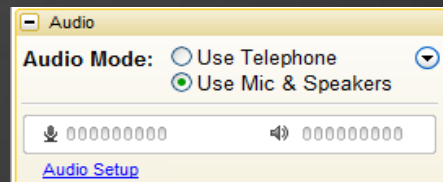


HUBSPOT ENTERPRISE REPORTING: REPORTS CUSTOMERS LOVE

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

#INBOUNDLEARNING



Mark Kilens

@MarkKilens

#InboundLearning



Blake Toder | @btoder

Senior Inbound Marketing Consultant



Sarah Phillips | @sarahgphillips

Senior Inbound Marketing Consultant

Try HubSpot Enterprise for yourself!

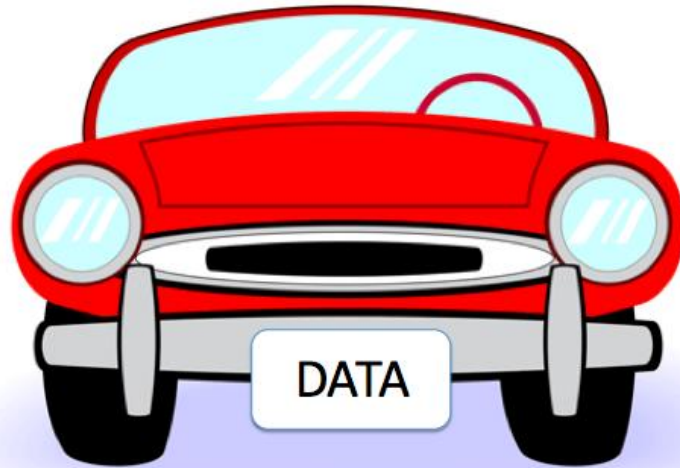
<http://bit.ly/academy-trial>

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.

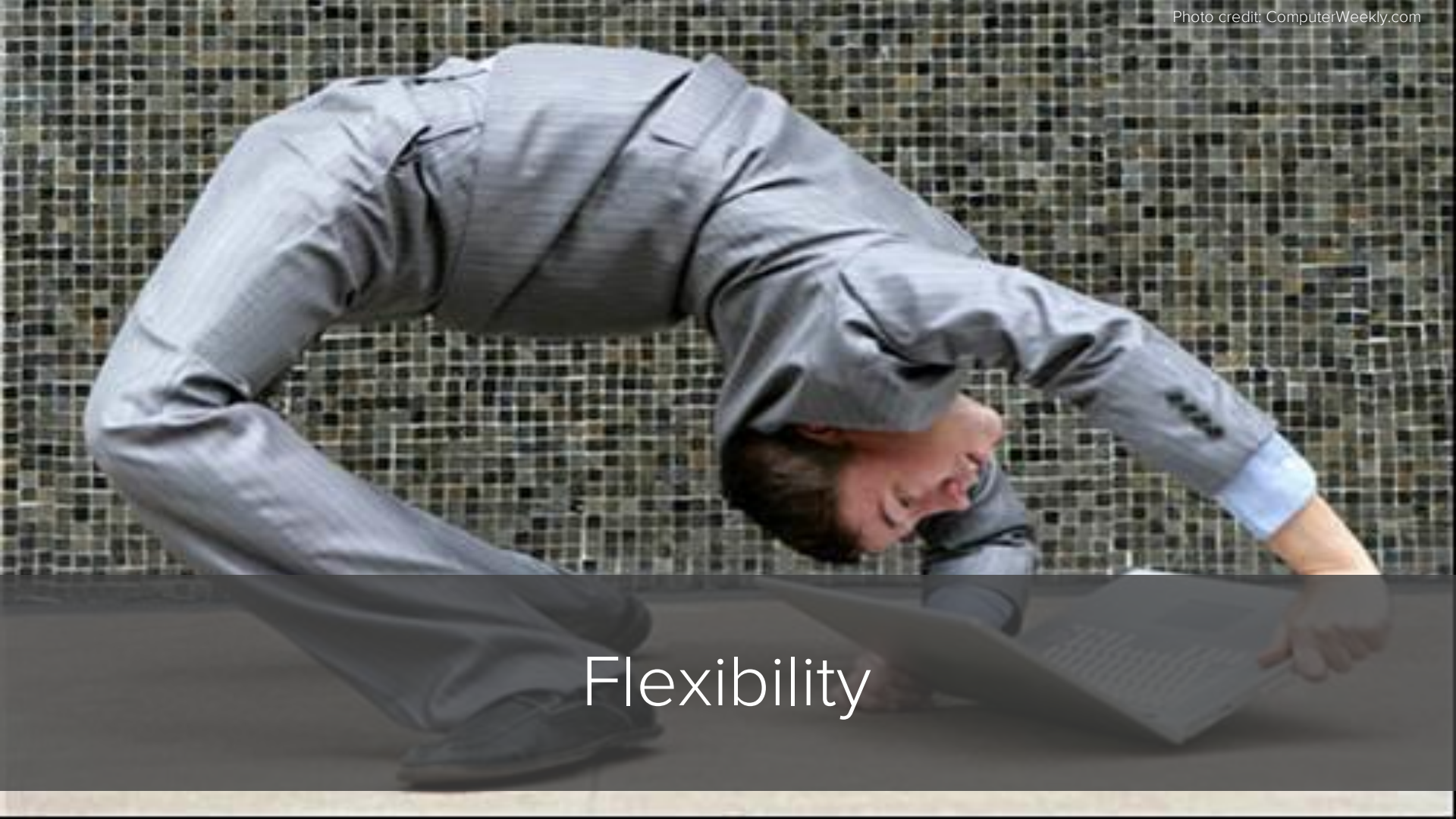


Marketing rarely has the reports to do so on a **granular** level.



Enterprise reporting helps us solve this problem





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.

The screenshot shows the 'Build your report' section of a HubSpot dashboard. It includes a line chart at the top with the title 'Example data' and a subtitle 'Became a Marketing Qualified Lead Date'. The chart shows a rising trend from January 2014 to January 2015. Below the chart, the 'Build your report' section contains several dropdown menus and a 'Save report' button. Orange arrows point from the instructional text on the left to specific fields in the report builder:

- An arrow points from 'Choose the **conversion event** that your contact list completed.' to the 'Choose a conversion type and time period.' dropdown, which is set to 'Became a Marketing Qualified Lead...'.
- An arrow points from 'Report on a **list of contacts** that you want to learn more about.' to the 'Choose a list' dropdown, which is set to 'First Referring Site - Twitter'.
- An arrow points from 'Break the report down by a **contact property** to see how this property contributed to the conversion event.' to the 'Break this report down by the following contacts property' dropdown, which is set to 'Original Source Type'.
- An arrow points from 'Attach a **revenue number** to the property by which you are breaking down the report.' to the 'Calculate the total value of the following numeric contact property' dropdown, which is currently empty.

The 'Build your report' section also includes a 'Create a new list' button, a 'Choose display options' section with radio buttons for 'Week' and 'Month', and a 'Save report' button at the bottom.

USE CASE #1

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

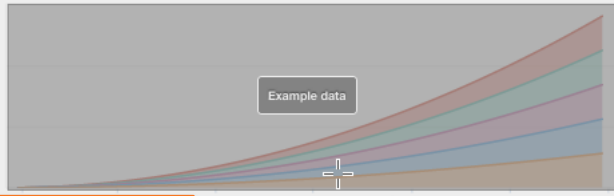
HOW TO CREATE THIS CONTACTS REPORT

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

Blog Leads - Month to Date



Count

Example data

Jan 2014 Mar 2014 May 2014 Jul 2014 Sep 2014 Nov 2014 Jan 2015

Became a Lead Date

Build your report

Choose a list

First Referring Site, First Page Seen, Original Source contains b... [Create a new list](#)

Choose a conversion type and time period.

Became a Lead Date in This year to date

363,230 contacts match the selected criteria.

Choose display options

Group contacts by

☒ Week ☐ Month

Break this report down by the following contacts property (optional) ⓘ

Original Source Type x

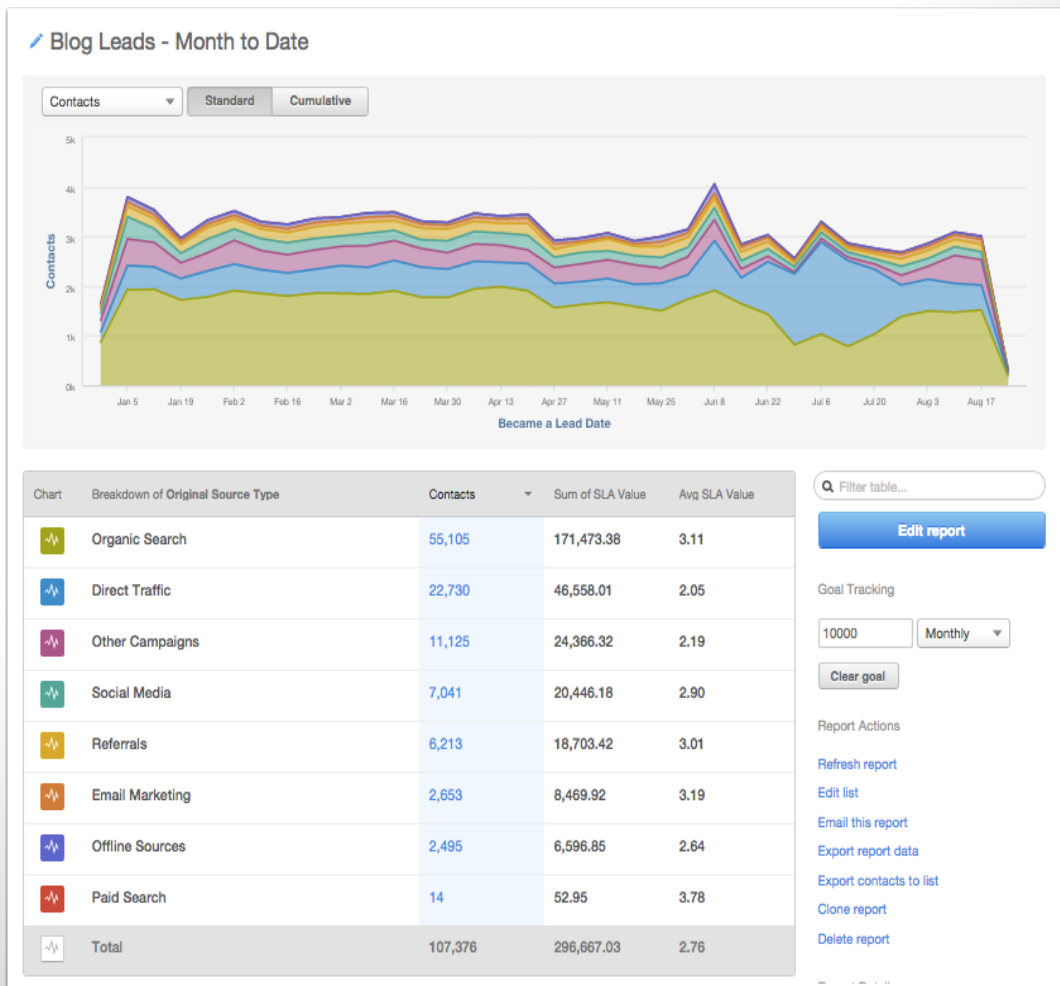
Calculate the total value of the following numeric contact property (optional) ⓘ

Save report

TAKEAWAYS

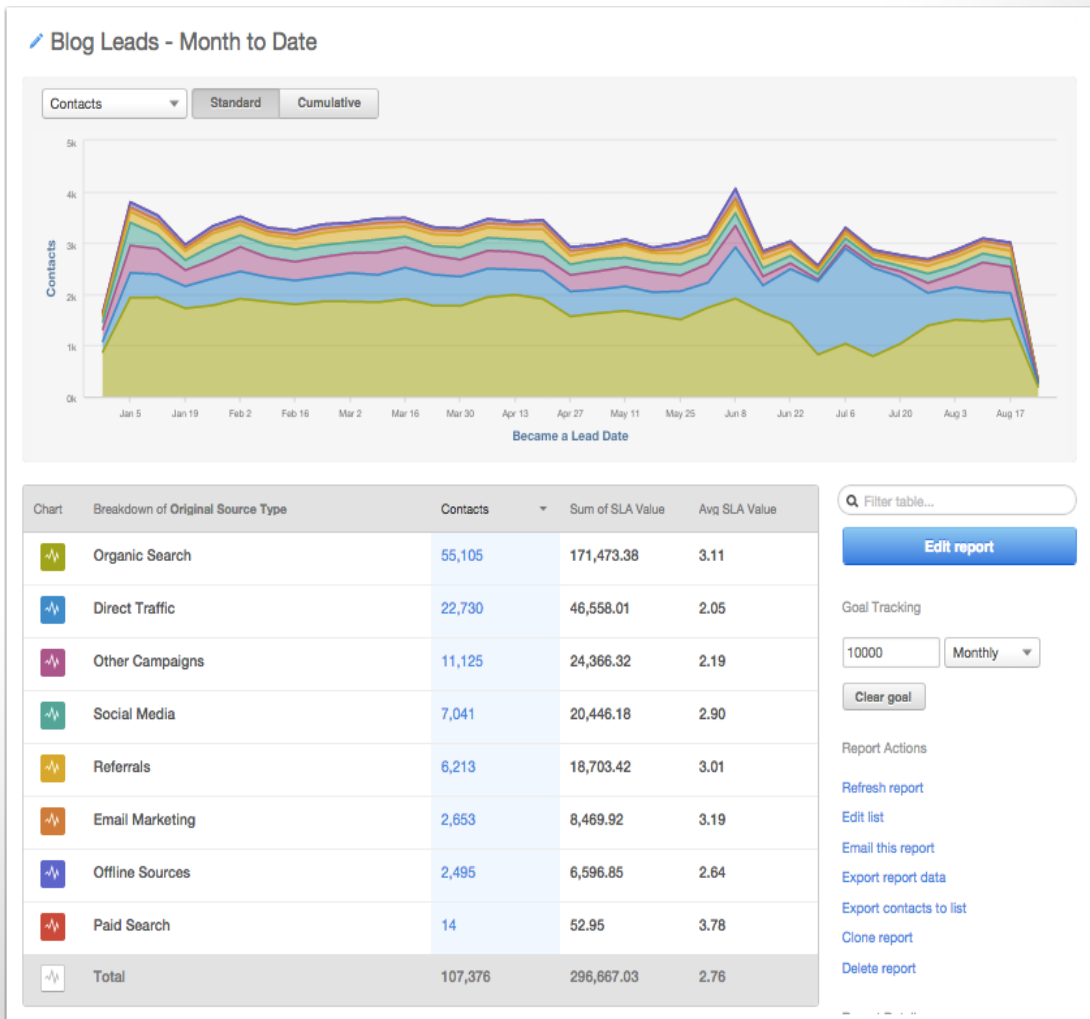
How effective is our blog in driving leads?

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



ACTION ITEM

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



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.

The screenshot shows the HubSpot report builder interface for a report titled "January Contacts by Lifecycle Stage". At the top, there is a horizontal bar chart with a label "Example data" and a "Count" label. Below the chart, the "Build your report" section contains three main configuration areas:

- Choose a list:** A dropdown menu is set to "All contacts", with a "Create a new list" button to its right.
- Choose a conversion type and time period:** A dropdown menu is set to "Create Date", and a date range selector is set to "01/01/2013 - 01/31/2013 (monthly)".
- Choose display options:** Under "Group contacts by", the "Month" radio button is selected, while "Day" and "Week" are unselected.

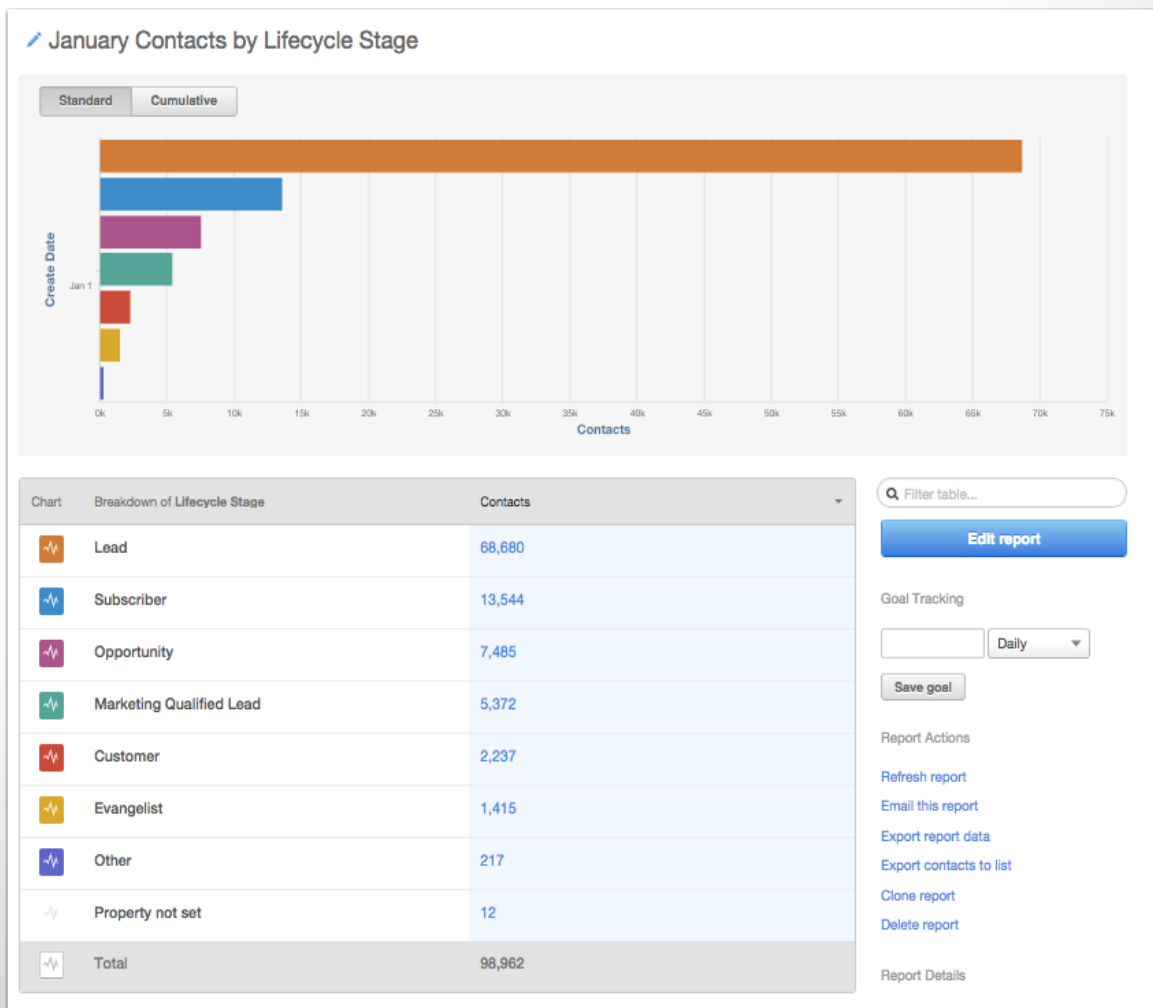
Below these options, it states "98,699 contacts match the selected criteria." Further down, there are two optional settings:

- Break this report down by the following contacts property (optional):** A dropdown menu is set to "Lifecycle Stage".
- Calculate the total value of the following numeric contact property (optional):** A dropdown menu is currently empty.

At the bottom of the form is a blue "Save report" button. Three orange arrows point from the text instructions on the left to the corresponding configuration elements in the report builder: the first arrow points to the "All contacts" dropdown, the second arrow points to the "Create Date" dropdown, and the third arrow points to the "Lifecycle Stage" dropdown.

TAKEAWAYS

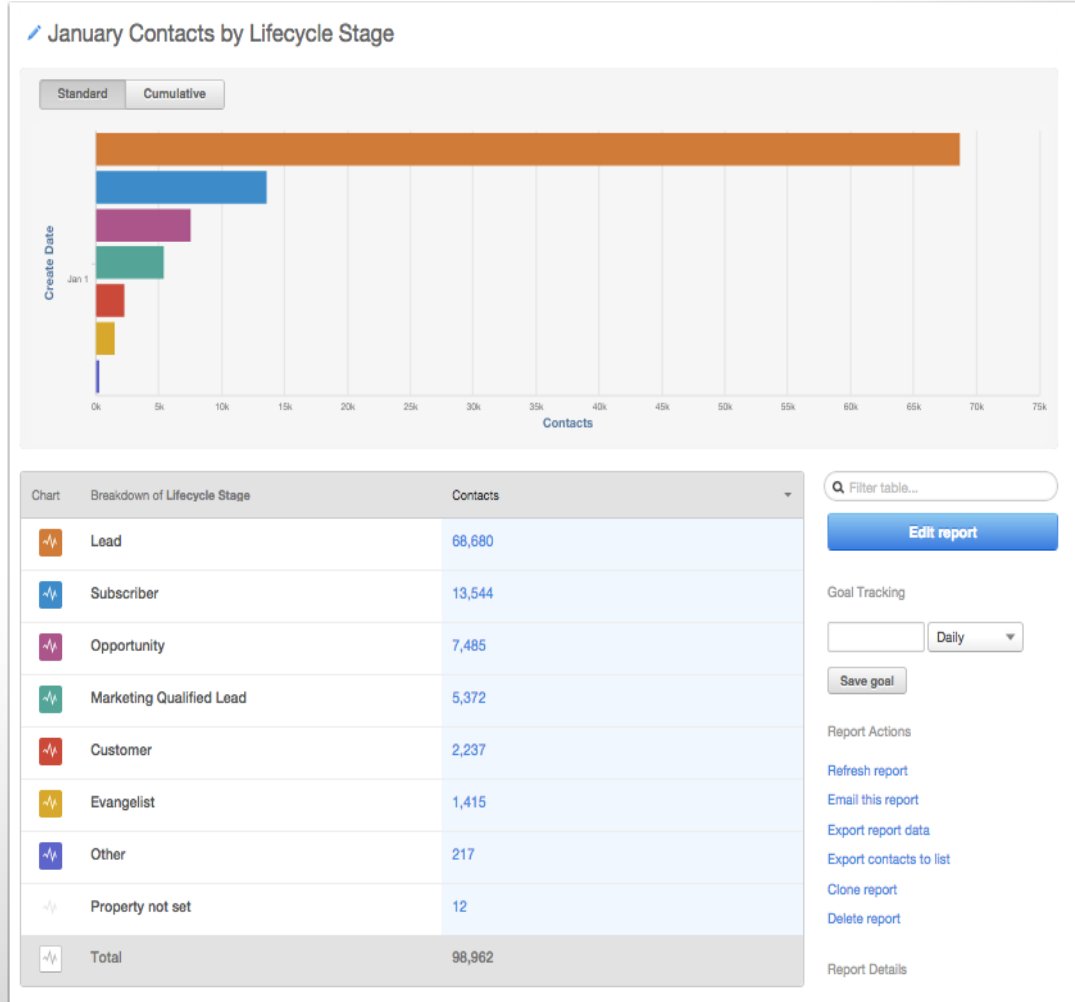
Find the deficiencies in your buyer's journey



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

Calculate the total value of the following numeric contact property (optional) ?

Total Lifetime Value X ▼

Save report

Contacts Standard Cumulative

Chart Breakdown of Original Source Type

Chart	Breakdown of Original Source Type	Contacts	Sum of Total Lifeti...	Avg Total Lifetime...
Direct Traffic		120	6,365.20	53.04
Organic Search		93	6,398.40	68.80
Offline Sources		35	3,453.80	98.68
Social Media		14	1,113.34	79.52
Referrals		3	267.60	89.20
Total		265	17,598.34	66.41

Filter table... Edit report

Goal Tracking

Save goal

Report Actions

Refresh report Edit list Email this report

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**.

PM-Companies by Closed Date broken down by Account Name 01/



Count

Example data

Jan 2013 Mar 2013 May 2013 Jul 2013 Sep 2013 Nov 2013

Close Date-Demo

Build your report

Choose a list.

All contacts Create a new list

Choose a conversion type and time period.

Close Date-Demo in 01/01/2013 - 12/31/2013 (monthly)

285 companies match the selected criteria.

Choose display options

Group contacts by

☐ Week

☒ Month

Break this report down by the following companies property (optional) ⓘ

Account Name x

Calculate the total value of the following numeric contact property (optional) ⓘ

Salesforce Total Revenue x

Save report

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”**

PM-Companies by Closed Date broken down by Account Name 01/



Close Date-Demo

Build your report

Choose a list.

All contacts Create a new list

Choose a conversion type and time period.

Close Date-Demo in 01/01/2013 - 12/31/2013 (monthly)

285 companies match the selected criteria.

Choose display options

Group contacts by

☐ Week

☒ Month

Break this report down by the following companies property (optional) ⓘ

Account Name x ▾

Calculate the total value of the following numeric contact property (optional) ⓘ

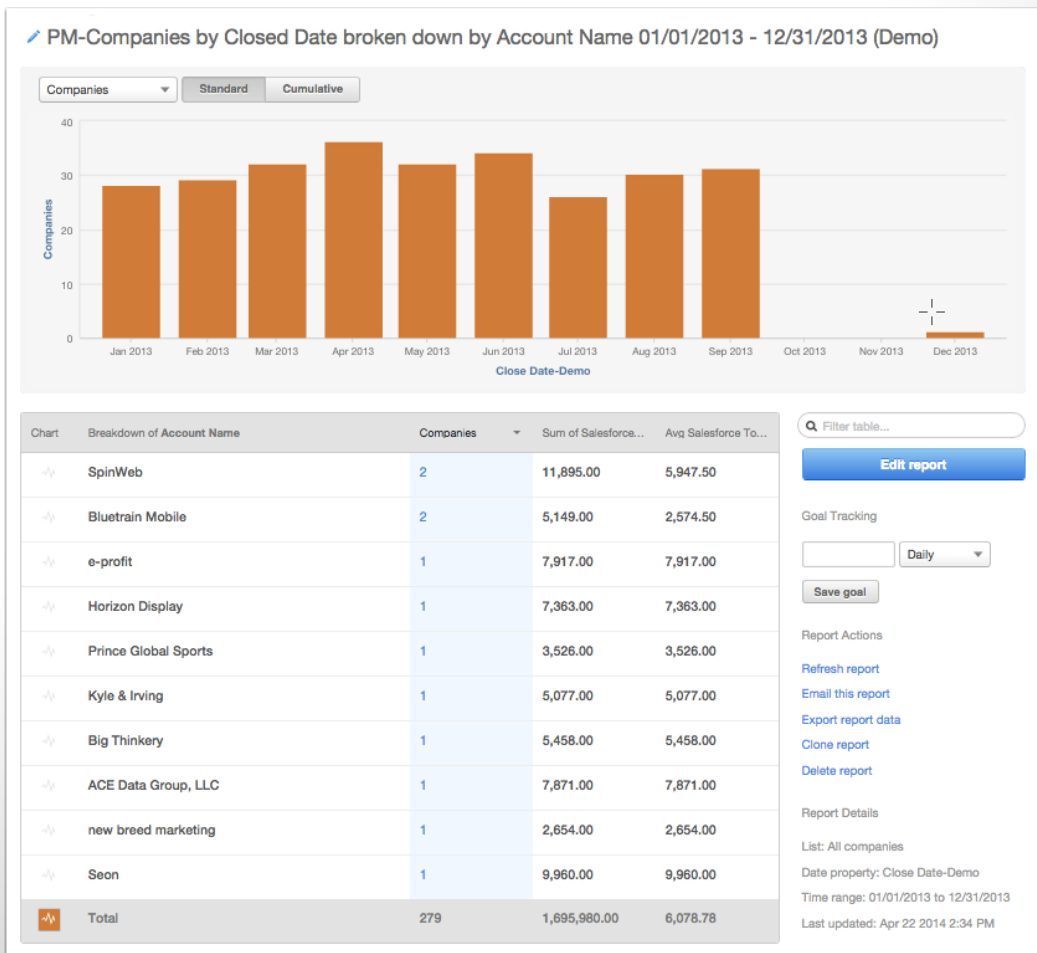
Salesforce Total Revenue x ▾

Save report

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

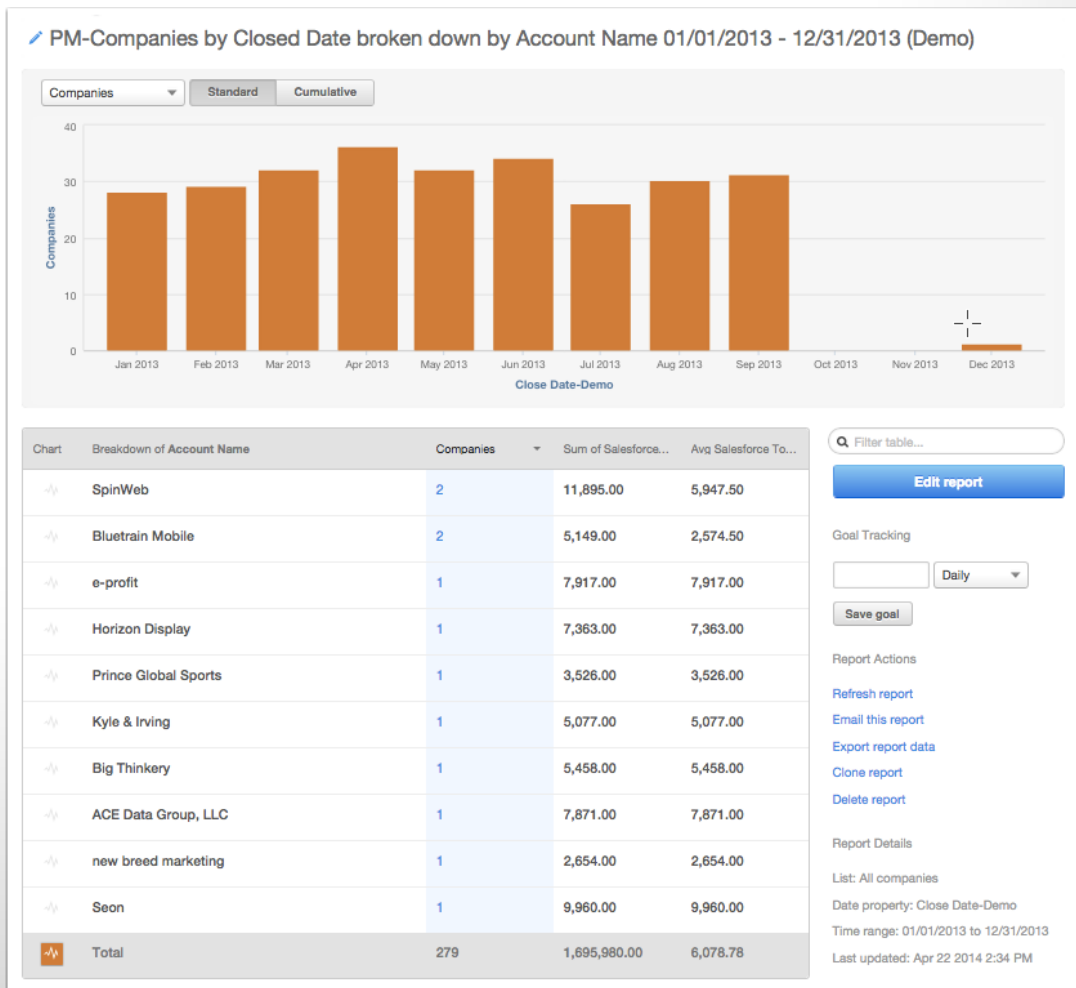


ACTION ITEMS:

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



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”**

PM-Companies by Closed Date broken down by Original Source Ty



Count

Example data

Close Date-Demo

Jan 2013 May 2013 May 2013 Jul 2013

Build your report

Choose a list.

All contacts Create a new list

Choose a conversion type and time period.

Close Date-Demo in 01/01/2013 - 08/31/2013 (monthly)

254 companies match the selected criteria.

Choose display options

Group contacts by

☐ Week

☒ Month

Break this report down by the following companies property (optional) ⓘ

Original Source Type x

Calculate the total value of the following numeric contact property (optional) ⓘ

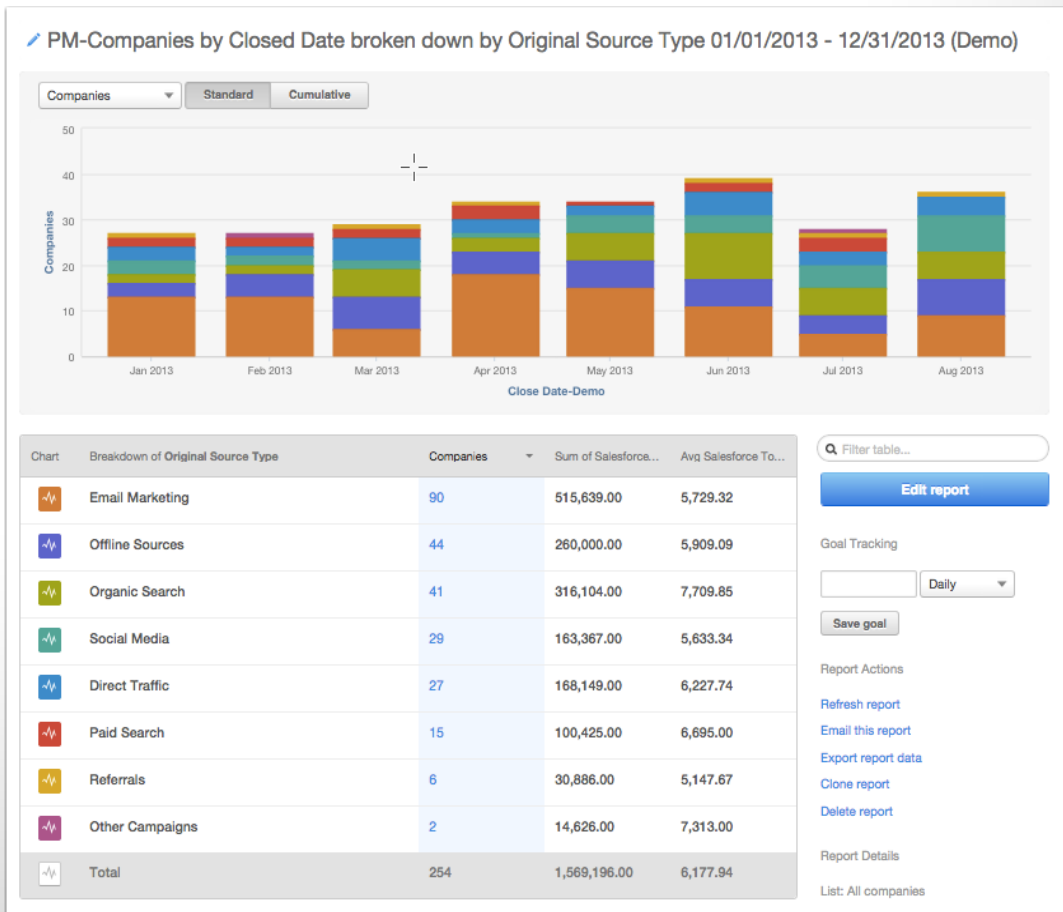
Salesforce Total Revenue x

Save report

TAKEAWAYS:

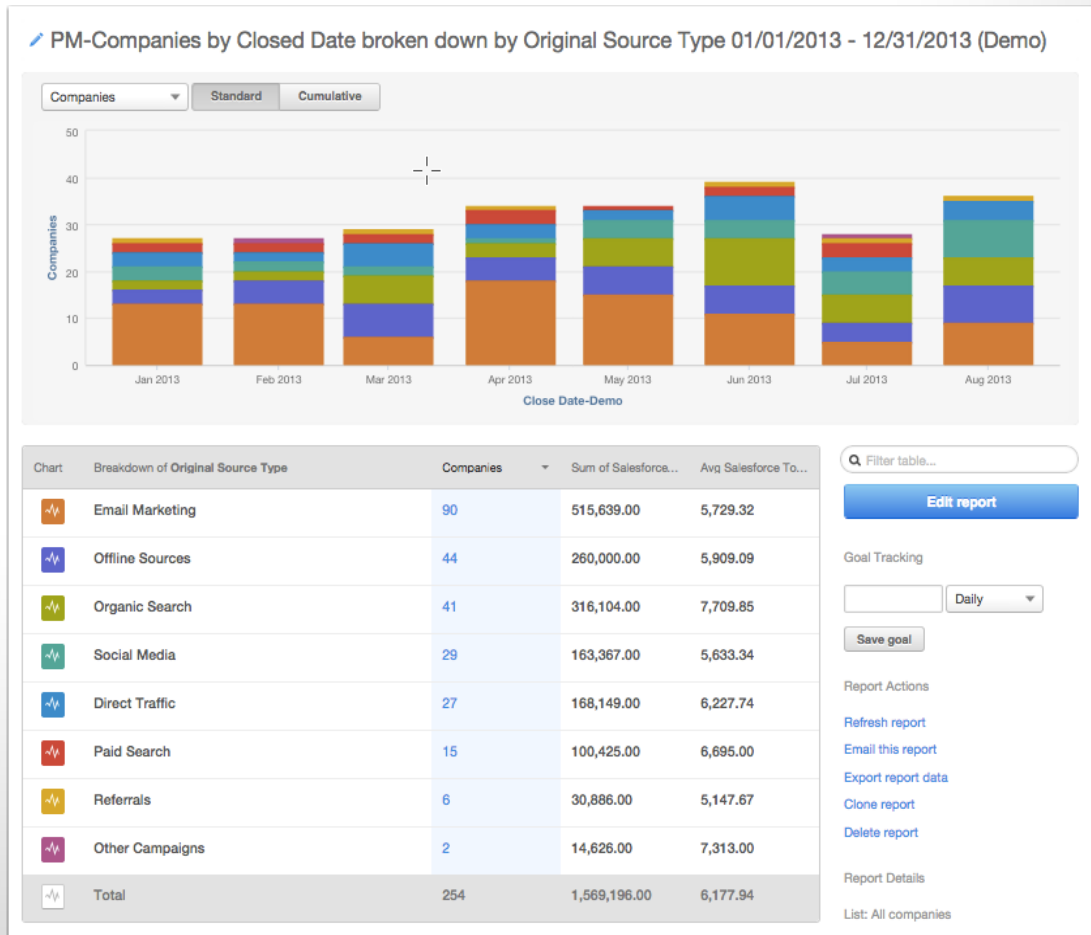
Understand which sources are best at acquiring new companies.

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



ACTION ITEMS:

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



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

Choose an interaction scoring type

Report on contact interactions with your website prior to conversion.

- ☒ **By URL** - URLs of pages on your website that contributed to conversion.
 - ☒ All interactions - All pages viewed.
 - ☐ First touch - First page ever viewed.
 - ☐ Last touch - First page viewed on the most recent visit to your site.
 - ☐ Last interaction - The page a contact converted on.
 - ☐ First and last interaction - The first and last page viewed, with equal weight given to each page.
 - ☐ Simple decay - The last six pages viewed, with more weight given to more recent pages.
- ☐ **By referrer** - URLs of referring pages that contributed to conversion.
- ☐ **By source** - Channels that brought a contact to your website.

Save report

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

The screenshot shows a web analytics interface for building an attribution report. At the top, a horizontal bar chart displays data for various referrers, with a label 'Example data' pointing to one of the bars. Below the chart, the 'Build your report' section contains three main configuration areas. The first area, 'Choose a list', has a dropdown menu set to 'All contacts' and a 'Create a new list' button. The second area, 'Choose a conversion type and time period', features a dropdown menu set to 'Create Date' and a date range selector showing '06/01/2013 - 06/30/2013 (monthly)'. Below these, it states '52,958 contacts match the selected criteria.' The third area, 'Choose an interaction scoring type', includes a sub-header 'Report on contact interactions with your website prior to conversion.' and a list of radio button options: 'By URL - URLs of pages on your website that contributed to conversion.', 'By referrer - URLs of referring pages that contributed to conversion.', 'All sessions - All external pages that referred a contact to your website.', 'First touch - The first external page that referred a contact to your website.', 'Last touch - The external page that referred a contact's most recent visit.', 'Last interaction - The page that referred a contact to the page they converted on.', 'First and last touch - The first and last external page that referred contacts to your website.', 'Simple decay - The last six external pages viewed, with more weight given to more recent pages.', and 'By source - Channels that brought a contact to your website.' The 'By referrer' option is selected. At the bottom of the form is a blue 'Save report' button. Four orange arrows originate from the text instructions on the left and point to the 'All contacts' dropdown, the 'Create Date' dropdown, the 'By referrer' radio button, and the 'Last interaction' radio button.

Referrer

Example data

Contacts assisted

Build your report

Choose a list.

All contacts

Create a new list

Choose a conversion type and time period.

Create Date

06/01/2013 - 06/30/2013 (monthly)

52,958 contacts match the selected criteria.

Choose an interaction scoring type

Report on contact interactions with your website prior to conversion.

☐ By URL - URLs of pages on your website that contributed to conversion.

☒ By referrer - URLs of referring pages that contributed to conversion.

☐ All sessions - All external pages that referred a contact to your website.

☐ First touch - The first external page that referred a contact to your website.

☐ Last touch - The external page that referred a contact's most recent visit.

☒ Last interaction - The page that referred a contact to the page they converted on.

☐ First and last touch - The first and last external page that referred contacts to your website.

☐ Simple decay - The last six external pages viewed, with more weight given to more recent pages.

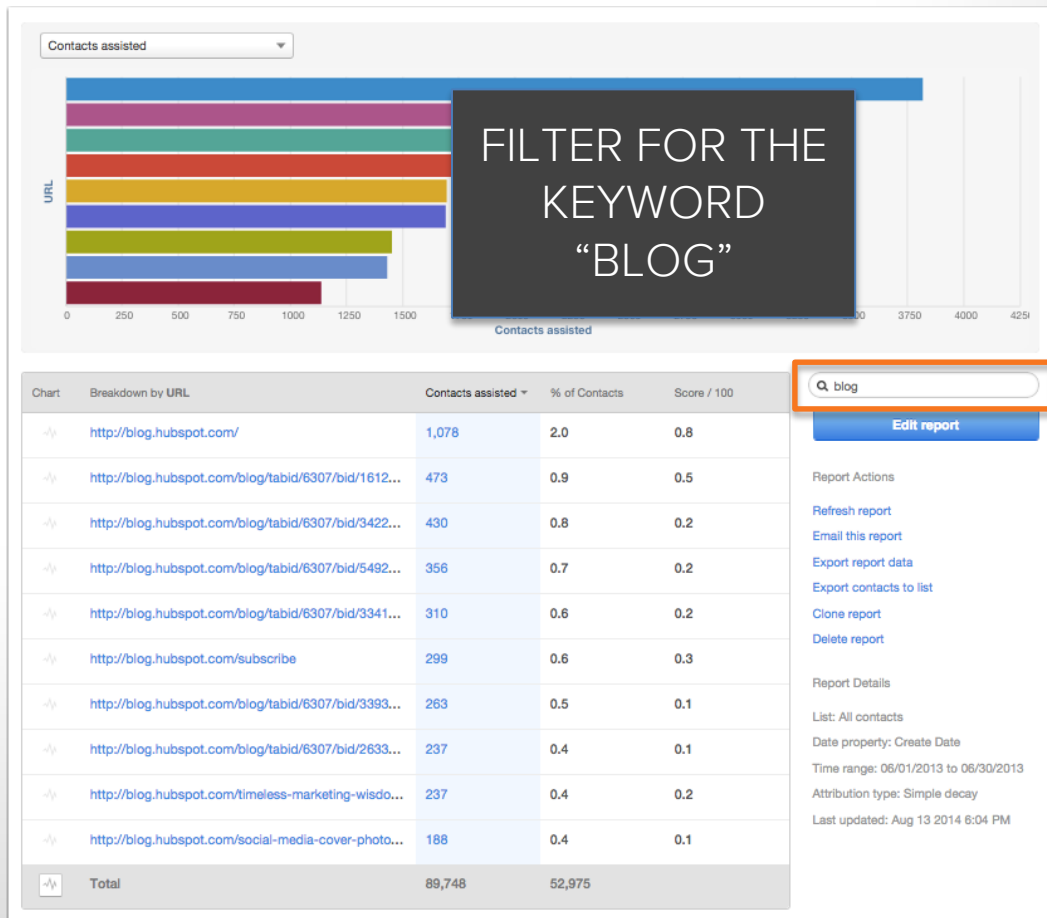
☐ By source - Channels that brought a contact to your website.

Save report

TAKEAWAYS:

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

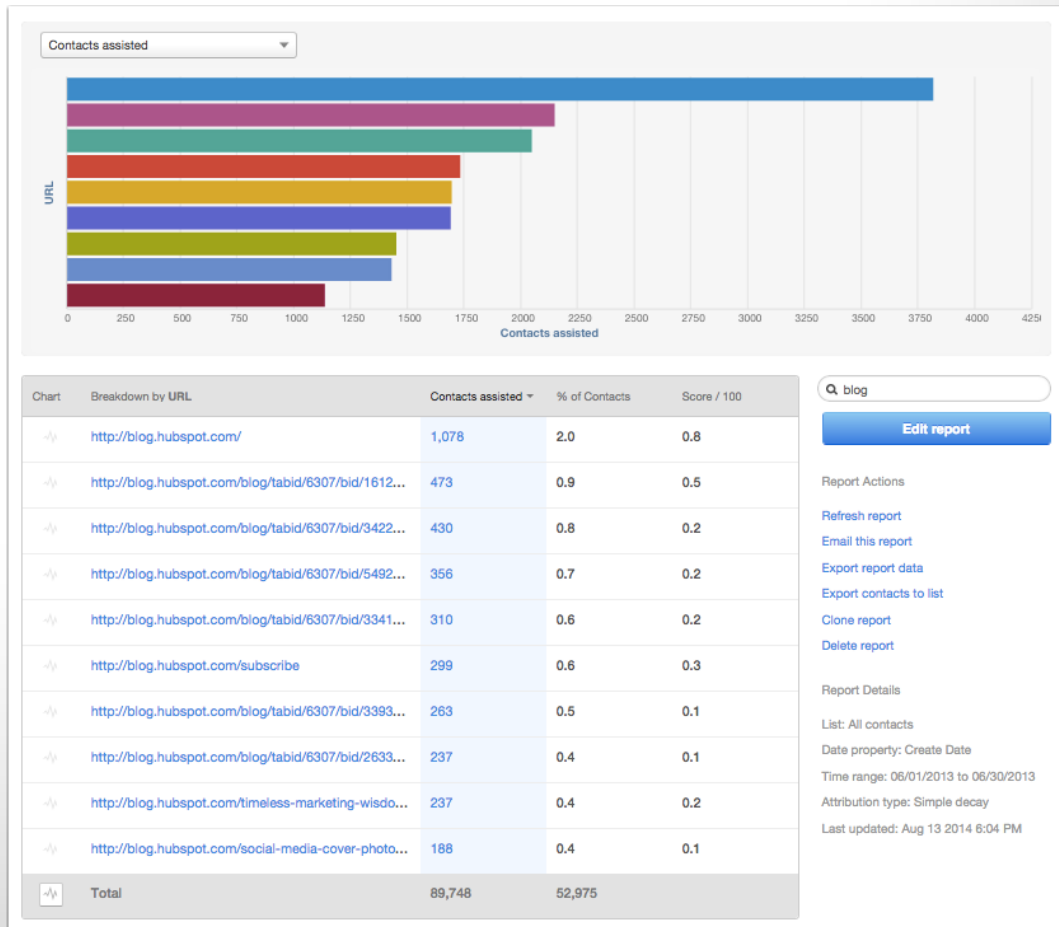
Find commonalities between the posts that are leading to conversions



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.

The screenshot shows a web analytics interface for building an attribution report. At the top, a horizontal bar chart displays data for various URLs, with a label 'Example data' pointing to one of the bars. Below the chart, the 'Build your report' section contains three main configuration areas. The first area, 'Choose a list', has a dropdown menu set to 'All contacts' and a 'Create a new list' button. The second area, 'Choose a conversion type and date range', has a dropdown menu set to 'Became a Marketing Qualified Lead...' and a date range selector for '06/01/2013 - 06/30/2013 (monthly)'. Below these, it states '4,646 contacts match the selected criteria.' The third area, 'Choose an interaction scoring type', has a radio button selected for 'By URL - URLs of pages on your website that contributed to conversion.' Other options include 'All interactions - All pages viewed.', 'First touch - First page ever viewed.', 'Last touch - First page viewed on the most recent visit to your site.', 'Last interaction - The page a contact converted on.', 'First and last interaction - The first and last page viewed, with equal weight given to each page.', 'Simple decay - The last six pages viewed, with more weight given to more recent pages.', 'By referrer - URLs of referring pages that contributed to conversion.', and 'By source - Channels that brought a contact to your website.' At the bottom of the form is a blue 'Save report' button. Three orange arrows originate from the text on the left: one points to the 'All contacts' dropdown, another points to the 'Became a Marketing Qualified Lead...' dropdown, and a third points to the 'By URL' radio button.

URL

Example data

Contacts assisted

Build your report

Choose a list.

All contacts

Create a new list

Choose a conversion type and date range.

Became a Marketing Qualified Lead...

06/01/2013 - 06/30/2013 (monthly)

4,646 contacts match the selected criteria.

Choose an interaction scoring type

Report on contact interactions with your website prior to conversion.

☒ By URL - URLs of pages on your website that contributed to conversion.

☐ All interactions - All pages viewed.

☐ First touch - First page ever viewed.

☐ Last touch - First page viewed on the most recent visit to your site.

☐ Last interaction - The page a contact converted on.

☐ First and last interaction - The first and last page viewed, with equal weight given to each page.

☐ Simple decay - The last six pages viewed, with more weight given to more recent pages.

☐ By referrer - URLs of referring pages that contributed to conversion.

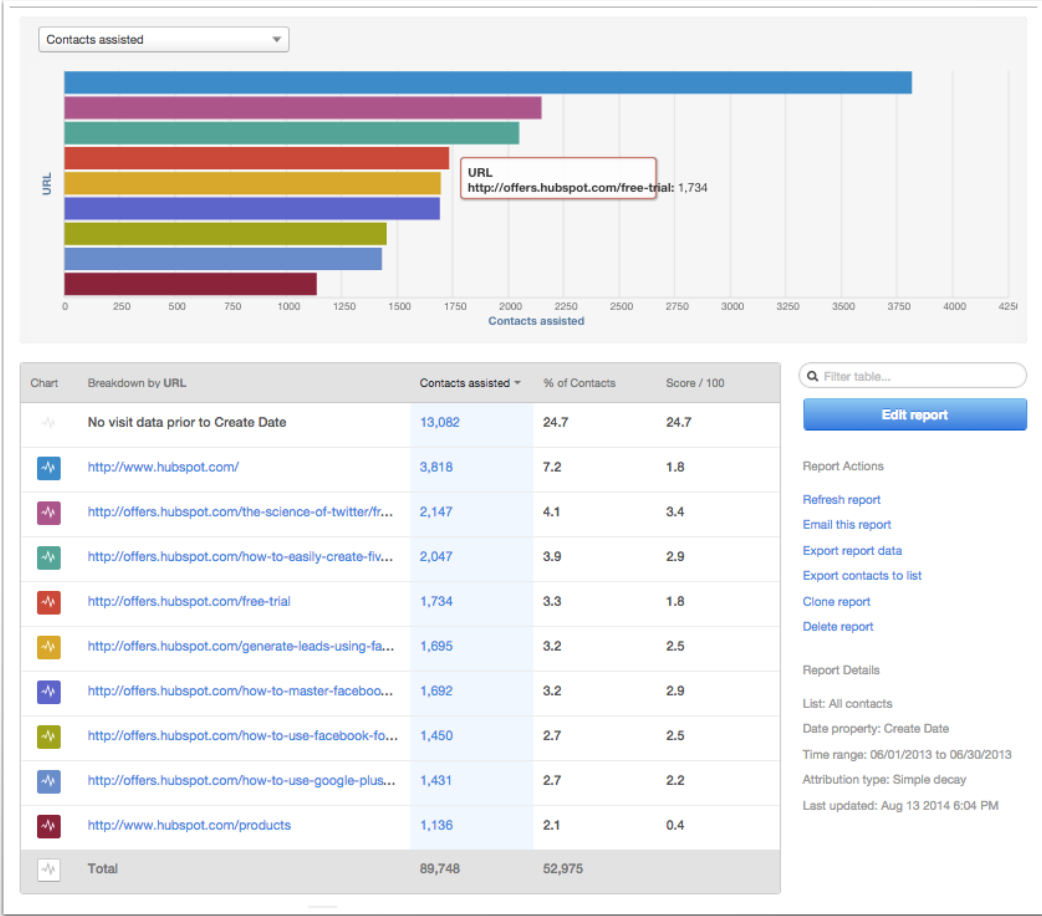
☐ By source - Channels that brought a contact to your website.

Save report

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.

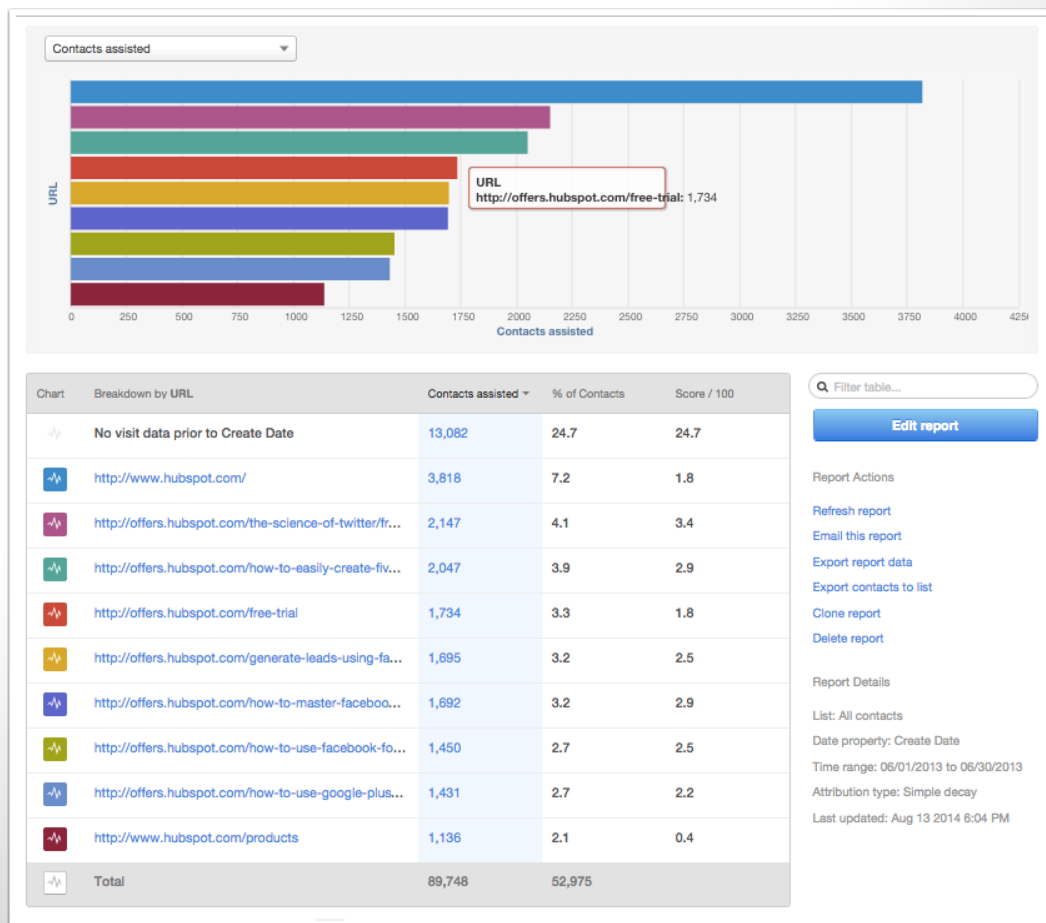


ACTION ITEMS:

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

Use the HubSpot 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.