

1

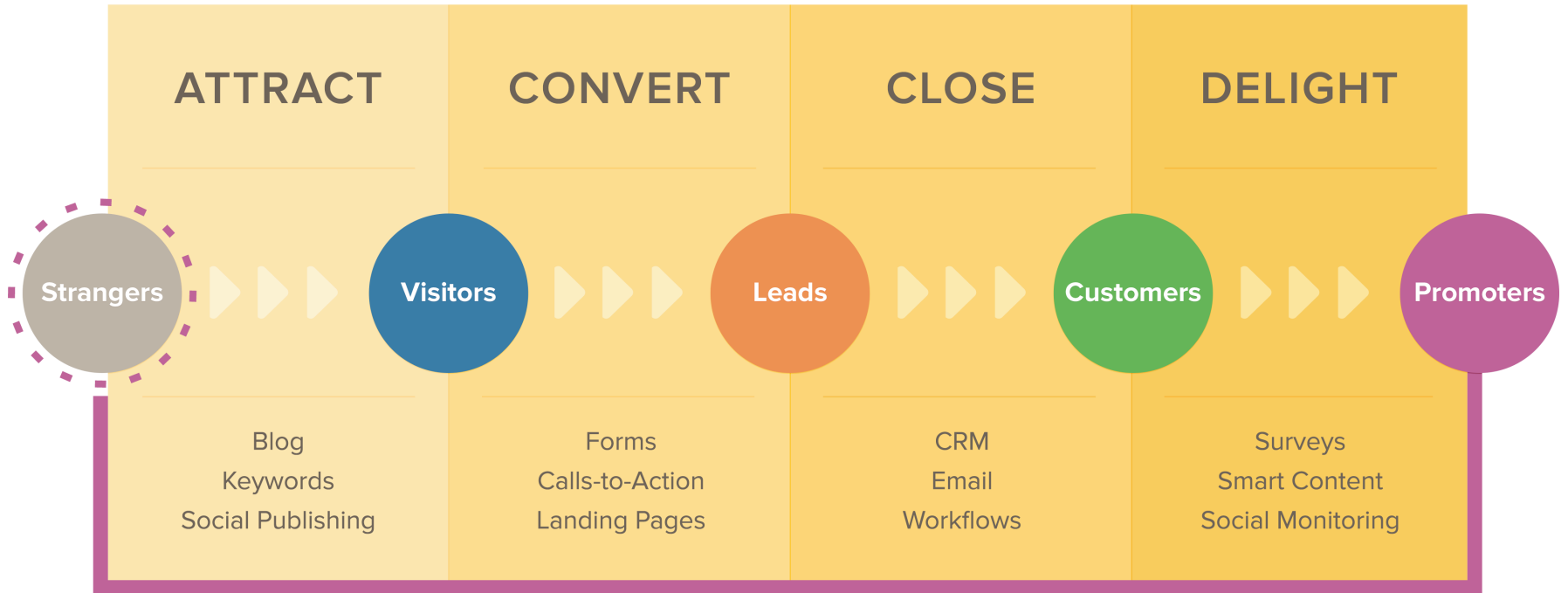
WHY USE THE
REPORTING ADD-ON?

The background of the slide is a dark blue-grey color with a repeating pattern of lightbulb icons in a lighter shade of blue-grey. The lightbulbs are arranged in a grid-like pattern, with some appearing slightly larger or more prominent than others.

90%

of top performing companies say that analytics is critical to driving their overall strategy and improving operational outcomes.

Inbound Methodology



The background is a dark blue-grey color with a repeating pattern of lightbulb icons in a lighter shade of blue-grey. The icons are arranged in a grid-like pattern across the entire page.

2 HOW TO USE YOUR REPORTING DASHBOARD.

GETTING STARTED WITH REPORTING

1. Start with a question for the data.
2. Segment your database.
3. Build your report.

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검정콩씨

Start with the **question** your data needs to answer.

ASK ABOUT RESULTS.

Ask a question to determine the value of a business initiative that happened in the past.

ASK ABOUT **INSIGHTS.**

A question that is asked in order to discover opportunities to drive future growth.

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WHAT IS A **CONTACT** PROPERTY?

A contact property is used to store information about an **individual contact.**

WHAT IS A **COMPANY** PROPERTY?

A contact property is used to store information about a **group of contacts.**


Learn more about Lists.

HubSpot | Academy

READ DOCS WATCH TRAINING DO PROJECTS GET CERTIFIED BE INSPIRED

INTRODUCTORY TRAINING

INTRODUCTION TO LISTS



Introduction to Lists
HubSpot Academy

4:05

PLAY SLOWER NORMAL SPEED PLAY FASTER

Having trouble watching our videos? [Click here.](#)

VIDEOS IN THIS CLASS

Introductory Training

01. Why use lists?	4:07
02. How to use lists	10:10

Tool Walkthrough Videos

03. Creating a list in HubSpot	4:52
04. Understanding list logic in HubSpot	6:02
05. Analyzing your list in Hubspot	2:42

CLASS RESOURCES

- [Download Slides](#)
- [Read User Guide](#)
- [Download Transcript](#)

Put your learning into action
Try the Contact Re-Engagement project

CLASS DESCRIPTION

This class will help you understand all of the different ways that Lists empower marketers to create contextual, relationship-driven marketing that creates results. You'll leave with a clearer vision of your segmentation strategy, a strong understanding of list logic, and knowledge of the metrics related to successful list performance.

ADDITIONAL RESOURCES

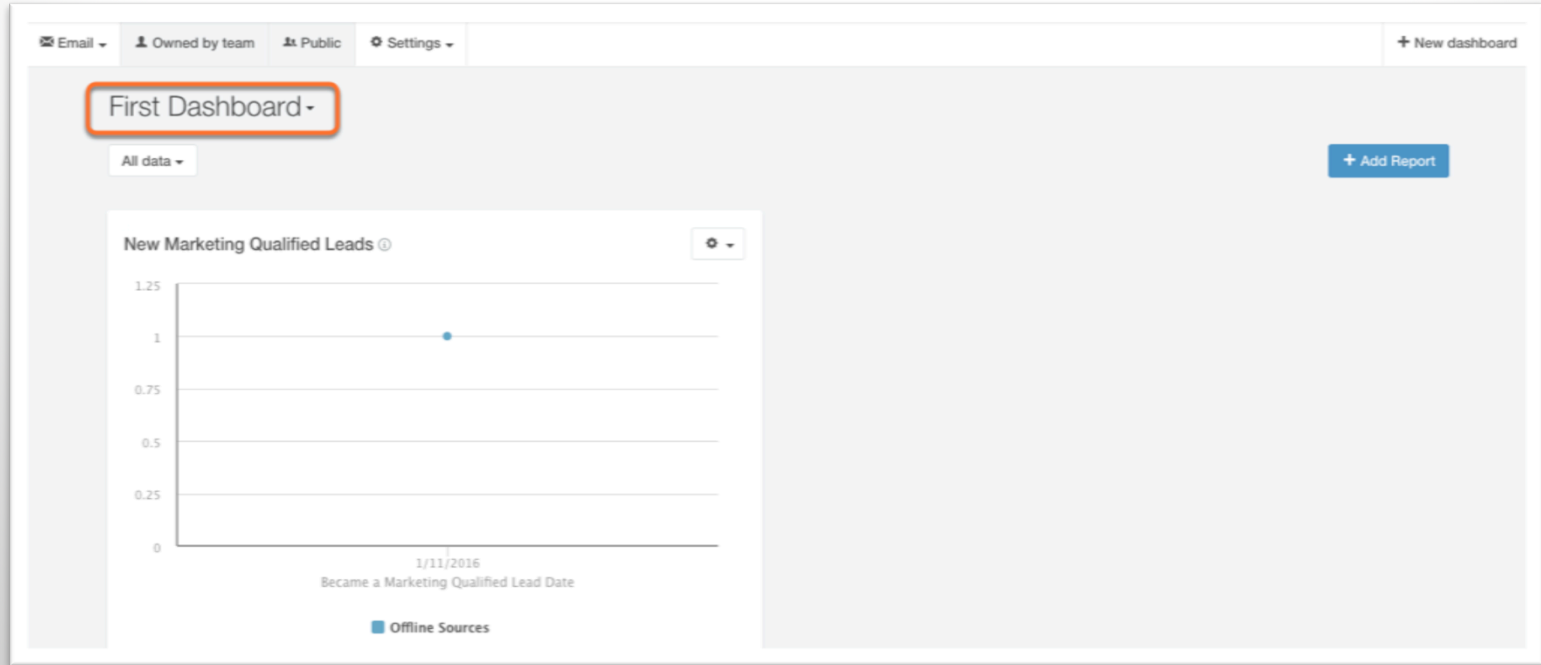
Tools

- [How to create a static list.](#)
- [How to create a smart list.](#)

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USING YOUR REPORTING DASHBOARD



REPORTING ADD-ON BEST PRACTICES

- Create a unique name for each dashboard.
- Use lists or views to segment your data.
- Organize your reports in order of importance.

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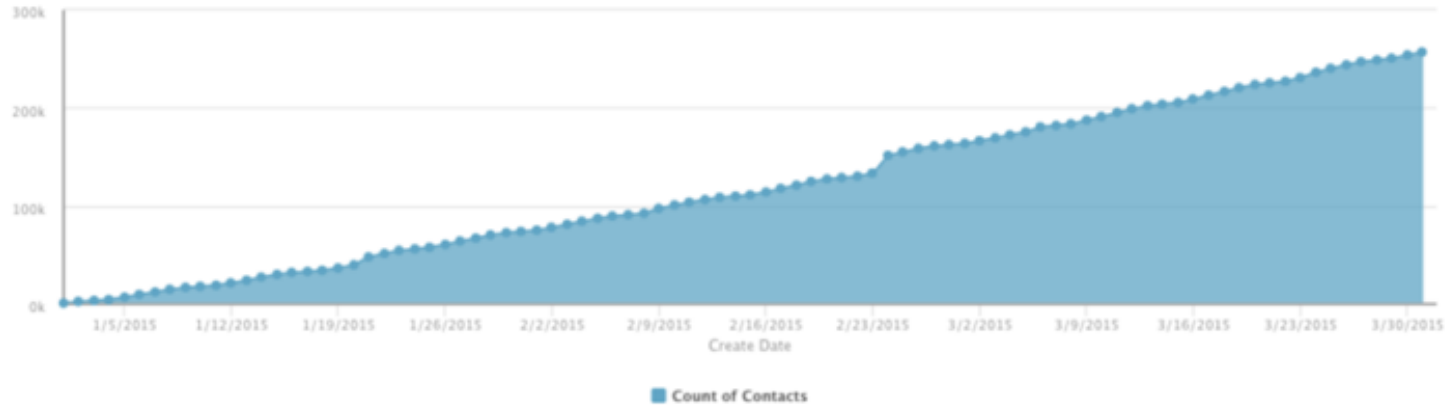
MARKETING REPORTING DASHBOARD

DEMO: Small Marketing Team Dashboard -

From 1/1/2015 to 3/31/2015

+ Add Report

New Contacts ⓘ



Contact Lifecycle Pipeline ⓘ

⊙ -

Marketing Qualified Leads by Source ⓘ

⊙ -

SALES REPORTING DASHBOARD

DEMO: Sales Dashboard -

Last year

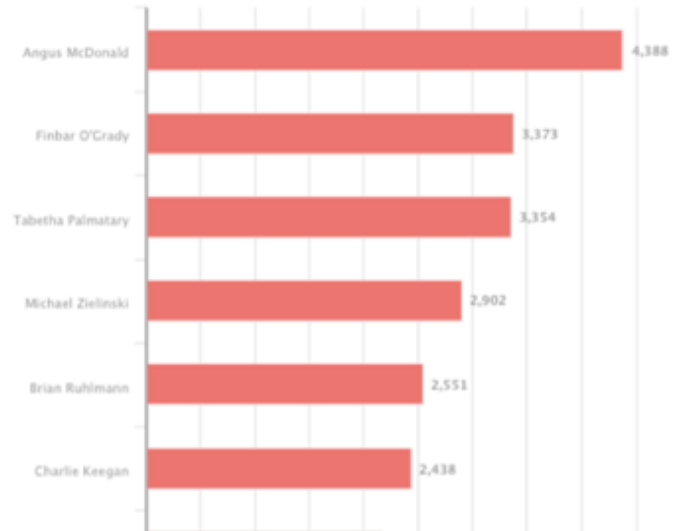
+ Add Report

2015 MRR



Total Annual Revenue

Activity Leaderboard



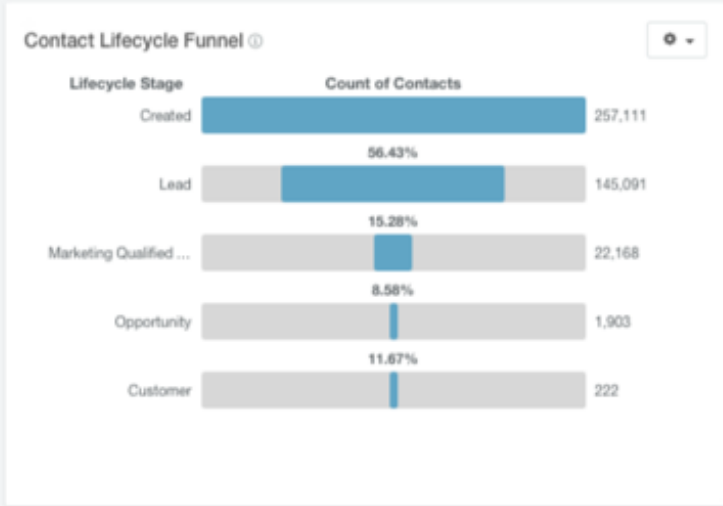
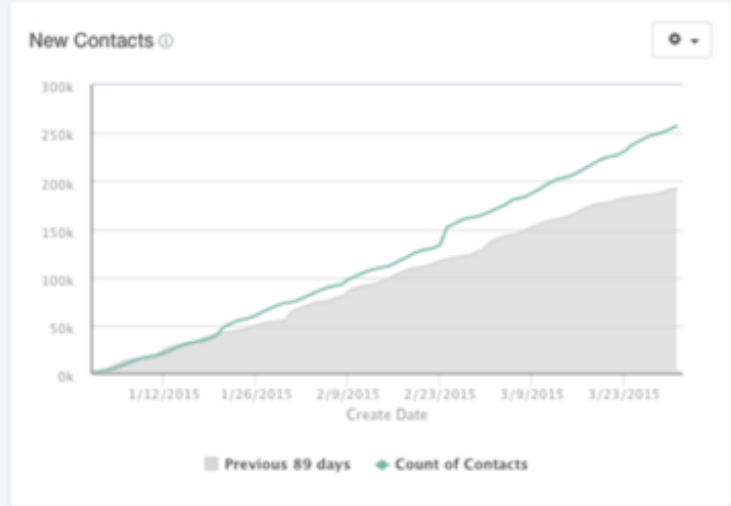
Deal Revenue Leaderboard

EXECUTIVE REPORTING DASHBOARD

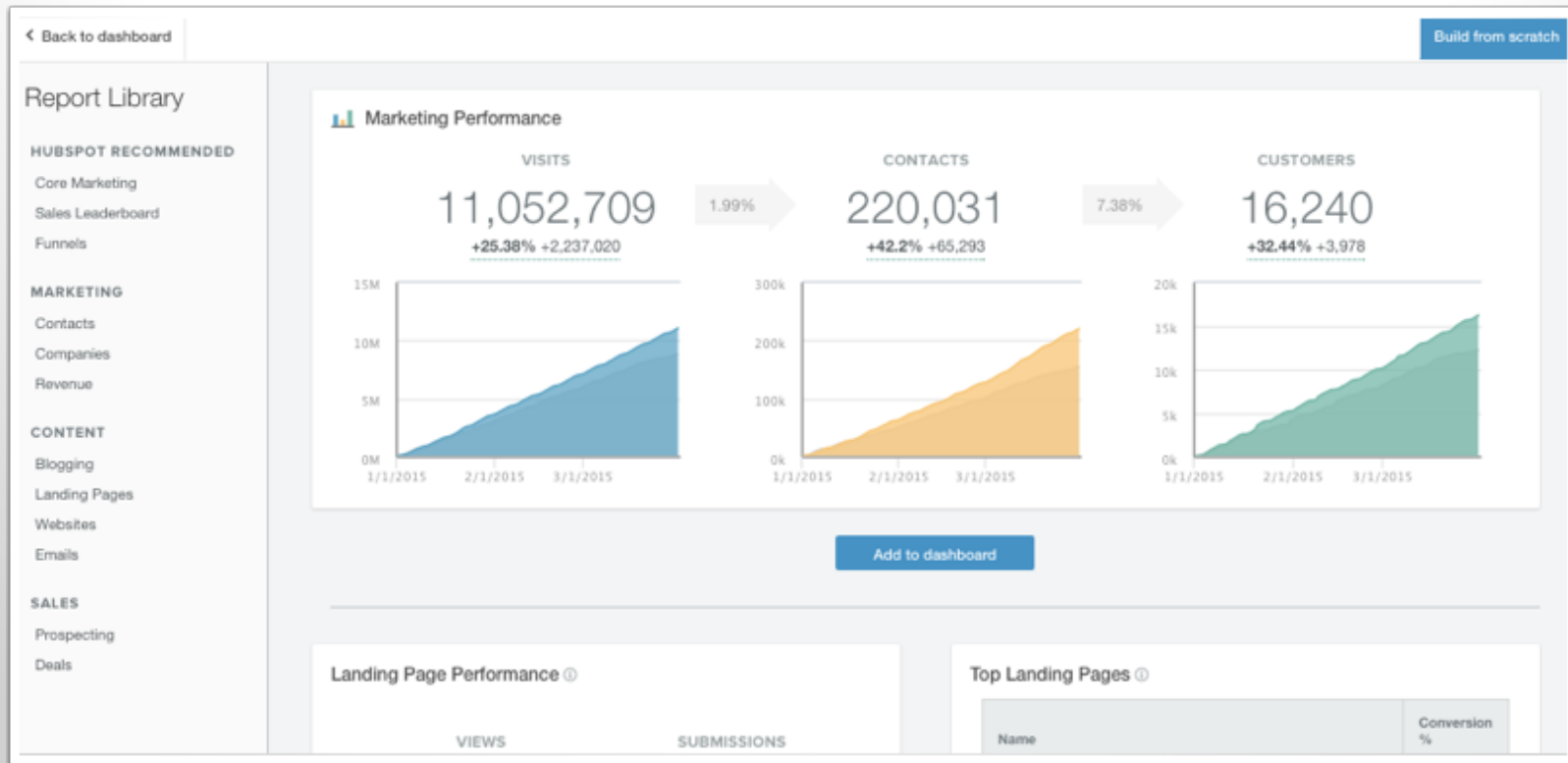
DEMO: Executive Dashboard -

From 1/1/2015 to 3/31/2015

+ Add Report



ADD A NEW REPORT TO YOUR DASHBOARD



SELECT FROM DOZENS OF TEMPLATES

Contact Lifecycle Pipeline



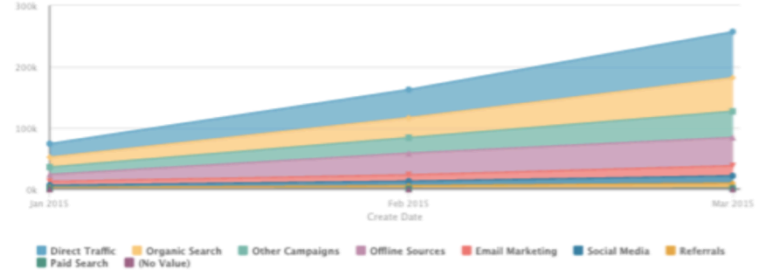
Marketing Qualified Leads by Source



Average Days to Close



New Contacts by Source



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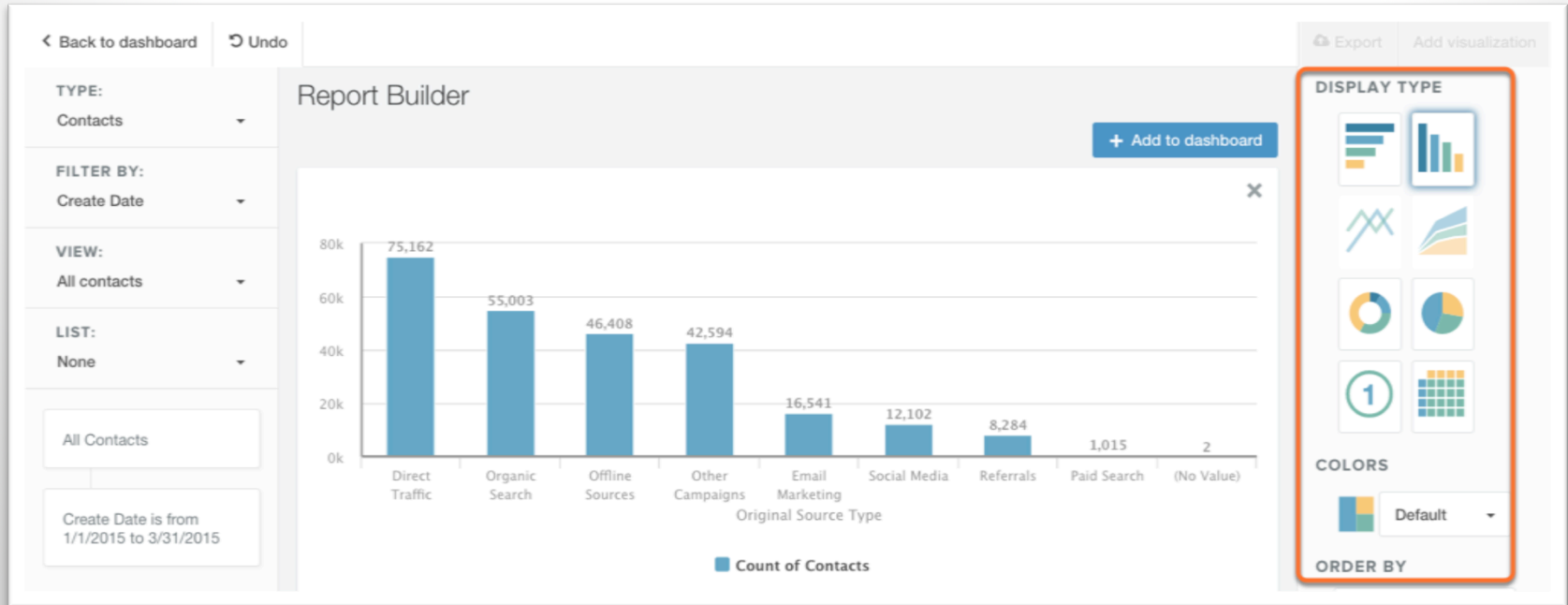
USING YOUR REPORTING DASHBOARD

The screenshot displays a reporting dashboard interface. On the left side, there are several filter and view controls: a 'Back to dashboard' link, an 'Undo' button, a 'TYPE: Contacts' dropdown, a 'FILTER BY: Create Date' dropdown, a 'VIEW: All contacts' dropdown, and a 'LIST: None' dropdown. Below these are two summary boxes: 'All Contacts' and 'Create Date is from 1/1/2015 to 3/31/2015'. The main area is titled 'Report Builder' and contains a table with the following data:

Original Source Type	Count of Contacts		+Add a column
Direct Traffic	75,162		
Organic Search	55,003		
Offline Sources	46,408		
Other Campaigns	42,594		
Email Marketing	16,541		
Social Media	12,102		
Referrals	8,284		
Paid Search	1,015		
(No Value)	2		

Below the table, it states 'Summarizing 257,111 Contacts'. In the top right corner, there are 'Export' and 'Add visualization' buttons. An orange arrow points to the 'Add visualization' button.

USING YOUR REPORTING DASHBOARD



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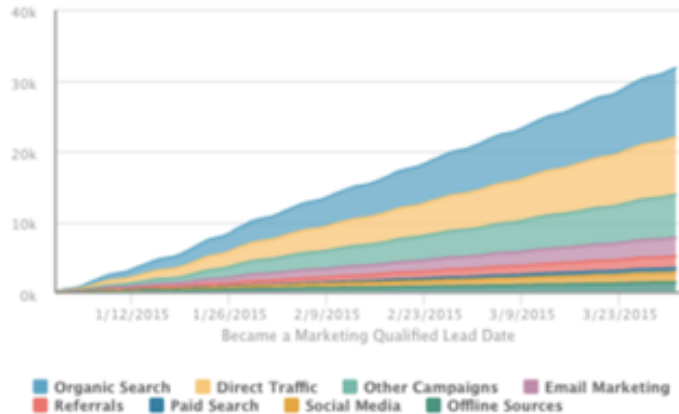
ORDER REPORTS BASED ON IMPORTANCE

DEMO: Marketing Dashboard -

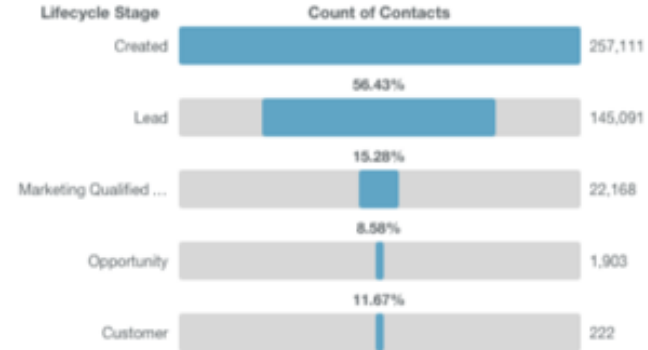
From 1/1/2015 to 3/31/2015

+ Add Report

New Marketing Qualified Leads



Contact Lifecycle Funnel



Blog Leads by Original Source

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THANK YOU.

HubSpot
Academy 