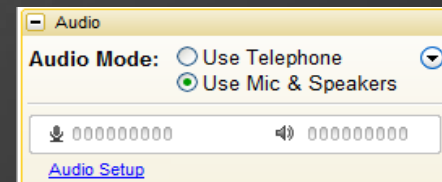


# USING CONTEXTUAL REPORTING TO MASTER YOUR MARKETING

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



HubSpot

**Mark Kilens**

@MarkKilens

Rachel  
Sprung

@RSprung







Nate  
Ciruolo

@NathanCiruolo

Try HubSpot Enterprise for yourself!

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

# HUBSPOT CONTACTS REPORT.

## Revenue Generated by Source Per Month

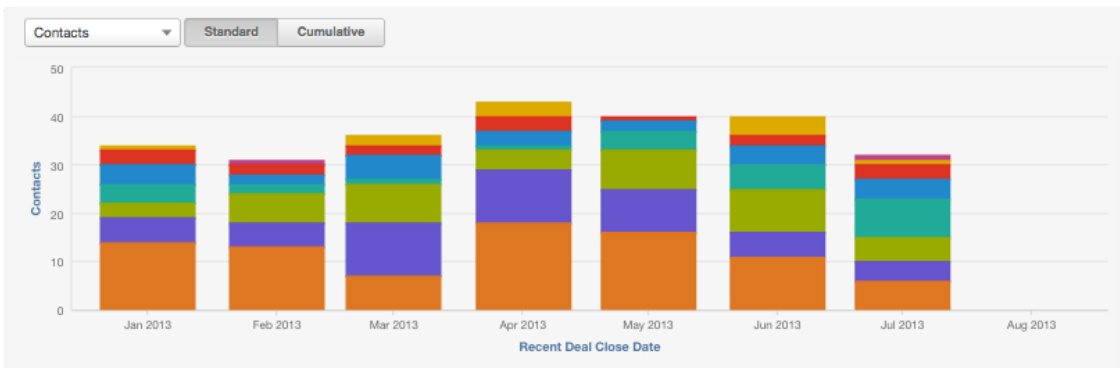


Chart	Breakdown of Original Source Type	Contacts	Sum of Recent De...	Avg Recent Deal ...
	Email Marketing	85	459,206.00	5,402.42
	Offline Sources	50	189,694.00	3,793.88
	Organic Search	43	231,977.00	5,394.81
	Social Media	25	120,949.00	4,837.96
	Direct Traffic	24	145,408.00	6,058.67
	Paid Search	16	95,800.00	5,987.50
	Referrals	11	37,396.00	3,399.64
	Other Campaigns	2	14,626.00	7,313.00
	Total	256	1,295,056.00	5,058.81

Filter table...

Edit report

Goal Tracking

Daily

Save goal

Report Actions

Refresh report

Edit list

Email this report

Export report data

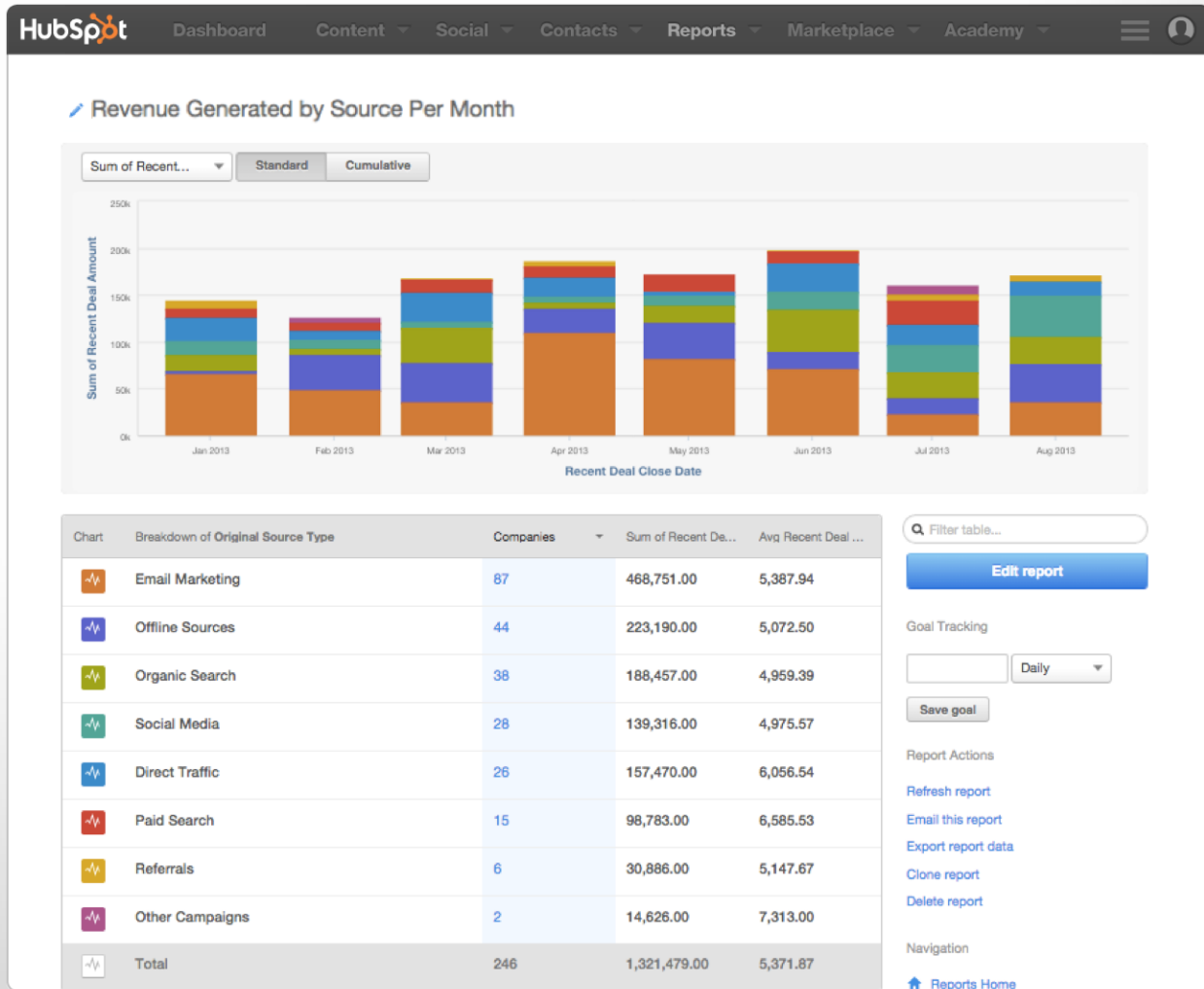
Export contacts to list

Clone report

Delete report



# HUBSPOT COMPANIES REPORT.



## 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) ?

Recent Deal Amount



Create report



Revenue reporting is  
not a separate app.

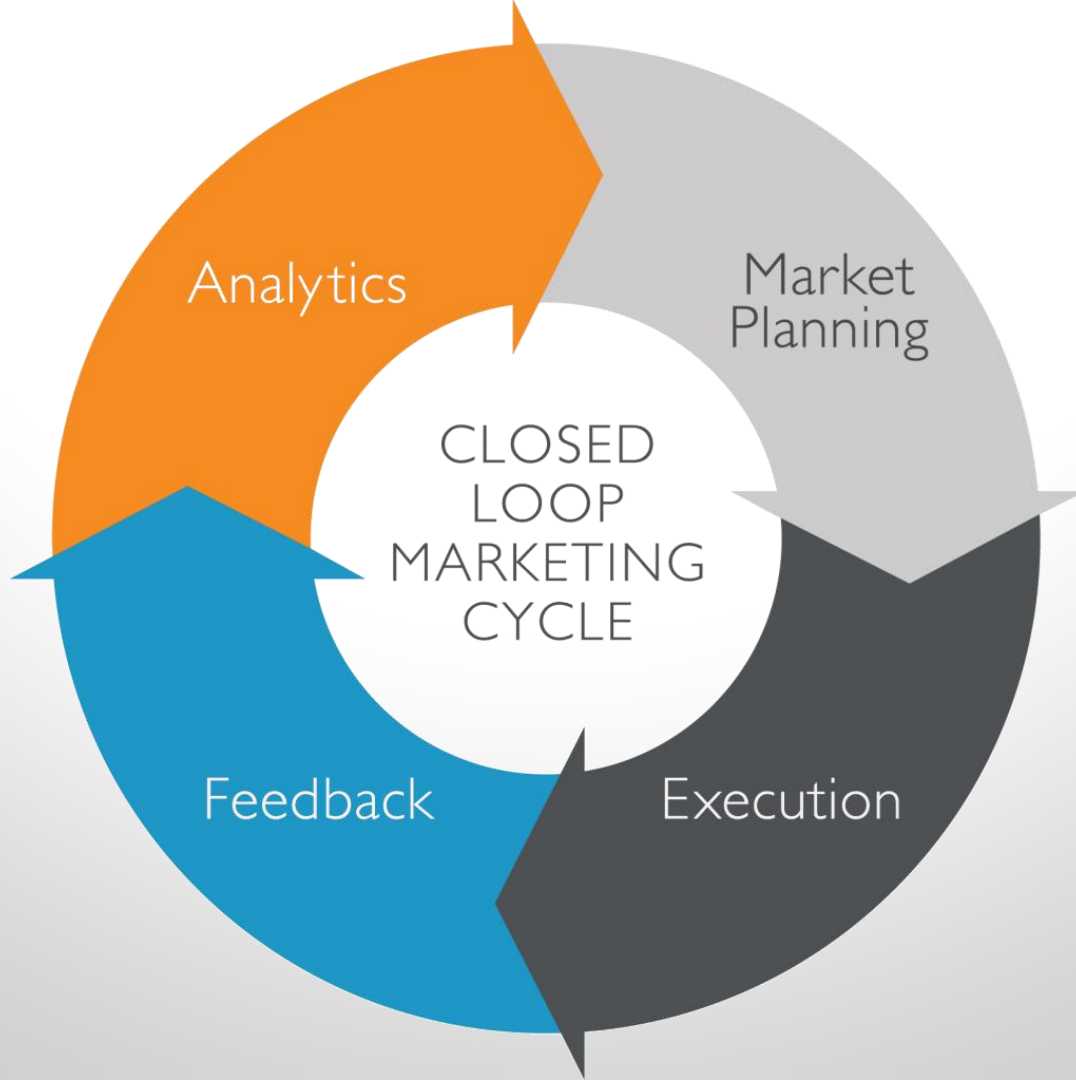
# AGENDA

- 1 Why does revenue reporting matter?
- 2 Your revenue reporting options
- 3 When to use revenue reporting
- 4 Revenue reporting demo

# 1 WHY DOES REVENUE REPORTING MATTER?



**HOW DO YOU  
DECIDE WHERE  
TO INVEST?**



What does this report tell you?

What will you do next?

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

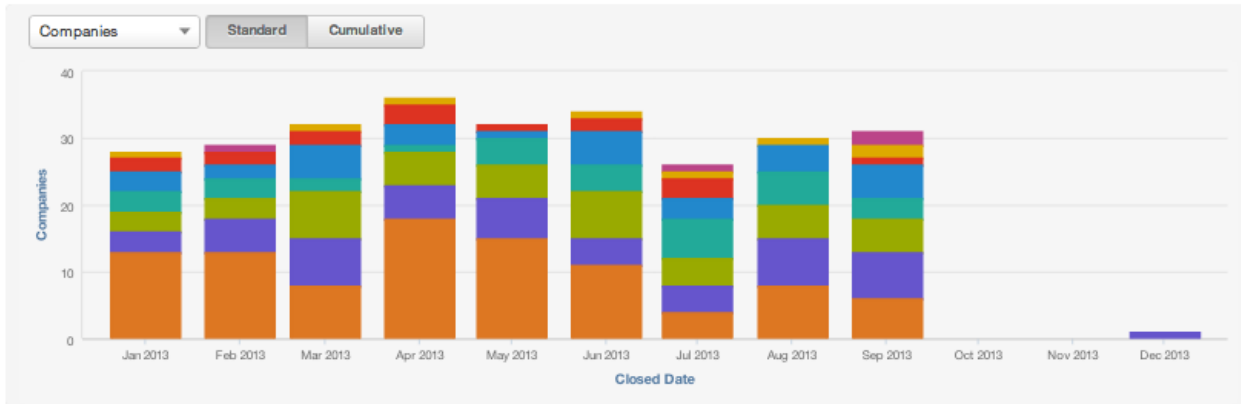


Chart	Breakdown of Original Source Type	Companies	Sum of Salesfo...	Avg Salesforce...
↔	Email Marketing	96	549,071.00	5,719.49
↔	Offline Sources	49	279,056.00	5,695.02
↔	Organic Search	44	336,742.00	7,653.23
↔	Social Media	31	173,499.00	5,596.74
↔	Direct Traffic	31	194,137.00	6,262.48
↔	Paid Search	16	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

Input field with Daily dropdown

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.

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

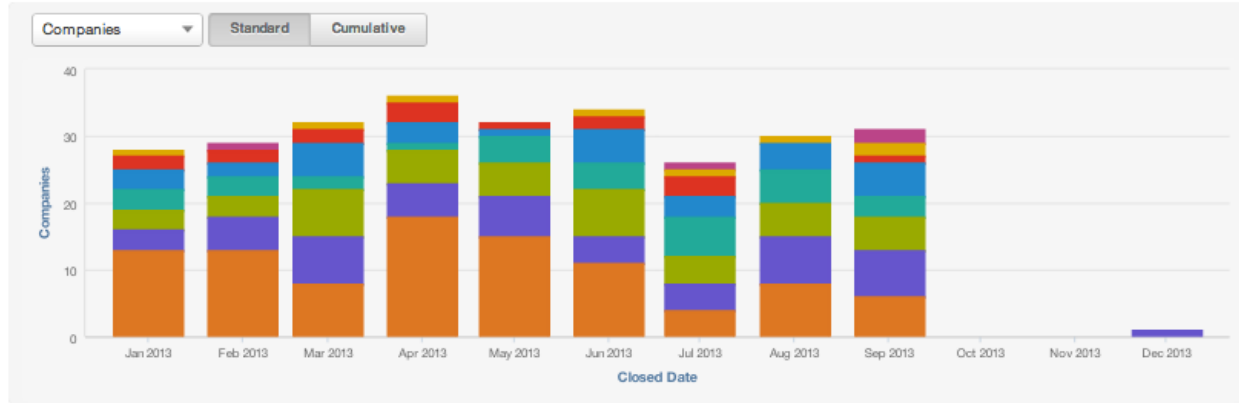


Chart Breakdown of Original Source Type

		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	44	336,742.00	7,653.23
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	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.

# REVENUE REPORTING HELPS YOU...

- Make educational decisions
- Plan for the future
- Invest in the right places
- Understand what's working



# RUNNING THESE REPORTS CAN HELP YOU:

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

# 2 YOUR REVENUE REPORTING OPTIONS.

The screenshot shows the HubSpot CRM interface. At the top, there are navigation tabs for 'Contacts', 'Companies', 'Deals', 'Tasks', and 'Settings'. A search bar is located on the right. Below the navigation, there's a 'Filter contacts by...' section with a search properties input. The main area displays a table of contacts with columns for First Name, Last Name, Company, Email, Last Contacted, and Phone. A modal dialog titled 'Create New Contact Property' is open in the center, containing the following fields and options:

- Label:** An empty text input field.
- Name:** An empty text input field.
- Description:** An empty text input field.
- Group:** A dropdown menu with 'Company' selected.
- Field type:** A dropdown menu with 'Single Line Text' selected.
- Use in forms?:** A toggle switch set to 'YES'.
- Save Changes:** A blue button at the bottom of the modal.

The contact list in the background includes entries like Jose Carroll at Vimbo, Dorothy Collins at Wikivu, Harold Skynoodle, Jonathan Zoonder, Nicole Donak at Vivnoodle, Michael Grudeo, Raymond Knight at Roombo, Judith Wikipeform, Carlos Cooper at Roomm, Virginia Yombu, Rose Montgomery at Realpoint.edu, Kathleen Freeman at Realria, Keith Jones at Wikibox, Wayne Gonzalez at Rhyzero, Karen Mills at Realbridge, and Samuel Howard at Babblestorm.

# OPTION 1:

You have the HubSpot CRM.

No custom setup.  
Revenue reporting will automatically work.



CRM Contacts Companies Deals Tasks Settings Search

**Michael Clark**  
CIO, Quantifyly

ABOUT MICHAEL

First Name  
Last Name  
Phone Number  
Last Contacted  
Lifecycle Stage  
HubSpot ID

Twitter Username: QuantifylyMike

Show more properties...

MICHAEL ON SOCIAL

Michael Clark Connect

Michael Clark @QuantifyMike

119 FOLLOWERS 836 TWEETS

MICHAEL'S COMPANY

Quantifyly  
Big Data Software Provider  
www.quantifyly.com

**New note** | Email | Call | Log activity | Create task

Start typing to leave a note...

**New note** | Email | Call | Log activity | Create task

Start typing to leave a note...

To: michael.clark@quantify.ly  
From: david.maines@biglytics.com  
Subject: Our call on Tuesday  
Email Body:  
Hi Mike,  
Hope your week is going well. I wanted to touch base to figure out the details of what we should cover

David called, but got no answer 2 days ago at 2:28 PM  
Didn't leave a vm.

David left a note 3 days ago at 10:54 AM  
Mike sent over a few notes about his boss, Tom, to prep me for our call next week. Tom is the VP and the ultimate decision maker, but Mike mentioned he'll probably still want to see a full demo. Tom may involve the IT department in the decision, but doesn't anticipate this will be a big blocker.

# OPTION 2:

You have  
Salesforce.

Turn on Opportunity  
Sync in your HubSpot  
Integrations settings.

The screenshot shows a Salesforce lead record for Mary Dawson. The lead is owned by David Miller and is in the 'In Progress' status. The lead detail includes fields for Name, Title, Company, Record ID, Partner, and Partner Account. A HubSpot Intelligence overlay is visible, showing a list of content items and their performance metrics. The HubSpot Score is 72. The overlay also shows a list of past emails and a section for scheduled emails.

**Lead Detail**

Lead Owner	David Miller [Change]	Lead Status	In Progress
Name	Mary Dawson	Bad Lead Reason	No
Title	Marketer	Reason	
Company	BIGytics	Reopened	✓
Record ID	000Q7000000000Z0ULw	Website	bigytics.com
Partner		Phone	800-555-0199
Partner Account		Email	mdaws@bigytics.com [Email]

**HubSpot Intelligence**

Item	Valid	Page Views	Submissions
Generate more leads from Facebook for VNP Jan 18th 2013 - 4:04 pm	194	454	45
HSCM-unbounce-comarketing-lead-generation-ebook-20130611 Jan 18th 2013 - 3:40 pm	Last seen 5 hours ago through		
Free Ebook: How to Generate Leads Using Facebook Jan 18th 2013 - 3:36 pm	Became a lead 7 months ago through		
Generic Form with Progressive Profiling - Download Jan 18th 2013 - 3:36 pm	20 Marketing Trends and Predictions for 2013 and Beyond First seen 2 years ago via organic search through/hubspot		

**HUBSPOT SCORE: 72**  
View in HubSpot

**Past Emails**

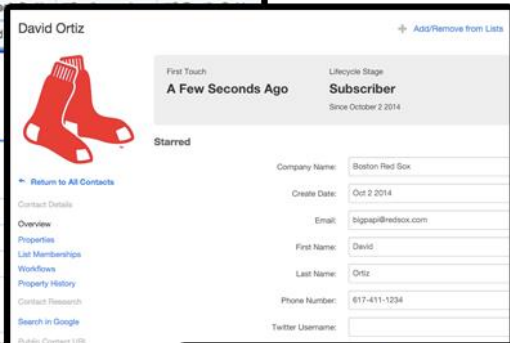
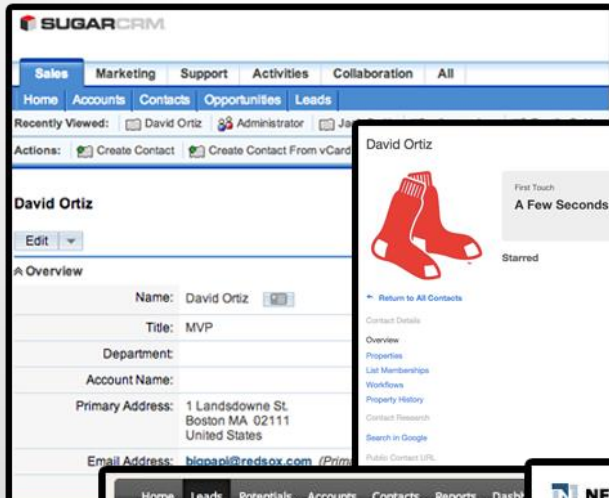
- MK VSB Workflow Platypus to New 1's - Second  
LN VSB New 1-3s and Med, High in Progress to Platypus
- MK VSB Workflow Step by Step Guide  
LN VSB New 1-3s and Med, High in Progress to Platypus
- MK VSB Workflow Platypus to New 1's - First  
LN VSB New 1-3s and Med, High in Progress to Platypus
- SendEmail  
Internal workflow

**Scheduled Emails**

Contact does not have any future emails scheduled

LN Campaign - SMBs  
Enroll in Workflow  
Contact is enrolled in 1 workflow

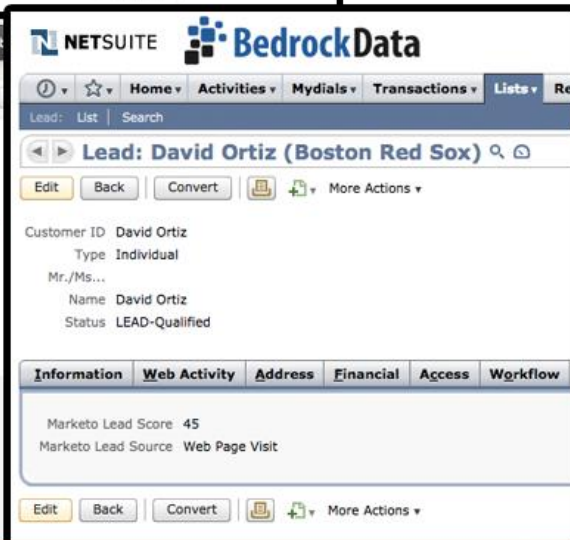
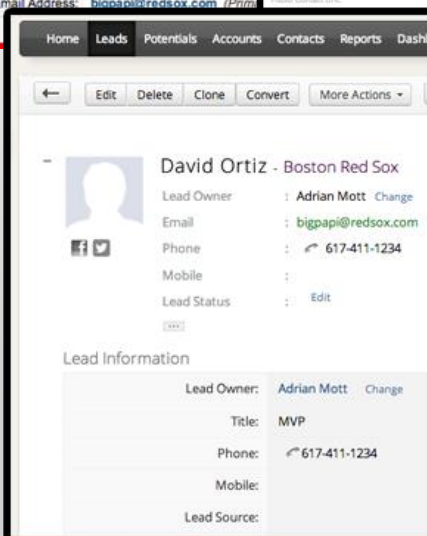




# OPTION 3:

You have Microsoft Dynamics, Zoho, or SugarCRM.

Bedrock Data has pre-built integrations for \$99/month.



# OPTION 4:

You have a different CRM.

Work with a third-party developer to integrate your CRM and HubSpot with the Deals API.

## Deals API

The Deals API enables developers to add Deal data from CRM into HubSpot to enable marketers to improve their lists and report on revenue.

Method Name	Endpoint	Description
Create a Deal	POST <a href="#">/deals/v1/deals/</a>	Create a new deal.
Update a Deal	PUT <a href="#">/deals/v1/deal/:dealId</a>	Update the properties for the specified deal.
Delete a Deal	DELETE <a href="#">/deals/v1/deal/:dealId</a>	Delete a specified Deal.
Get a Deal	GET <a href="#">/deals/v1/deal/:dealId</a>	Get a specified deal.

Integrations with **Zapier** will **not work** for revenue reporting.

The screenshot shows the HubSpot interface with the Zapier integration dashboard. The top navigation bar includes HubSpot, Dashboard, Content, Social, **Contacts**, Reports, Marketplace, and Academy. Below the navigation, there are links for 'Contacts' and 'Contacts Settings'. The main heading is 'Zapier Use Zapier to integrate HubSpot with your favorite app(s)'. The Zapier dashboard itself has a 'Make a Zap!' button and a 'Dashboard' link. A list of active Zaps is shown, each with a toggle switch set to 'ON' and a settings gear icon. The Zaps include: LiveChat Chat Creates or Updates Contacts; HubSpot Lifecycle Stage Update to New Note on Contact in Insightly; Eventbrite New Attendee to HubSpot New Form Submission; HubSpot New Form Submission to Google Docs Create Spreadsheet Row; Gravity Forms New Form Submission to HubSpot New Form Submission (old) (deprecated); and HubSpot Customer to Quickbooks. A 'Task History' section on the right shows a list of recent tasks, including 'New Contact with Lead' and 'New Evernote Creates ...'.

# 3 WHEN TO USE REVENUE REPORTING.

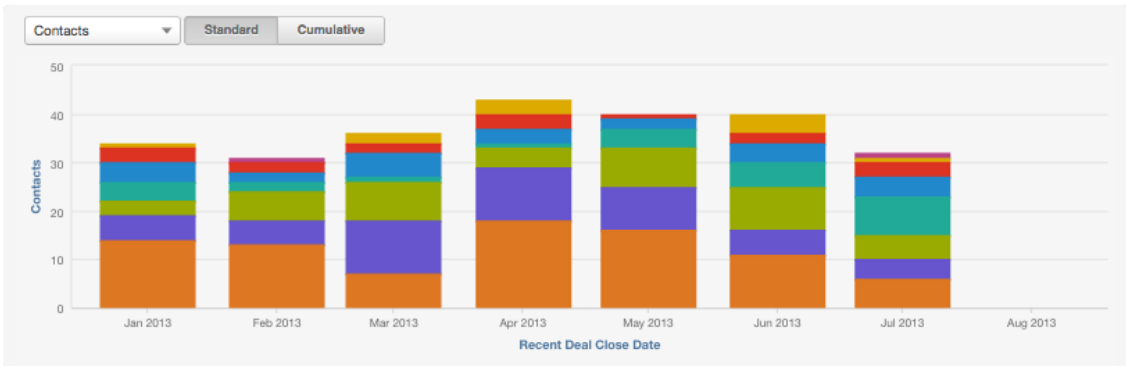




**B2C – CONTACTS REPORT.**

**B2B – COMPANIES REPORT.**

### Revenue Generated by Source Per Month



# HUBSPOT CONTACTS REPORT WITH REVENUE.

Chart	Breakdown of Original Source Type	Contacts	Sum of Recent De...	Avg Recent Deal ...
	Email Marketing	85	459,206.00	5,402.42
	Offline Sources	50	189,694.00	3,793.88
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	Social Media	25	120,949.00	4,837.96
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	Referrals	11	37,396.00	3,399.64
	Other Campaigns	2	14,626.00	7,313.00
	Total	256	1,295,056.00	5,058.81

Filter table...

Edit report

Goal Tracking

Daily

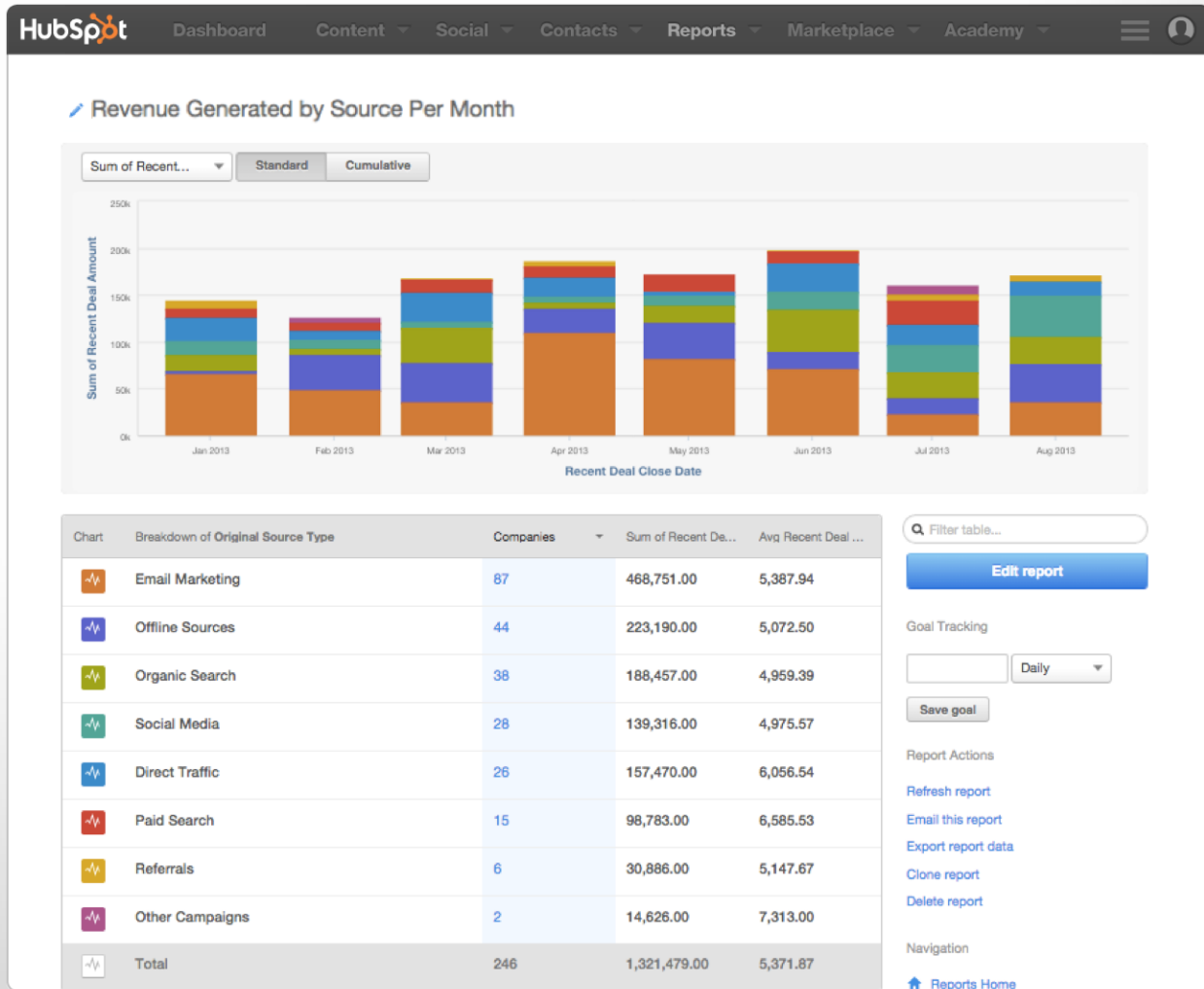
Save goal

Report Actions

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



# HUBSPOT COMPANIES REPORT WITH REVENUE.



# GLOSSARY OF REVENUE TERMS

- **Total Revenue** - the total amount of revenue generated by companies in your database
- **First Deal Created Date** - the first time an opportunity was created. *This would most likely be created the first time a sales rep sees a company as a potential deal*
- **Recent Deal Close Date** - the most recent time a deal closed
- **Recent Deal Amount** - the most recent amount a deal paid. *If you have customers who pay more than once (renewals or upgrades), there would be a new date every time they renewed or upgrades. This field will take the most recent deal amount.*
- **Associated Deals** - the number of deals associated with the company or contact

# 4 REVENUE REPORTING DEMO.



LIVE  
DEMO.



HubSpot  
Academy 

**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

- 
-  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

Q |

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



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

## Create Contacts Report

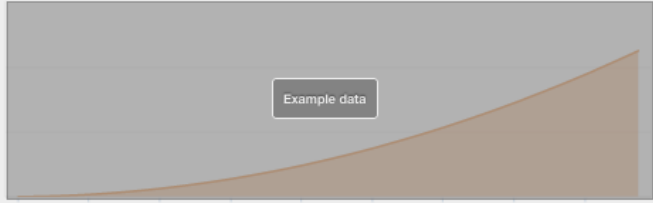
Tutorial Tour

[Back to all reports](#)

### Contacts by Create Date all time

Navigation

- Reports Home
- Create a new report
- Browse Recipes



Count

Example data

2006 2007 2008 2009 2010 2011 2012 2013 2014

Create Date

#### Build your report

Choose a list.

All contacts

Choose a conversion type and time period.

Create Date in All time

4,242 contacts match the selected criteria.

#### Choose display options

Group contacts by

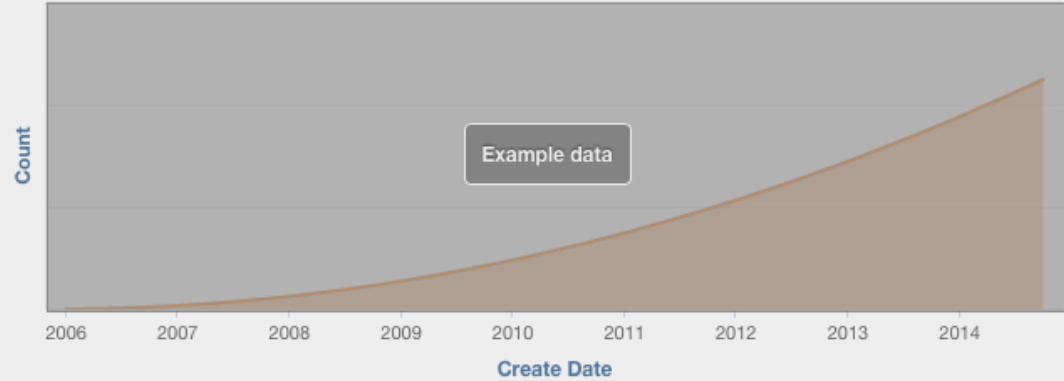
Week

Month

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

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

## Contacts by Create Date all time



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

### Build your report

Choose a list.

All contacts

Create a new list

Q |

A New Leaf Painting- Test List

A1 Dinner Invite

Abandoned Leads TOFU Offer

Abandoned Leads TOFU Offers

Abandoned Leads TOFU Offer

ABE Contest Opt in

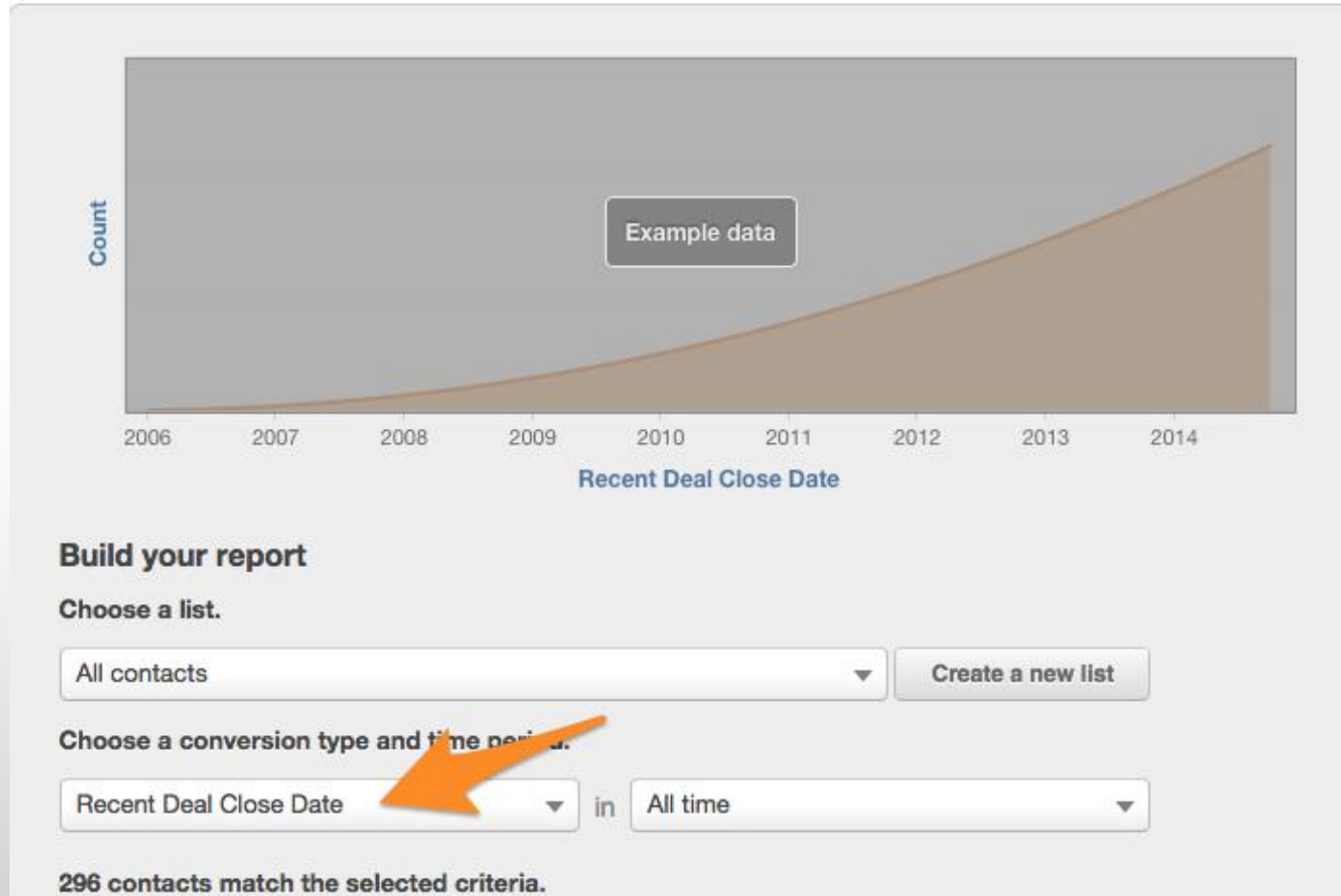
ABE Life Insurance list

Week

## Contacts by Recent Deal Close Date all time

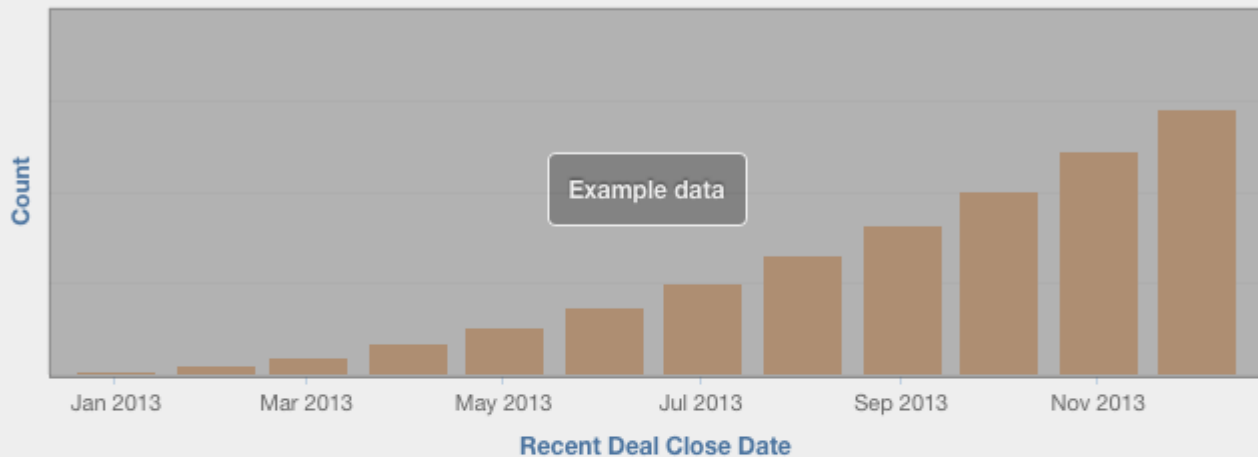
Select a label for the x axis of your report. This will be your date label.

When running revenue reports, select First Deal Created Date or Recent Deal Close Date.



## Contacts by Recent Deal Close Date 01/01/2013 - 12/31/2013

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



### Build your report

#### Choose a list.

All contacts

Create a new list

#### Choose a conversion type and time period.

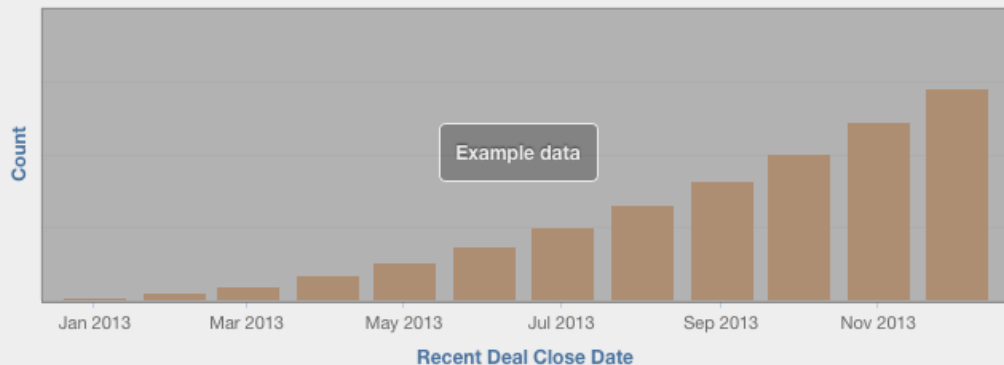
Recent Deal Close Date

in

01/01/2013 - 12/31/2013

295 contacts match the selected criteria.

## Contacts by Recent Deal Close Date 01/01/2013 - 12/31/2013



Select a date frequency. That means daily, weekly, or monthly.

### Build your report

Choose a list.

All contacts

Create a new list

Choose a conversion type and time period.

Recent Deal Close Date

in

01/01/2013 - 12/31/2013

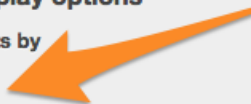
295 contacts match the selected criteria.

### 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.

When running revenue reports, select Total Revenue, Recent Deal Amount, or Associated Deals.

**Choose display options**

**Group contacts by**

Week

Month

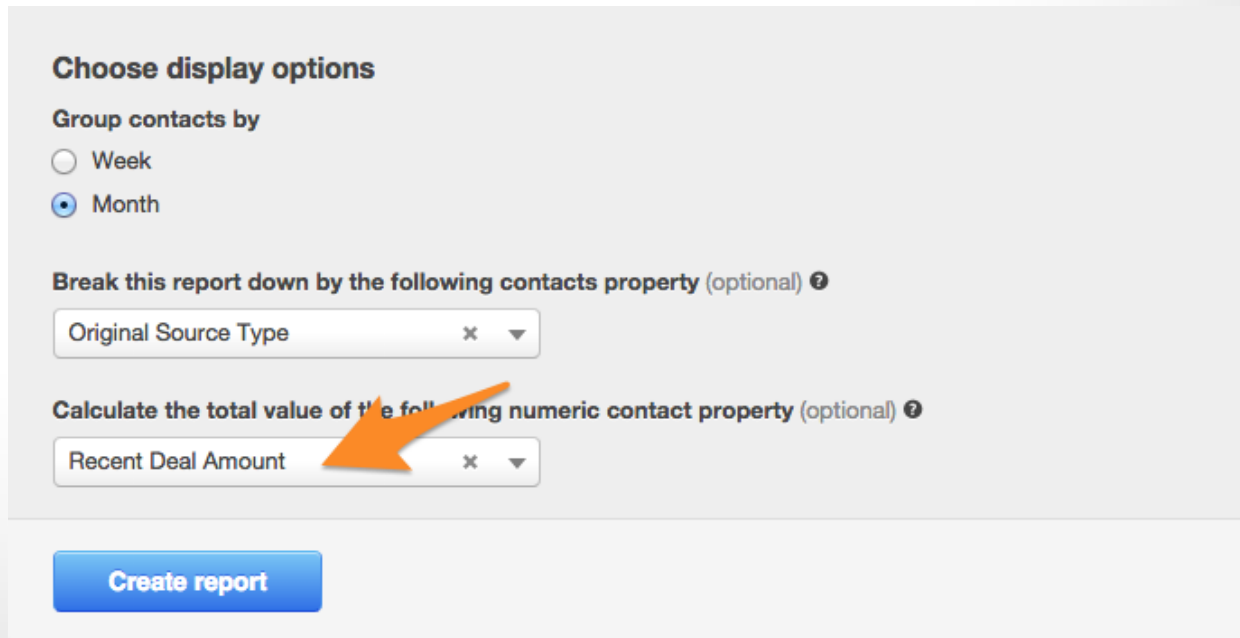
**Break this report down by the following contacts property (optional) ?**

Original Source Type x ▾

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

Recent Deal Amount x ▾

**Create report**



**2**

# **REVENUE REPORTING IN A COMPANIES REPORT**

# 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
Companies by First Contact Create Date broken down by Annual Revenue all time Companies reports	03/25/2014
Companies by Create Date broken down by Original Source Type all time Companies reports	03/21/2014
Contacts by Create Date broken down by Lifecycle Stage this year to date Contacts reports	03/20/2014
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

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

## Step 2a: Select Companies 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 ✕

- 

### 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.

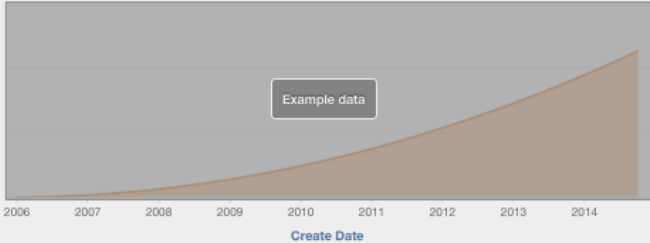
Marketing Dashboard Content Social Contacts Reports Partner Search

## Create Companies Report [▶ Overview Video](#)

[← Back to all reports](#) [Companies by Create Date all time](#)

Navigation

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



**Build your report**

**Choose a list.**

All contacts [Create a new list](#)

**Choose a conversion type and time period.**

Create Date in All time

296 companies match the selected criteria.

**Choose display options**

**Group contacts by**

Week

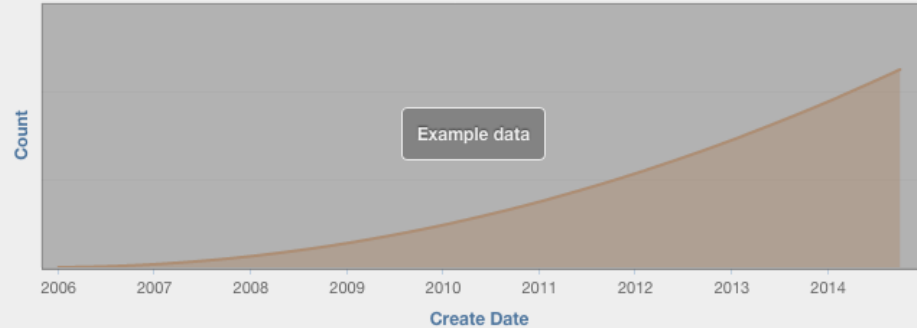
Month

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

### Build your report

Choose a list.

All contacts

Create a new list

Q

Adam Schwartz (personal)

**AdaptSuite Business**

ADP Test

AdaptSuite Business

Advanced Assembly HOT Leads

AE - 5 things to change...

AFCO Systems - Targeted Sales Rep Email

Week

Month

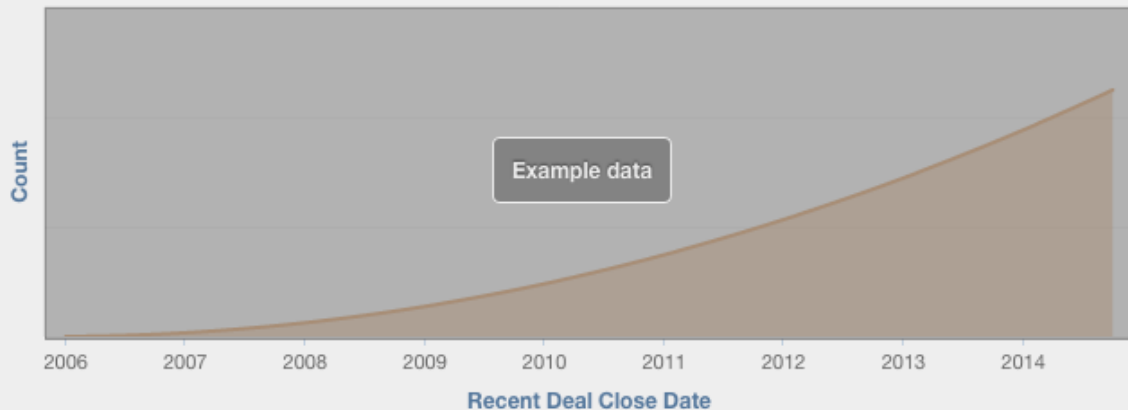


## Companies by Recent Deal Close Date all time

Select a label for the x axis of your report.

This will be your date label.

When running revenue reports, select First Deal Created Date or Recent Deal Close Date.



### Build your report

#### Choose a list.

All contacts

Create a new list

#### Choose a conversion type and time period.

Recent Deal Close Date

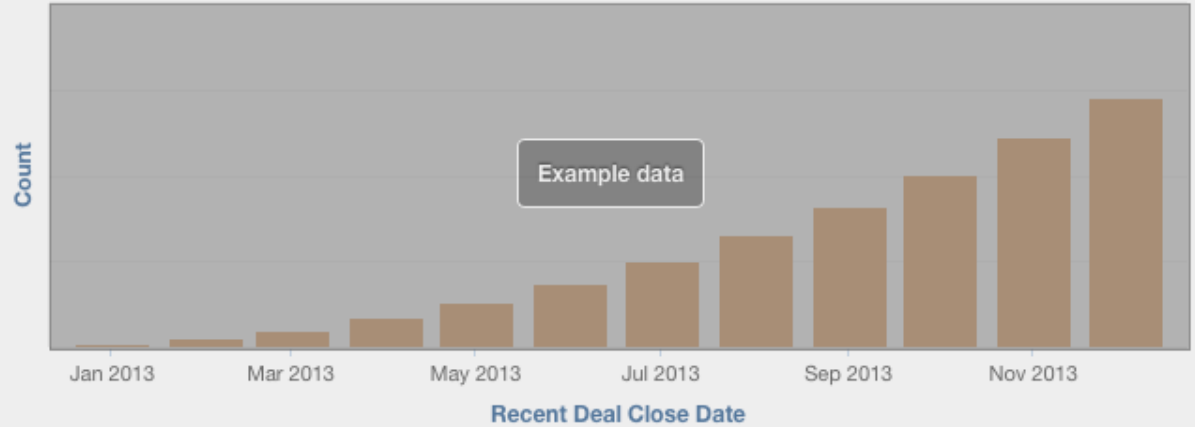
in All time

256 companies match the selected criteria.

## Companies by Recent Deal Close Date 01/01/2013 - 12/31/2013

Select a date range.

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



### Build your report

Choose a list.

All contacts

Create a new list

Choose a conversion type and time period.

Recent Deal Close Date

in

01/01/2013 - 12/31/2013

254 companies match the selected criteria.

Select a date frequency.

That means daily, weekly, or monthly.

## Companies by Recent Deal Close Date 01/01/2013 - 12/31/2013



### Build your report

Choose a list.

All contacts

Create a new list

Choose a conversion type and time period.

Recent Deal Close Date

in

01/01/2013 - 12/31/2013

254 companies match the selected criteria.

### Choose display options

Group contacts by

Week

Month



### 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

Choose a companies property to break up your report.

Your results will show up as a stacked bar graph.


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

When running revenue reports, select Total Revenue, Recent Deal Amount, or Associated Deals.

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

Original Source Type x ▼

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

Recent Deal Amount x ▼ 

[Create report](#)

**3**

**CHECK OUT REVENUE  
REPORTING RECIPES.**

**Step 1:**  
Under Reports  
Home, select  
Recipes.

**Reports** [Tour](#) Create a new report

▼ 1% VISITS FROM PAID SEARCH Sep 27 - Oct 04

▼ 3% VISITS FROM ORGANIC Sep 27 - Oct 04

▼ 6% VISITS FROM REFERRALS Sep 27 - Oct 04

7 more trends ▶

All report types All time Created by anyone Search...

Report	Created on
<a href="#">Sources of Most Qualified Leads (HS Recipes)</a> <small>Contacts reports</small>	10/10/2014
<a href="#">Contacts by Create Date broken down by Lead Source all time</a> <small>Contacts reports</small>	10/10/2014
<a href="#">September 2014 - Most Converting Channels (HS Recipes)</a> <small>Attribution reports</small>	10/10/2014
<a href="#">Autogenerated: Video "How to Turbocharge Your Business with Inbound Marketing": Played</a> <small>Event analysis</small>	10/10/2014
<a href="#">Autogenerated: 000000008814*</a> <small>Event analysis</small>	10/10/2014
<a href="#">Autogenerated: * onEvent=X3052170320Y4Z</a> <small>Event analysis</small>	10/10/2014
<a href="#">Autogenerated: * onEvent=X3052170472Y4Z</a> <small>Event analysis</small>	10/10/2014
<a href="#">Autogenerated: * onEvent=X170046380Y4Z</a> <small>Event analysis</small>	10/10/2014

- Sources**  
Find out how your online visitors, leads and customers are finding you.
- Page Performance**  
Analyze and optimize your individual website pages.
- 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.
- Tracking URL Builder**  
Build links to track your marketing campaigns.
- Reports Settings**  
Find your tracking code and adjust other analytics settings.

## Step 2:

Scroll down to the bottom of the Recipes page.

You will see example revenue reports for Contacts and Companies Reports.

### Discover What Brings You the Most Revenue

This recipe features a set of three reports by either the contacts or companies listed in your database that are designed to de-mystify the channels, offers, and customers that bring you the most revenue.

Companies

Contacts



#### 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.

Add this recipe





**PRO TIP.**

**Revenue Reporting is not its own report.** You can report on your revenue using Contacts or Companies Reports.

# 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
 <a href="#">Contacts Revenue Last Month (HS Recipes)</a> <small>📄 Contacts reports</small>	10/03/2014 
 <a href="#">Contacts by Create Date broken down by Original Source Type this month to date</a> <small>📄 Contacts reports</small>	10/03/2014 
 <a href="#">Frequent Pages Viewed That Generate Leads (HS Recipes)</a> <small>📊 Attribution reports</small>	10/02/2014 
 <a href="#">Frequent Pages Viewed That Generate Leads (HS Recipes)</a> <small>📊 Attribution reports</small>	10/02/2014 
 <a href="#">Website Content &amp; Blog Posts That Generate Leads (HS Recipes)</a> <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. Run a revenue report based on source to see what channels are generating the most revenue for your business.
2. Use a segmented list to drill down into what marketing efforts work for specific parts of your audience.
3. Don't be afraid to change your strategy after you gain a better understanding of where your revenue is coming from.

# RESOURCES

1. How do I report on revenue in HubSpot?
2. Does HubSpot Sync with the Salesforce Opportunity Object?
3. What is the difference between Annual Revenue and Total Revenue?
4. Speak Your CEO's Language: 3 Ways to Show Marketing's Impact on Revenue

## THIS WEEK YOU LEARNED:

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

## NEXT WEEK YOU WILL LEARN:

- 1 What are Attribution Reports
- 2 How Attribution Reports can help you track what content someone views before converting
- 3 How to use different Attribution Report models
- 4 How to interpret your Attribution Reports

# QUESTIONS?



THANK YOU &  
SEE YOU NEXT WEEK.