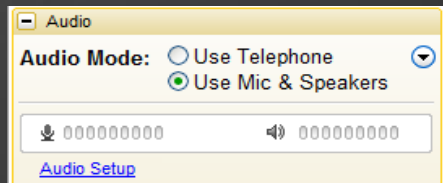


USING CONTEXTUAL REPORTING TO MASTER YOUR MARKETING

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



WEBINAR SCHEDULE

11/6 - Digging into Your Database With Custom Reports

11/13 - Closing the Loop on Your Marketing with Revenue

11/20 - Understanding Cause and Effect in Your Marketing



Mark Kilens

@MarkKilens

Rachel Sprung

@RSprung





Nate
Ciruolo

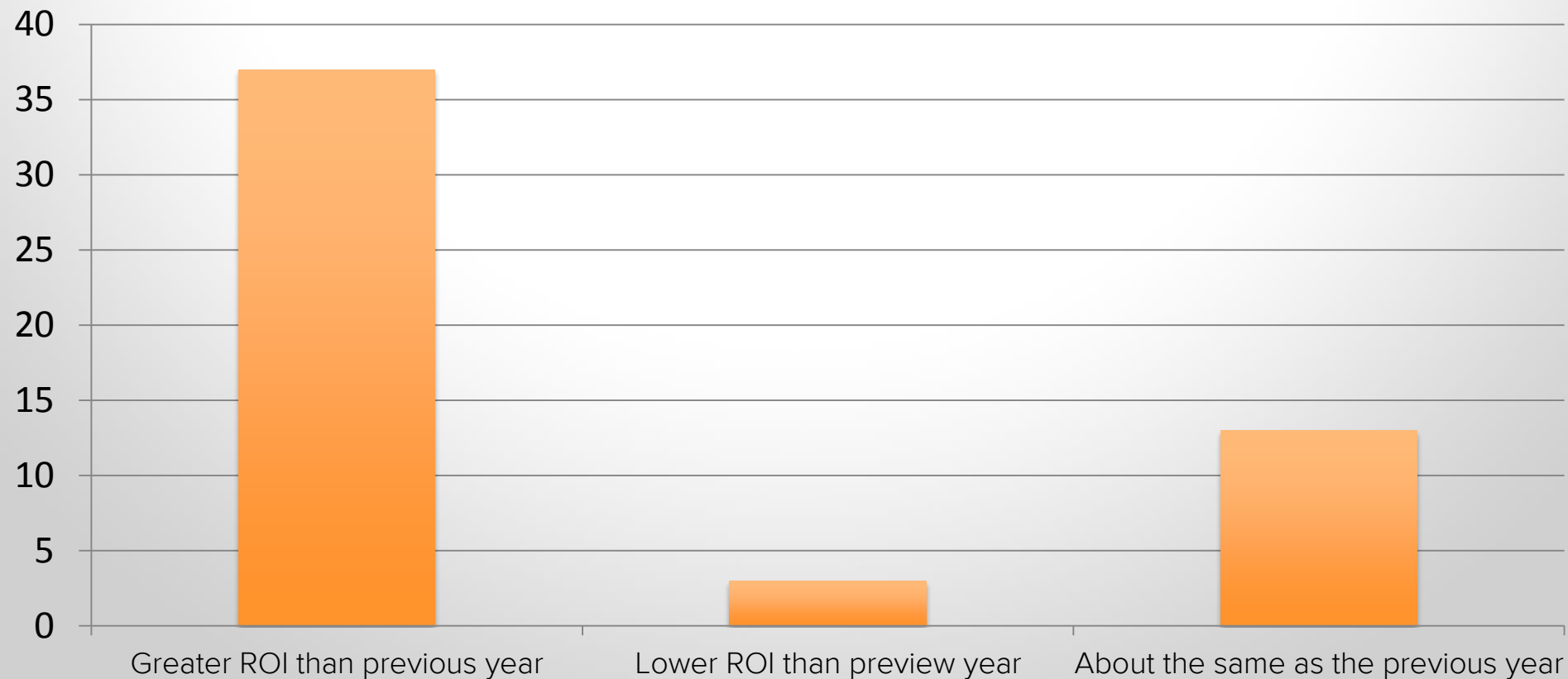
@NathanCiruolo

AGENDA

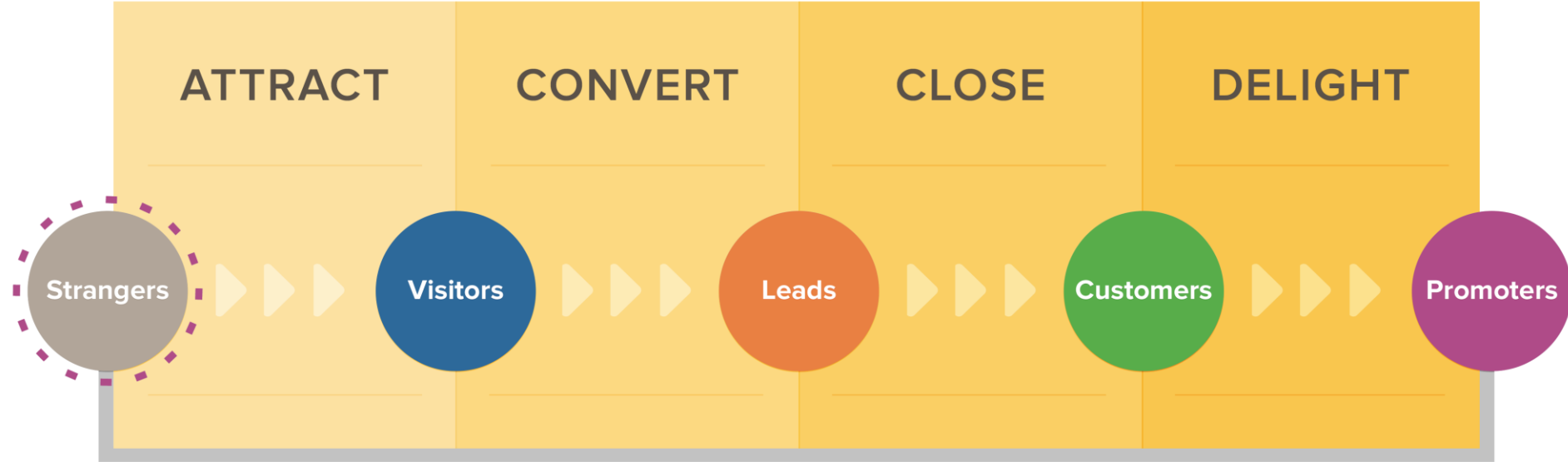
- 1 The importance of context in reporting
- 2 Ask the right questions
- 3 Understanding what reports tell you
- 4 Contacts & Companies report demo

1 THE IMPORTANCE OF CONTEXT IN REPORTING.

Inbound marketers that measure ROI see a major impact



Inbound Methodology



by **HubSpot**

**WHERE DO
YOU START?**

Sample Sally

BACKGROUND:

- Head of Human Resources
- Worked at the same company for 10 years; worked her way up from HR Associate
- Married with 2 children (10 and 8)

DEMOGRAPHICS:

- Skews female
- Age 30-45
- Dual HH Income: \$140,000
- Suburban

IDENTIFIERS:

- Calm demeanor
- Probably has an assistant screening calls
- Asks to receive collateral mailed/printed



All topics

All content types

Sorted by:

Published date

Search...



#TweetSmarter Webinar
2014

Webinar



Live Webinar: How to Get
50k Email Subscribers in a...

Webinar



How to Master Your Own
Personal Brand

Ebook



The Guide to Marketing your
Agency

Ebook



The State of Inbound: Sales
Edition 2014-2015

Ebook



How to Use Social Selling at
Every Stage of the Buy...

Ebook



State of Inbound 2014-2015

Ebook



Behind the Content

Ebook



Free Chapter: Create
Remarkable Content

Ebook



An Introduction to LinkedIn
for Business

Ebook



The C-Suite's Guide to Social
Media

Ebook



Anatomy of Inbound:
Visualizing the 5 Essential
Ele...

Recently Viewed Content

[Free Template: Create Buyer Personas
For Your Business](#)

[State of Inbound 2014-2015](#)

[2013 State of Inbound Marketing](#)

Inbound Marketing Resources



[Inbound Marketing Blog](#)



[HubSpot on Twitter](#)



[HubSpot on Facebook](#)



[HubSpot on LinkedIn](#)



[HubSpot on YouTube](#)



[HubSpot on SlideShare](#)



[HubSpot on Flickr](#)



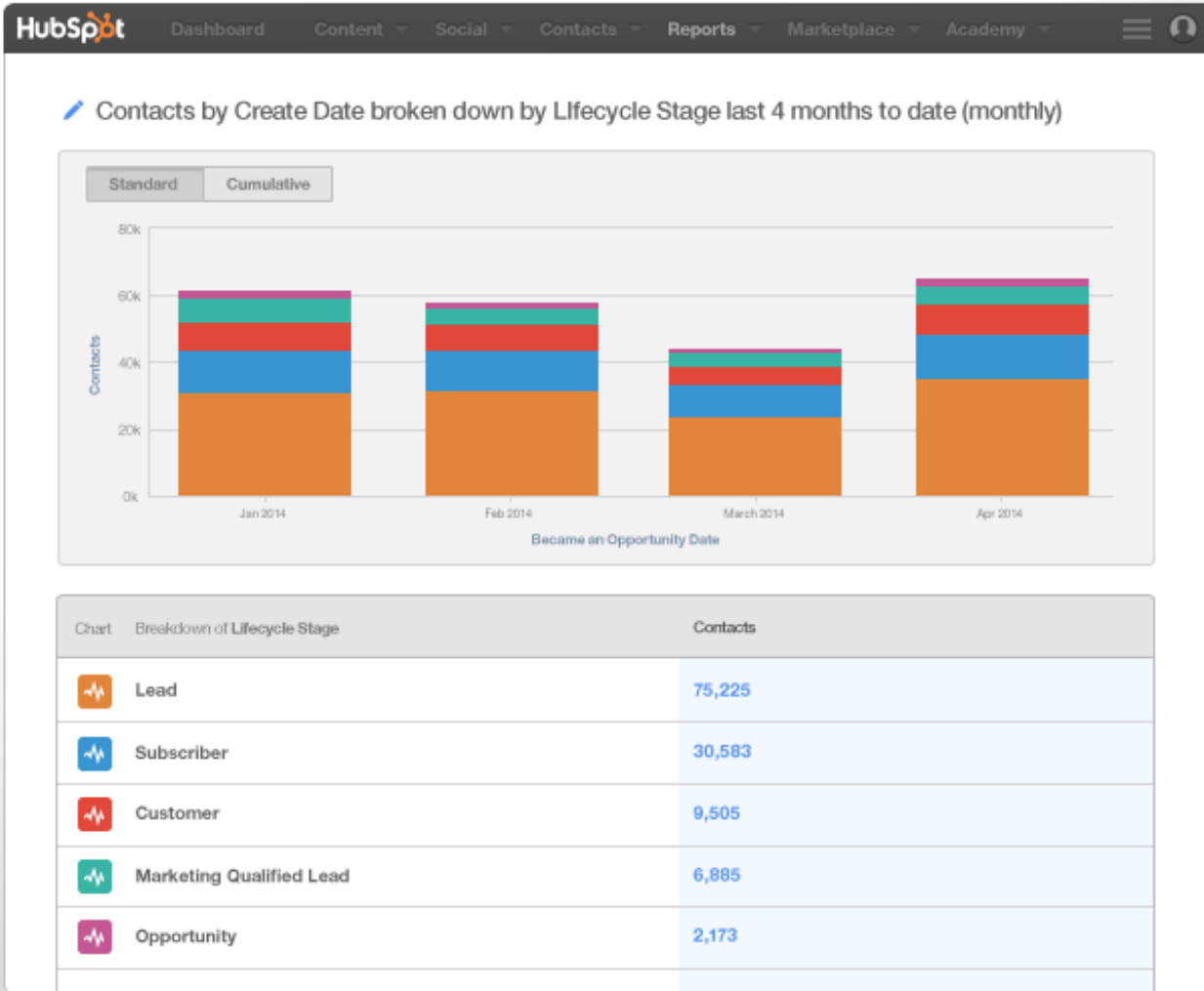
[Inbound Marketers Group](#)

[Library Topics](#)

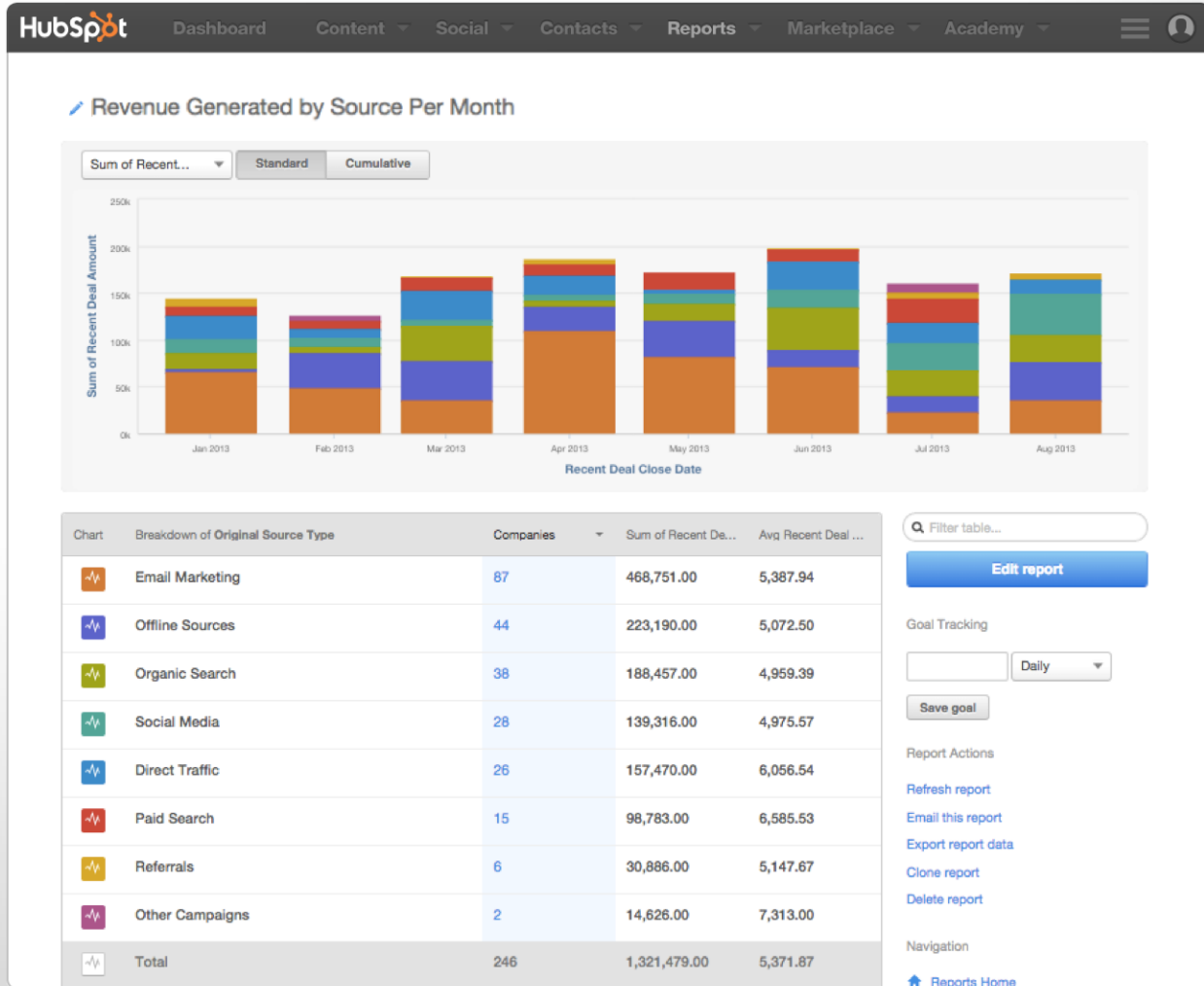
CONTEXT WILL HELP YOU UNDERSTAND:

- The topics that resonate with your audience
- The format of your content
- The channels or sources that drive visitors
- How to drive conversions throughout your funnel

HUBSPOT CONTACTS REPORT.



HUBSPOT COMPANIES REPORT.



RUNNING THESE REPORTS CAN HELP YOU:

- Focus on the efforts that generate results
- Better prioritization
- Understand your marketing to budget properly for the future

REPORTS COULD TELL YOU:

- That content you have created attracts visitors, but not leads.
- That one of your personas generates more revenue than others.
- That one of your marketing channels generates more MQLs than others.
- That your favorite topic actually doesn't resonate with your persona.

2 ASK THE
RIGHT QUESTIONS.

**“Pull an analysis on
your marketing.”**

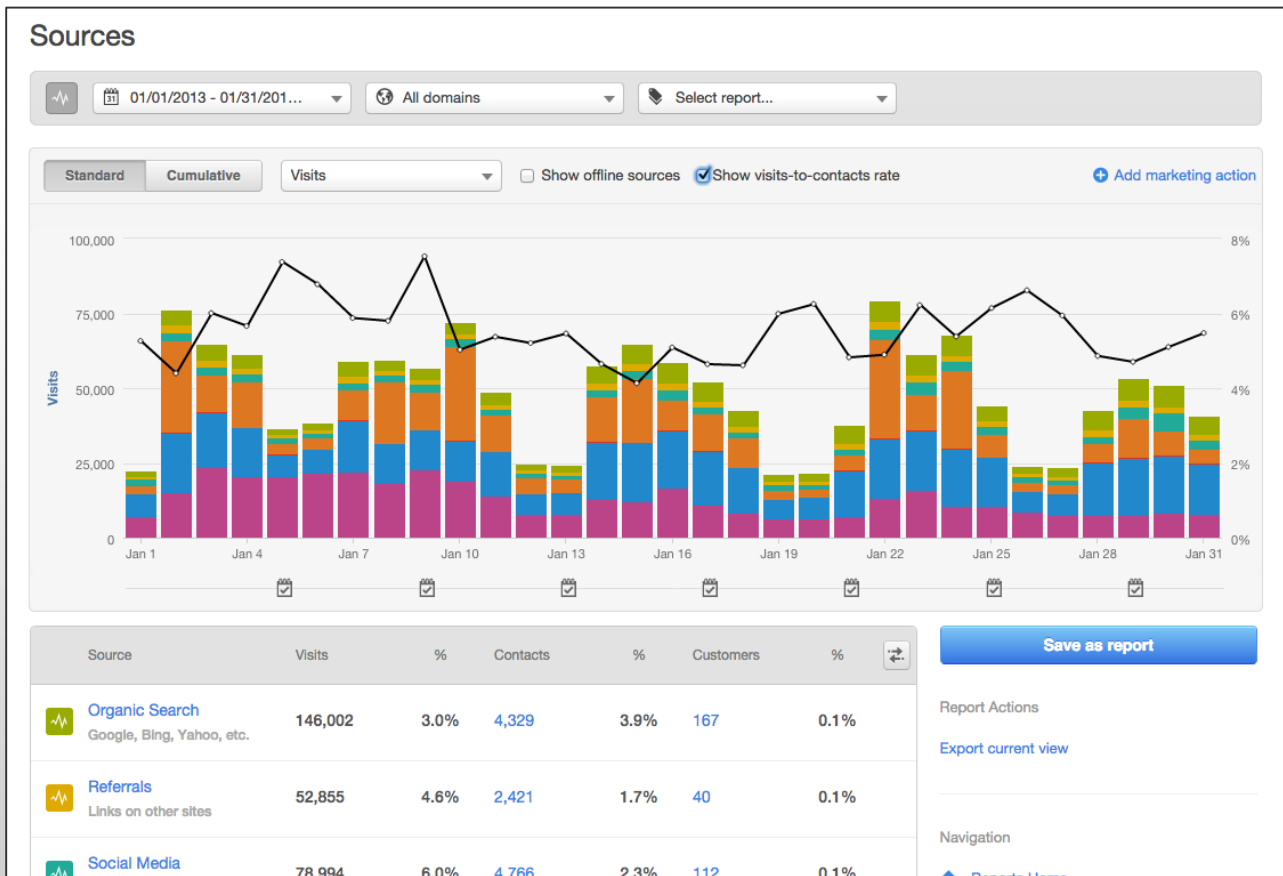
-Your boss

**“Pull an analysis on
your marketing.”**

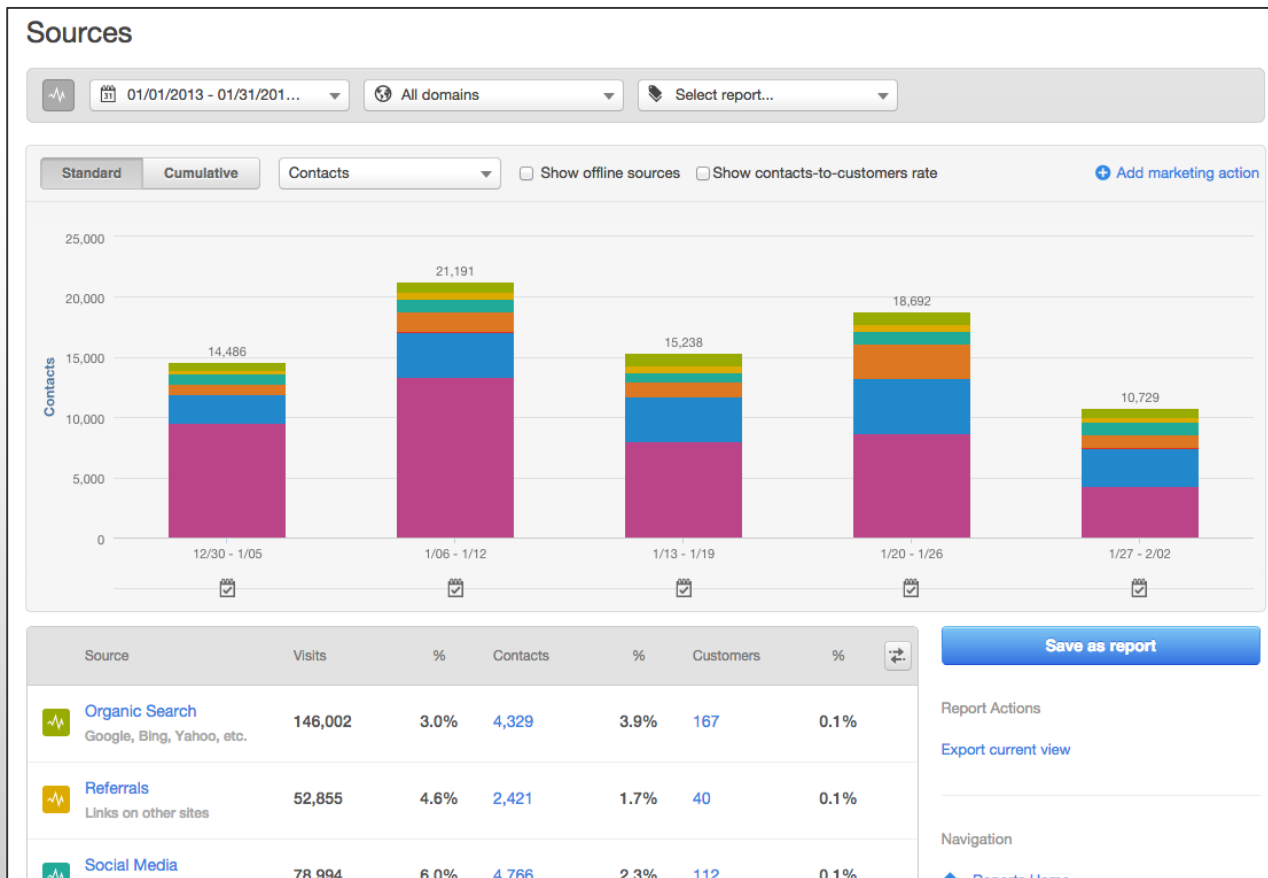
-Your boss



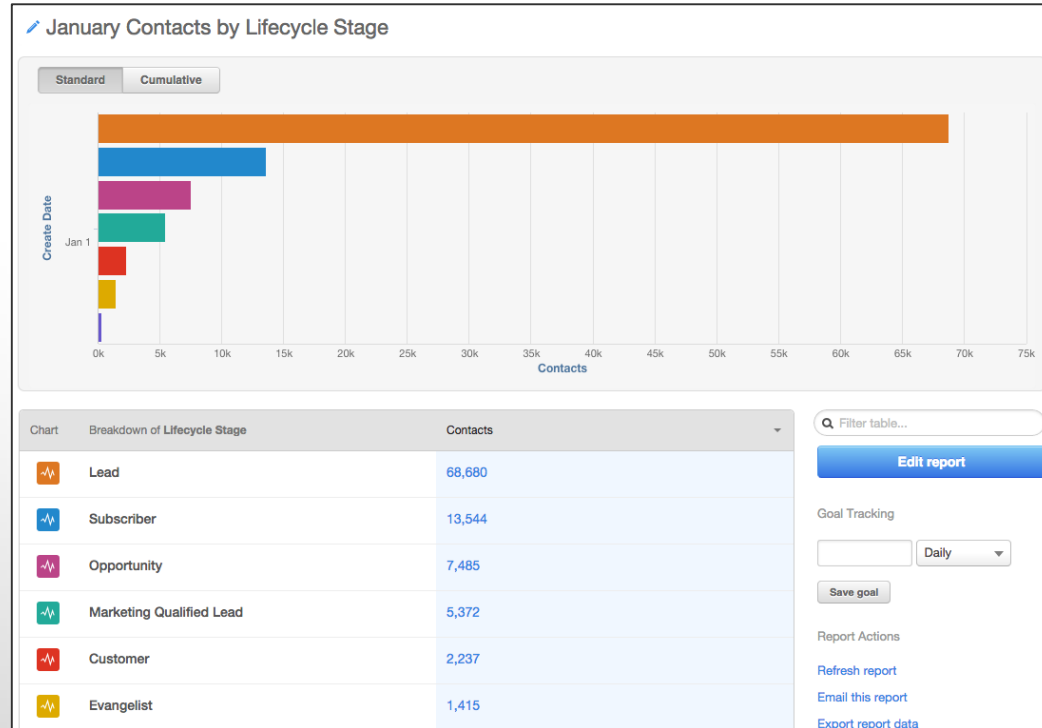
HOW MANY CONVERSIONS DO MY PAGES GET?



HOW MANY LEADS DO I GENERATE PER MONTH?

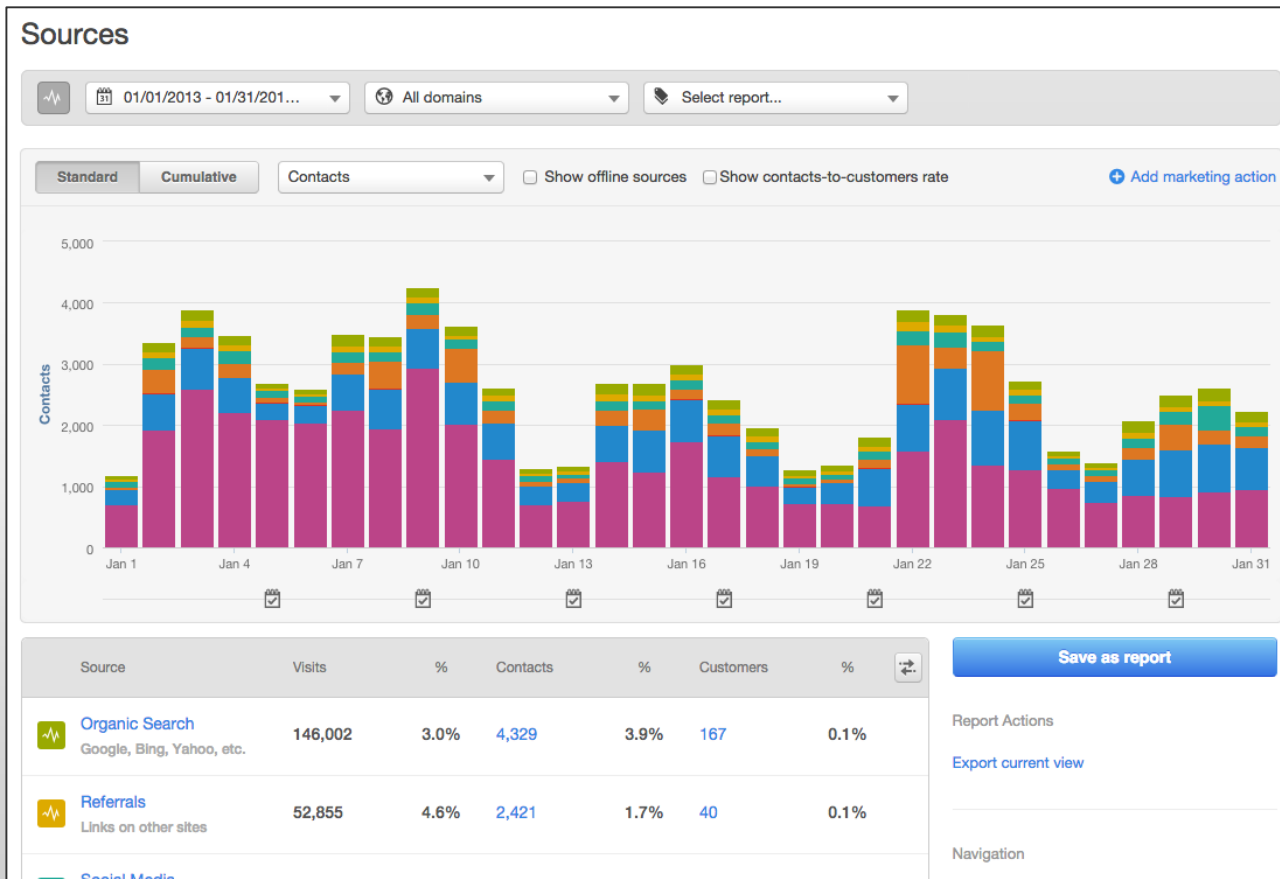


HOW MANY MQLS DO I GENERATE PER MONTH?

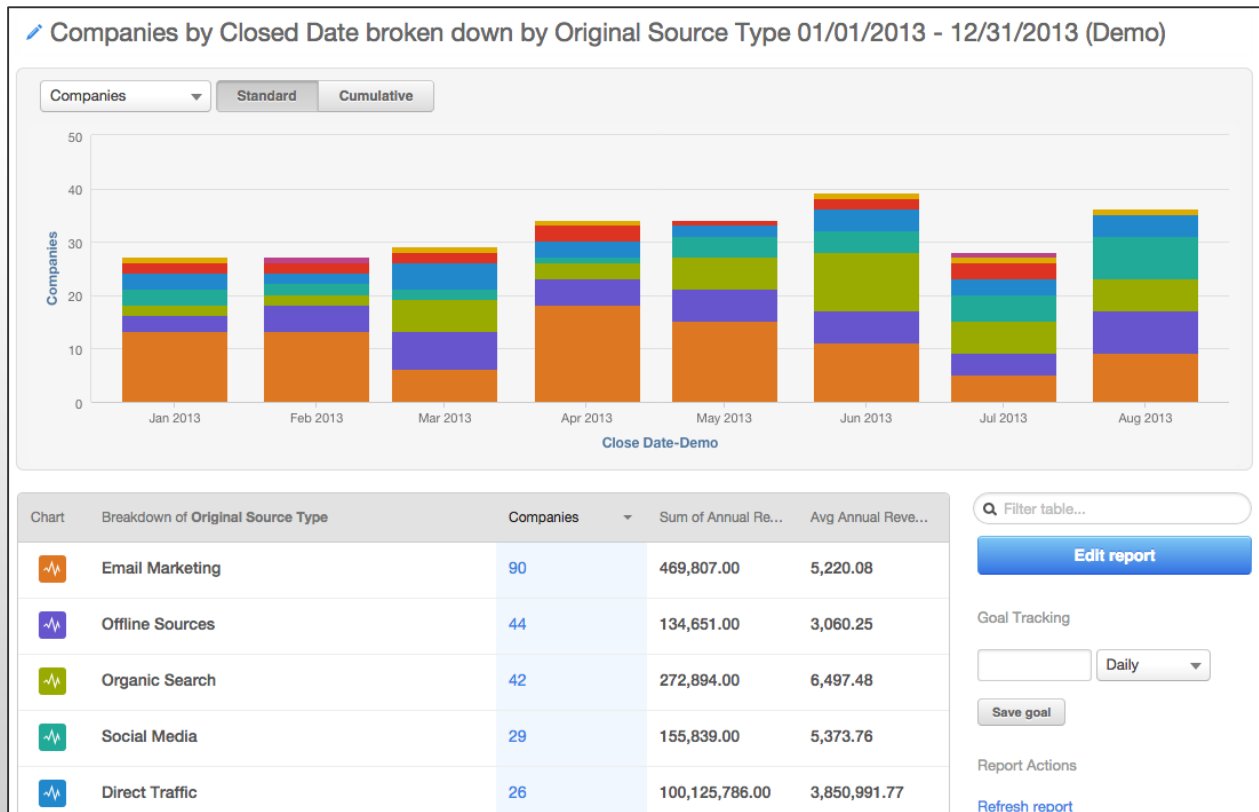


MQL = Marketing Qualified Lead.

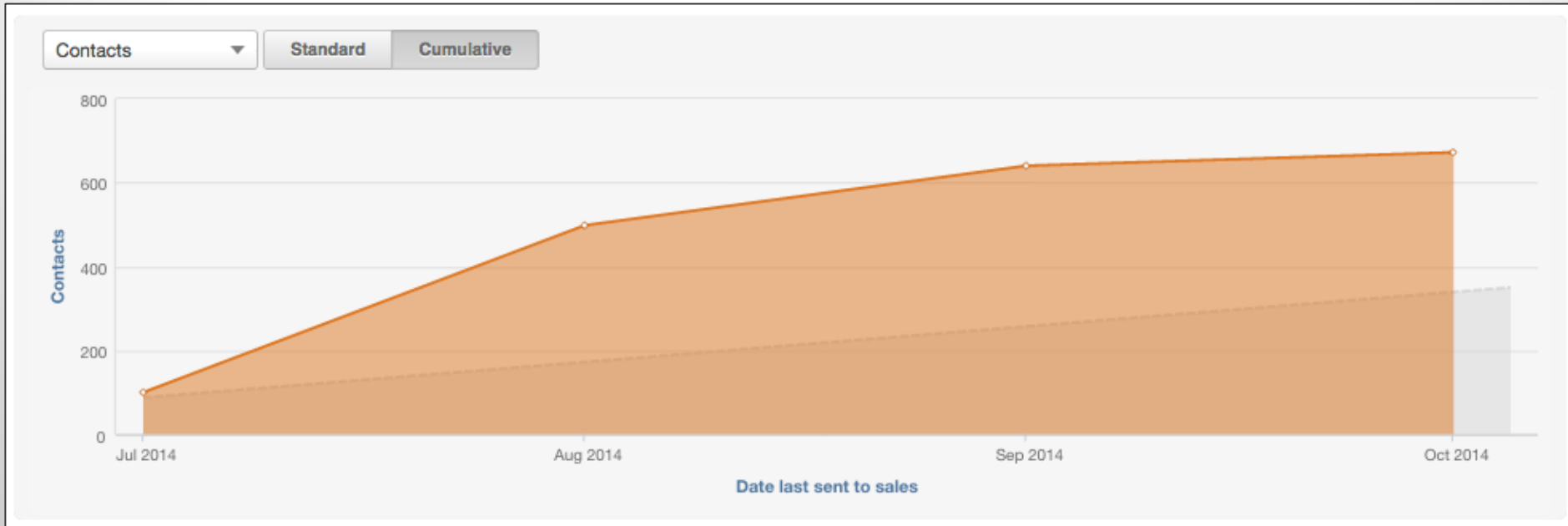
WHAT CHANNEL GENERATES THE MOST LEADS?



AM I ALLOCATING ENOUGH RESOURCES TO MY STRONGEST CHANNELS?



CUSTOMER EXAMPLE



Customer keeps track of the contacts sent to sales by individual sales report. This report is used to break down how many contacts each sales rep receives and closes.

3 UNDERSTANDING WHAT REPORTS TELL YOU.

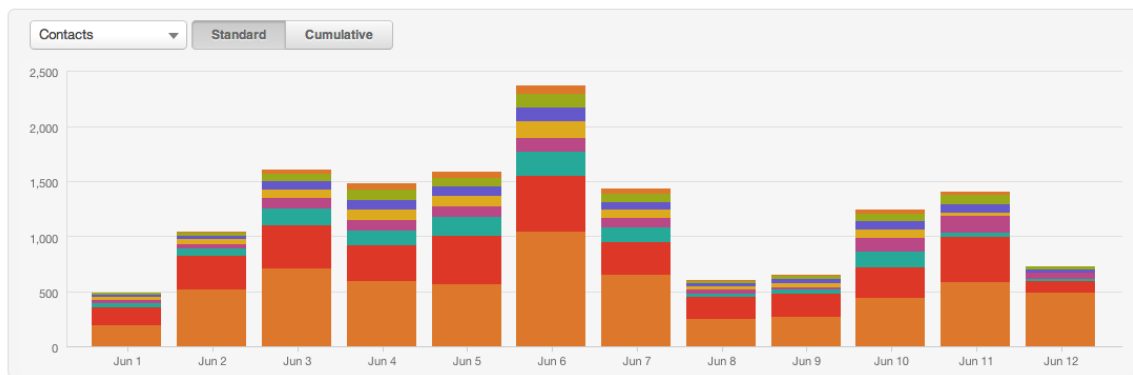
What does the report tell you?

- You are getting the most amount of contacts from International and your 1:10 segment.
- The SLA value weights the importance of those contacts. Therefore 11:200 is the most valuable segment with this metric.

Action items:

- Consider the campaigns you are running with your most successful segments and see how you can replicate them.
- If you are not segmenting content and communication toward different audiences, see if there are opportunities to do that.

All Contacts By Persona - This Month to Date



Select all Select none

Q Search...

Chart	Breakdown	Contacts	Sum of SLA Value	Avg SLA Value
	International	6,207	2,142.88	0.35
	Property not set	5,833	0.00	0.00
	1:10	3,650	1,514.59	0.41
	VAR	1,175	2,188.27	1.86
	11:200	8,107.64	8.52	
	Experiment	747	2,646.07	3.54
	Non-Profit/Edu	727	4,064.03	5.59
	200+	716	4,207.41	5.88
	Outbound	383	3,716.10	9.70
	Total	20,390	28,586.99	1.40

Edit report

Report Tools

[View all reports](#)

[Refresh report](#)

[Email this report](#)

[Export report data](#)

[Clone report](#)

[Delete report](#)

Goal

50000

Monthly

[Clear goal](#)

Report Parameters

From:

06/01/2013

To:

06/11/2013

Frequency:

Daily

What does the report tell you?

- Email marketing is your most successful channel.
- Organic Search is generating the second highest amount of revenue.
- Paid Search and Referrals are not generating customers.

Action items:

- See what pages are generating the most search traffic. Optimize other pages to help increase organic search.
- Dig in to your best practices for email marketing and see if they can apply to other channels.

Companies by Closed Date broken down by Original Source Type 01/01/2013 - 12/31/2013

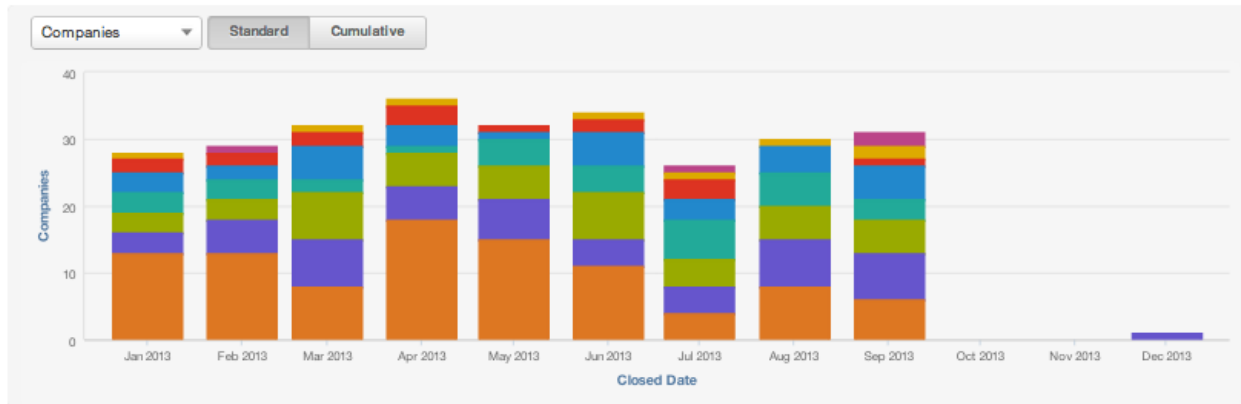


Chart	Breakdown of Original Source Type	Companies	Sum of Salesfo...	Avg Salesforce...
	Email Marketing	96	549,071.00	5,719.49
	Offline Sources	49	279,056.00	5,695.02
	Organic Search	31	336,742.00	7,653.23
	Social Media	31	173,499.00	5,596.74
	Direct Traffic	31	194,137.00	6,262.48
	Paid Search	16	101,426.00	6,339.13
	Referrals	8	40,997.00	5,124.63
	Other Campaigns	4	21,052.00	5,263.00
	Total	279	1,695,980.00	6,078.78

Filter table...

Edit report

Goal Tracking

Daily

Save goal

Report Actions

Refresh report

Clone report

Delete report

Navigation

Reports Home

View all of your saved reports.

Trends & Suggestions

React to your current trends.

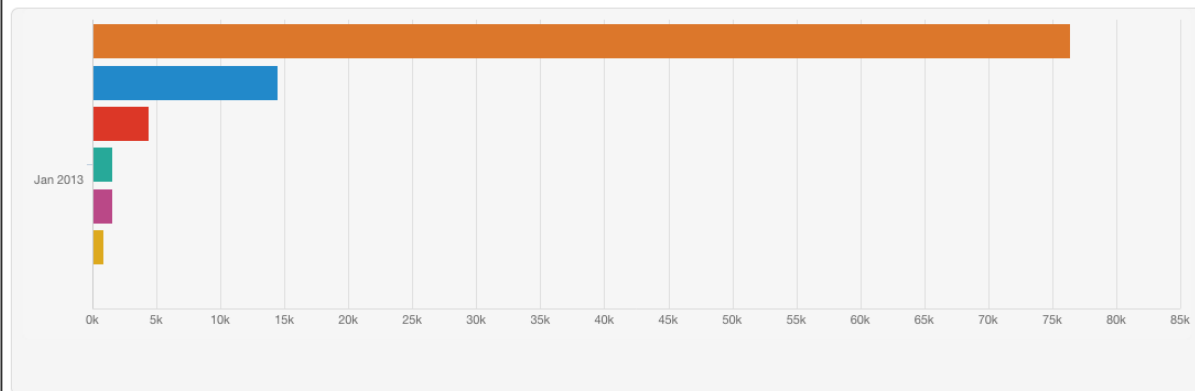
What does the report tell you?

- You are generating a lot of leads, but that isn't translating into as many customers.

Action items:

- Dig into what could be blocking your lead to customer conversion.
- See what content is moving leads to marketing qualified leads. Can you show them that content sooner in their lifecycle?

January Contacts by Lifecycle Stage



Select all

Select none

Q Search...

Chart	Breakdown	Contacts
	Lead	76,304
	Subscriber	14,409
	Marketing qualified lead	4,358
	Customer	1,532
	Opportunity	1,499
	Evangelist	826
	Other	17
	Property not set	4
	Total	98,949

Edit report

Report Tools

[View all reports](#)

[Refresh report](#)

[Email this report](#)

[Export report data](#)

[Clone report](#)

[Delete report](#)

[+ Save goal](#)

Report Parameters

From:
01/01/2013

To:
01/31/2013

Frequency:
Monthly

Created On:

KEY TAKEAWAYS

1. Focus on more than your top page or channel
2. Dig into the marketing efforts that are working, and see how you can replicate its success across different channels.
3. Find the trends in your content that may give you an indication about your success.

4 CONTACTS & COMPANIES REPORT DEMO.





LIVE
DEMO.

**EVERYTHING
STARTS WITH A LIST.**

Lists » New List

What's the name of this list?

What type of list do you want?

- ☒  **Smart list** – Add contacts continuously according to rules you set
- ☐  **Static list** – Add contacts manually

Which contacts should be in this list?

Include contacts who meet all of these requirements:



Contact Property

account_type__c

is equal to

Enter a value



Contact Property

Company Property

List Membership

Form Submission

Email

Page View



+ Add another set of requirements

Test contact against this list

Save list

Which contacts should be in this list?

Include contacts who meet all of these requirements:

Form Submission

Contact has filled out

[Universal Subscribe LP - Custo...

on any page

no filter

Refine

Add another requirement

No filter



No filter

Rolling dates

On or before date

On or after date

Between dates

Number of times

Preview list size

Test contact against this list

Save list



CONTACTS REPORT

Step 1:
Under Reports
Home, select
create a new
report.

HubSpot

DashboardContentSocialContactsReportsResources

2

Rachel Sprung

Reports

Tour

All report types

All time

By anyone

Search...

Create a new report

Report	Created on	
<div>Companies by Create Date broken down by Salesforce Total Revenue all time</div> <div>Companies reports</div>	03/26/2014	
<div>Companies by Create Date broken down by Salesforce Total Revenue all time</div> <div>Companies reports</div>	03/26/2014	
<div>Companies by First Contact Create Date broken down by Lifecycle Stage all time</div> <div>Companies reports</div>	03/25/2014	
<div>Companies by First Contact Create Date broken down by Annual Revenue all time</div> <div>Companies reports</div>	03/25/2014	
<div>Companies by Create Date broken down by Original Source Type all time</div> <div>Companies reports</div>	03/21/2014	
<div>Contacts by Create Date broken down by Lifecycle Stage this year to date</div> <div>Contacts reports</div>	03/20/2014	
<div>Jay Test: Companies by First Contact Create Date broken down by Lifecycle Stage this ye...</div> <div>Companies reports</div>	03/20/2014	
<div>Zapier testing</div> <div>Event analysis</div>	01/28/2014	
<div>Viewed Pricing Page</div> <div>Event analysis</div>	12/09/2013	
<div>Autogenerated: Video "We Love Music": 100% Watched</div> <div>Event analysis</div>	10/03/2013	

Sources

Find out how your online visitors, leads and customers are finding you.

Page Performance

Analyze and optimize your individual website pages.

Conversion Assists

Learn more about which pages are helping to convert more visitors.

Competitors

Measure and improve your marketing compared with your competitors.

Event Analysis

Track clicks and custom events to investigate how your visitors behave on your site.

Links

Monitor and build inbound links.

Tracking URL Builder


Build links to track your marketing campaigns.

Reports Settings


Find your tracking code and adjust other analytics settings.

Step 2a: Select Contacts Report.


Choose report type




Sources
Find out which marketing sources are generating visits, new contacts and customers




Contacts Report
Build custom reports based on the data you've collected about your contacts



Event Analysis
Track visitor actions on your website and find out what they did to get there



Companies Report
Build custom reports based on the data you've collected about companies




Attribution Report
Build custom reports to discover the conversion paths of your contacts

Create report

Step 2b:
Select Start
From Scratch or
one of the pre-
built reports.

Create a report




Contacts Report

Build a report based on the data you've collected about your contacts.

☒ **Start From Scratch**

Customize a report to see exactly the information you want.

☐ **Contacts Revenue Last Month** 




Understand how much revenue you have made from the contacts in your database.

☐ **Lifecycle Stage Distribution**

Visualize how your contacts move through the funnel over time.

☐ **Most Converting Offers**


Discover which offers are creating the most new leads.



Create report

Step 3:

Select the criteria for your report.

[Marketing](#) [Dashboard](#) [Content](#) [Social](#) [Contacts](#) [Reports](#) [Partner](#) 

Create Contacts Report

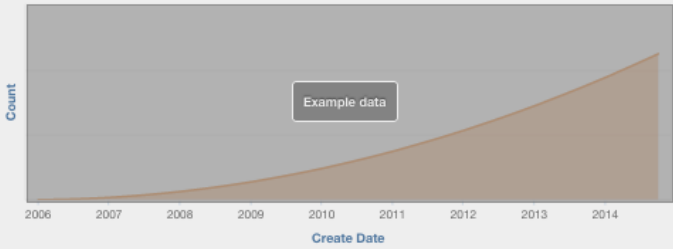
[Tutorial](#) [Tour](#)

[Back to all reports](#)

[Contacts by Create Date all time](#)

Navigation

- [Reports Home](#)
- [Create a new report](#)
- [Browse Recipes](#)



Count

Create Date

Example data

Build your report

Choose a list.

[Create a new list](#)

Choose a conversion type and time period.

in

4,242 contacts match the selected criteria.

Choose display options

Group contacts by

☐ Week

☒ Month

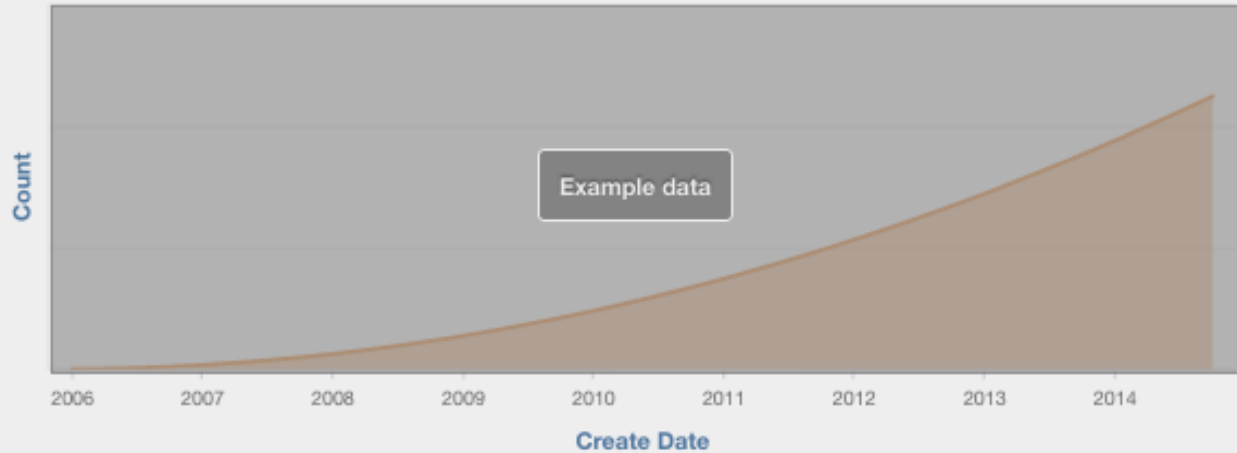
Break this report down by the following contacts property (optional) ⓘ

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

[Create report](#)

Contacts by Create Date all time

Select any contact list you have, create a new list, or create a report based off all of your contacts.



Build your report

Choose a list.

#InboundLearning Webinar List

Create a new list

Choose a conversion type and time period.

Create Date

in

All time

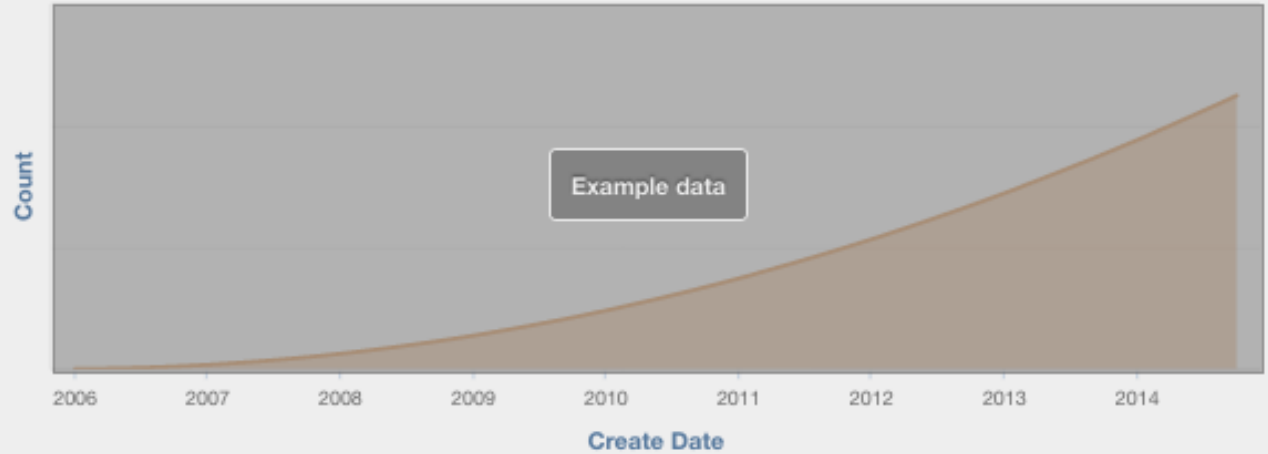
4,958 contacts match the selected criteria.

Contacts by Create Date all time

Select a label for the x axis of your report.

This will be your date label.

Examples include Create Date, Close Date, Days to Close, etc.



Build your report

Choose a list.

#InboundLearning Webinar List

Create a new list

Choose a conversion type and time period.

Create Date

in

All time

4,958 contacts match the selected criteria.

Contacts by Create Date 01/01/2013 - 10/03/2014

Select a date range.

You can choose the last week or month or use a custom date range.



Build your report

Choose a list.

#InboundLearning Webinar List

Create a new list

Choose a conversion type and time period.

Create Date

in

01/01/2013 - 10/03/2014

622 contacts match the selected criteria.

Contacts by Create Date 01/01/2013 - 10/03/2014

Select a date frequency.

That means daily, weekly, or monthly.



Build your report

Choose a list.

#InboundLearning Webinar List

Create a new list

Choose a conversion type and time period.

Create Date

in

01/01/2013 - 10/03/2014

622 contacts match the selected criteria.

Choose display options

Group contacts by

☐ Week

☒ Month



Choose a companies property to break up your report. Your results will show up as a stacked bar graph.

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) ?

Create report

Use this field to calculate a numeric property for the companies in your report.

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) ?

Days to Close x ▼



Create report



COMPANIES REPORT

Step 1:
Under Reports
Home, select
Create a new
report.

HubSpot Dashboard Content Social Contacts **Reports** Resources Rachel Sprung

Reports [Tour](#)

All report types All time By anyone Search...

[Create a new report](#)

Report	Created on
Companies by Create Date broken down by Salesforce Total Revenue all time Companies reports	03/26/2014
Companies by Create Date broken down by Salesforce Total Revenue all time Companies reports	03/26/2014
Companies by First Contact Create Date broken down by Lifecycle Stage all time Companies reports	03/25/2014
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Jay Test: Companies by First Contact Create Date broken down by Lifecycle Stage this ye... Companies reports	03/20/2014
Zapier testing Event analysis	01/28/2014
Viewed Pricing Page Event analysis	12/09/2013
Autogenerated: Video "We Love Music": 100% Watched Event analysis	10/03/2013

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Analyze and optimize your individual website pages.

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Measure and improve your marketing compared with your competitors.

Event Analysis
Track clicks and custom events to investigate how your visitors behave on your site.


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Find your tracking code and adjust other analytics settings.

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Track visitor actions on your website and find out what they did to get there



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Build custom reports based on the data you've collected about companies








Attribution Report

Build custom reports to discover the conversion paths of your contacts

[Create report](#)


Step 2b:
Select Start
From Scratch or
one of the pre-
built reports.


Create a report








Companies Report
Build a report based on the data you've collected about companies.

☒ **Start From Scratch**
Customize a report to see exactly the information you want.

☐ **Companies Revenue Last Month** 
Understand how much revenue you have made from the companies in your database.

☐ **Companies Revenue by Source This Year** 
Learn which channels generate the most revenue for your business.

☐ **Companies Revenue by First Conversion** 
Prove how much ROI your business receives from your content.

Create report

Step 3:

Select the criteria for your report.

[Marketing](#) [Dashboard](#) [Content](#) [Social](#) [Contacts](#) [Reports](#) [Partner](#)

Create Companies Report

[Overview Video](#)

[Back to all reports](#)

Companies by Create Date all time

Navigation

- [Reports Home](#)
- [Create a new report](#)
- [Browse Recipes](#)

Count

Create Date

Build your report

Choose a list.

[Create a new list](#)

Choose a conversion type and time period.

in

296 companies match the selected criteria.

Choose display options

Group contacts by

☐ Week

☒ Month

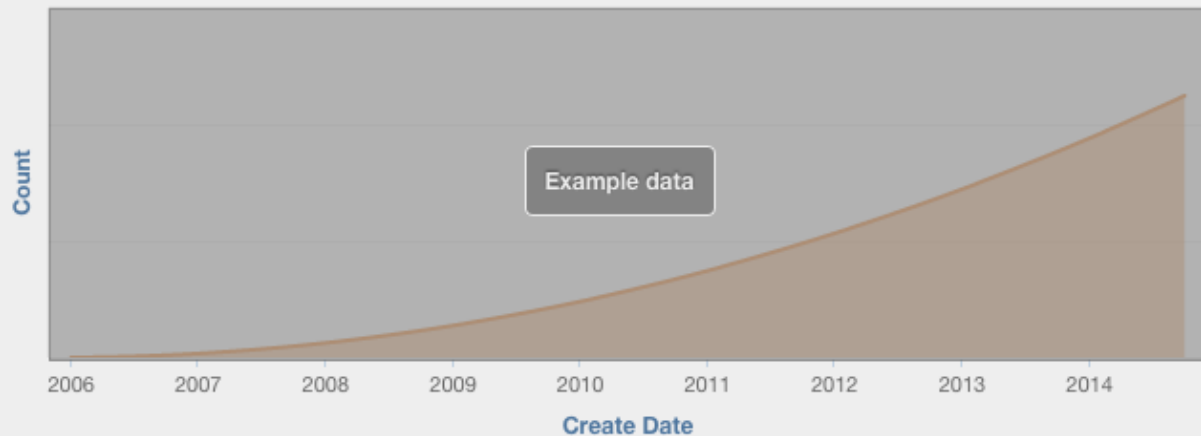
Break this report down by the following companies property (optional) ⓘ

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

[Create report](#)

Companies by Create Date all time

Select any contact list you have, create a new list, or create a report based off all of your contacts.



Build your report

Choose a list.

#InboundLearning Webinar List

Create a new list

Choose a conversion type and time period.

Create Date

in

All time

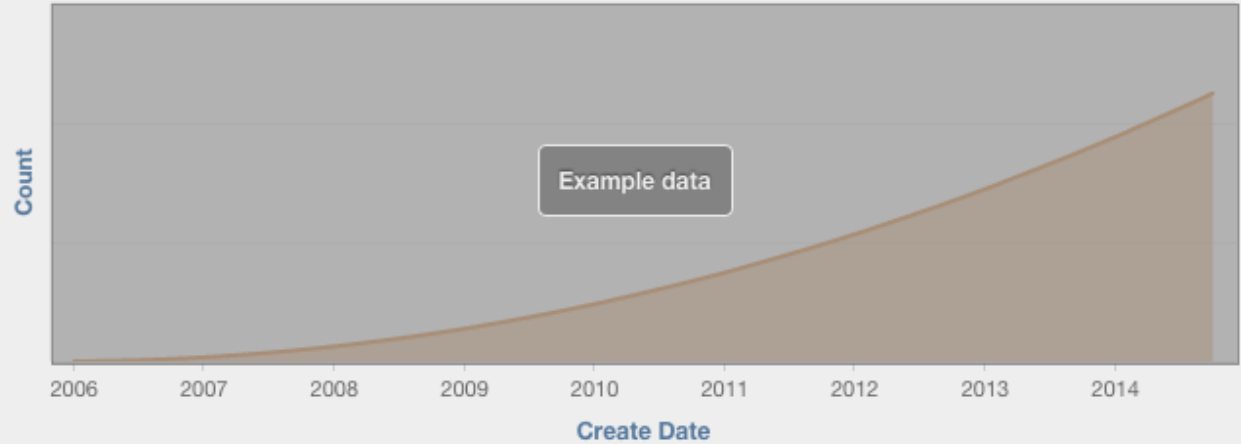
4,667 companies match the selected criteria.

Companies by Create Date all time

Select a label for the x axis of your report.

This will be your date label.

Examples include Create Date, Close Date, Days to Close, etc.



Build your report

Choose a list.

#InboundLearning Webinar List

Create a new list

Choose a conversion type and time period.

Create Date

in

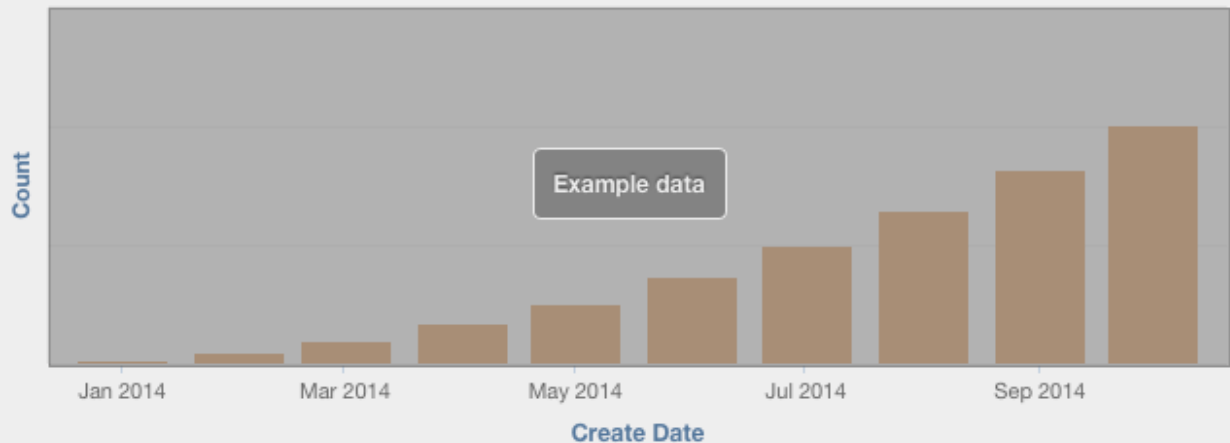
All time

4,667 companies match the selected criteria.

Companies by Create Date this year to date

Select a date range.

You can choose the last week or month or use a custom date range.



Build your report

Choose a list.

#InboundLearning Webinar List

Create a new list

Choose a conversion type and time period.

Create Date

in

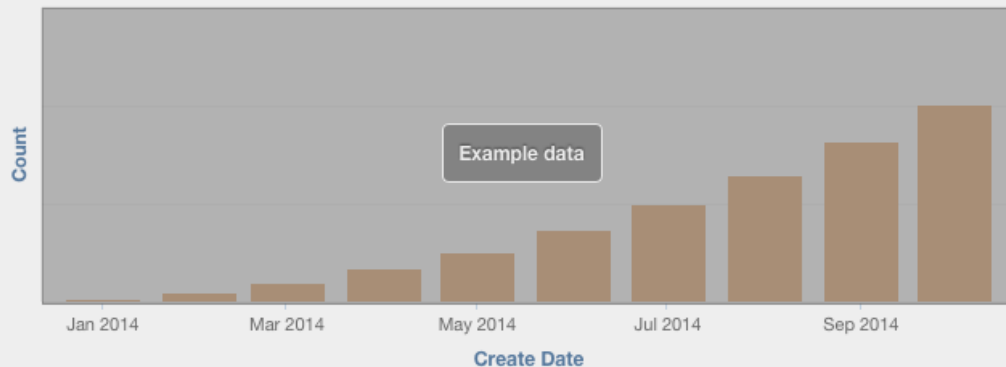
This year to date

4,667 companies match the selected criteria.

Companies by Create Date this year to date

Select a date frequency.

That means daily, weekly, or monthly.



Build your report

Choose a list.

#InboundLearning Webinar List

Create a new list

Choose a conversion type and time period.

Create Date

in

This year to date

4,667 companies match the selected criteria.

Choose display options

Group contacts by

☐ Week

☒ Month



Choose a companies property to break up your report.

Your results will show up as a stacked bar graph.

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) ?

Create report

Use this field to calculate a numeric property for the companies in your report.

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) ?

Days to Close x ▼



Create report



PRO TIPS.

- **Get into the habit of checking your reports.** Check the progress of your reports a couple of times a week. (Put a reminder on your calendar!)
- **Improve.** Consider how you can improve your results.
- **Don't be afraid of change.** If a campaign isn't working but you are halfway through the month, don't be afraid to make some big changes to drive improved metrics.

Try HubSpot Enterprise for yourself!

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

TRY OUT YOUR REPORTS – bit.ly/HSreports

Reports [Tour](#)

New: Find out which channels, content, and customers bring you the most revenue. [Report on revenue](#)

Create a new report

▲ 28%

VISITS FROM ORGANIC
Sep 20 - Sep 27

▲ 11%

VISITS FROM SOCIAL MEDIA
Sep 20 - Sep 27

▼ 31%

VISITS FROM PAID SEARCH
Sep 20 - Sep 27











2 more trends ▶

All report types

All time

Created by anyone

Search...

Report	Created on
 Contacts Revenue Last Month (HS Recipes) <small>Contacts reports</small>	10/03/2014 
 Contacts by Create Date broken down by Original Source Type this month to date <small>Contacts reports</small>	10/03/2014 
 Frequent Pages Viewed That Generate Leads (HS Recipes) <small>Attribution reports</small>	10/02/2014 
 Frequent Pages Viewed That Generate Leads (HS Recipes) <small>Attribution reports</small>	10/02/2014 
 Website Content & Blog Posts That Generate Leads (HS Recipes) <small>Attribution reports</small>	10/02/2014 

Sources

Find out how your online visitors, leads and customers are finding you.

Recipes

Explore commonly used reports to help you measure performance.

Competitors

Measure and improve your marketing compared with your competitors.

Event Analysis

Track clicks and custom events to investigate how your visitors behave on your site.

Links

Monitor and build inbound links.

NEXT STEPS

1. Ask the right questions. Look at recipes to help you get started.
2. Find trends in your data that you can replicate across different channels.
3. Segment your database using lists to find more detailed information about your contacts.
4. Break your reports down further by different contact and company properties.

THIS WEEK YOU LEARNED:

- 1 The importance of context in your reports
- 2 The right questions to ask when reporting
- 3 What you can learn from your report data
- 4 How to use reporting on contacts and companies in your database

NEXT WEEK YOU WILL LEARN:

- 1 The importance of revenue reporting
- 2 How to get revenue reporting in HubSpot
- 3 Use cases for using revenue reporting

RESOURCES

- [How to create a Contacts report](#)
- [How to create a Companies report](#)
- [Which Marketing Analytics Should You Be Looking At?](#)
- [6 Incredibly Insightful Marketing Reports You Should Be Running](#)

QUESTIONS?



THANK YOU &
SEE YOU NEXT WEEK.