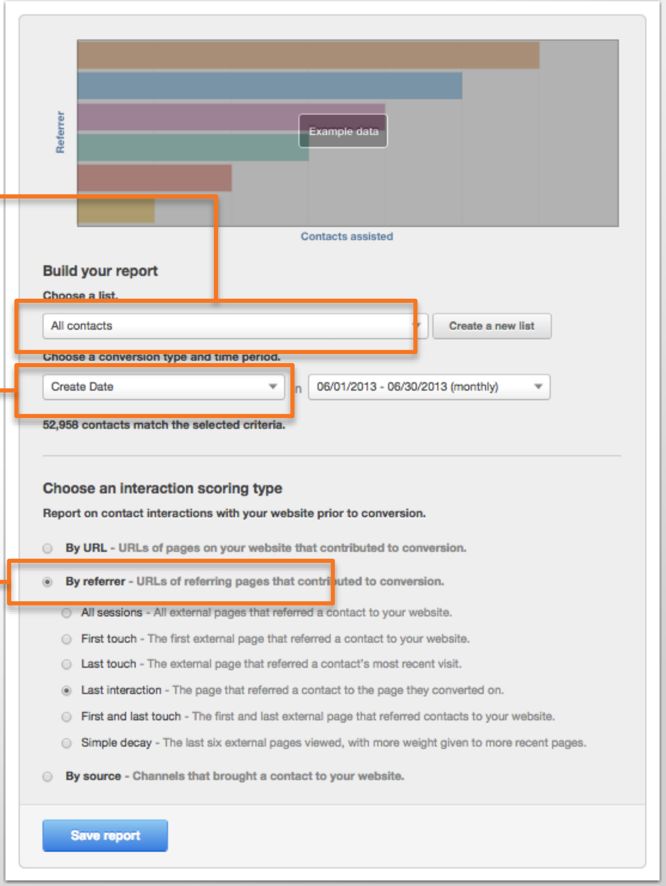
"I want to know which blog posts directly contributed to the conversion of a lead"

HOW TO CREATE THIS ATTRIBUTION REPORT

Build the report using a **list of all contacts**

Pick a conversion event of "**became a lead**" or "**recent conversion date**"

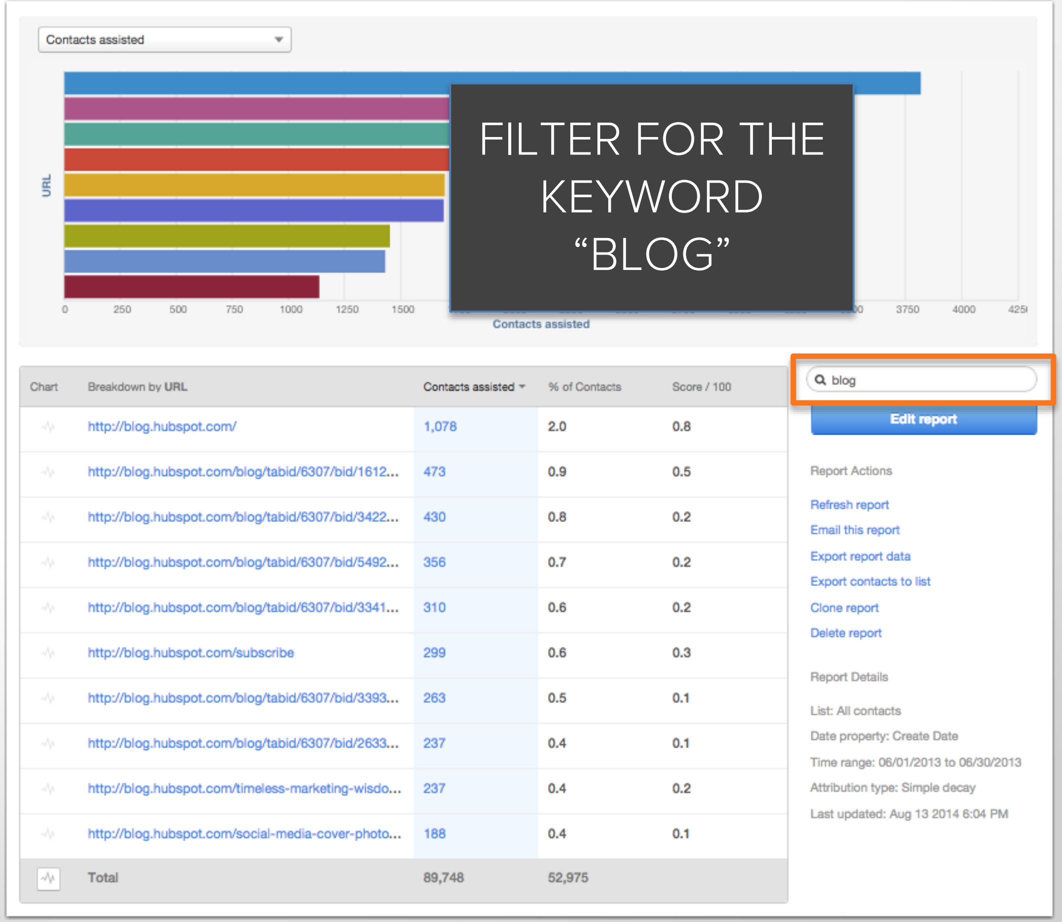
The page, internal or external that immediately **referred a visitor** to the page they converted on



TAKEAWAYS:

Know which blog posts are doing the best job of enticing visitors to click through and convert on a landing page

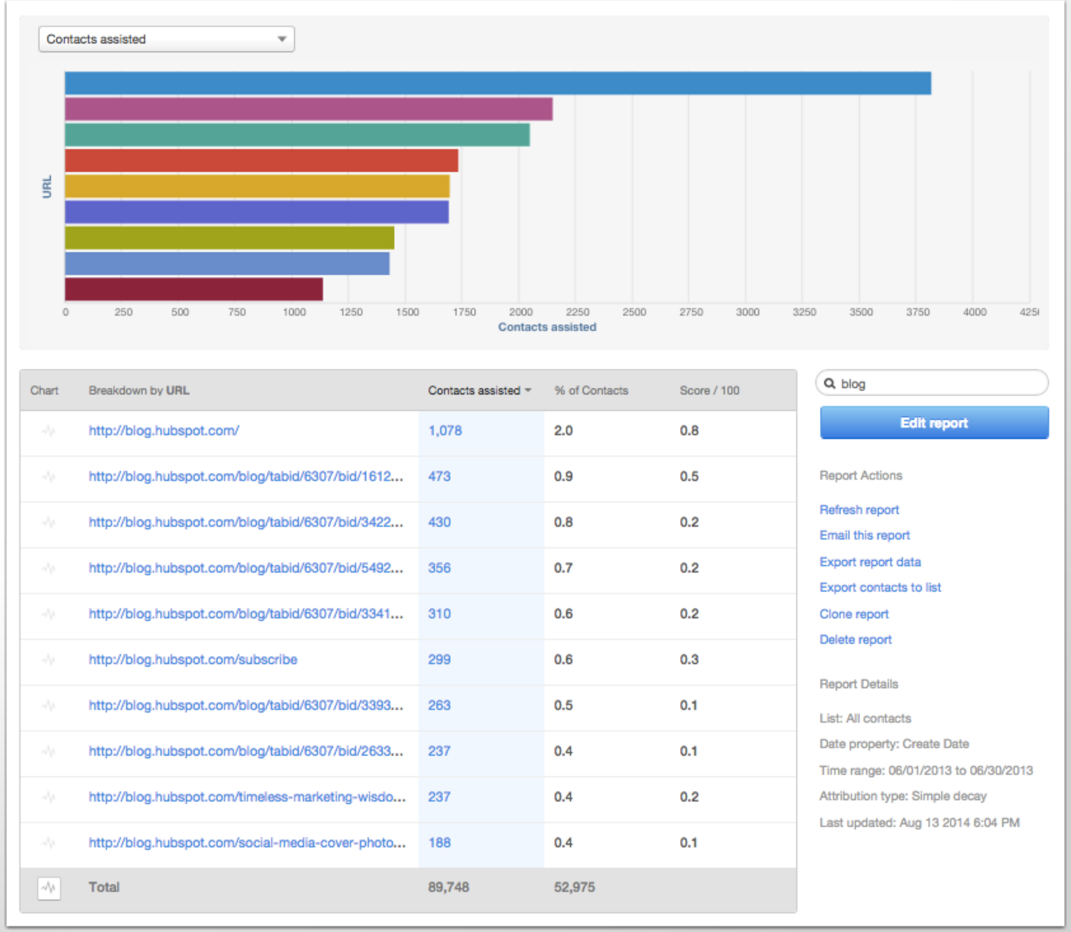
Find commonalities between the posts that are leading to conversions



ACTION ITEMS:

Consider re-using high converting blog posts in social media and email campaigns to draw additional traffic to them

Reverse engineer highly converting blog posts to find trends with the post type, offer type, or combination that can be replicated.



USE CASE #2

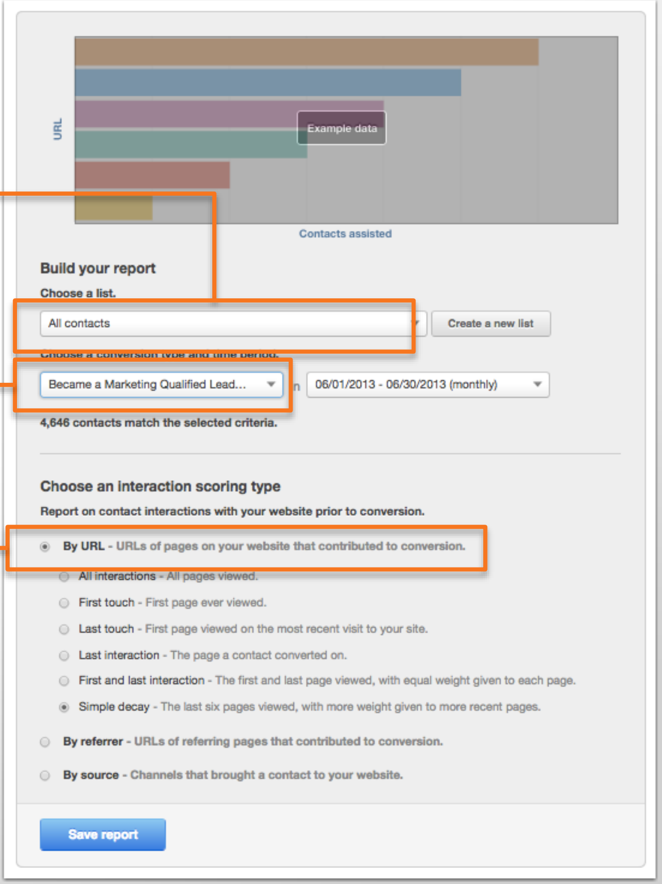
"I want to see the pages on my site that are influencing my marketing qualified lead (MQL) conversions"

HOW TO CREATE THIS ATTRIBUTION REPORT

Build the report using a **list of all contacts**

Filter the conversion type is **“became an MQL”** to ensure we are only reporting on contacts who entered the MQL stage

Attribution to the **last 6 pages viewed** before the MQL event. Higher weight being attributed to the pages immediately before the conversion.



TAKEAWAYS:

Generating leads is important, but generating quality leads is vital.

This report will show you the actions people are taking on your site before they are considered an MQL.

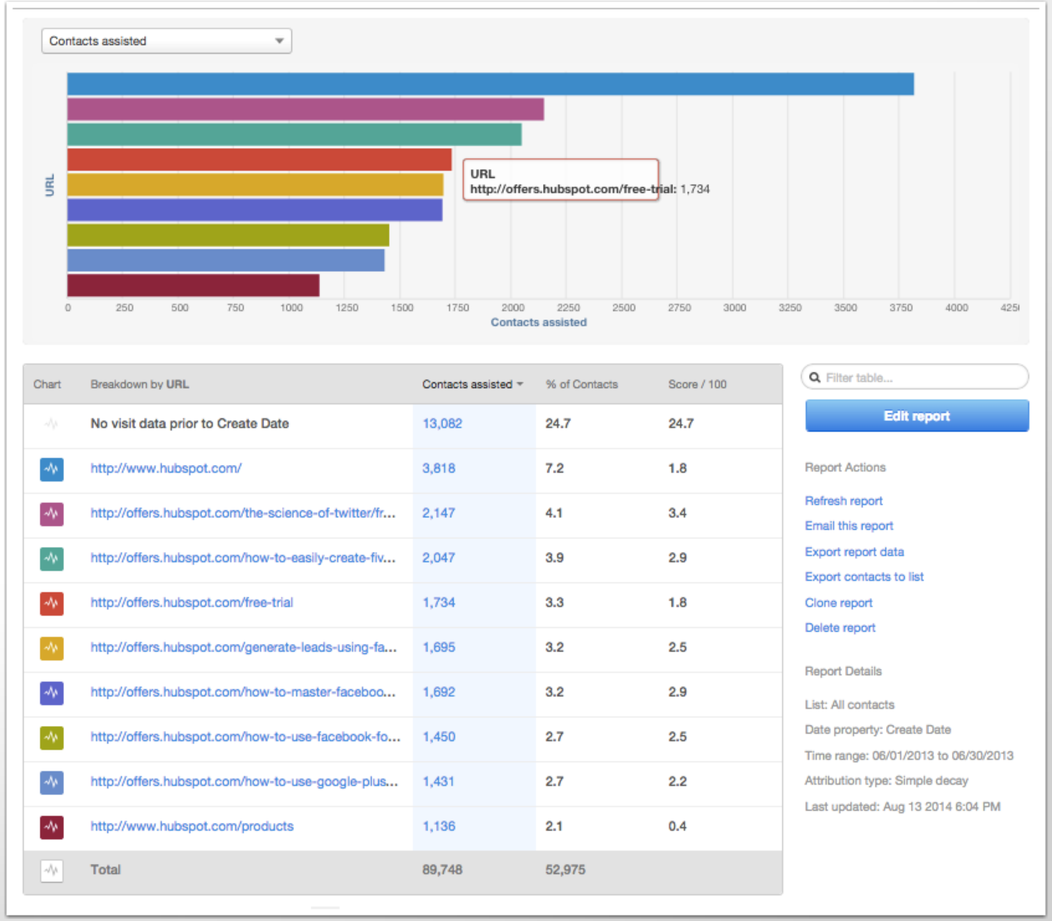


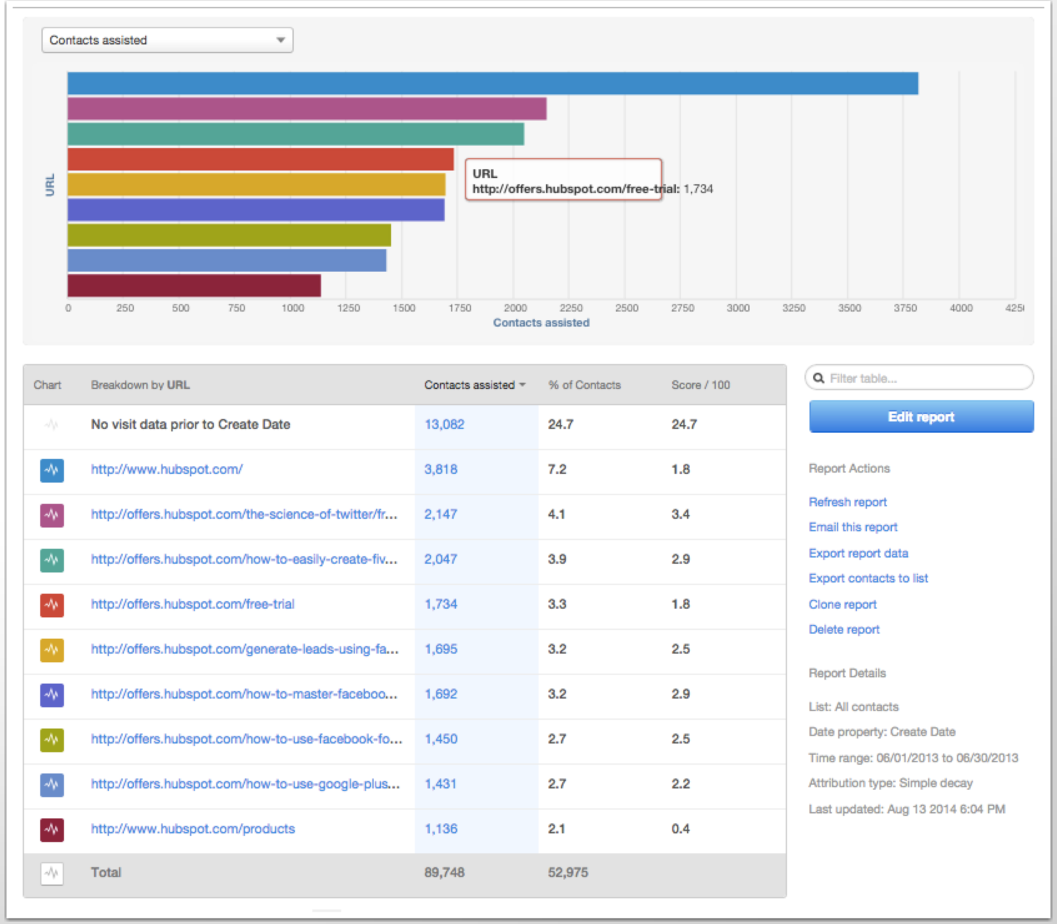
Chart	Breakdown by URL	Contacts assisted	% of Contacts	Score / 100
	No visit data prior to Create Date	13,082	24.7	24.7
	http://www.hubspot.com/	3,818	7.2	1.8
	http://offers.hubspot.com/the-science-of-twitter/fr...	2,147	4.1	3.4
	http://offers.hubspot.com/how-to-easily-create-fiv...	2,047	3.9	2.9
	http://offers.hubspot.com/free-trial	1,734	3.3	1.8
	http://offers.hubspot.com/generate-leads-using-fa...	1,695	3.2	2.5
	http://offers.hubspot.com/how-to-master-faceboo...	1,692	3.2	2.9
	http://offers.hubspot.com/how-to-use-facebook-fo...	1,450	2.7	2.5
	http://offers.hubspot.com/how-to-use-google-plus...	1,431	2.7	2.2
	http://www.hubspot.com/products	1,136	2.1	0.4
	Total	89,748	52,975	

ACTION ITEMS:

Make the most influential pages easier to access on your site by providing more frequent and accessible links.

Use the HubSpot page performance tool to make sure the pages with most influence are optimized for conversion.

Find pages that are not contributing (that should be) and promote the pages.



Try HubSpot Enterprise for yourself!

http://bit.ly/academy-trial

NEXT STEPS

1. Choose a type of enterprise report that you want to create
2. Use one of the examples to create your own report
3. Experiment by breaking the reports down by different contact or company properties
4. Use the data to refine your marketing strategy

RESOURCES

- How to use the Contacts Report [Help Doc]
- How do I create an Attribution Report? [Help Doc]
- HubSpot Enterprise Reporting Recipe Book

QUESTIONS?

THANK YOU.

HubSpot Academy