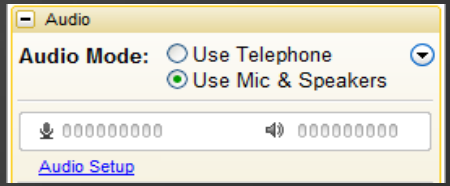
USING CONTEXTUAL REPORTING TO MASTER YOUR MARKETING

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

HubSpot Academy

#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

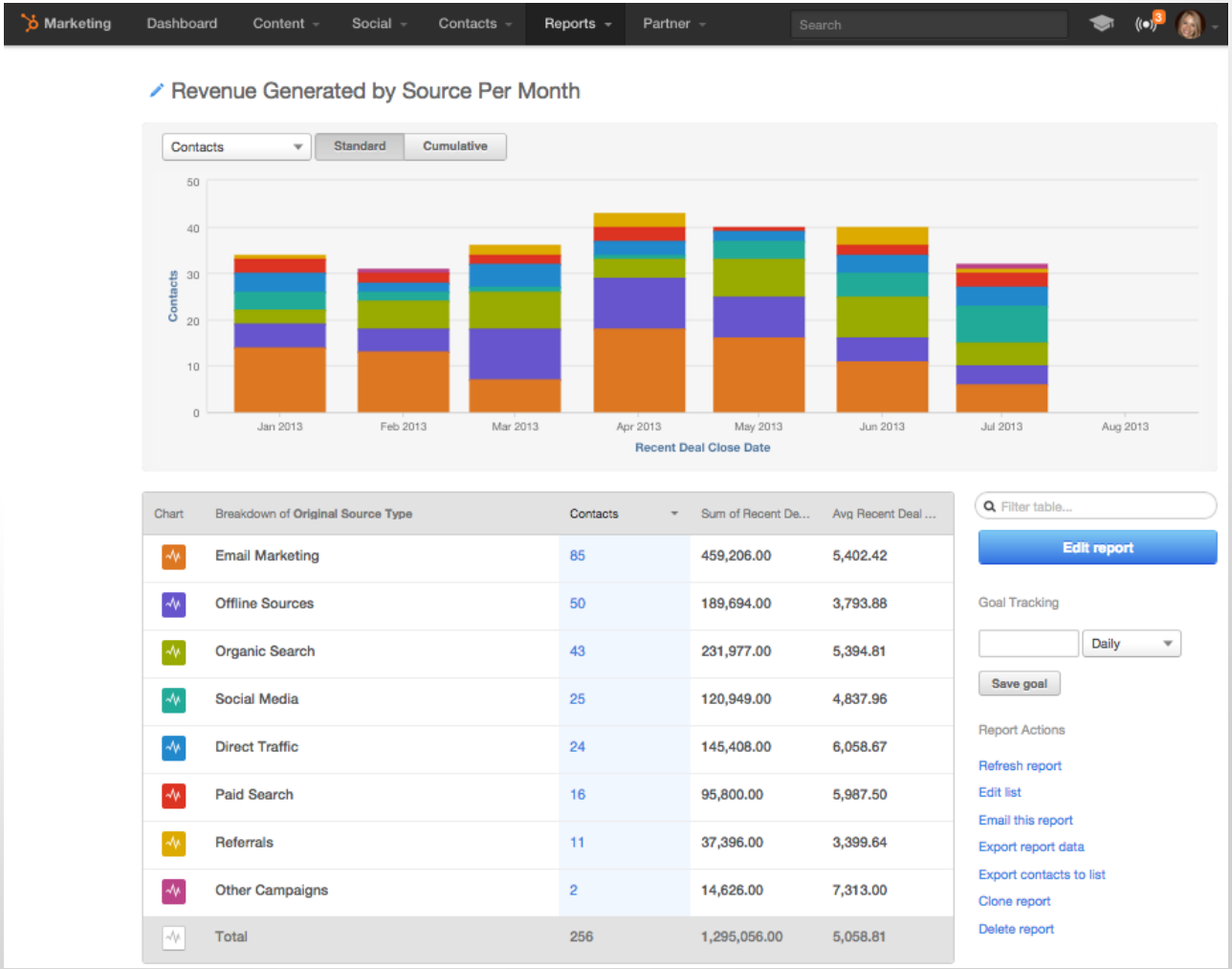
Rachel
Sprung
@RSprung

Nate
Ciruolo
@NathanCiruolo

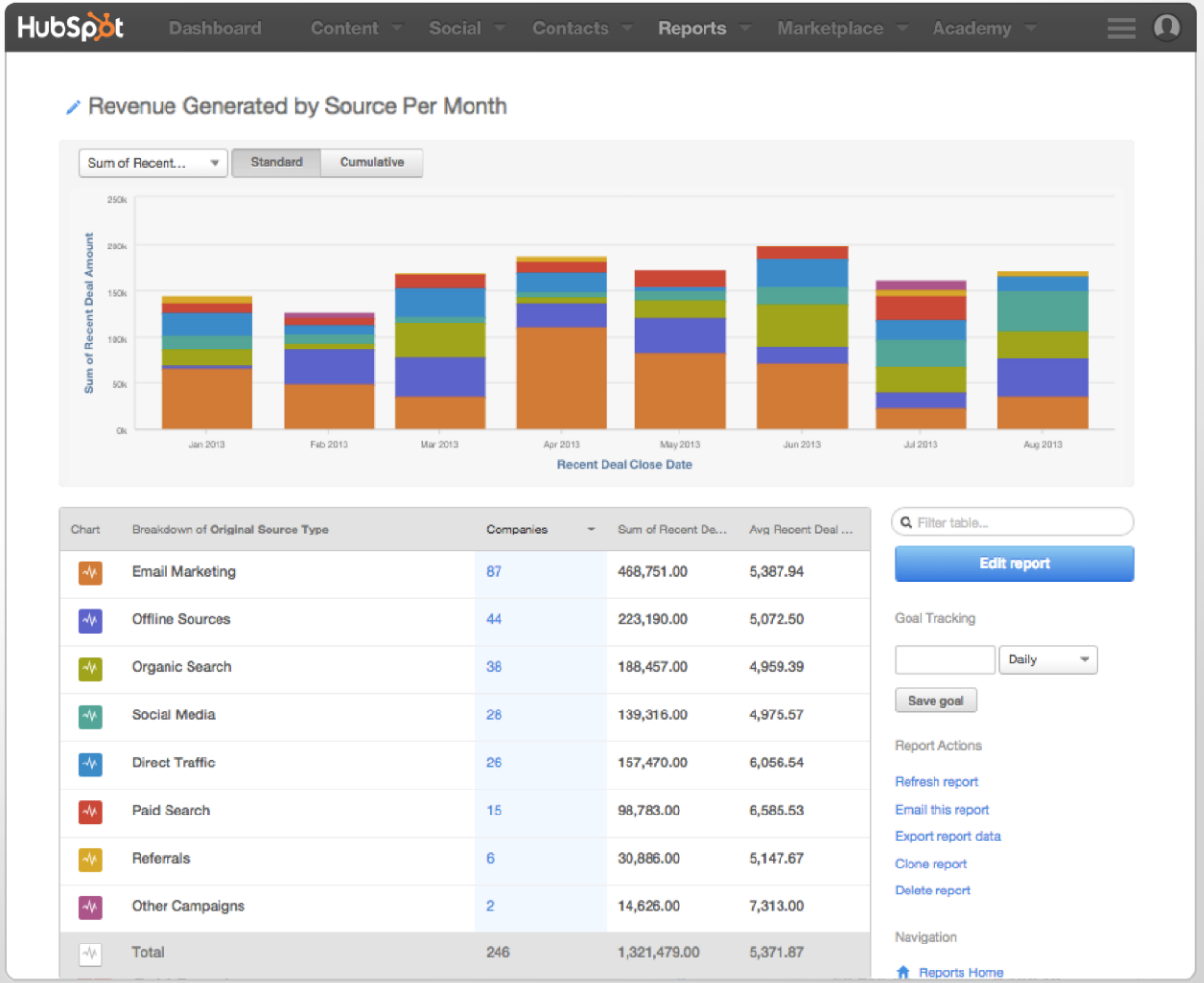
Try HubSpot Enterprise for yourself!

http://bit.ly/academy-trial

HUBSPOT CONTACTS REPORT.



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

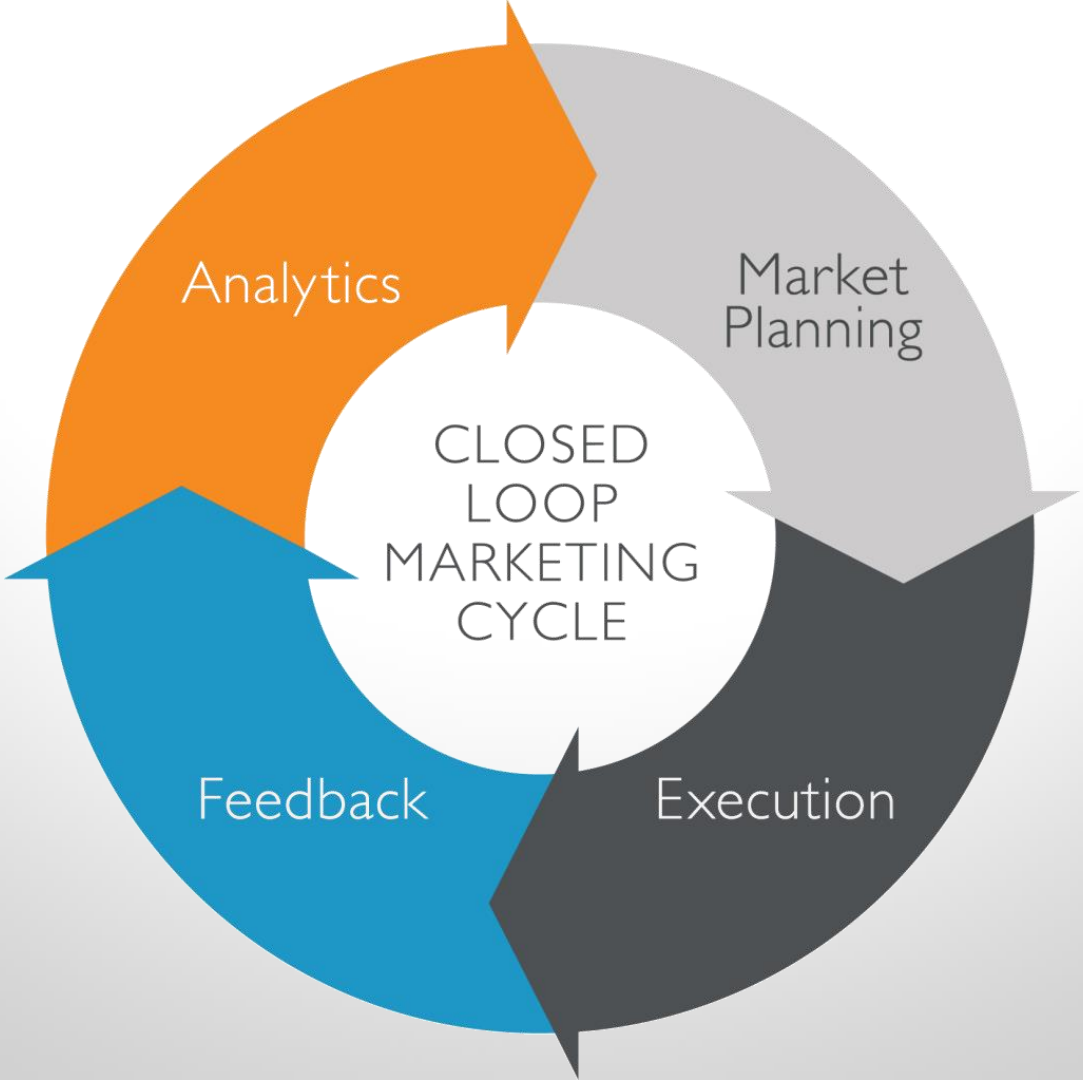
Revenue reporting is
not a separate app.

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?


Analytics
Market Planning
CLOSED LOOP MARKETING CYCLE
Feedback
Execution

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

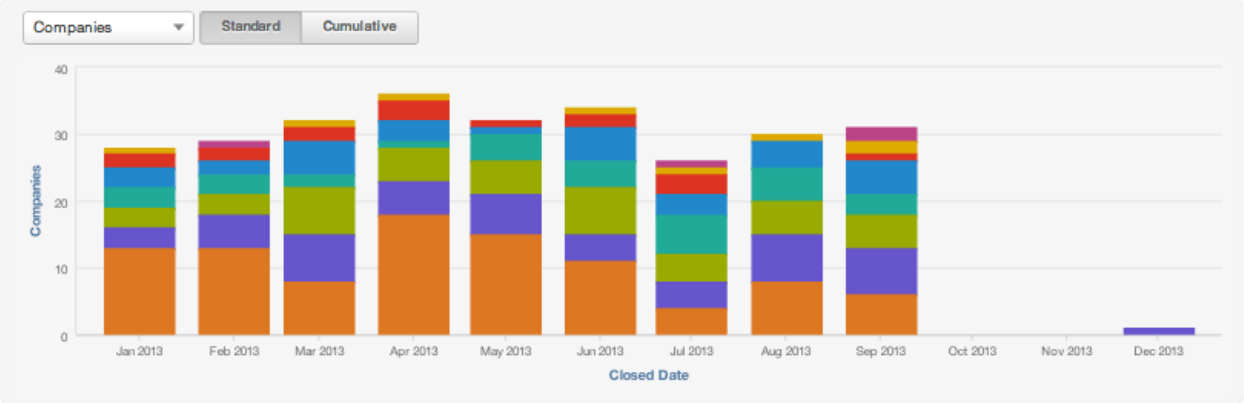


Chart	Breakdown of **Original Source Type**	Companies ▲	Sum of Salesfo...	Avg Salesforce...
	Email Marketing	96	549,071.00	5,719.49
	Offline Sources	49	279,056.00	5,695.02
	Organic Search	44	336,742.00	7,653.23
	Social Media	31	173,499.00	5,596.74
	Direct Traffic	31	194,137.00	6,262.48
	Paid Search	16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

Daily

Save goal

Report Actions

Refresh report

Clone report

Delete report

Navigation

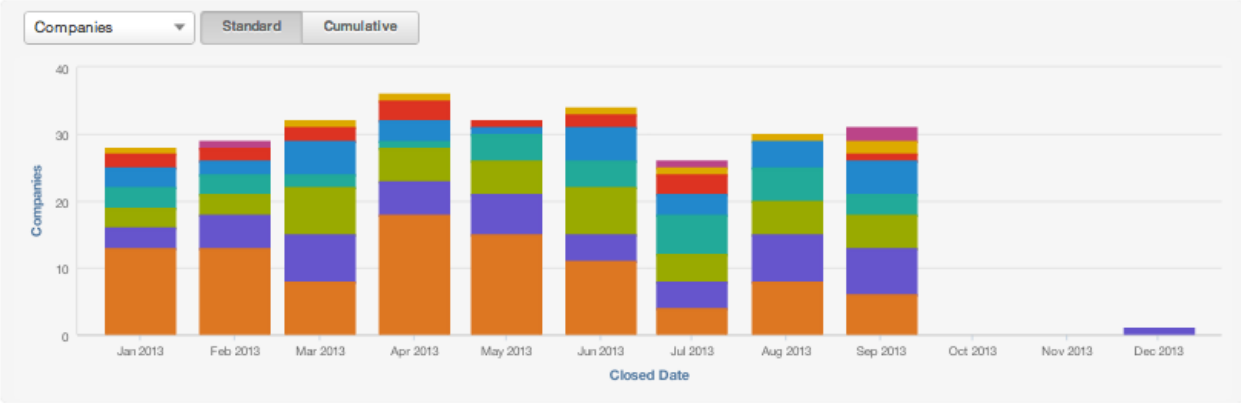
Reports Home

View all of your saved reports.

Trends & Suggestions

React to your current trends.

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



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Trends & Suggestions

React to your current trends.

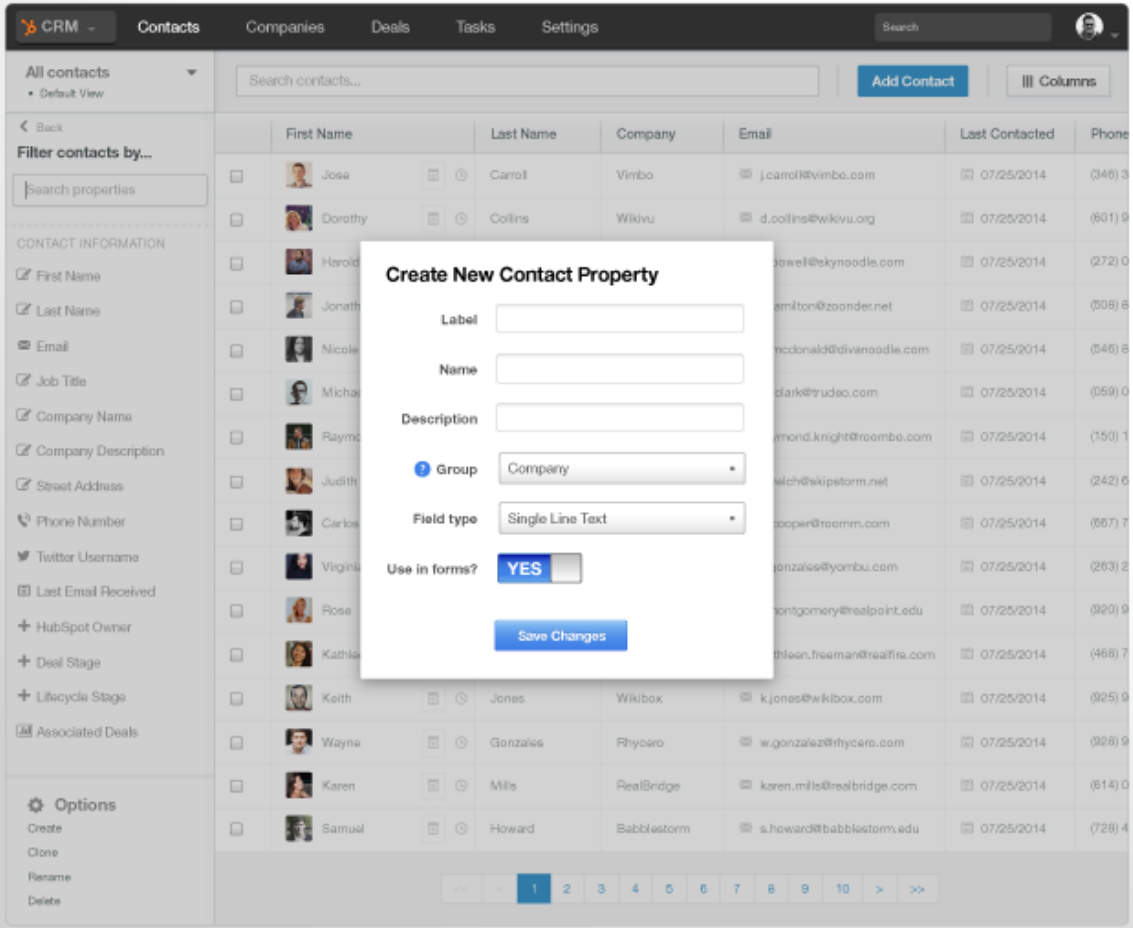
REVENUE REPORTING HELPS YOU…

- 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.

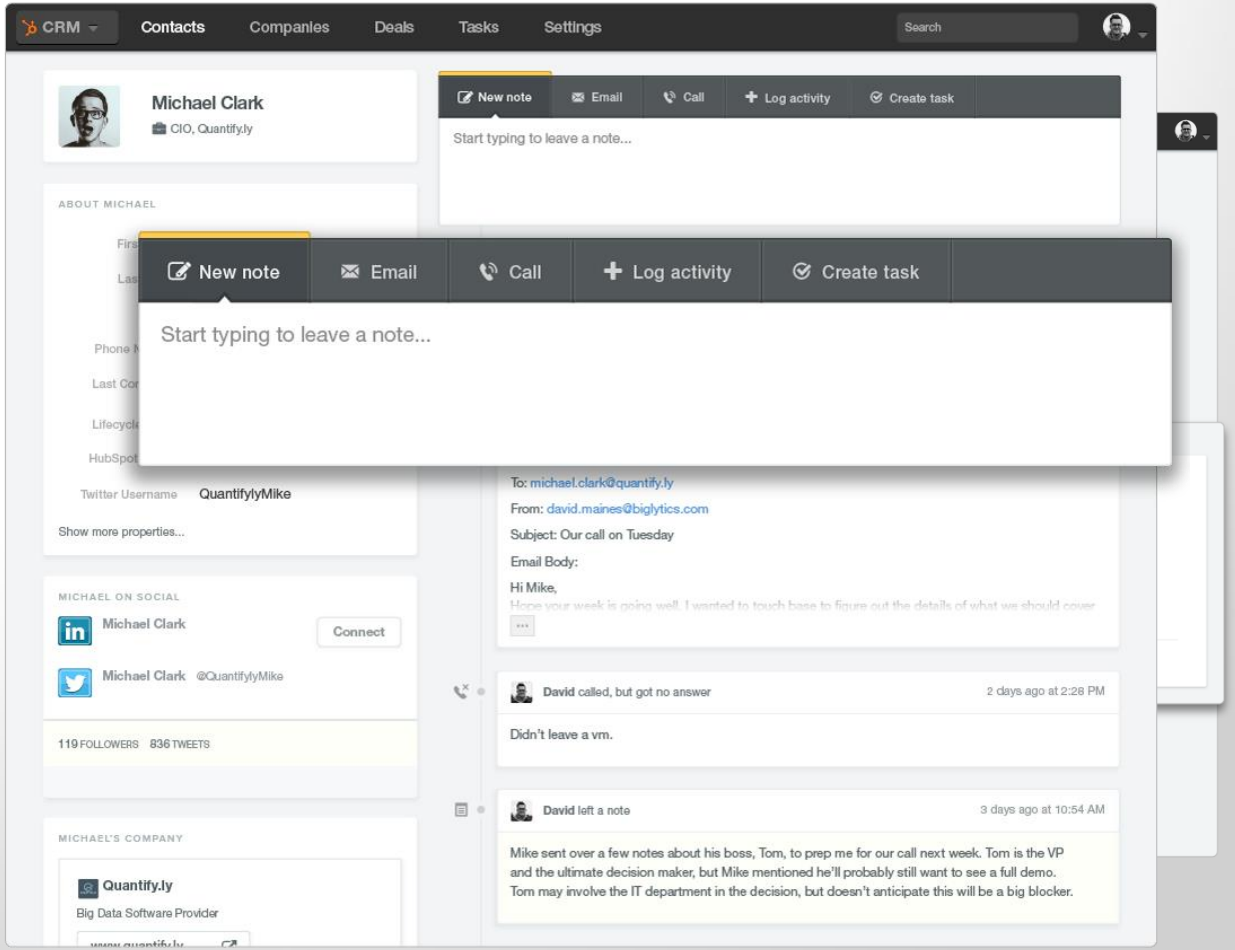


OPTION 1:

You have the HubSpot CRM.

No custom setup. Revenue reporting will automatically work.

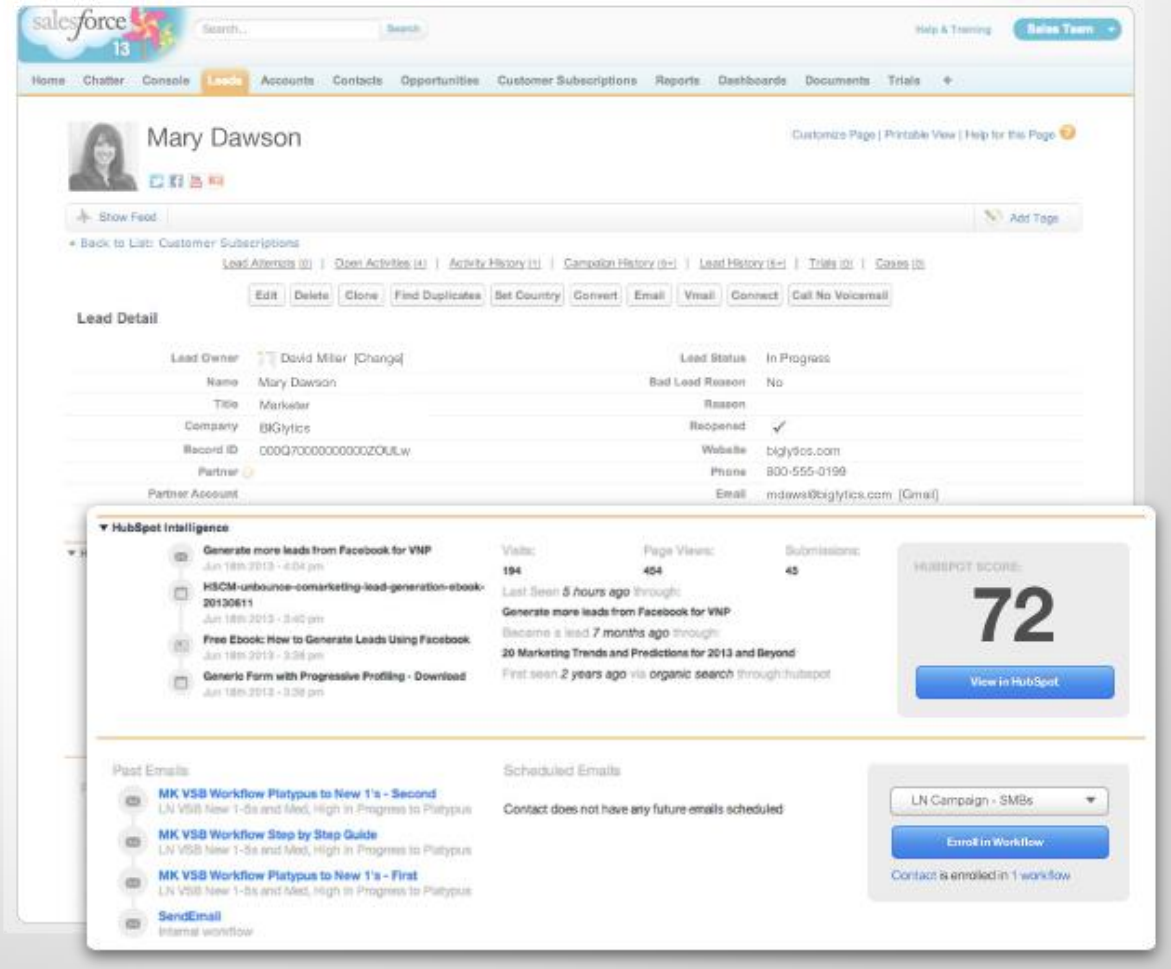
HubSpot **CRM**

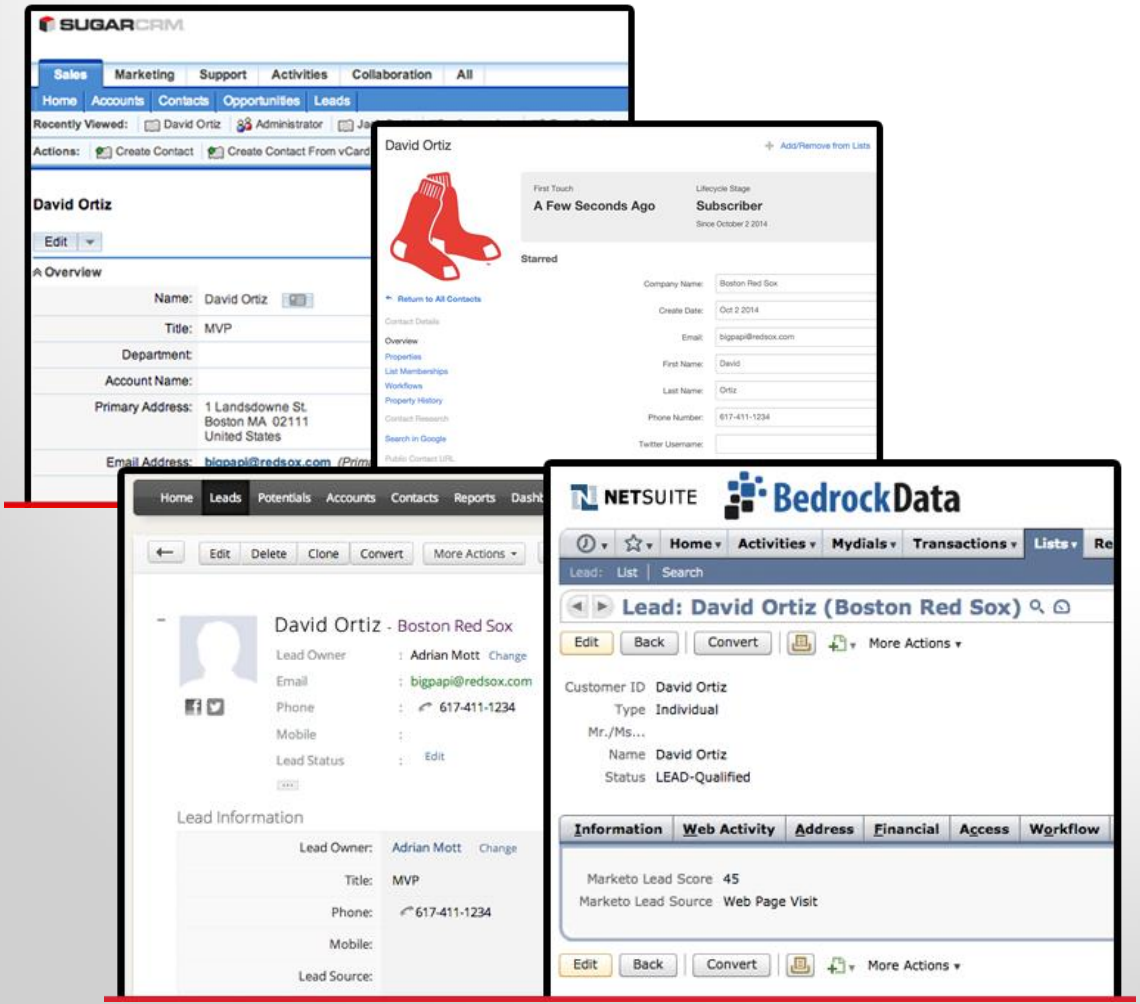

CRM
Contacts
Companies
Deals
Tasks
Settings
Search
Michael Clark
CIO, Quantify.ly
New note
Email
Call
Log activity
Create task
Start typing to leave a note...
ABOUT MICHAEL
Twitter Username
QuantifylyMike
Show more properties...
MICHAEL ON SOCIAL
Michael Clark
Connect
Michael Clark @QuantifylyMike
119 FOLLOWERS 836 TWEETS
MICHAEL'S COMPANY
Quantify.ly
Big Data Software Provider
To: michael.clark@quantify.ly
From: david.maines@biglytics.com
Subject: Our call on Tuesday
Email Body:
Hi Mike,
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.





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.

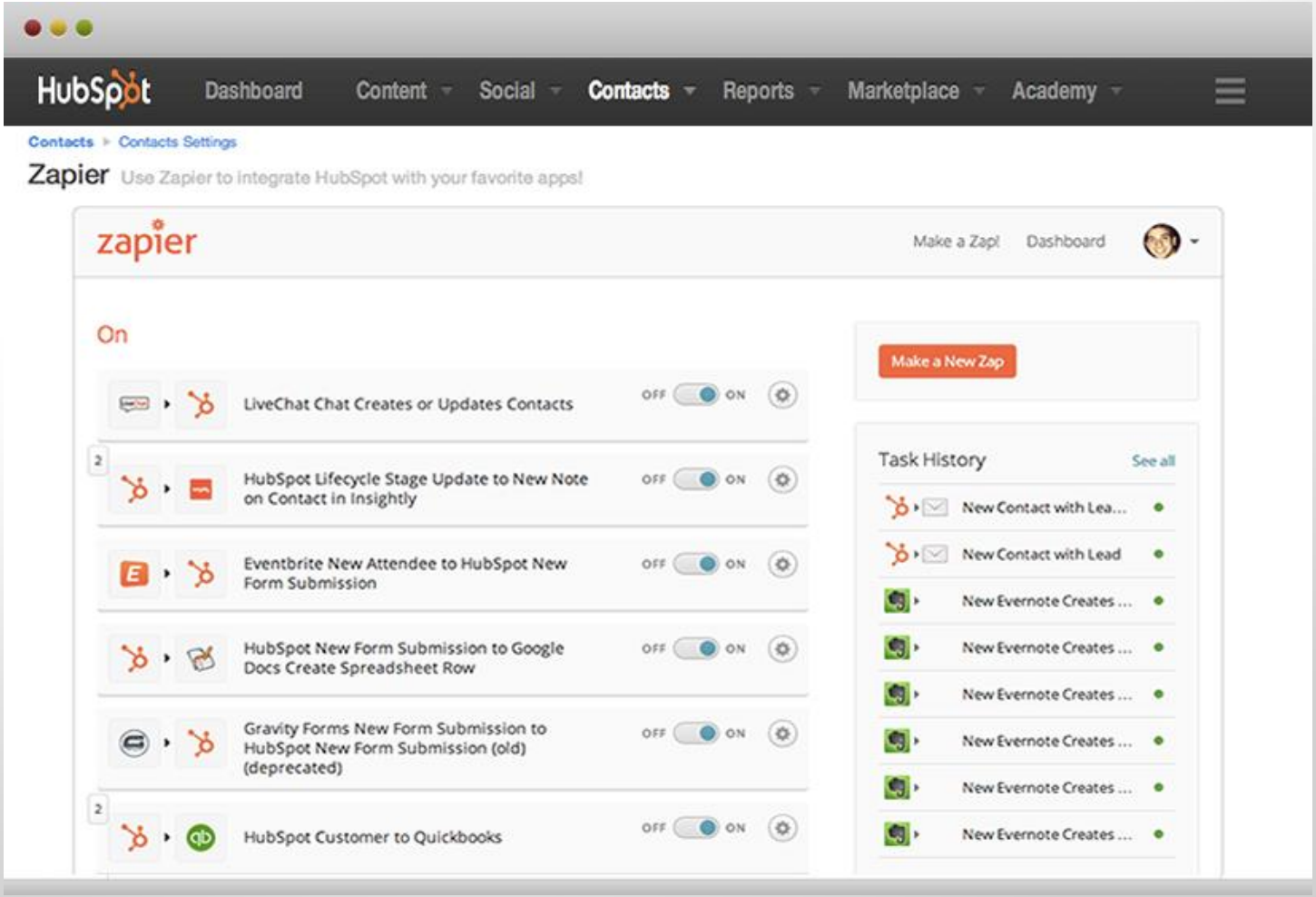
Work with a third-party developer to integrate your CRM and HubSpot with the Deals API.

Deals API

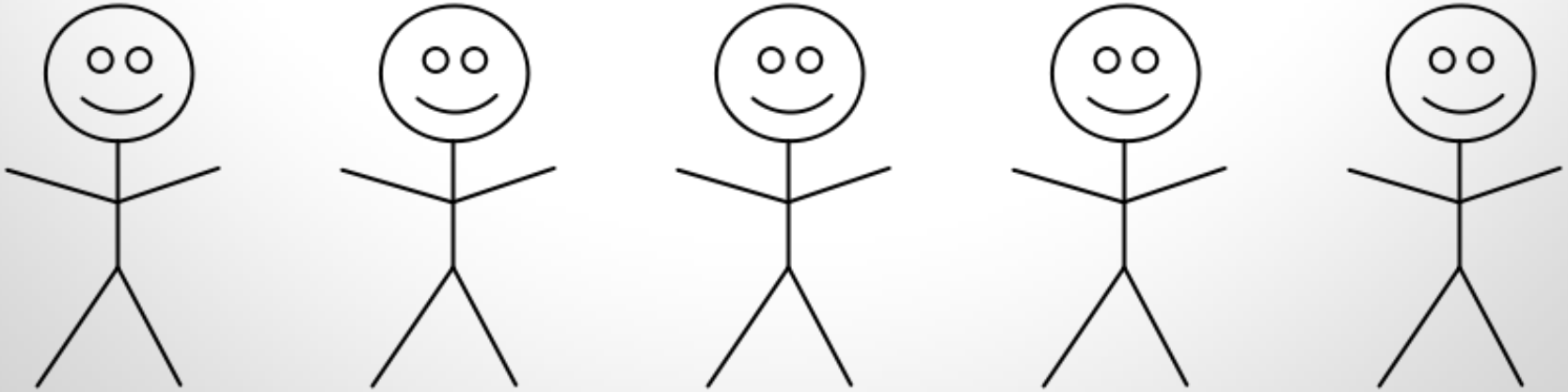
The Deals API enables developers to add Deal data from CRM into HubSpot to enable marketers to improve their lists and report on revenue.

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

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



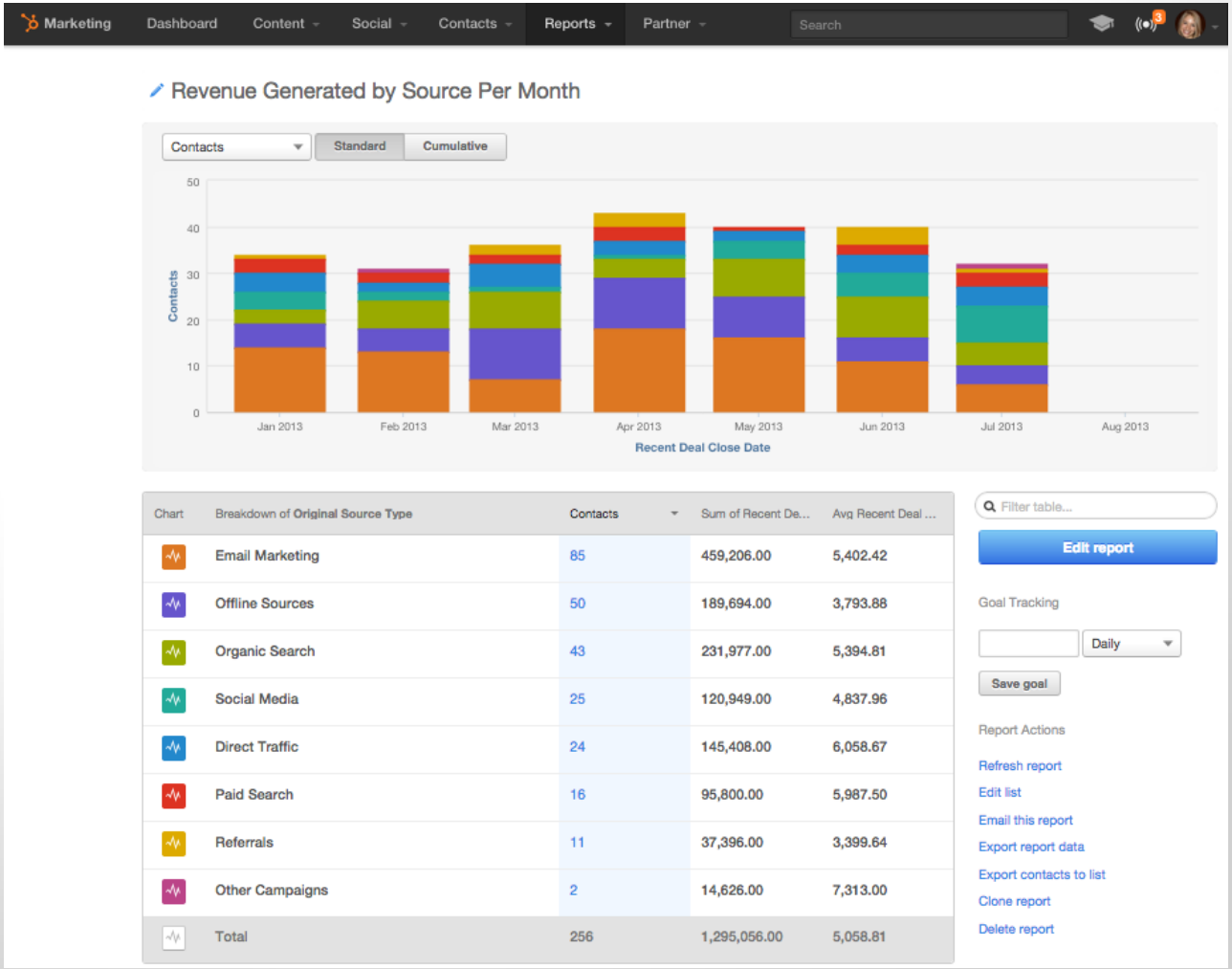
3 WHEN TO USE REVENUE REPORTING.



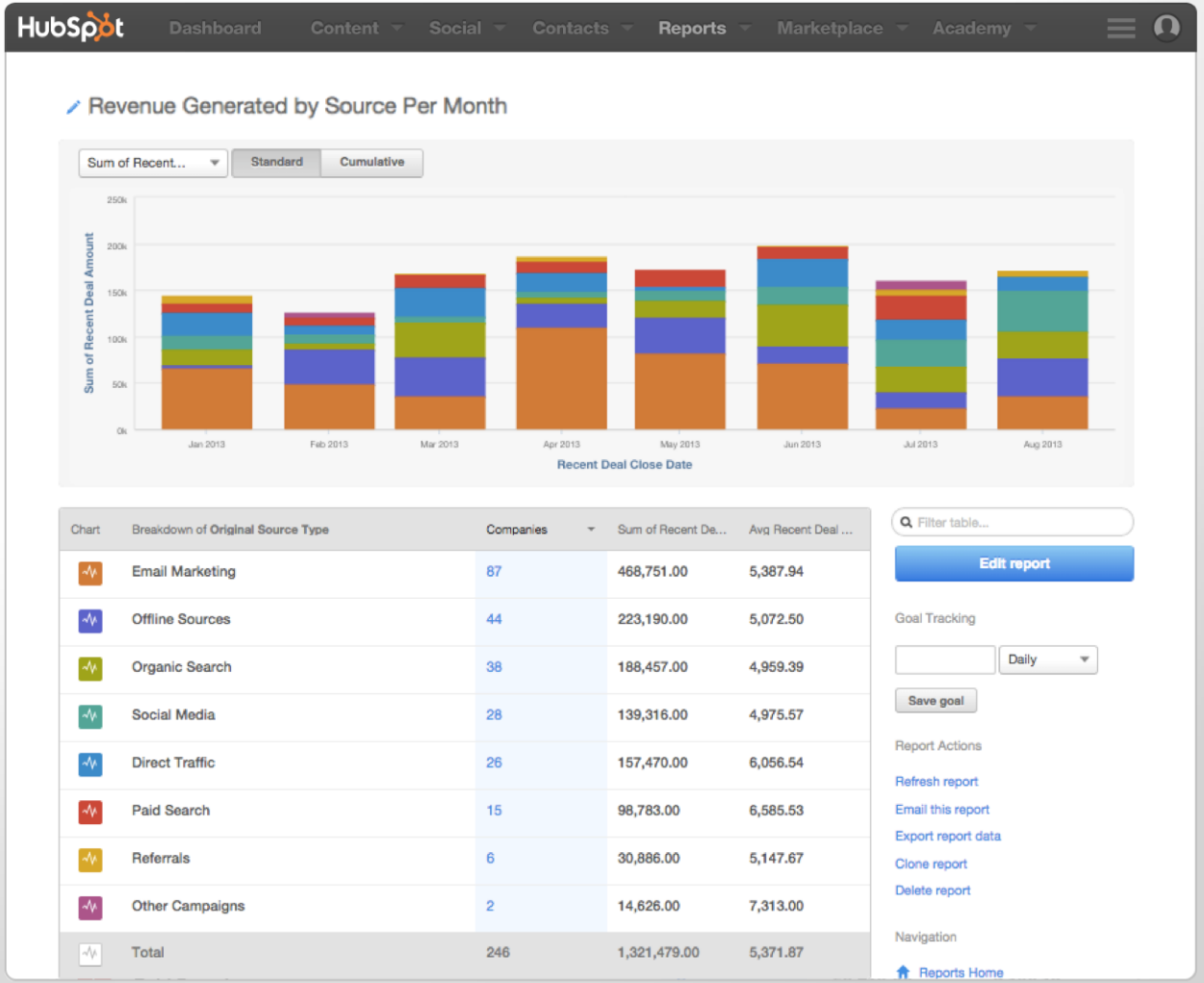
B2C – CONTACTS REPORT.

B2B – COMPANIES REPORT.

HUBSPOT CONTACTS REPORT WITH REVENUE.



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?

#InboundLearning Webinar 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?

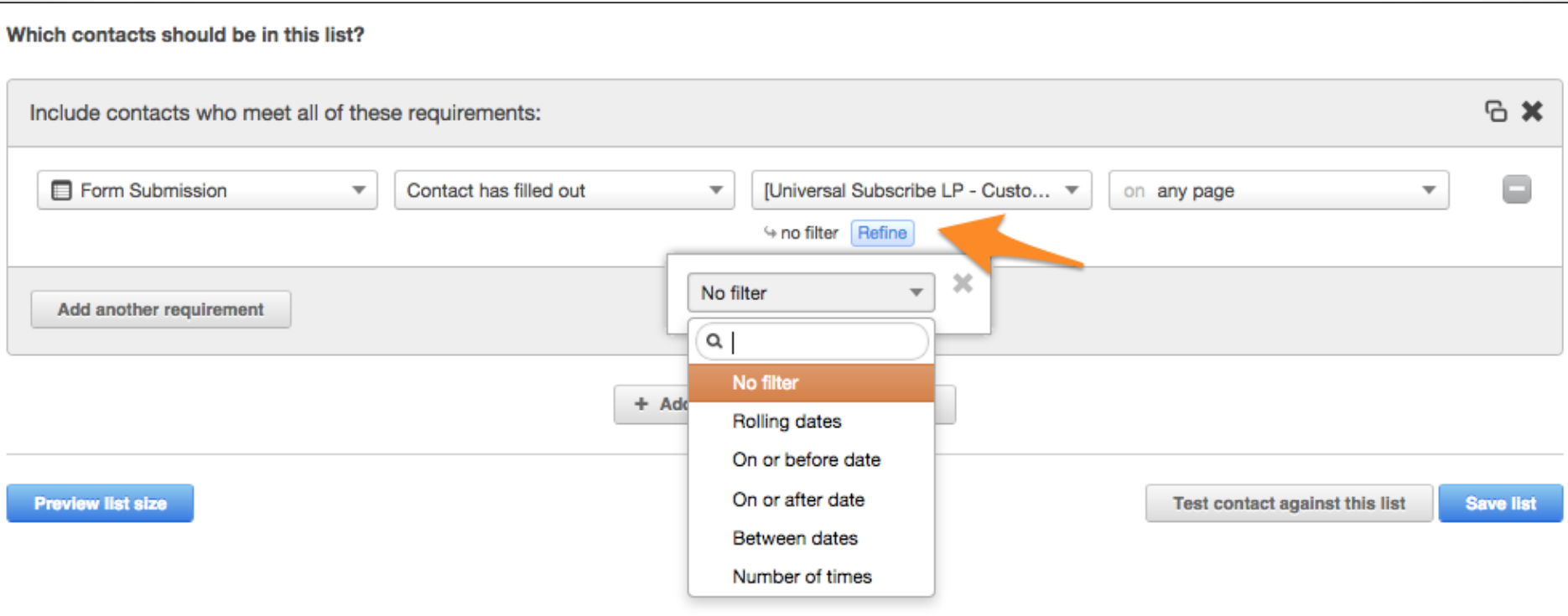
Include contacts who meet all of these requirements:

Contact Property | account_type__c | is equal to | Enter a value

- Contact Property
- Company Property
- List Membership
- Form Submission
- Email
- Page View

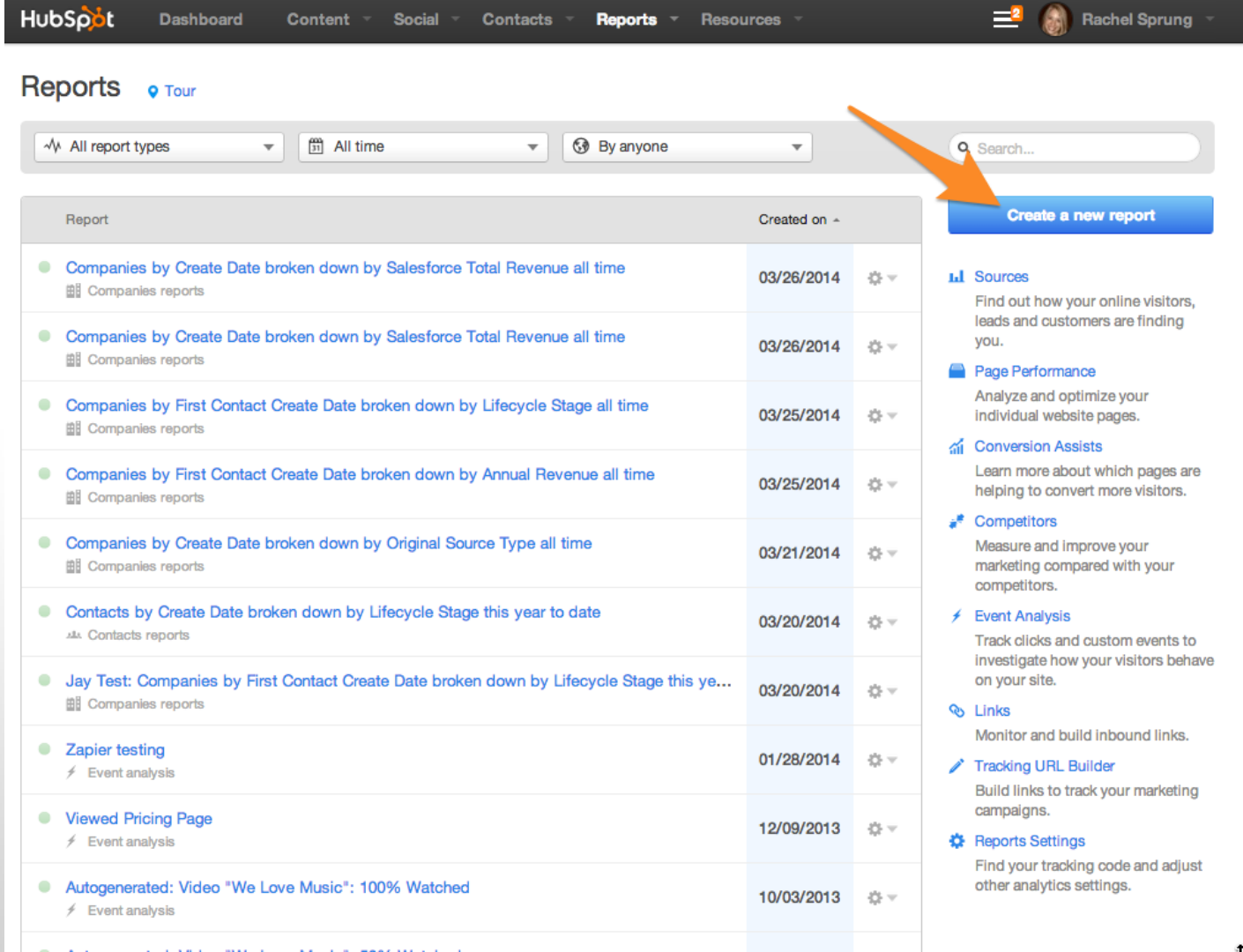
+ Add another set of requirements

Test contact against this list | Save list

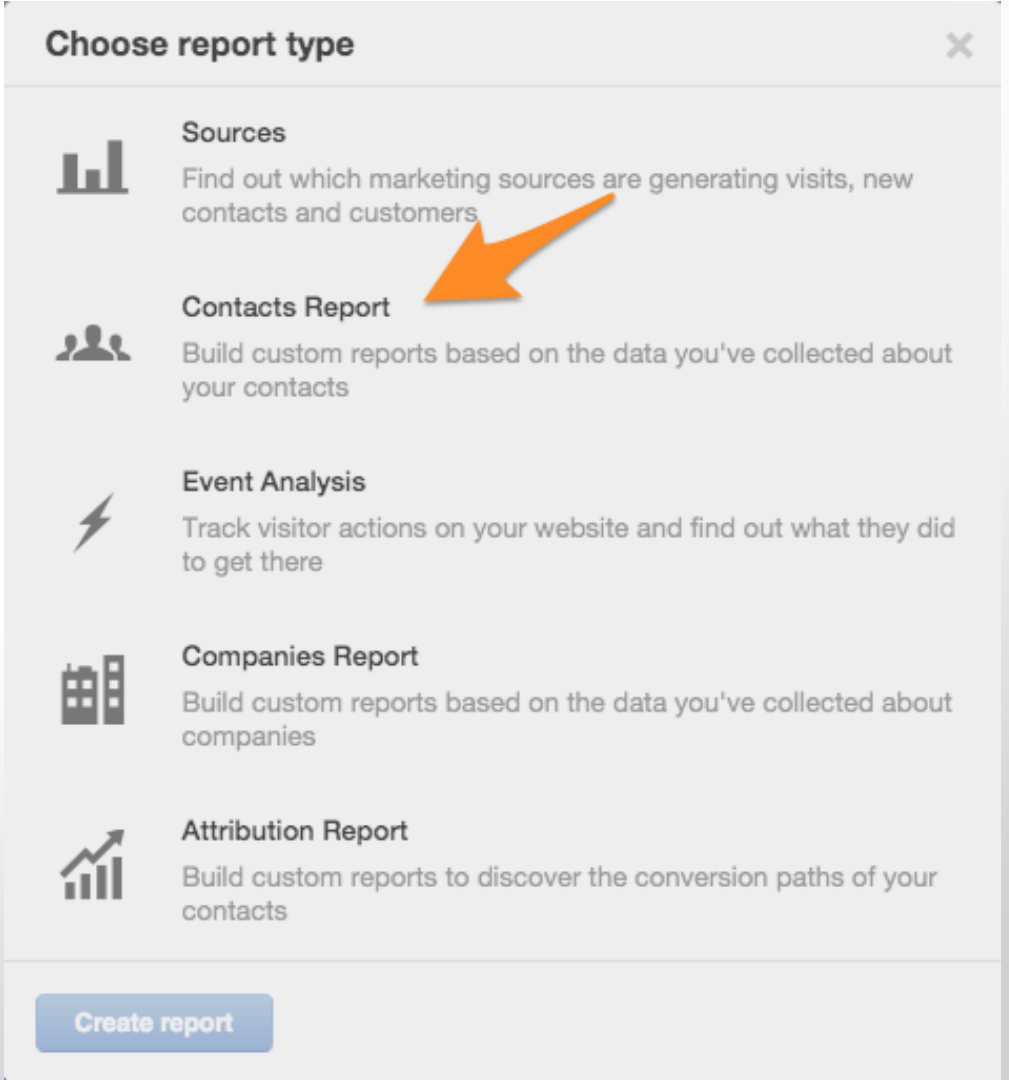

Which contacts should be in this list?
Include contacts who meet all of these requirements:
Form Submission
Contact has filled out
[Universal Subscribe LP - Custo...
on any page
no filter
Refine
No filter
Add another requirement
No filter
Rolling dates
On or before date
On or after date
Between dates
Number of times
Preview list size
Test contact against this list
Save list

1 REVENUE REPORTING IN A CONTACTS REPORT

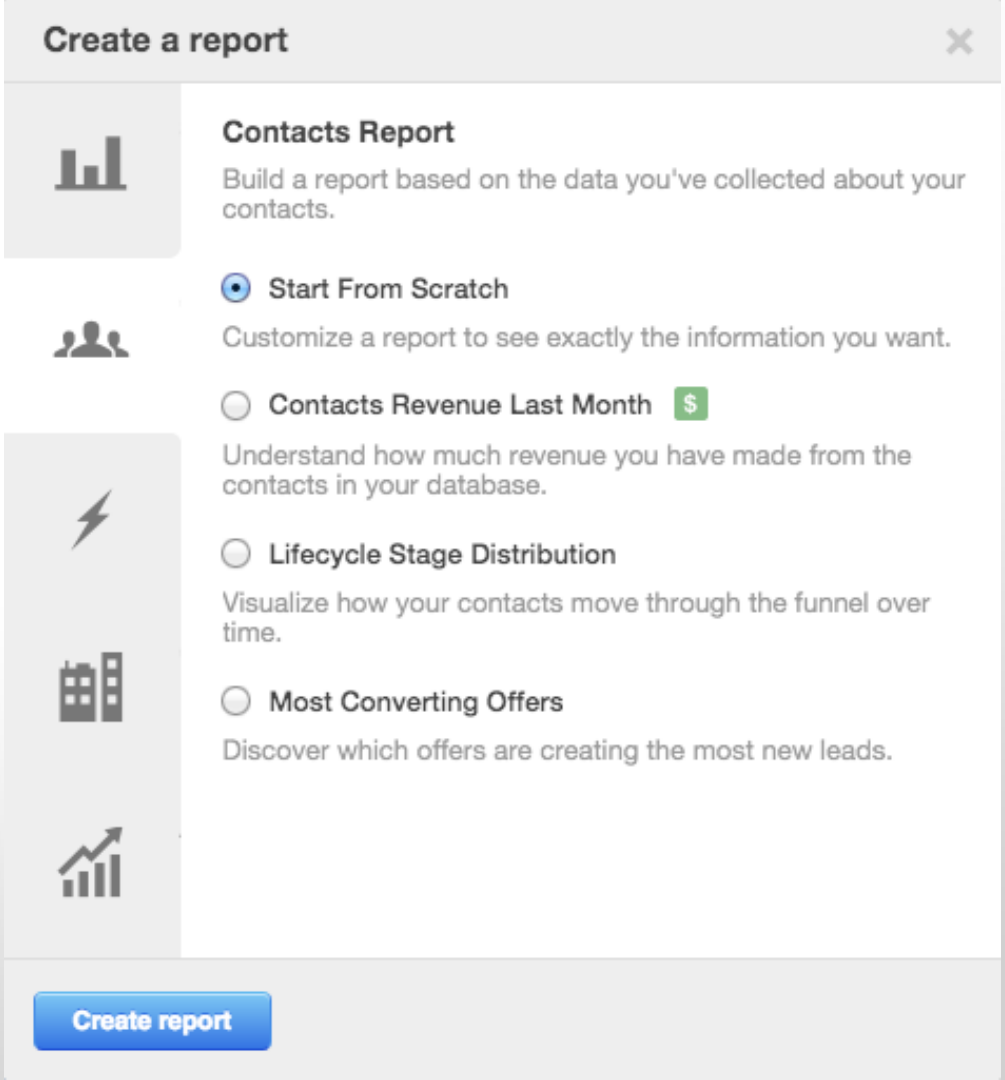
Step 1:
Under Reports Home, select Create a new report.



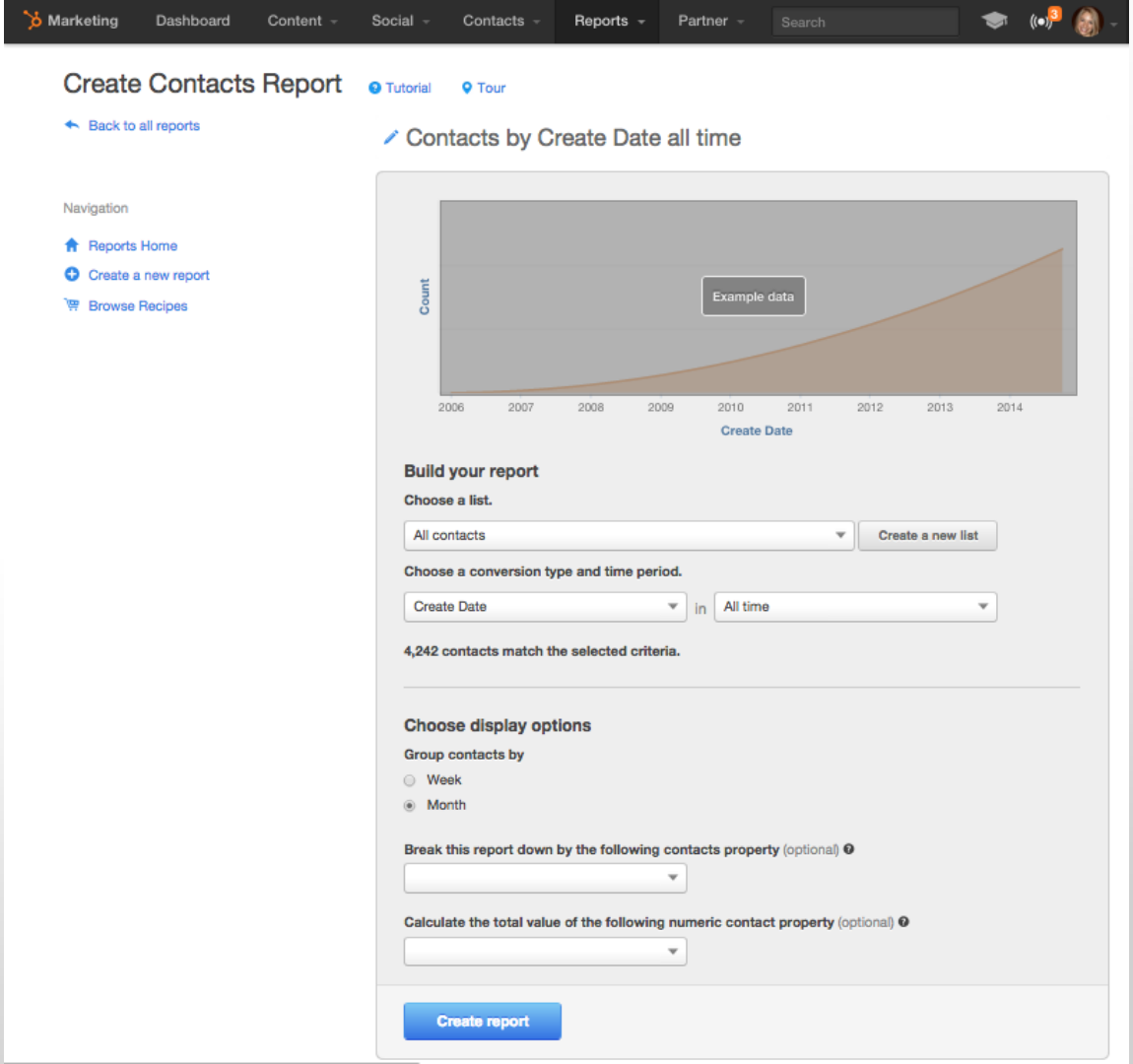
Step 2a:
Select Contacts Report.



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



Step 3:
Select the criteria for your report.



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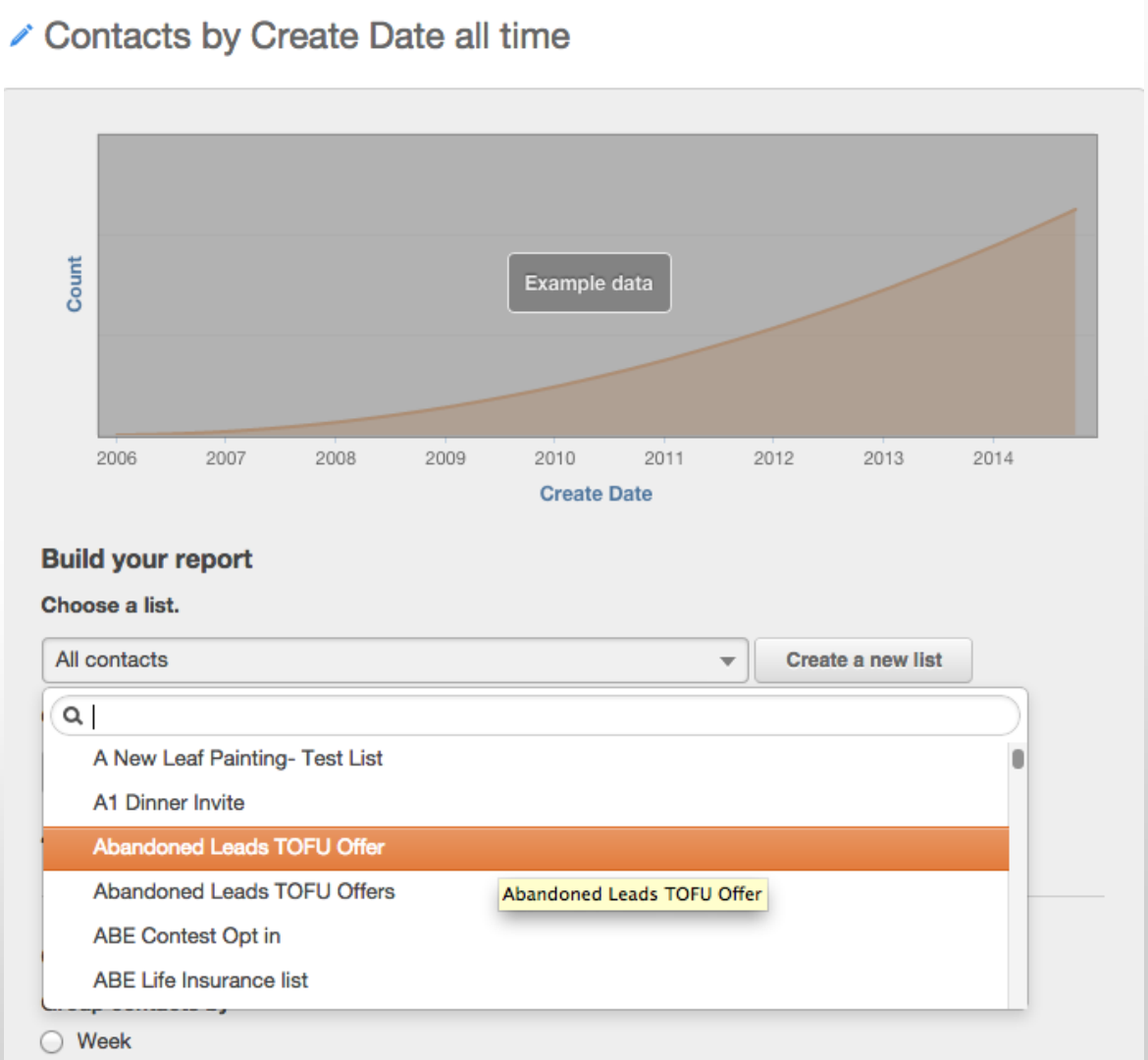
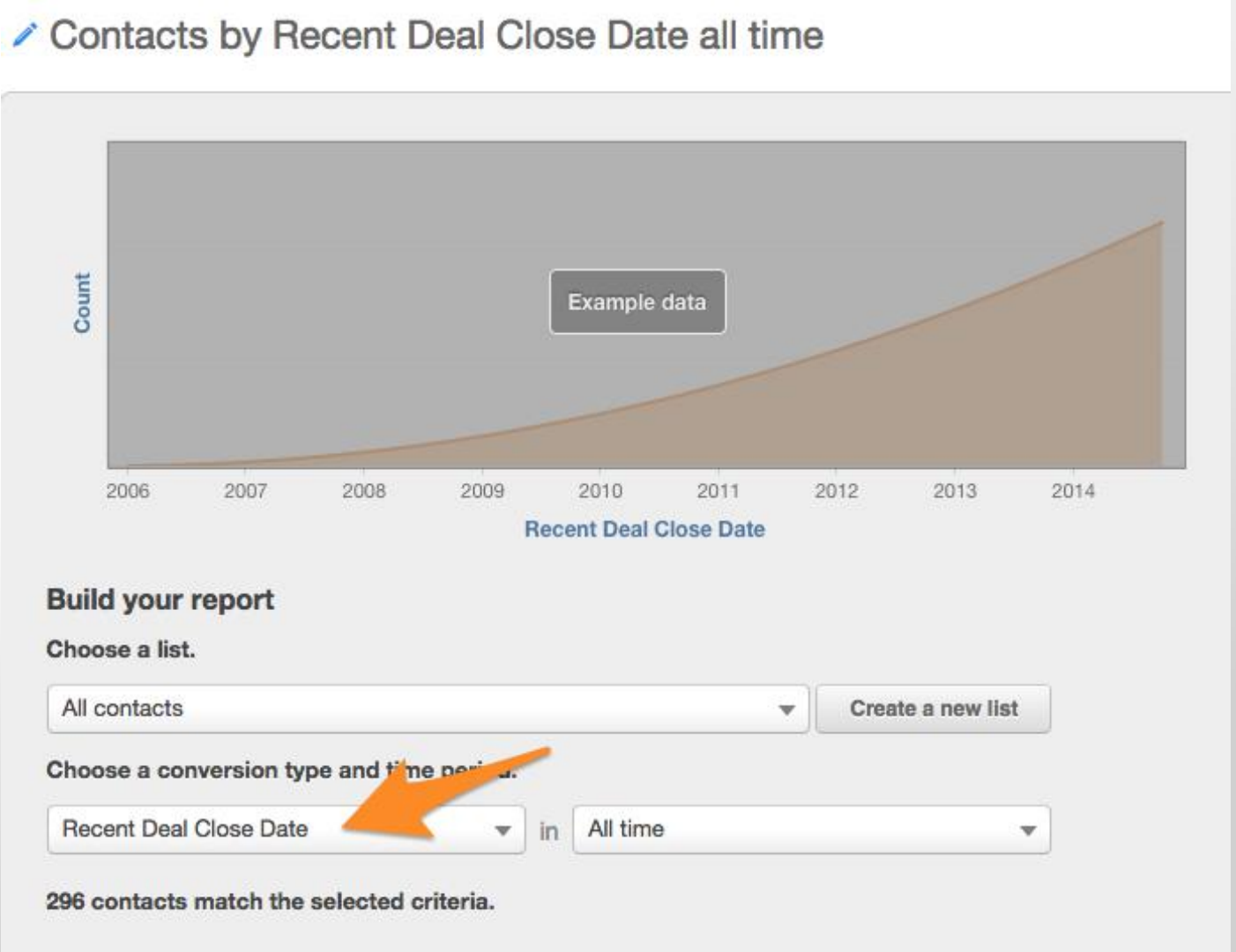


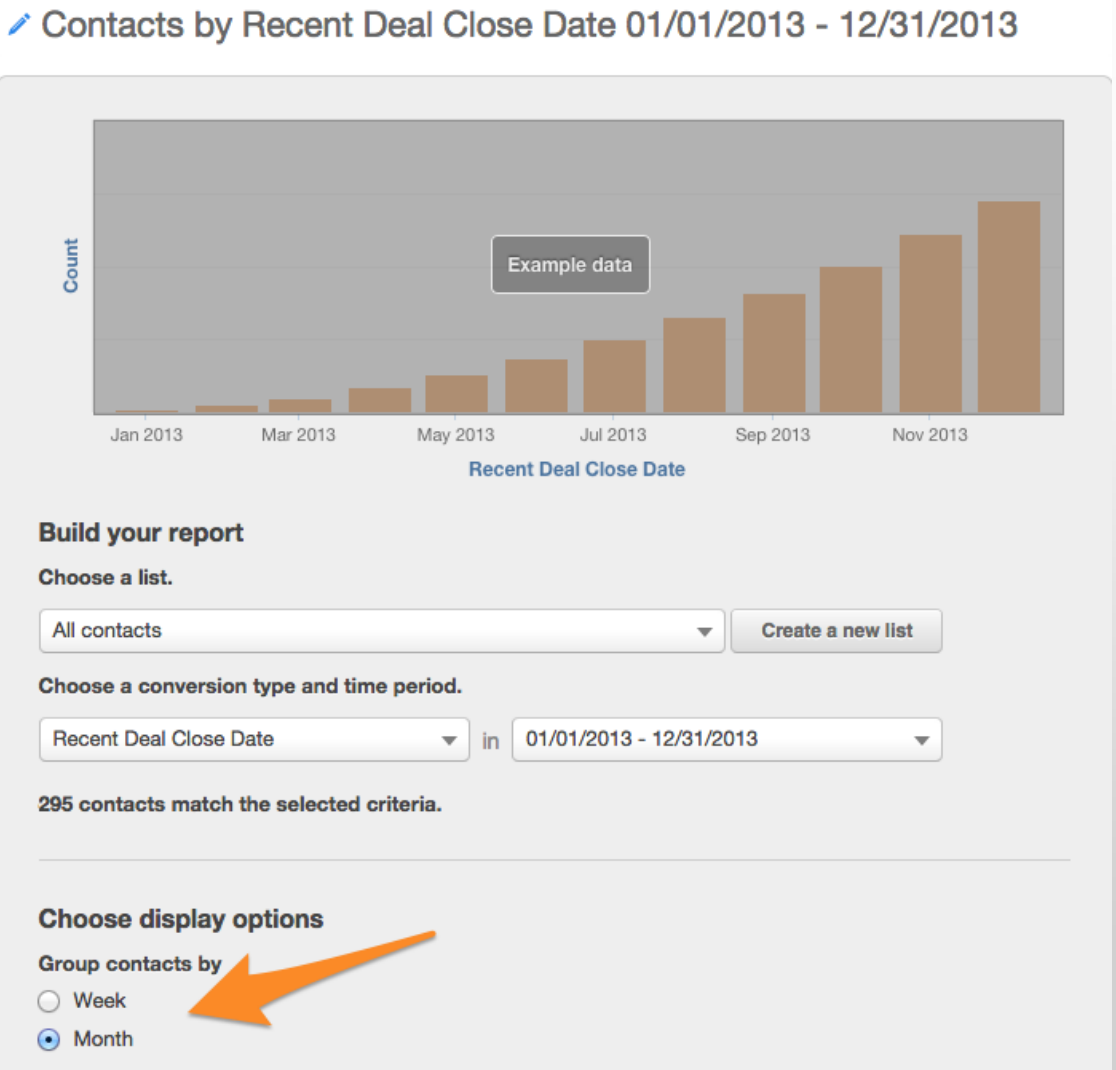
Select a label for the x axis of your report. This will be your date label.

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

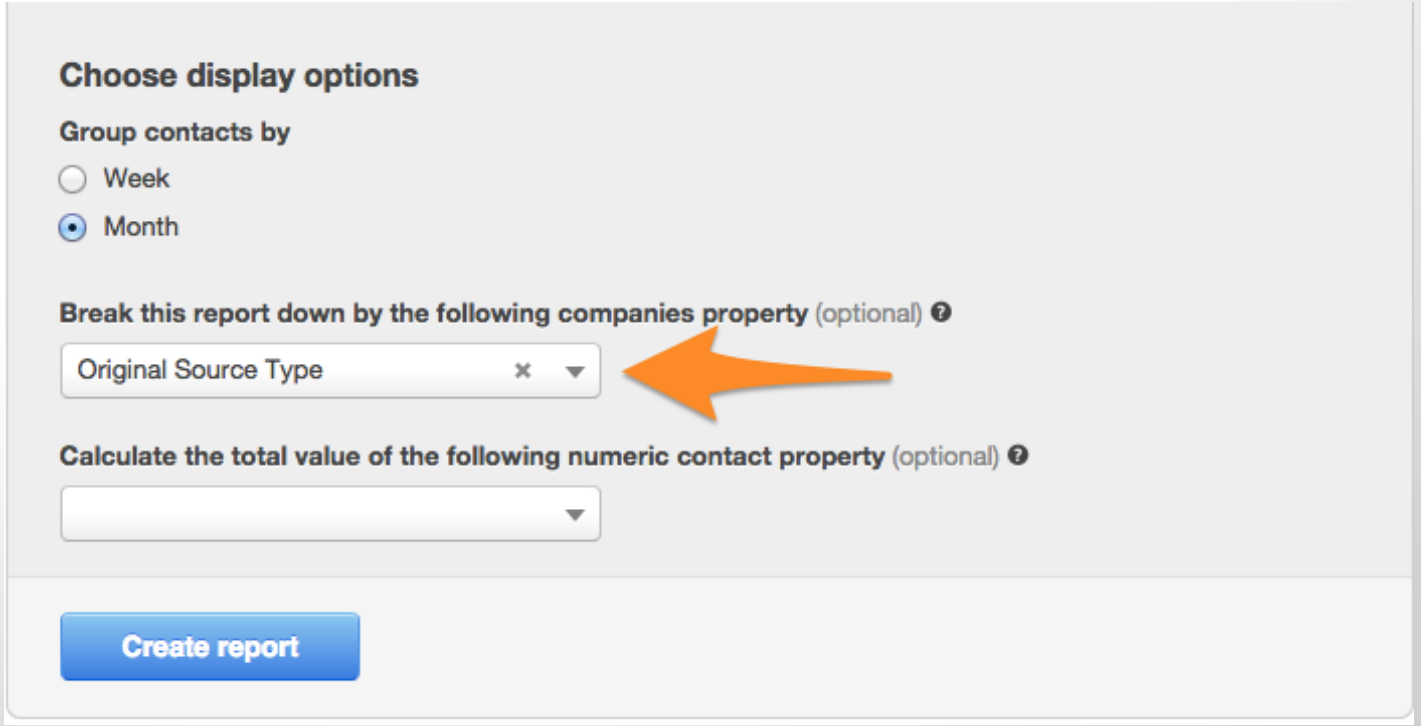


Select a date range. You can choose the last week or month or use a custom date range.

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

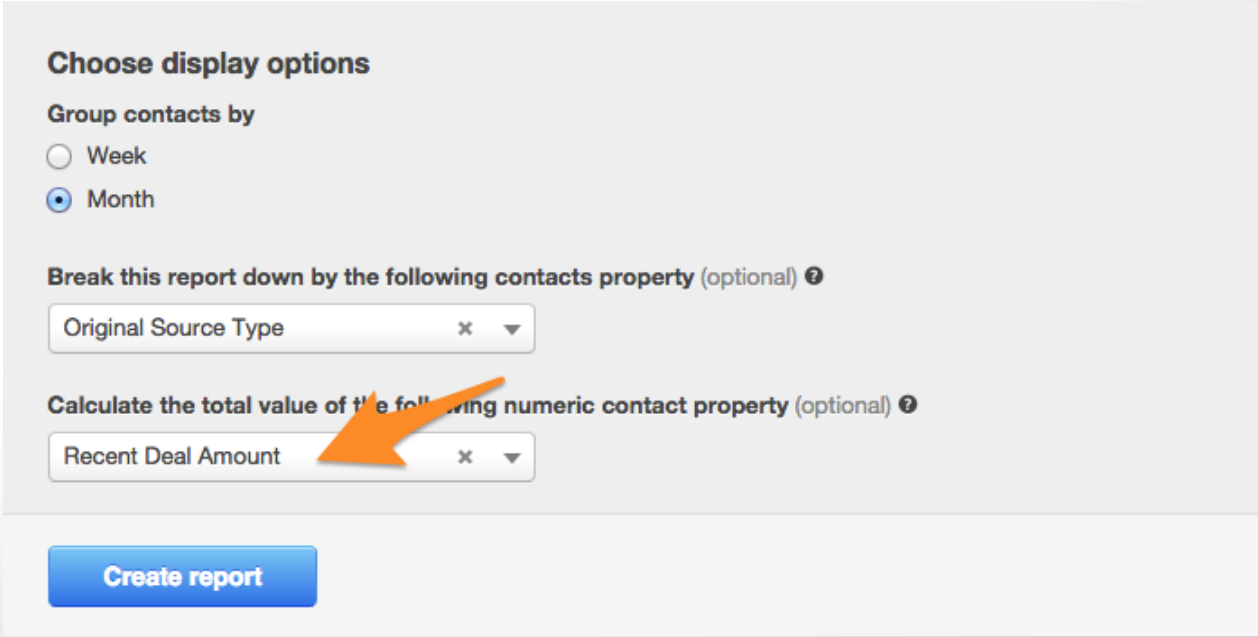


Choose a companies property to break up your report. Your results will show up as a stacked bar graph.



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.



REVENUE REPORTING IN A COMPANIES REPORT

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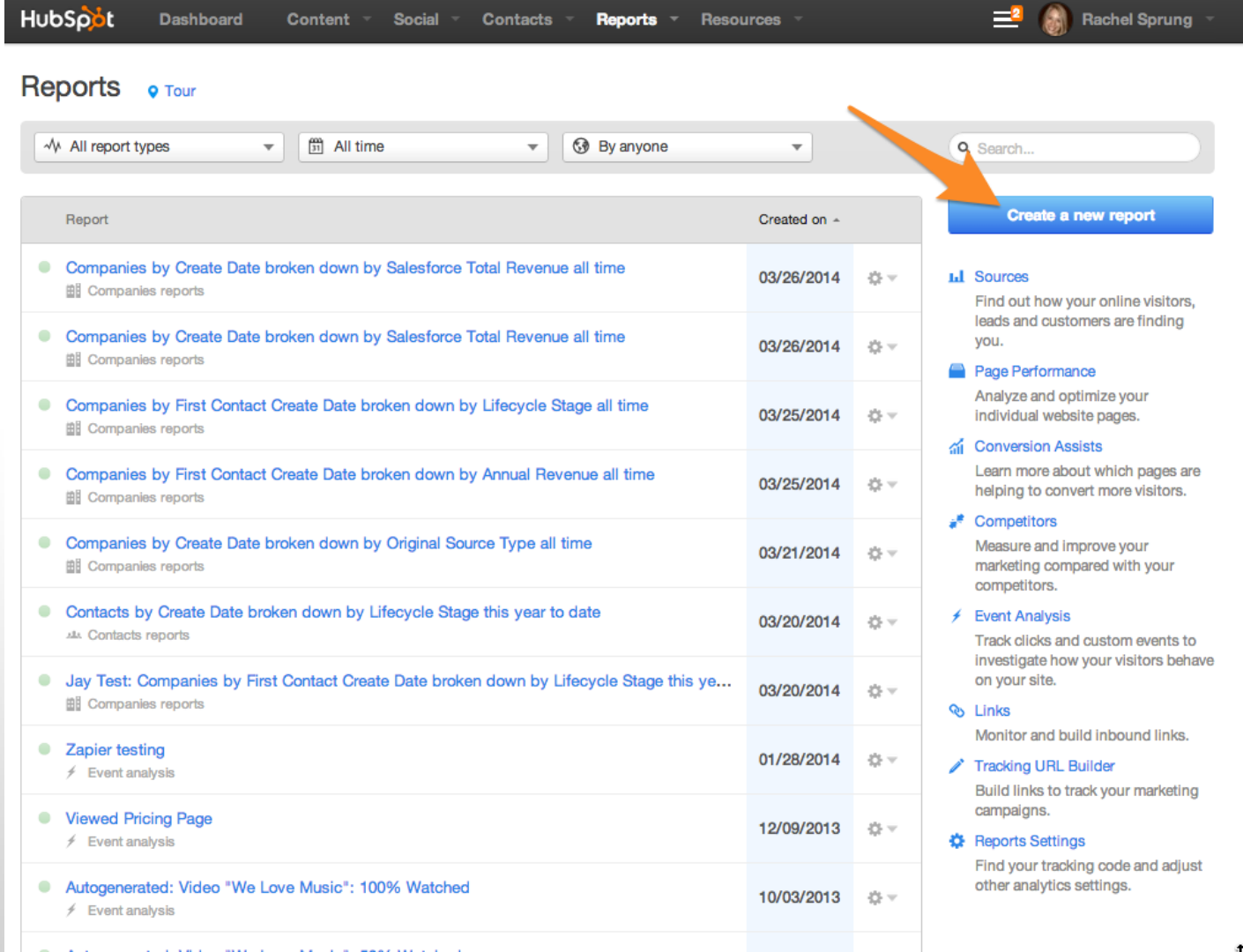
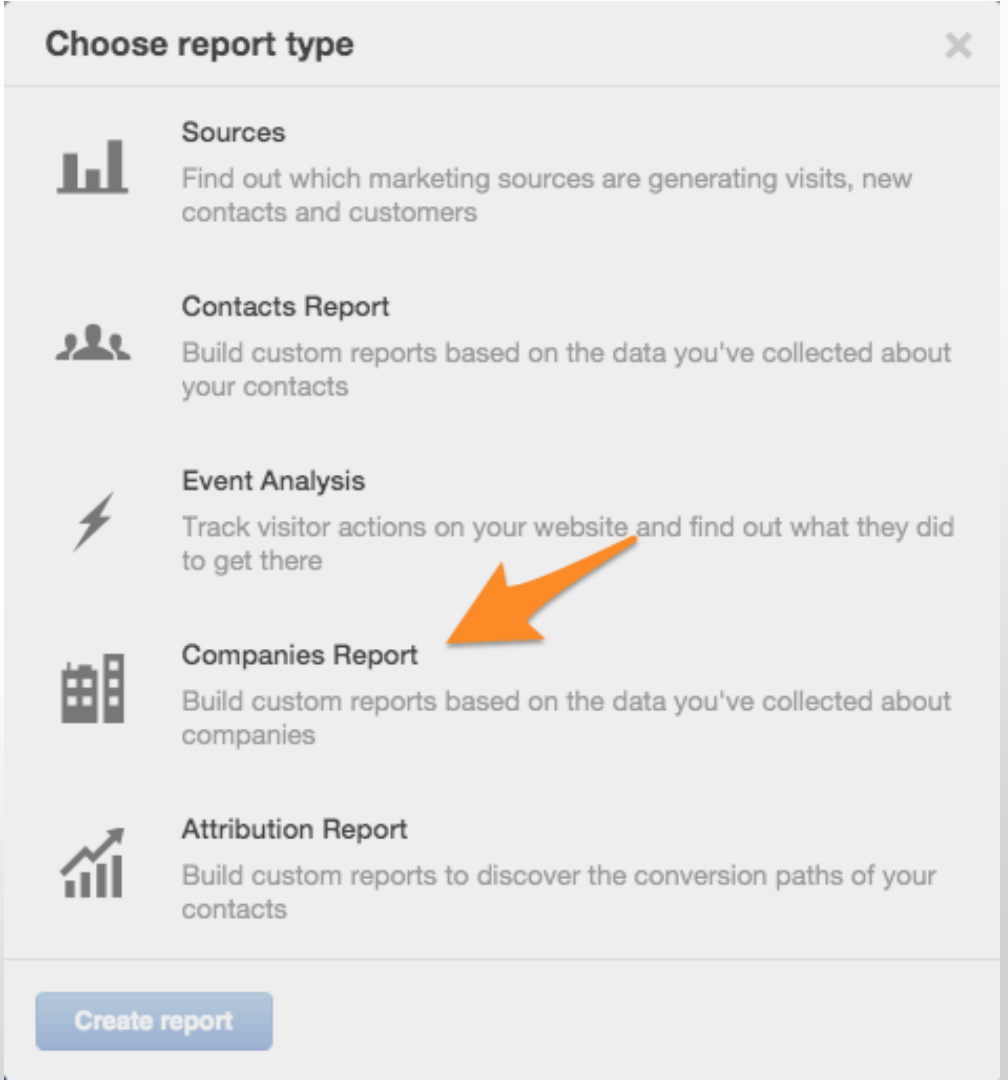
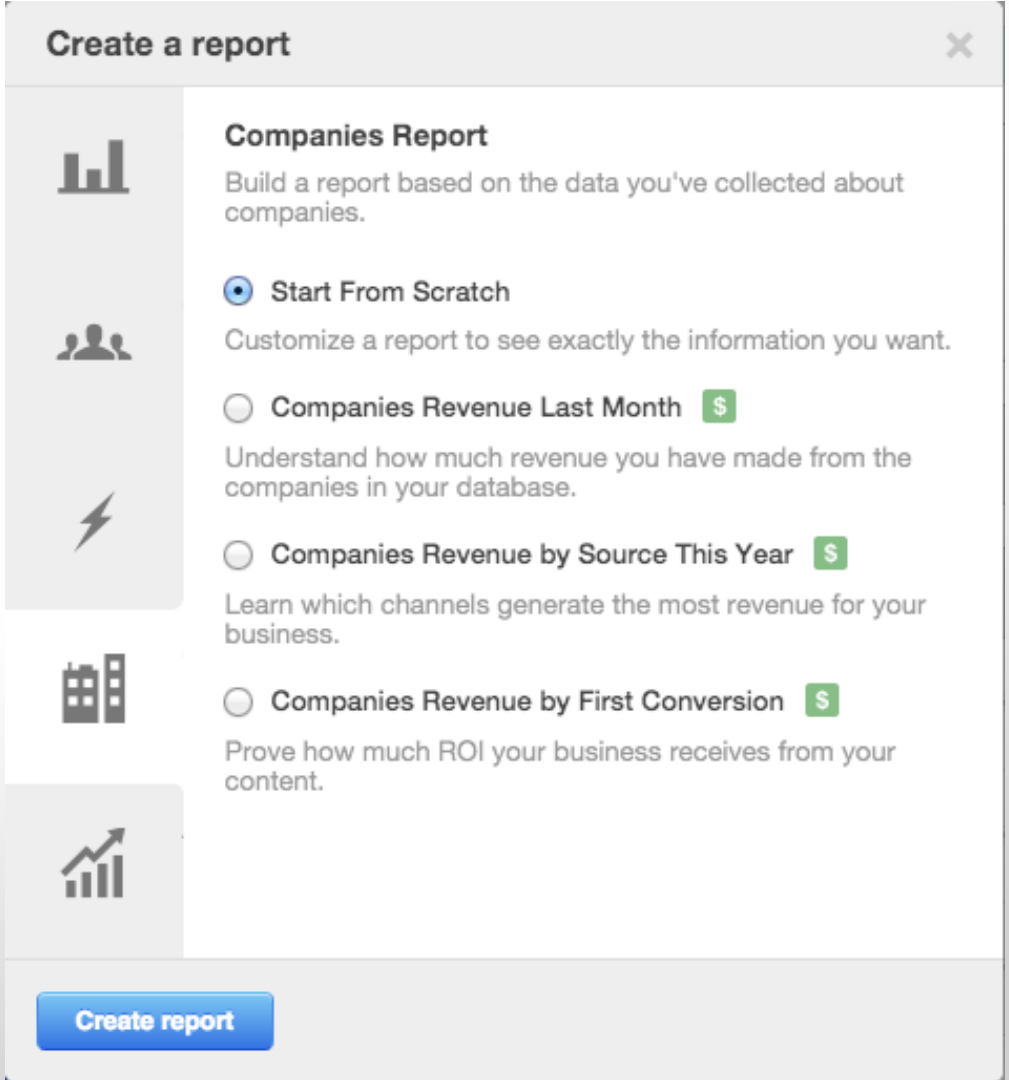


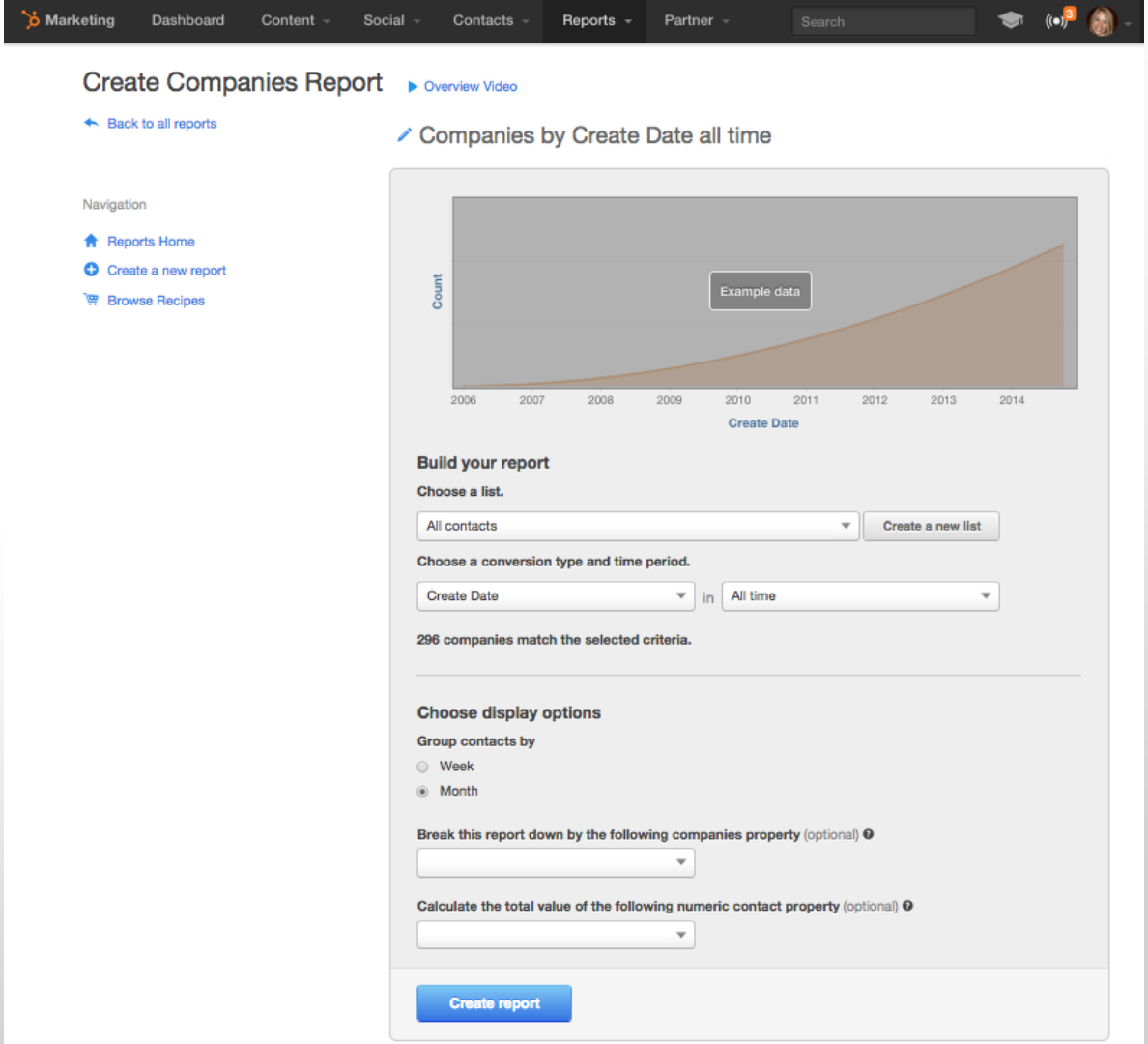
Step 2a:
Select Companies Report.



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



Step 3:
Select the criteria for your report.



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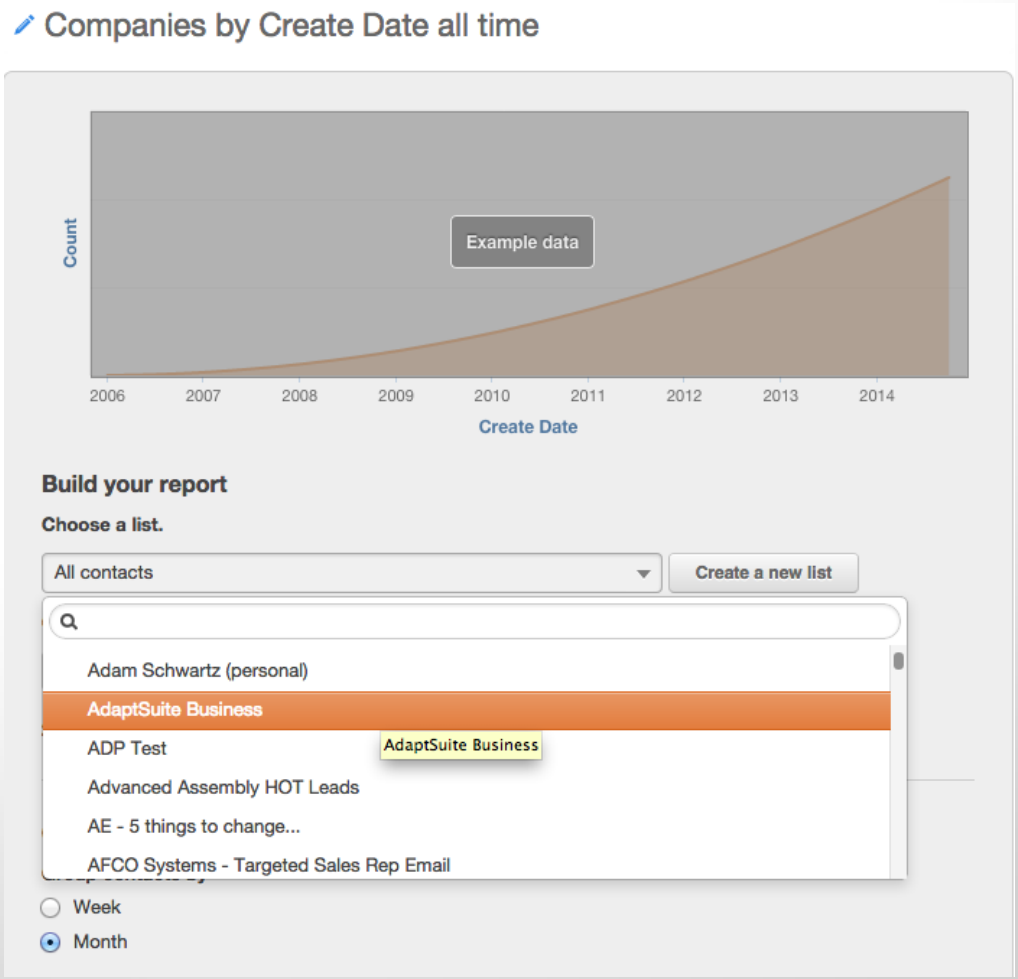

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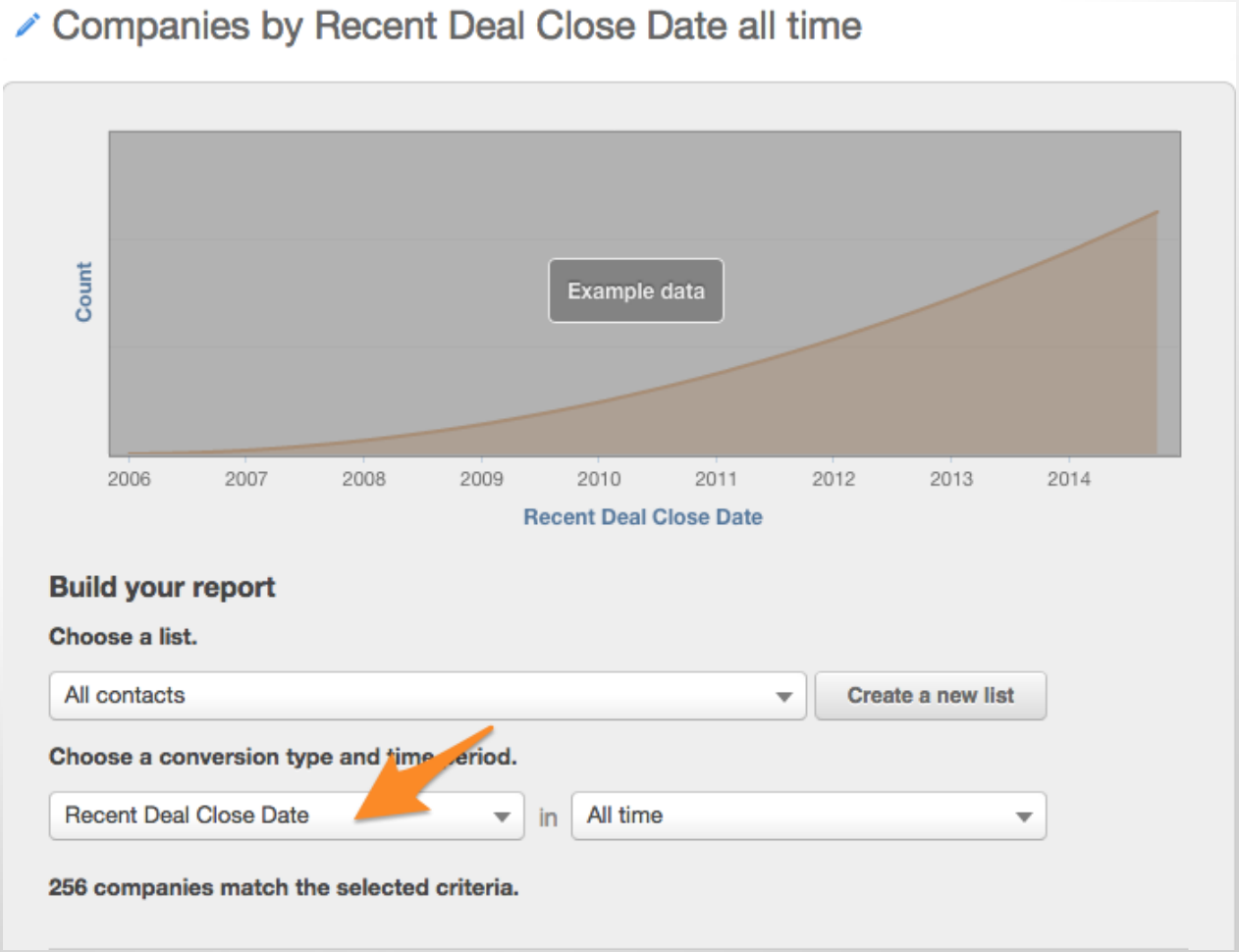

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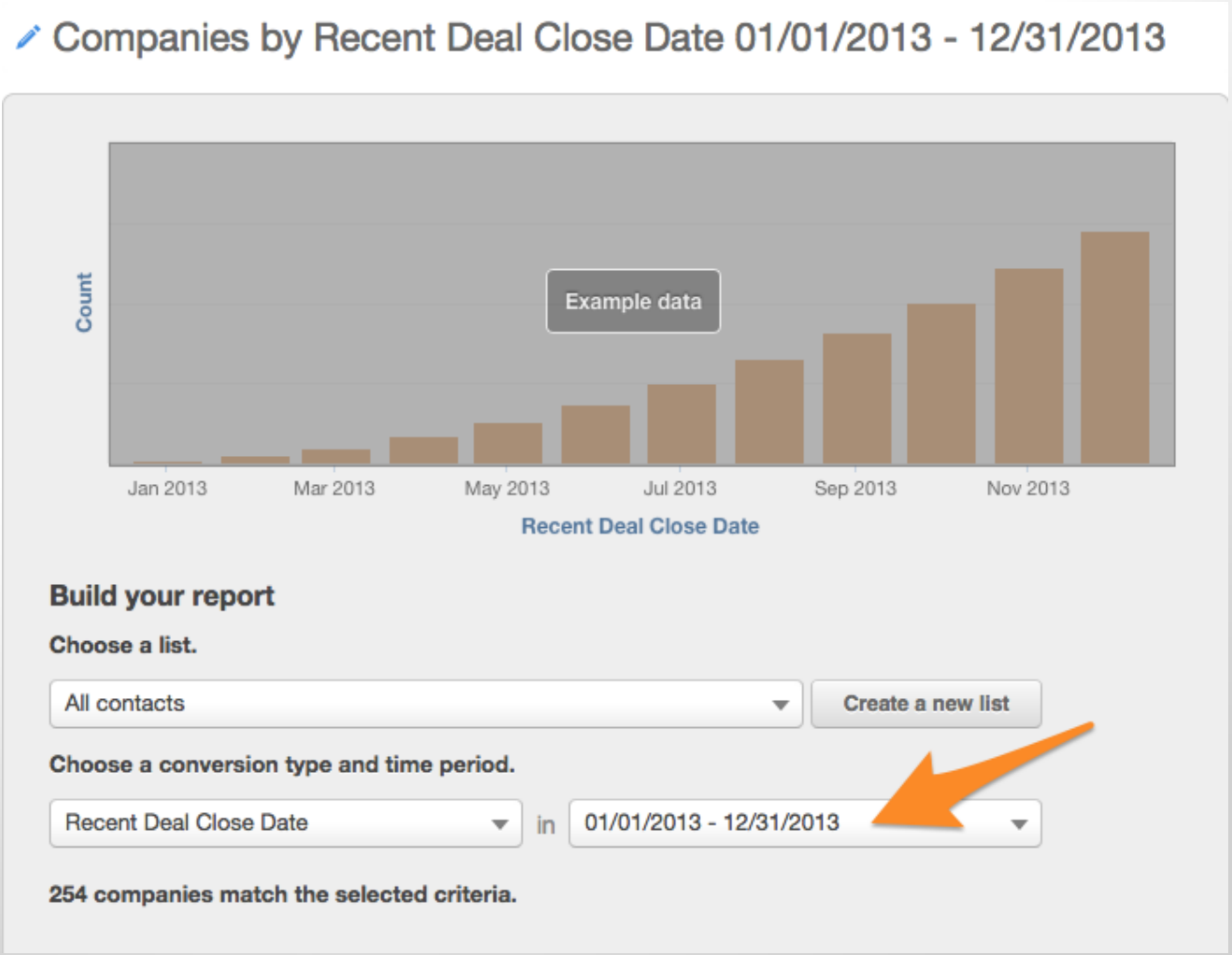

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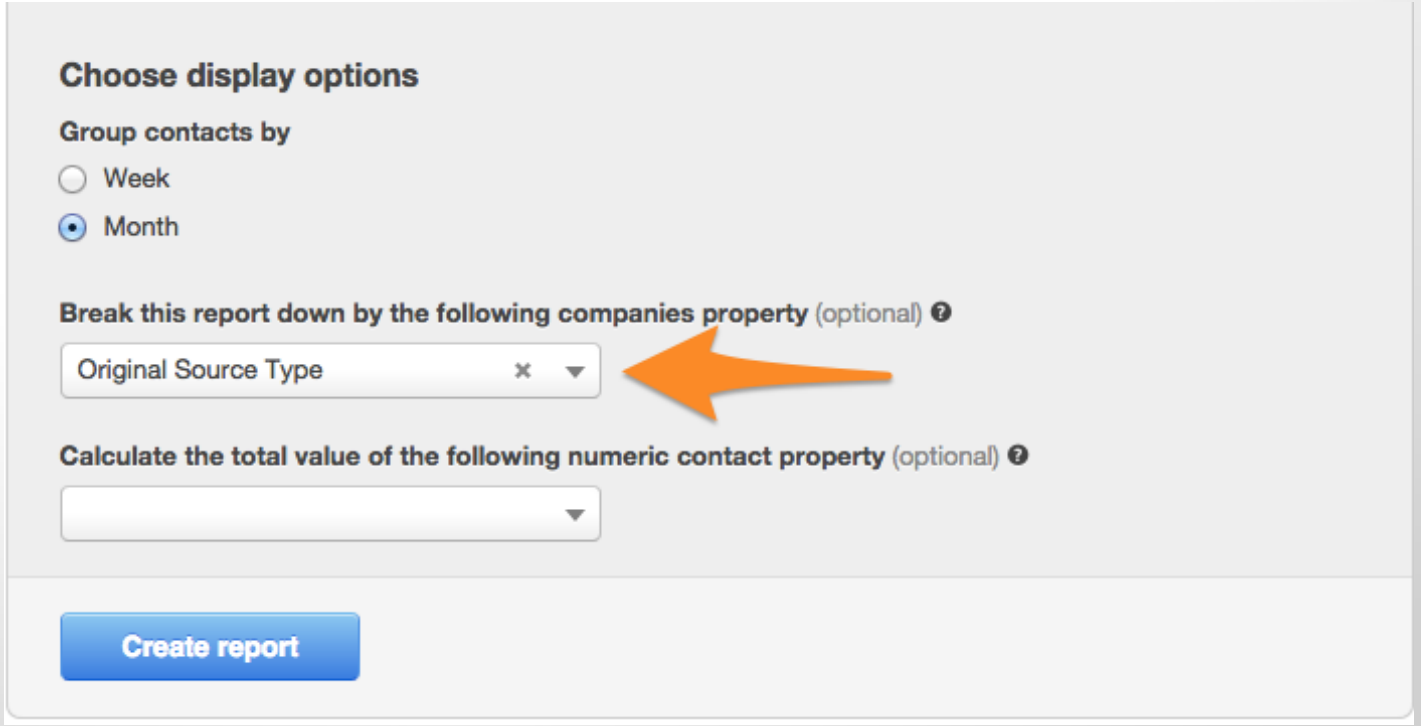

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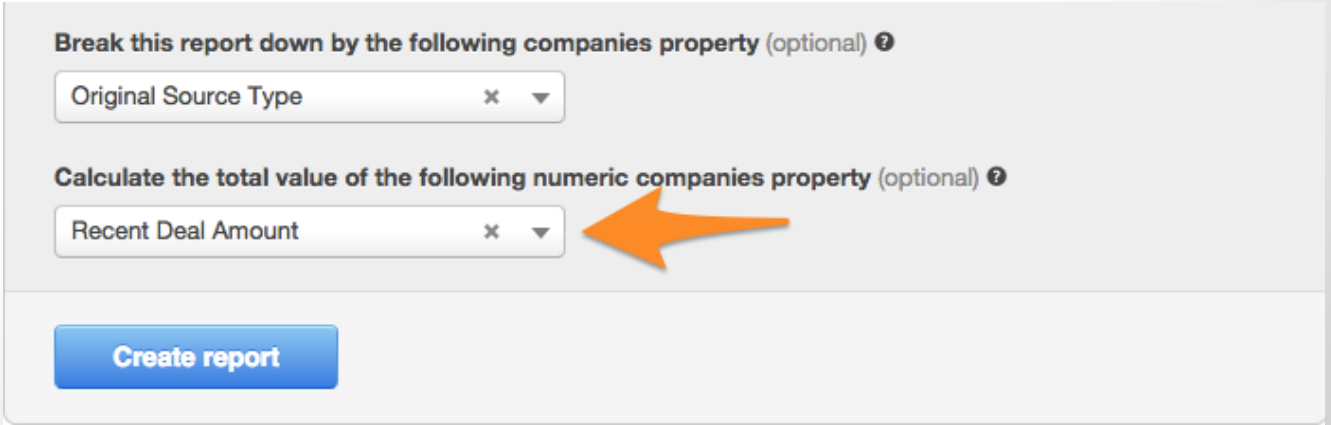
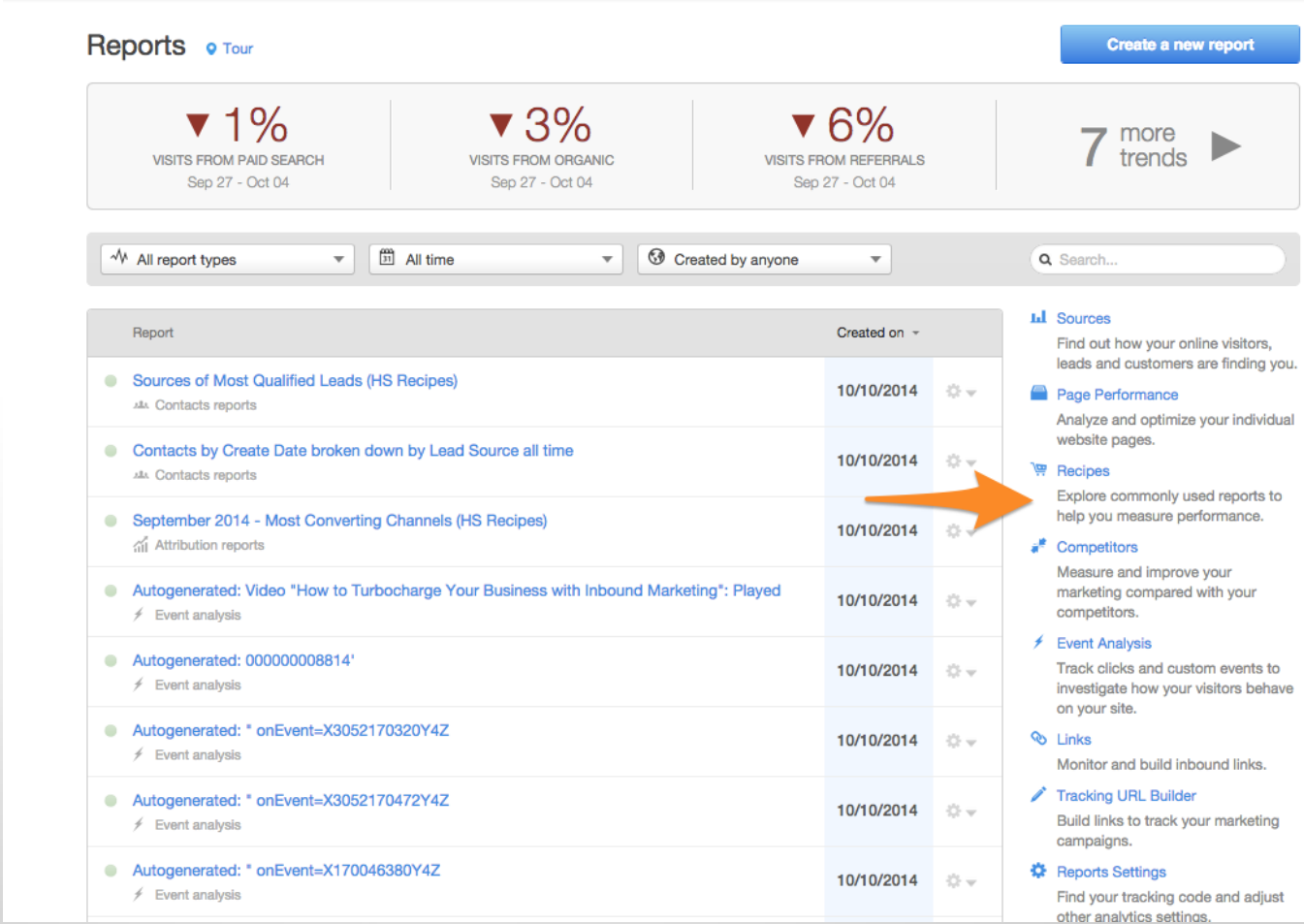


3

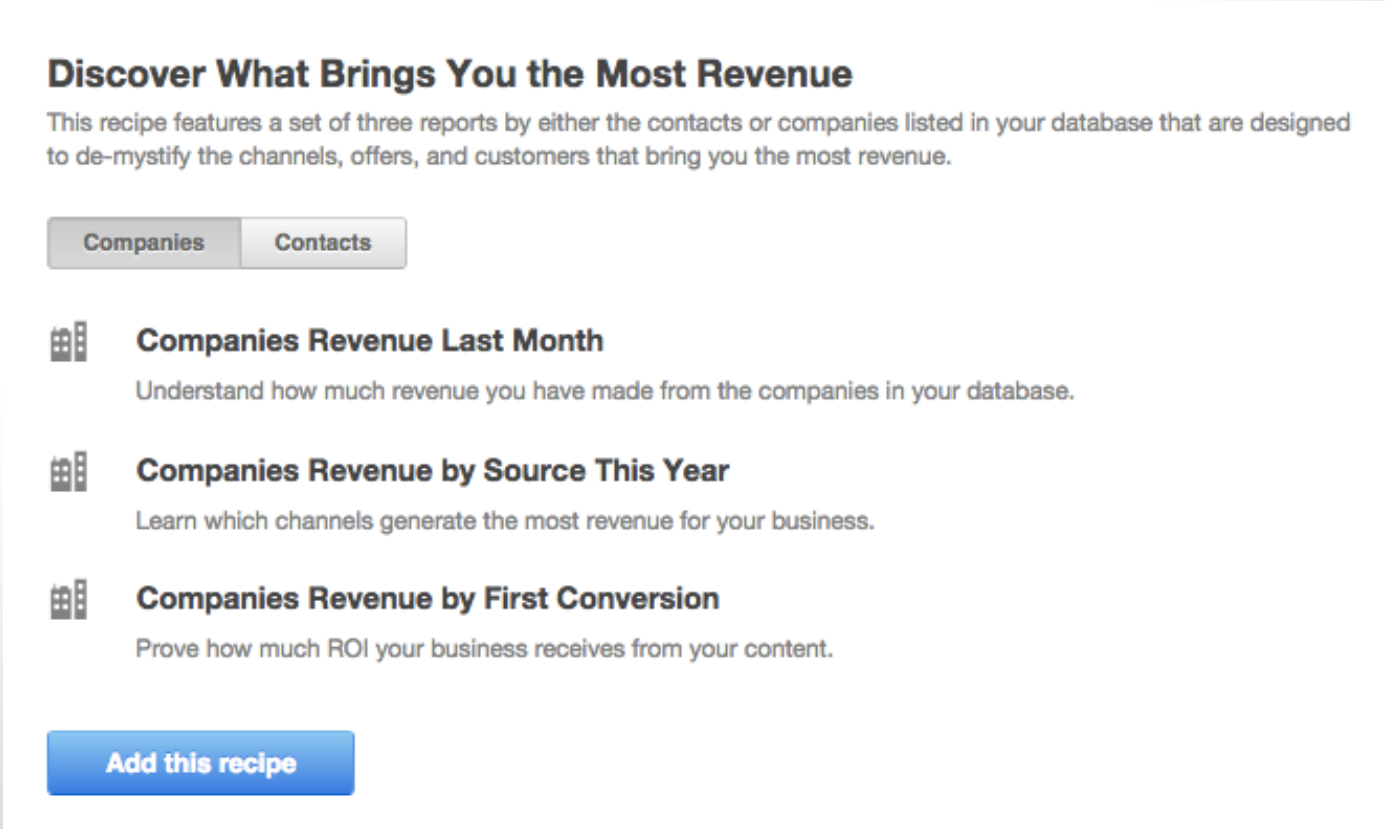
CHECK OUT REVENUE REPORTING RECIPES.

Step 1:
Under Reports Home, select Recipes.



Step 2:
Scroll down to the bottom of the Recipes page.

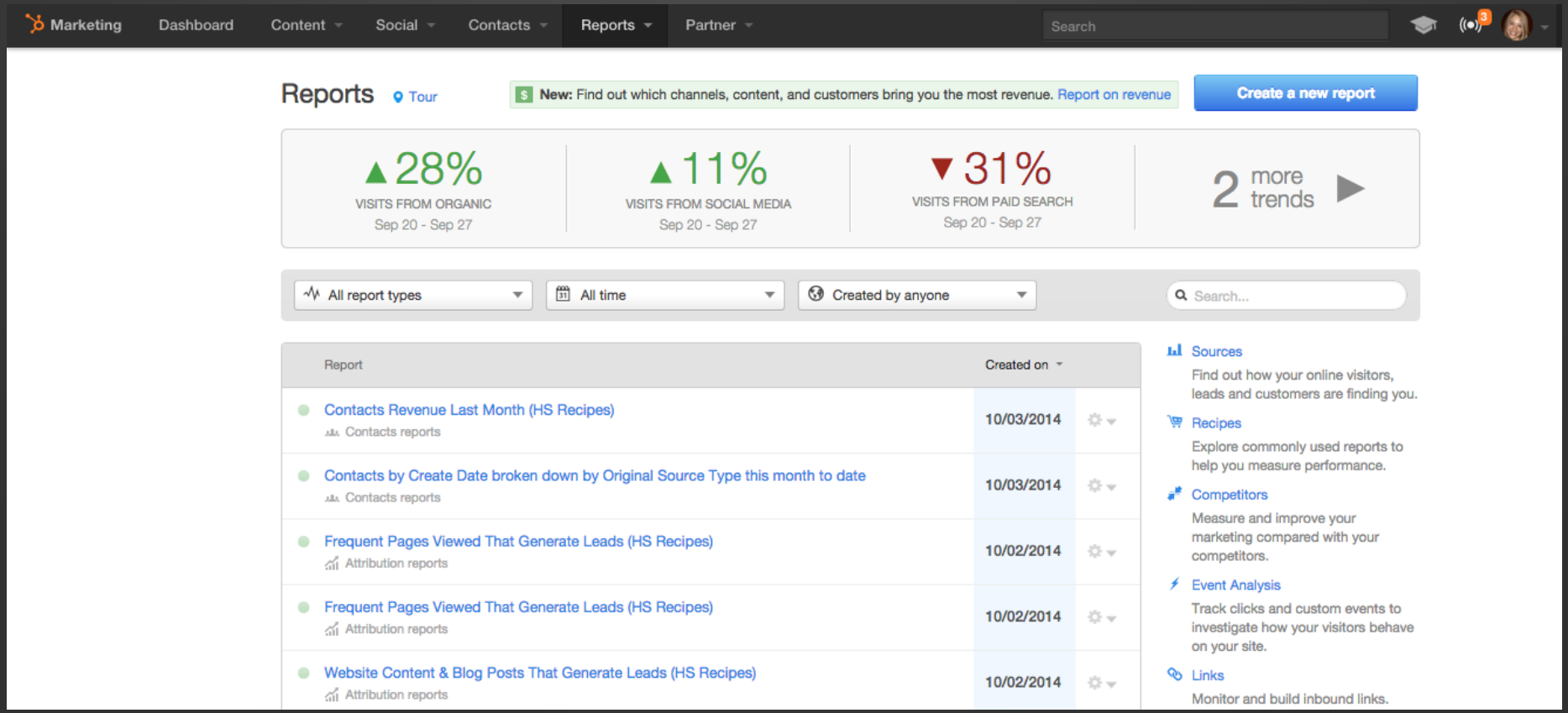
You will see example revenue reports for Contacts and Companies Reports.



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



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.

HubSpot Academy