ENTERPRISE REPORTING RECIPE BOOK.

HubSpot

Ready?

Check out the next **2 slides** for an example of how we will display each report**.**

HubSpot

This will be the title of the report

Report in Edit Mode:

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.

This section will show you how the report is constructed.

○ Week
○ Month

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

Original Source Type   ✕ ▼

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

▼

Save report

List Criteria:

Include contacts who meet all of these requirements: ⧉ ✖

⚑ Contact Property   ▼   First Referring Site   ▼   contains the word   ▼   ✕ blog.hubspot.com   ⊟
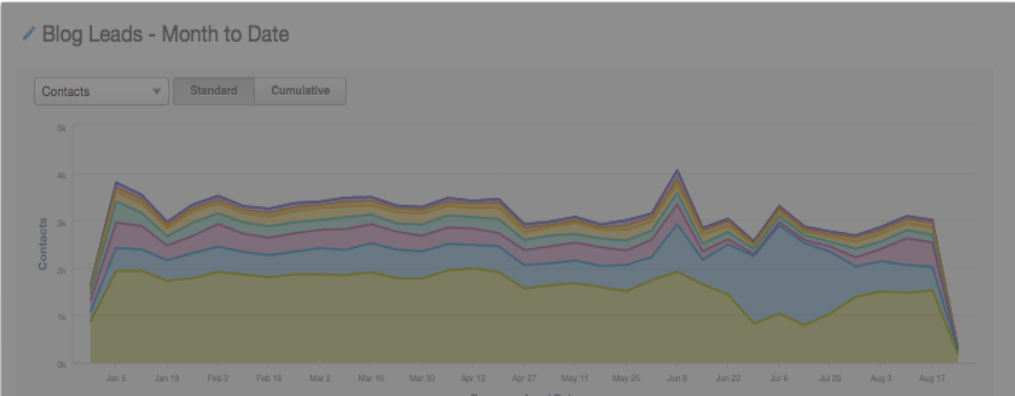
Add another requirement

This section will explain or show the criteria used for the list of contacts off which the report is built

Also, include contacts who meet all of these requirements: ⧉ ✖

⚑ Contact Property   ▼   Original Source Data 1   ▼   contains the word   ▼   ✕ blog.hubspot.com   ⊟

Add another requirement

REPORT TAKEAWAYS PAGE

Blog Leads - Month to Date

Example of how the graph will look

Organic Search	55,105	171,473.38	3.11	Edit report
Direct Traffic	22,730	46,558.01	2.05	Goal Tracking
Other Campaigns	11,125	24,366.32	2.19	10000 Monthly
Social Media	7,041	20,446.18	2.90	Clear goal
Referrals	6,213	18,703.42	3.01	Report Actions
Email Marketing	2,653	8,469.92	3.19	Refresh report
Offline Sources	2,495	6,596.85	2.64	Edit list
Paid Search	14	52.95	3.78	Email this report
Total	107,376	296,667.03	2.76	Export report data

Export contacts to list
Clone report
Delete report

- Gauge how effective our blog is at driving leads. Better understand which channel was most effective at driving people to the blog

This section will give you key takeaways form the report

- Based on this information we should be able to decide the channels to more heavily promote our blog posts for lead generation.

Ok, got it?

Next, check out our **table of contents** to jump to a specific report or report type.

HubSpot

Included Contacts Reports

1. <u>Leads that first visited your blog broken down by original source type</u>

2. <u>Marketing qualified leads broken down by source (with optional revenue)</u>

3. <u>All contacts broken down by lifecycle stage</u>

4. <u>MQLs broken down by recent conversion event</u>

5. <u>All online generated contacts broken down by industry</u>

Included Companies Reports

1. Companies that "closed" broken down by the company name

2. Companies that "closed" broken down by the source of first visit to our site

3. Companies that "closed" broken down by the number of page views (with revenue)

Included Attribution Reports

1. Blog posts that were the immediate referrer of a conversion

2. The last touch source of all contacts before they were created as "contacts"

3. Website pages that immediately referred a recent conversions

4. Website pages that are highly influencing MQL conversions

Contacts Reports

VIEW YOUR ENTIRE CONTACT DATABASE, OR A CERTAIN SEGEMENT, BASED ON THE INFORMATION THAT IS MOST IMPORTANT TO YOU.

MQLs broken down by original source (with optional revenue)

Report in Edit Mode:

Build your report

Choose a list.

| All contacts ▼ | Create a new list |

Choose a conversion type and time period.

| Became a Marketing Qualified Lead... ▼ | in | Last 6 months to date ▼ |

59,911 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

If you are storing revenue properties in HubSpot*

List Criteria:

This report uses "**all contacts**" and selects a conversion event of "**became a marketing qualified lead**" so that the report only plots all contacts who have completed that conversion event.

REPORT TAKEAWAYS
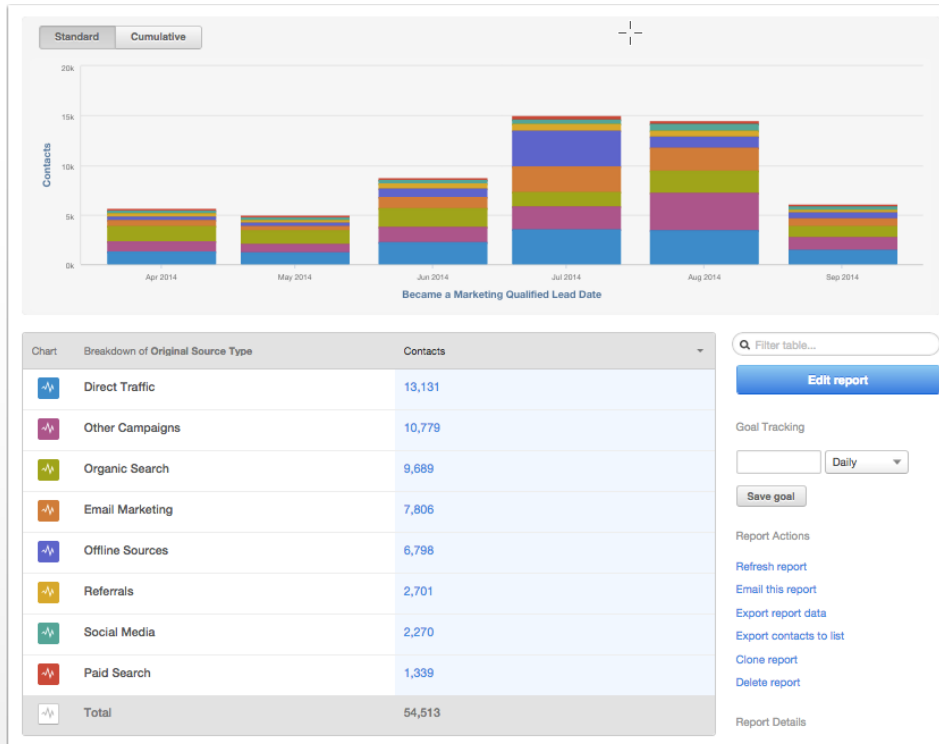
- Understand the marketing channels that are driving the **most qualified leads**. The source that is driving leads might be a different one than is driving the qualified leads.

- Continue to leverage the channels that are working best and investigating the ones that are not.

*Note that this report can also be run using an SQLs.

Leads who first visited your blog broken down by original source type

Report in Edit Mode:

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   ✕   ▼

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

▼

Save report

List Criteria:

Include contacts who meet all of these requirements: ⬚ ✖

🏳 Contact Property   ▼   First Referring Site   ▼   contains the word   ▼   ✕ blog.hubspot.com   ⊟

Add another requirement

Also, include contacts who meet all of these requirements: ⬚ ✖

🏳 Contact Property   ▼   First Page Seen   ▼   contains the word   ▼   ✕ blog.hubspot.com   ⊟

Add another requirement

Also, include contacts who meet all of these requirements: ⬚ ✖

🏳 Contact Property   ▼   Original Source Data 1   ▼   contains the word   ▼   ✕ blog.hubspot.com   ⊟

Add another requirement

REPORT TAKEAWAYS
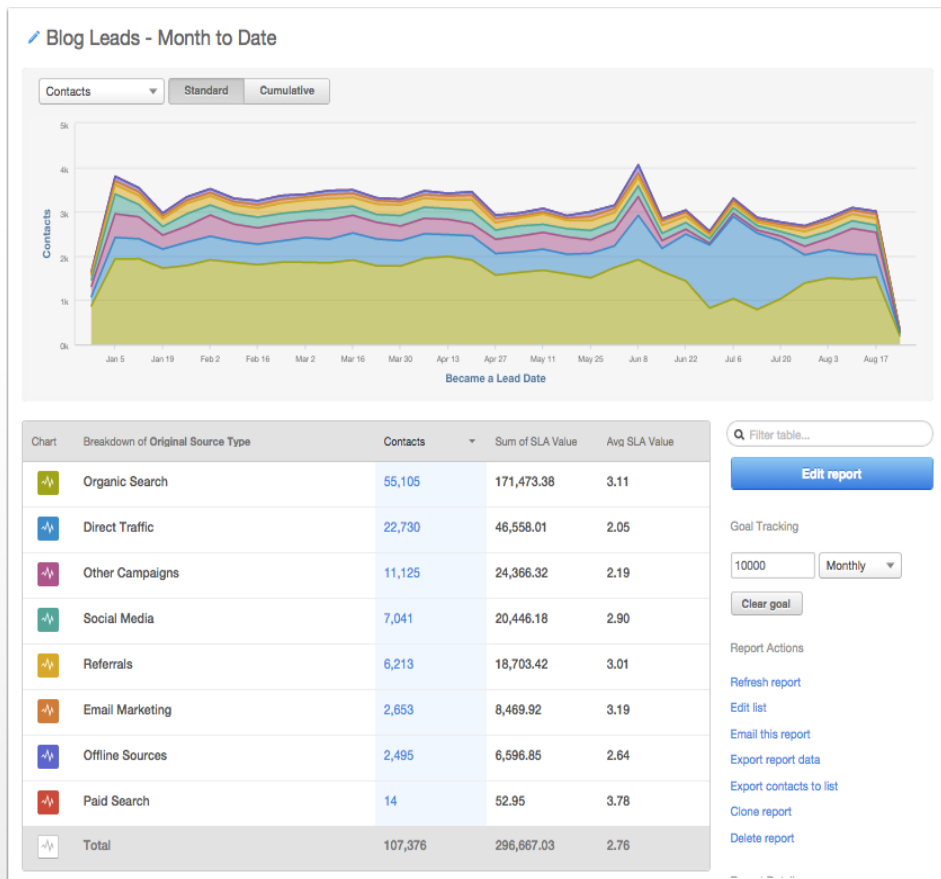
- Gauge how effective our blog is at driving leads. Better understand which channel was most effective at driving people to the blog and converting them to a lead.

- Based on this information we should be able to decide the channels to more heavily promote our blog posts for lead generation.

All contacts broken down by lifecycle stage

Edit Mode

🔬 PRO TIP

Appropriately marking the "Lifecycle Stage" property in HubSpot is key to reporting on your marketing and sales funnel. There are different ways to set this property based on the actions taken on your website. See the help document for details.

KEY TAKEAWAYS
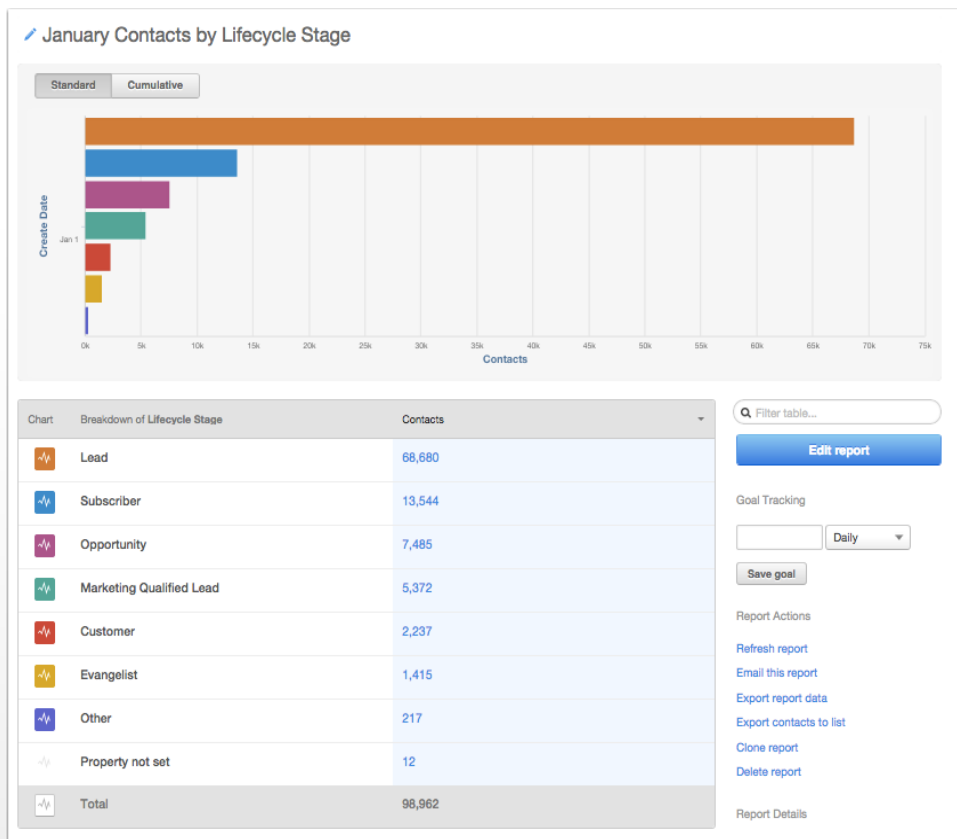
- Seeing where there are deficiencies in your buying journey will help you decide where your marketing energy should be spent.

- If you have a high conversion rate from Lead to MQL but a low MQL to Customer conversion rate, your next steps should be creating a nurturing campaign to help drive your MQLs to customers.

- If your Lead to MQL conversion is suffering, focus your energy building better marketing qualified offers and using them as a part of your "Lead to MQL" campaign.

MQLs broken down by recent conversion event

Edit Mode:

Build your report

Choose a list.

| All contacts ▾ | Create a new list |

Choose a conversion type and time period.

| Became a Marketing Qualified Lead... ▾ | in | This year to date ▾ |

81,130 contacts match the selected criteria.

Choose display options

Group contacts by

○ Week
◉ Month

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

| Recent Conversion   x ▾ |

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

| ▾ |

Save report

List Criteria:

This report uses "**all contacts**" and selects a conversion event of "**Became a marketing qualified lead**" so that the report only plots contacts who have completed the MQL conversion event.

KEY TAKEAWAYS
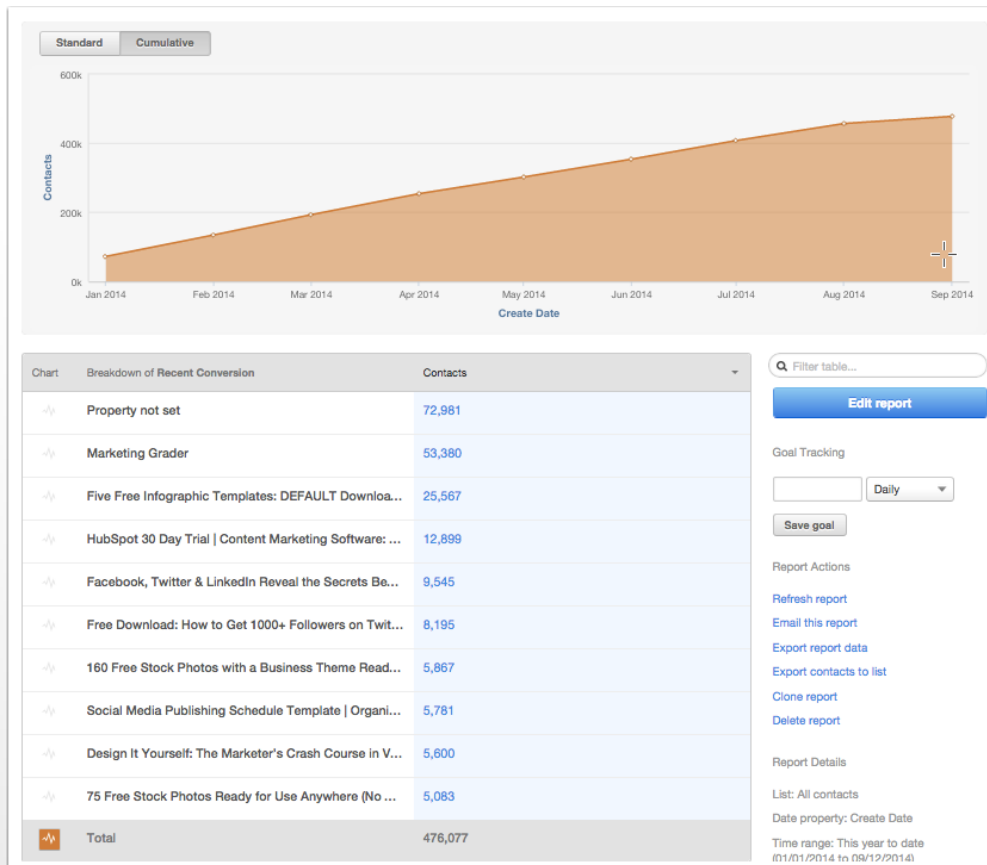
- Comparing what offers are doing the best job converting leads to MQLs can help you understand where you should be directing your leads both on the site and in your nurturing campaigns. It's not always the "demo" or "trial" that has the best success moving leads down the funnel, but why guess what your best offer is when you can prove it.

- Experimenting with a new Case Study offer this month? Run the report over a specific time frame to see how this new case study stacks up against your other offers from the time of launch.

ALL ONLINE GENERATED CONTACTS BROKEN DOWN BY INDUSTRY

Edit Mode:

Build your report

Choose a list.

| All contacts ▾ | | Create a new list |

Choose a conversion type and time period.

| Recent Conversion Date ▾ | in | All time ▾ |

2,624,310 contacts match the selected criteria.

Choose display options

Group contacts by

○ Week

◉ Month

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

| Industry | x ▾ |

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

| ▾ |

Save report

List Criteria:

This report uses "**all contacts**" and selects a conversion event of "**Recent Conversion Date**" so that the report only plots contacts who have converted.

KEY TAKEAWAYS
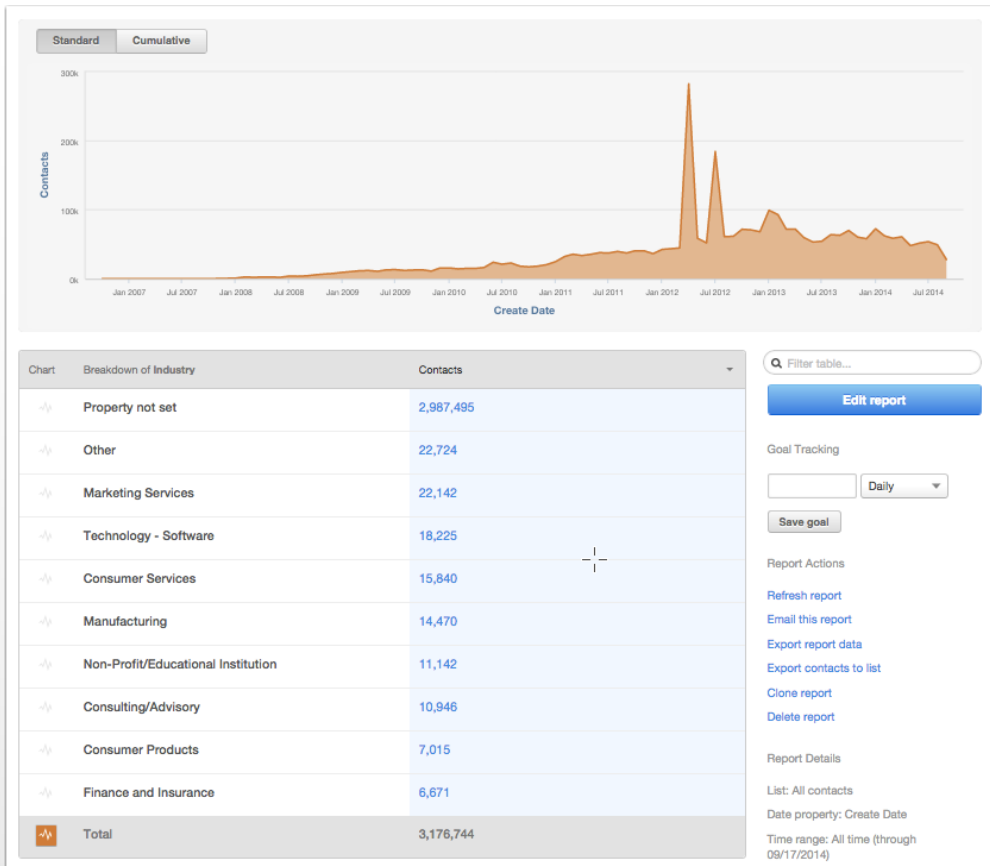
- Perhaps one industry holds more value to your business than another. Based on the information gathered in this report you may be able to develop more content for that industry.

- If there is an industry not performing as well as you expected, maybe it is time to reconsider the way you positioning yourself to them.

* Think about including revenue in the criteria of this report to see if your most successful industry for lead generation is lucrative.

Customers originated from social media broken down by social channel

Report in Edit Mode:

Build your report

Choose a list.

| Contacts Originated From Social Media ▼ | | Create a new list |

Choose a conversion type and time period.

| Became a Customer Date ▼ | in | This month to date ▼ |

21 contacts match the selected criteria.

Choose display options

Group contacts by

◉ Day
○ Week
○ Month

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

| Original Source Data 1   × ▼ |

Calculate the total value of the following numeric contacts property (optional) ❓

| Total Lifetime Value   × ▼ |

Save report

List Criteria:

Which contacts should be in this list?

Include contacts who meet all of these requirements: ⧉ ✖

| 🏳 Contact Property ▼ | Original Source Type ▼ | is equal to ▼ | × Social Media | ▬ |

Add another requirement

+ Add another set of requirements

Preview list size   Test contact against this list   Save list

KEY TAKEAWAYS
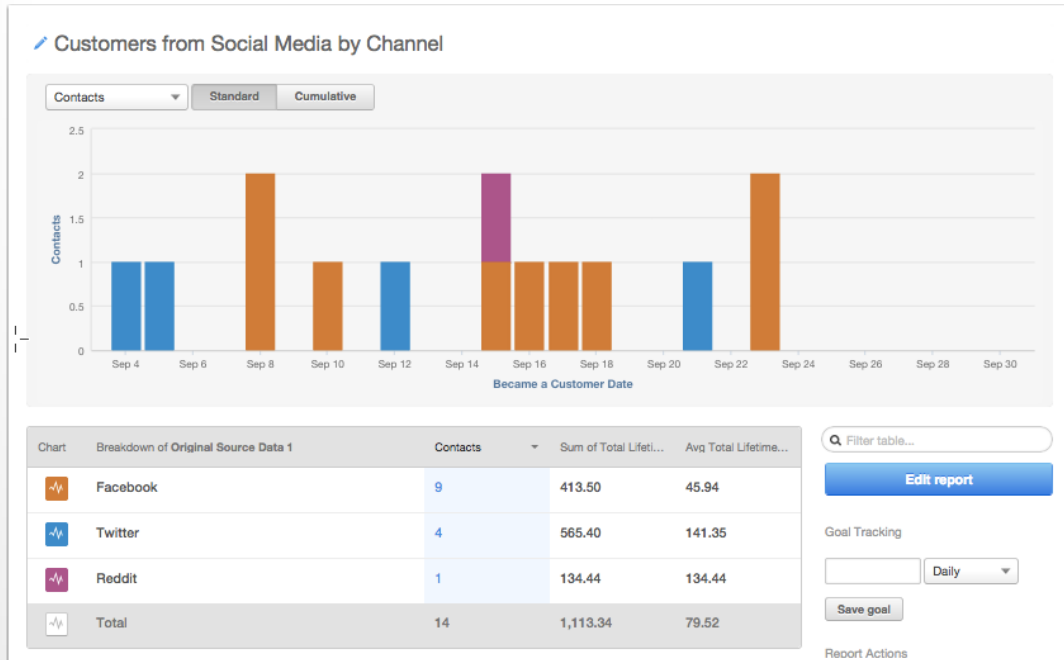
- Ask yourself if there is more opportunities in your highest converting channel. Perhaps you should invest more money in a paid social campaign through this channel. Why not? It produces MQLs.

- If you are storing revenue associated with customers, this would be a good time to see if it is worth the investment.

Companies Report

FIGURE OUT EXACTLY HOW MANY COMPANIES ARE IN YOUR DATABASE SEGMENTED BY ANY DATA STORED IN HUBSPOT (INCLUDING REVENUE)

COMPANIES THAT "CLOSED" BROKEN DOWN BY NAME

Edit Mode:

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) ▼

282 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 × ▼

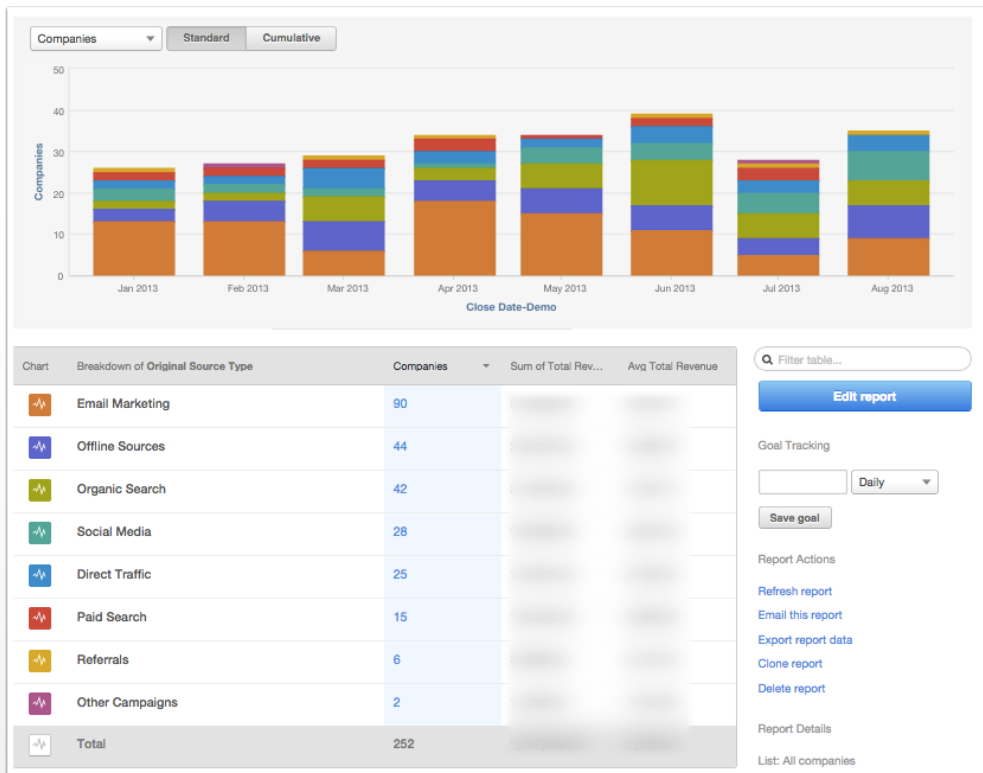Calculate the total value of the following numeric companies property (optional) ⦿

Total Revenue × ▼

Create report

List Criteria

This report uses "all contacts" and uses the conversion event "close date" so that the report only plots companies that have been marked "closed."

KEY TAKEAWAYS
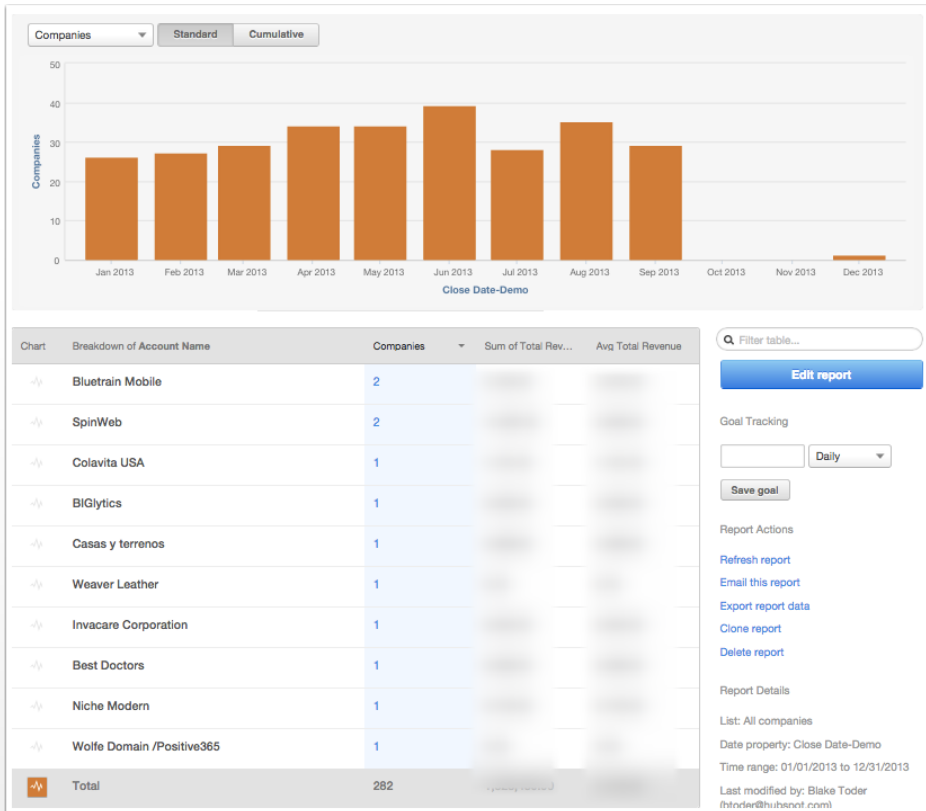
- As a marketer you have the ability to stay on top of your largest accounts and work with sales to create an upsell, cross sell, or evangelist campaign.

- Set up an automated email to send this report out to the sales manager.

COMPANIES THAT "CLOSED" BROKEN DOWN BY THE SOURCE OF THEIR FIRST VISIT

Edit Mode:

List Criteria:

This report uses "all contacts" and uses the conversion event "close date" so that the report only plots companies that have been marked "closed."

KEY TAKEAWAYS

- This report helps us understand the marketing channels that are driving our B2B success. The source that is driving leads might be a different one than is driving companies.

- Make sure you continue to leverage the channels that are working best and investigating the ones that are not.

COMPANIES BROKEN DOWN BY NUMBER OF PAGE VIEWS (WITH REVENUE)

Edit Mode:

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 - 10/31/2013 (monthly) ▼

281 companies match the selected criteria.

Choose display options

Group contacts by

○ Week
● Month

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

Number of Pageviews   x ▼

Calculate the total value of the following numeric companies property (optional) ❓

Total Revenue   x ▼

Save report

List Criteria:

This report uses "all contacts" and uses the conversion event "close date" so that the report only plots companies that have been marked "closed."

KEY TAKEAWAYS
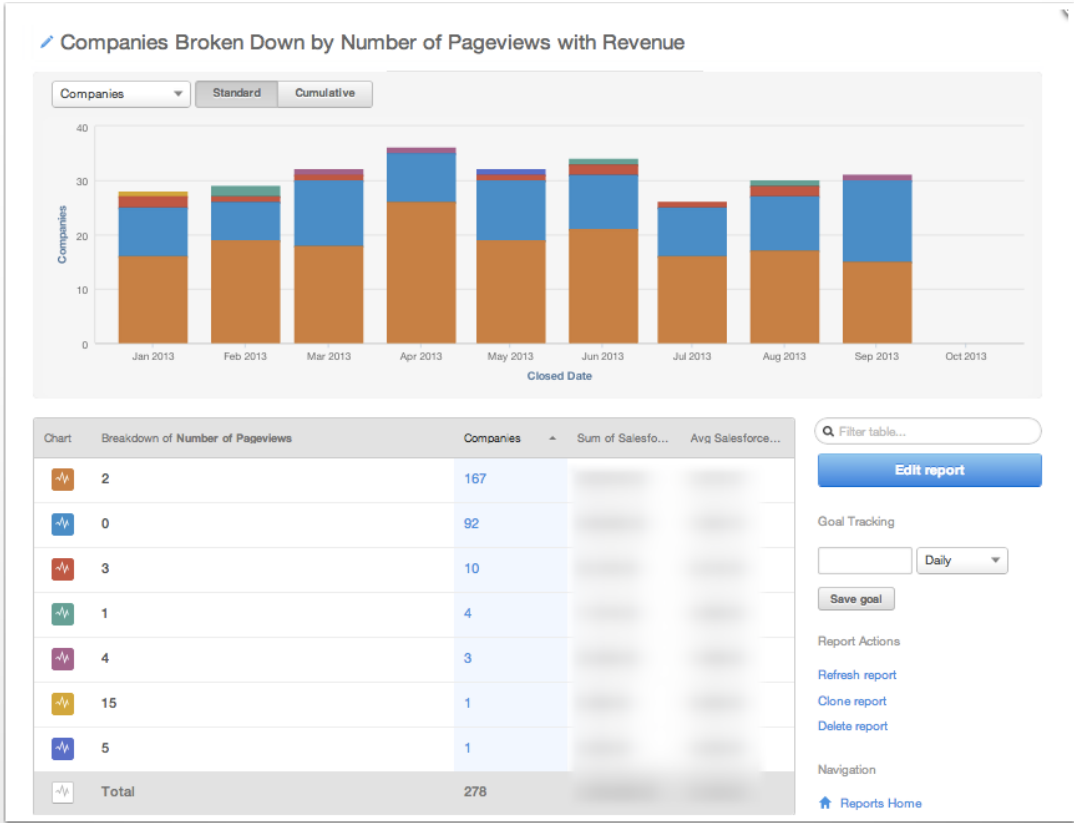
- This report shows how the number of total page views correlates to the ultimate revenue that these customers generate

- Use this data to assess the effectiveness of engagement with your site in producing revenue

ATTRIBUTION REPORT

REPORT ON CONTACT INTERACTION WITH YOUR WEBSITE PRIOR TO A CONVERSION EVENT.

BLOG POSTS THAT CONTRIBUTED TO THE CONVERSION OF A LEAD

Edit Mode:

Build your report

Choose a list.

| All contacts ▼ | Create a new list |

Choose a conversion type and time period.

Close Date ▼ in 06/01/2013 - 06/30/2013 (monthly) ▼

3,293 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]

List Criteria:

This report uses "all contacts" and uses the conversion event "close date" so that the report only reports on contacts who have "closed" as customers.

KEY TAKEAWAYS
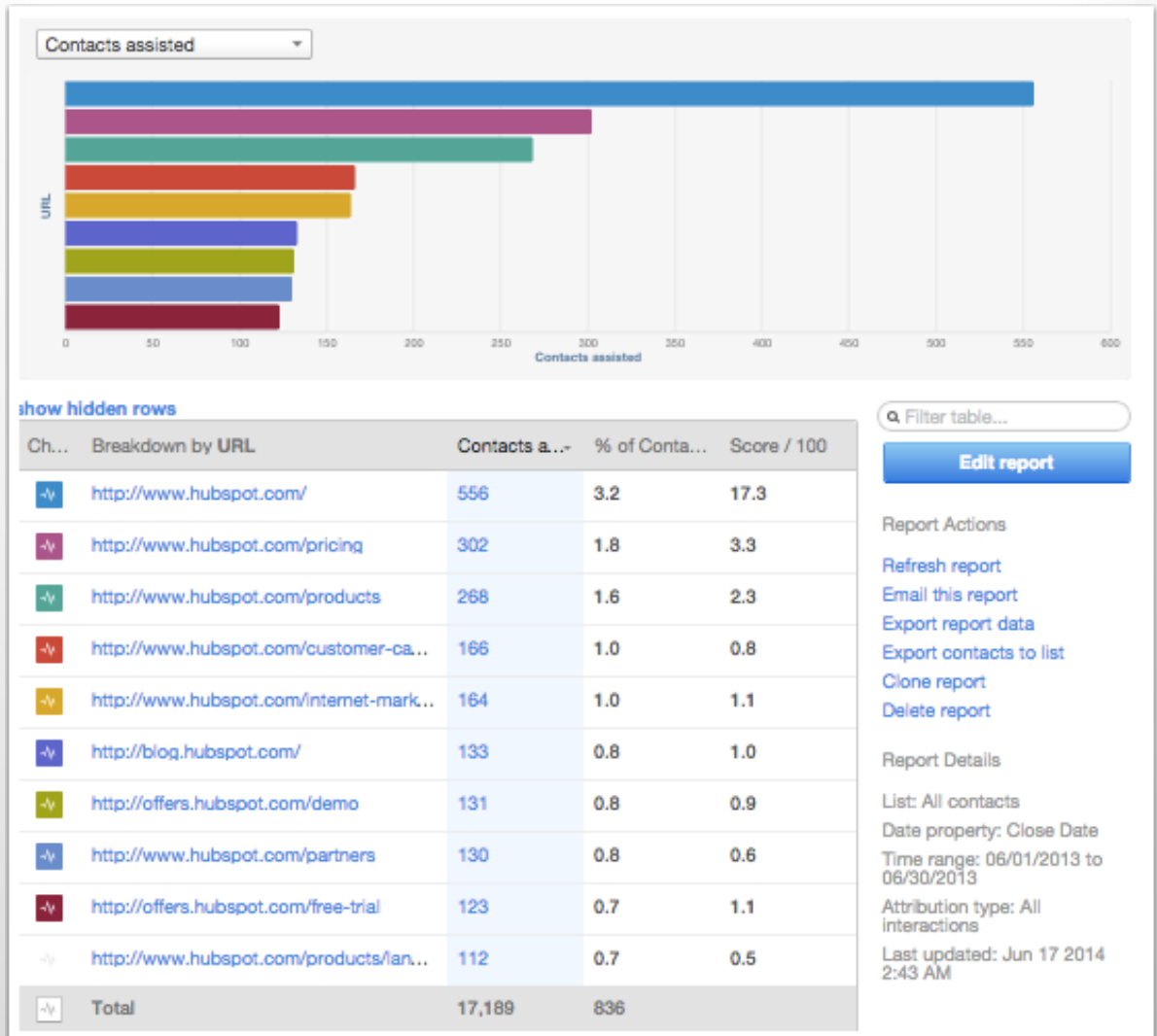
- This report allows us to see all the pages that were influential in a prospects conversion to a customer.

- Look for pages that you wouldn't expect to be at the top of this list. Perhaps your customers are being influenced by a topic you thought was less influential. If so, it's time to create more content on that topic specifically.

THE LAST TOUCH SOURCE OF ALL CONTACTS BEFORE THEY WERE CREATED

Edit Mode:

Build your report
Choose a list.

| All contacts | ▼ | | Create a new list |

Choose a conversion type and time period.

| Create Date | ▼ | in | 06/01/2013 - 06/30/2013... | ▼ |

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.

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

   ○ All sessions - All sources.

   ○ First touch - The source of a contact's first visit.

   ◉ Last touch - The source of a contact's most recent visit.

   ○ First and last touch - The source of a contact's first and last visit.

   ○ Simple decay - The last six sources, with more weight given more recent sources.

Save report

List Criteria:

This report uses "all contacts" and uses the conversion event "create date." This criteria will include all contacts in your HubSpot account.

KEY TAKEAWAYS
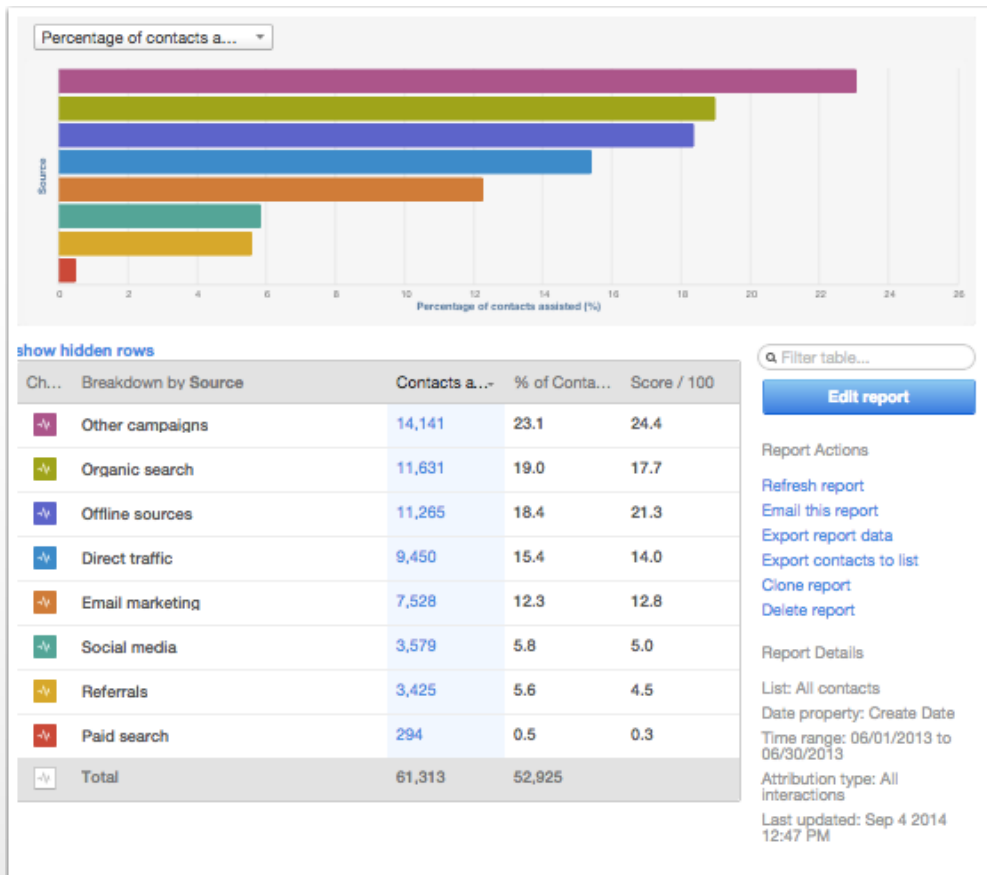
- Typically you get insight into the source of your leads first marketing visit. Here you get insight into the source of their last visit before they were created as a contact in your account.

- Often times what first drives someone to your site is very different than the source that convinces them to purchase. Recognizing the the "last touch source" helps you understand what sources drive a sense of urgency. Stack these up against your "first touch" report to see how they compare.

PAGES THAT REFERRED RECENT CONVERSIONS

Edit Mode:

List Criteria:

This report uses "**all contacts**" and uses the conversion event "**recent conversion date**" so that the report only reports on contacts who have a "recent conversion date."

KEY TAKEAWAYS

FILTERED FOR THE KEYWORD "BLOG"
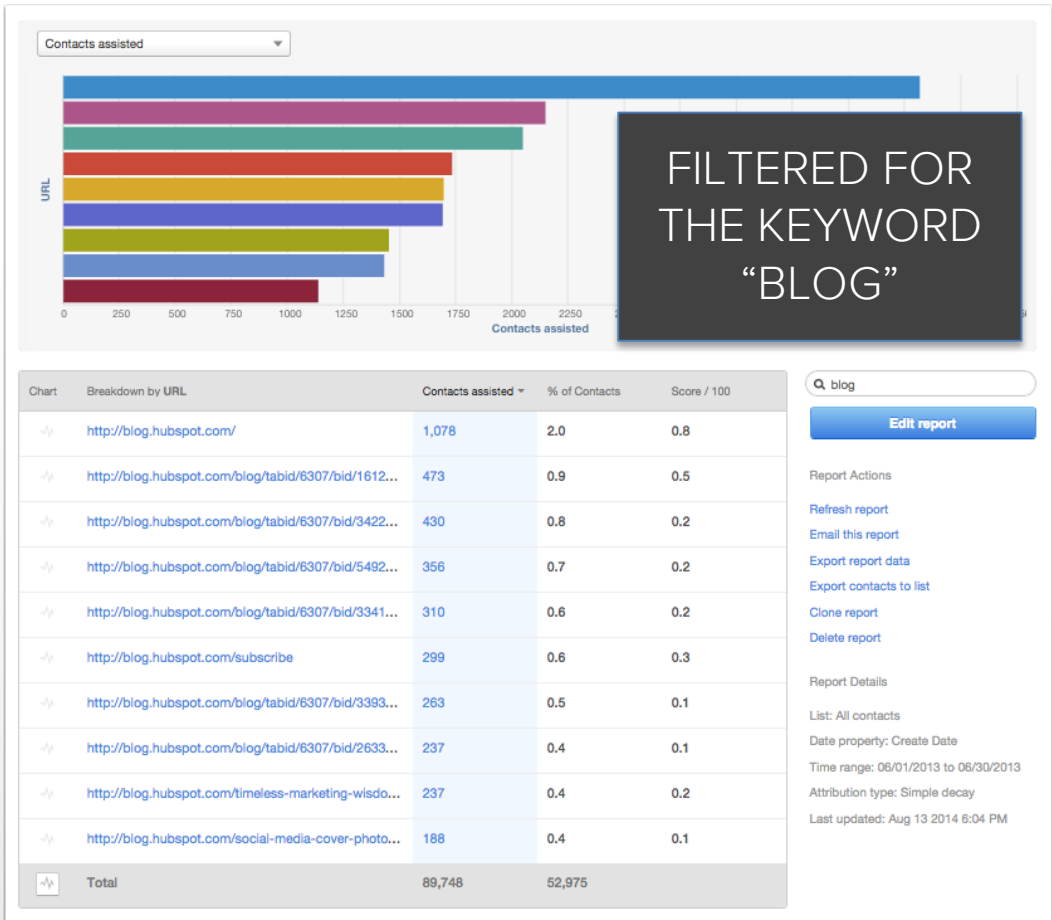
- Now you know which blog posts are doing the best job of enticing visitors to click through and convert on a landing page.

- Look for commonalities between the posts that are leading to conversions. Are the posts themselves similar in content type? Are they all linking to the same great offer? Is their a really strong relationship between the blog content and the offer?

- Consider re-using the highest converting blog posts in this months social media/email campaign to bolster visits to these highly converting posts.

WEBSITE PAGES THAT ARE HIGHLY INFLUENCING MQL CONVERSIONS

Edit Mode:

List Criteria:

This report uses "all contacts" and selects a conversion event of "became a marketing qualified lead" so that the report only plots contacts who have completed that conversion event.

KEY TAKEAWAYS

- A weighted point distribution of **the last 6 pages viewed prior to becoming an MQL** can provide a sense of your "hot" pages. Make the most influential pages easier to access and more frequently located on your site.

- Use the HubSpot page performance tool to make sure these pages are optimized for search. Remember, these are your most valuable pages so we should be giving them special attention. Do you have a MQL CTA on your blog? Use this data to pick which one to use.

Do you have reports that you want us to include in our Academy examples?

Email me: btoder@hubspot.com

THANK
YOU.

HubSpot
Academy