Creating an ROI Report.

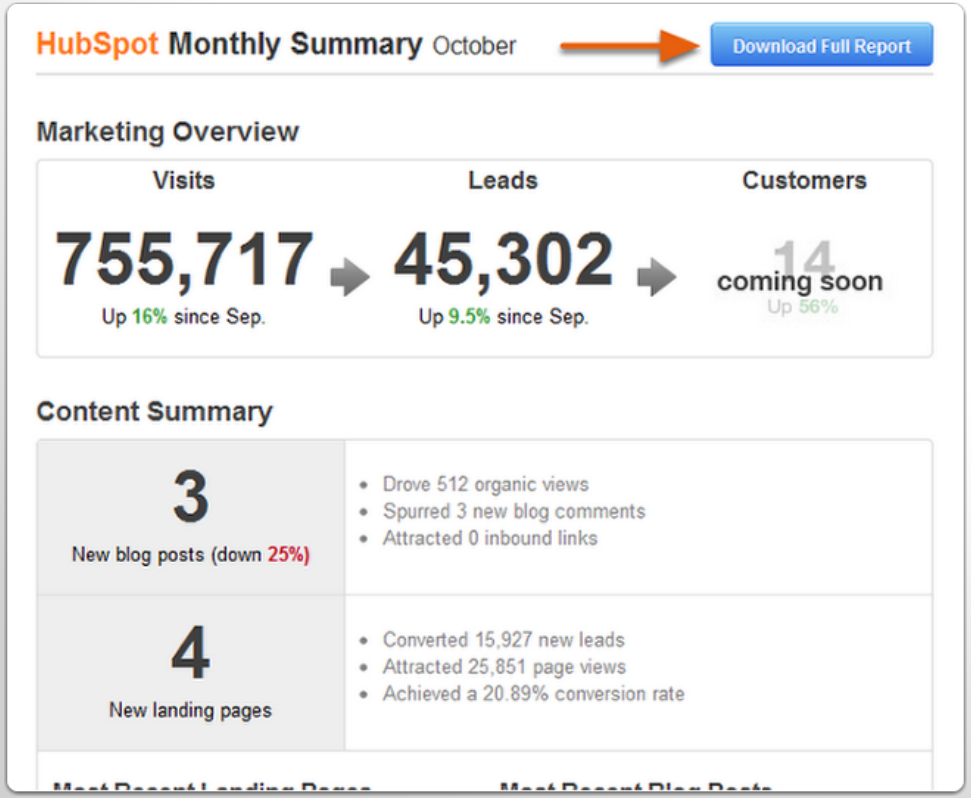
AGENDA

1 The HubSpot Monthly Marketing Report

2 Evaluating ROI

3 Benefits of Reporting ROI

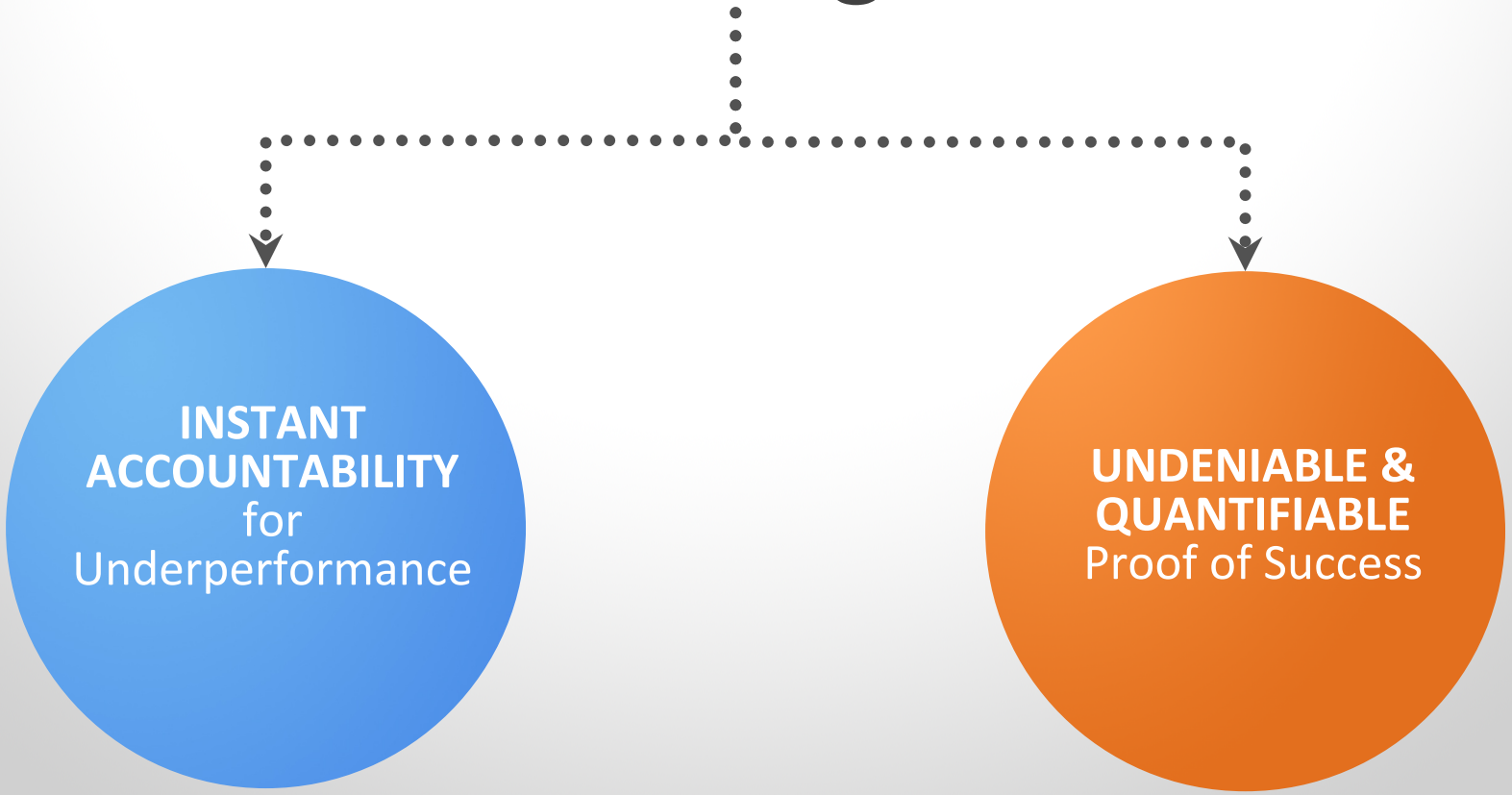
HubSpot Monthly Marketing Report



1. Determine the right time interval
2. Group marketing efforts by service you provide
3. Make connections—progress towards goals
4. Start high-level, then go granular
5. Use HubSpot template as a foundation

benefits
goal setting
REACH ONE!
career
goals
business
relationship

Evaluating ROI



Benefits to Reporting ROI

1. Path to Referrals
2. Motivation for Client Collaboration
3. Path to Upselling
4. Maintain and Renew Your Retainer

KEY TAKEAWAYS ☑

1. Best practice is to report on ROI to a client monthly

2. **All of the metrics that you share with clients should tie back to their business goals**

3. **Use the HubSpot Monthly marketing report as a template**

REPORTING TRAFFIC GENERATION METRICS.

AGENDA

1 The tools in HubSpot for reporting on Traffic

2 The Questions to ask and metrics to show

TRAFFIC GENERATION METRICS:
ARE YOU GETTING THEM FOUND ONLINE?

1. Search Engine Optimization
2. Blog
3. Social Media

SEARCH ENGINE OPTIMIZATION

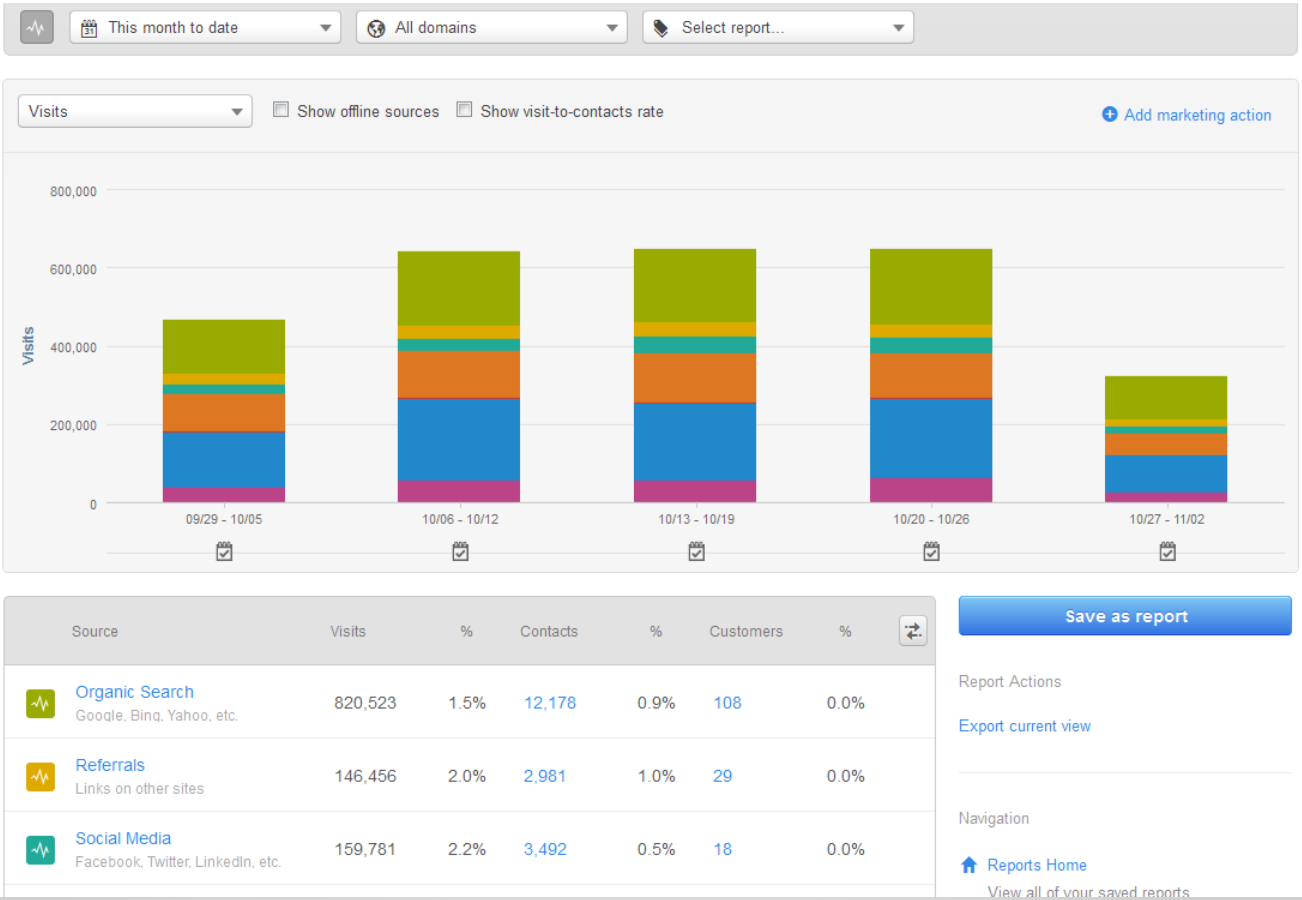
METRICS TO SHOW

- Pages that got optimized.
- Keywords specifically targeted
- Traffic from previous months for comparison

QUESTIONS TO ANSWER

- How much did traffic increase or decrease?
- What were the main drivers?
- How much did organic traffic increase?
- Can we identify keywords that are bringing in traffic?
- Which keywords should we target?
- Have our rankings improved?
- Did key pages improve?
- Did our Cost-Per-Click increase or decrease?

Reporting Tools: Sources

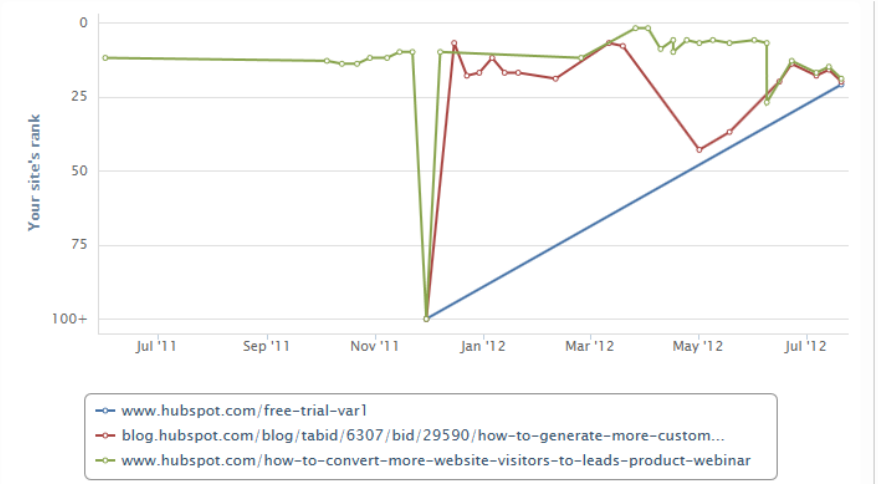


Reporting Tools: Keywords

Keywords	Keywords	Impressions	Savings
508	663	517,707	$39,771.76
ranked in top 3	ranked in top 10	from first-page search results	total

Actions | Filter by Campaign | converting

Keyword	Visits	Leads	Rank	Searches	Difficulty	CPC	Campaigns	Date Added	Actions
converting more leads to customers	0	0	19	Low	16	Low	1	29-Jun-2012	Delete



Awesome.

This is a great keyword for you to go after.

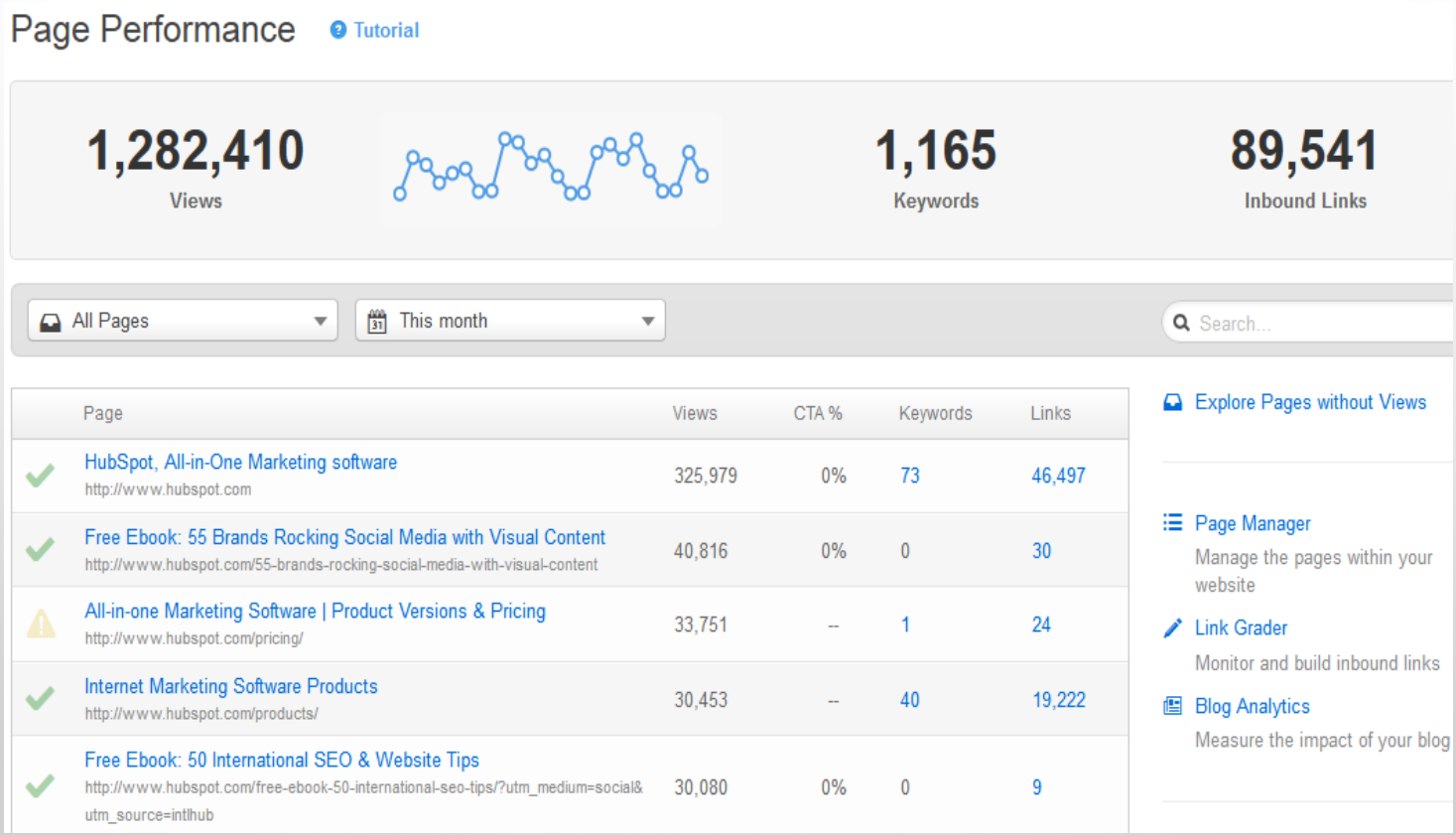
You can boost your rank even further if you:

- Get more quality inbound links to these pages
- Nail the on-page SEO components
- Link some related blog posts to this page

Compare your rank to that of your competitors for this keyword.

Show competitors

Reporting Tools: Page Performance



BLOGGING

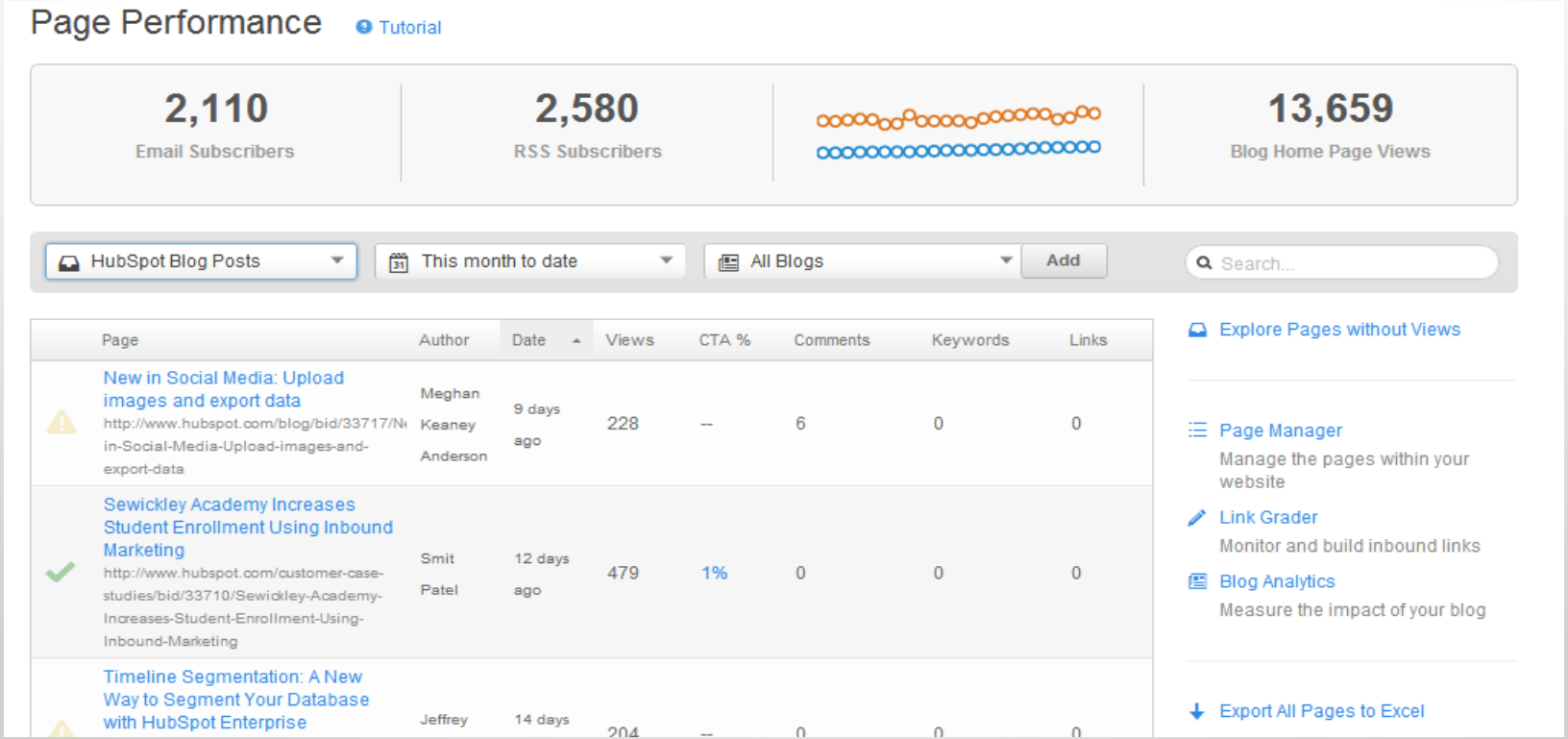
Y METRICS TO SHOW

- Examples of blogs written.
- Keywords specifically targeted.
- Performance of blog in previous months

? QUESTIONS TO ANSWER

- Has traffic to the blog helped over all site traffic?
- Any leads from the blog?
- How many blog articles got posted?
- This month's top posts?
- Which topics performed best?
- Notable/number of inbound links?
- Any comments worth highlighting

Reporting Tools: Page Performance



SOCIAL MEDIA

Y METRICS TO SHOW

- People who participated.
- Platforms used.
- Social Reach compared to previous months

? QUESTIONS TO ANSWER

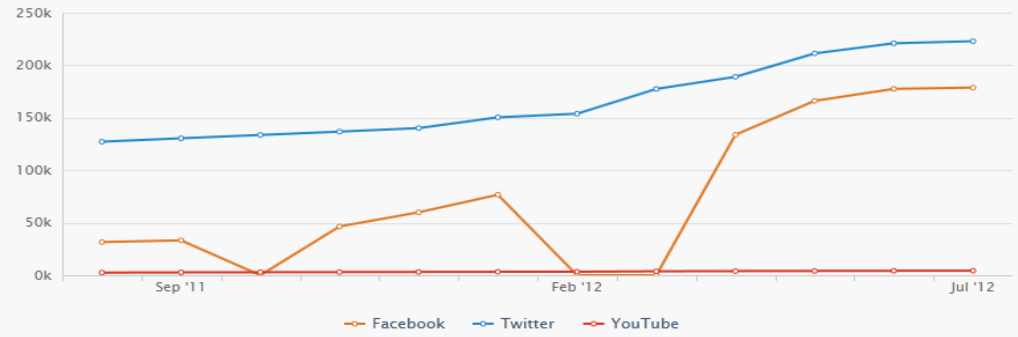
- How did social media contribute to traffic?
- How did social media contribute to leads?
- How did our social media reach grow/ shrink?
- How active were we on the different channels?

Reporting Tools: Social Reach

Social Reach

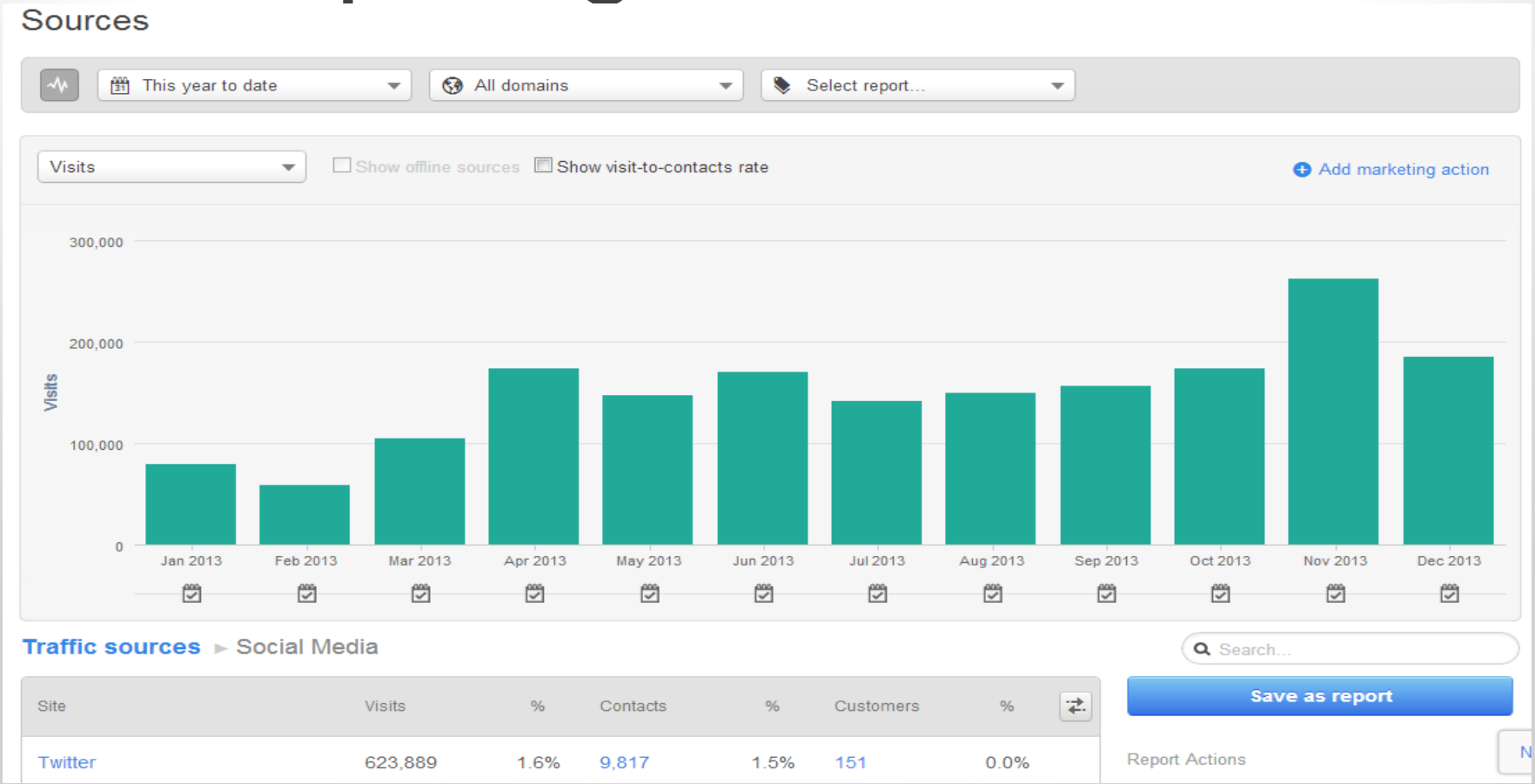
405,992	3,244 0.8%	9,166 2.3%
reach as of July 11	growth this month	average monthly growth

Last 12 months



Name	Reach	Growth This Month	%	Avg. Monthly Growth	%
Facebook	178,769	1,228	0.69	5,072	282.44
Twitter	222,950	1,967	0.89	6,313	37.49

Reporting Tools: Sources



RINSE
& REPEAT.

KEY TAKEAWAYS

1. To report on traffic utilize the sources tool, the keywords tool, page performance, and social media tool
2. Reporting on social media in HubSpot is focused much more on visitors, contacts and customers than “likes” and “followers”

REPORTING LEAD GENERATION METRICS.

AGENDA

1 The tools in HubSpot for reporting on Lead Generation

2 The Questions to ask and metrics to show

LEAD GENERATION METRICS:
ARE YOU CONVERTING THEIR VISITORS INTO LEADS?

1. Landing Page Performance
2. Email Campaign Performance

LANDING PAGE PERFORMANCE

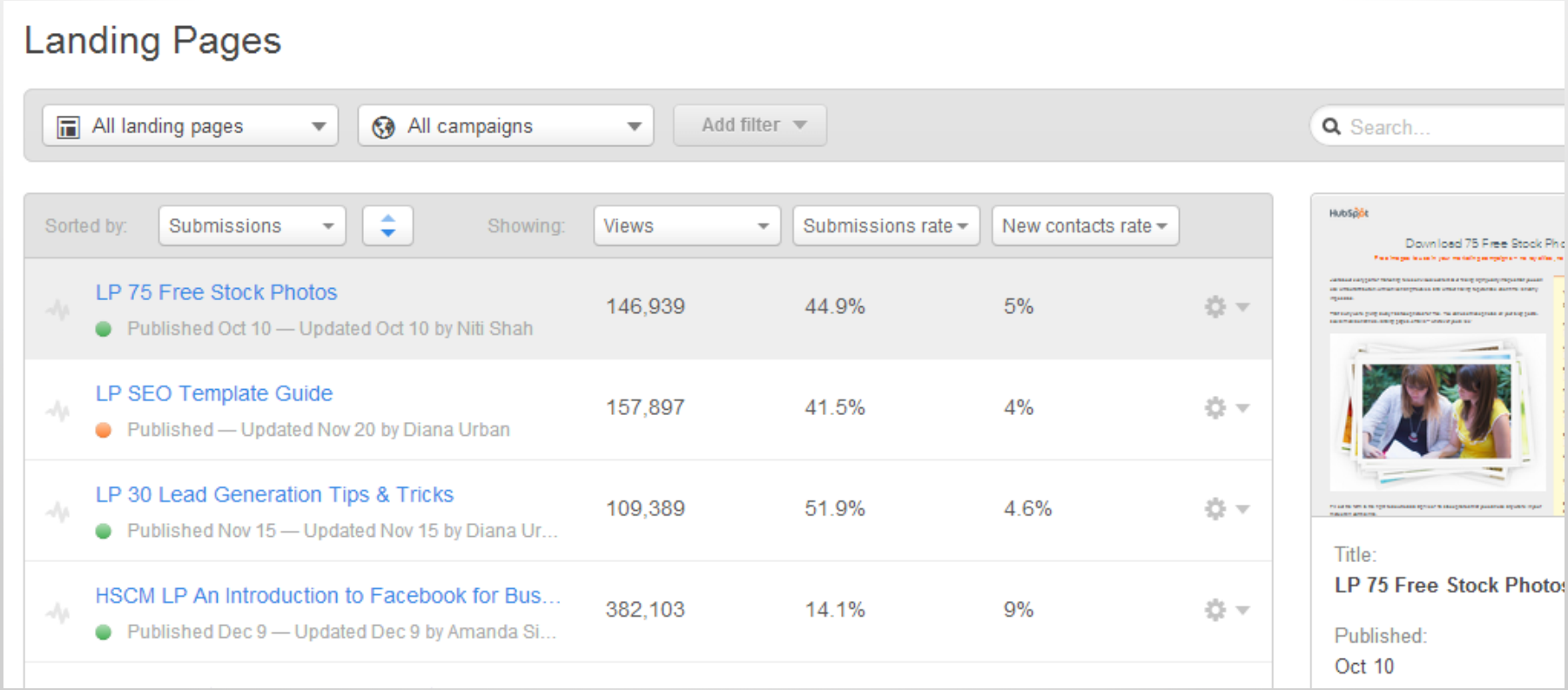
Y METRICS TO SHOW

- Premium Content Created
- Landing Pages Created
- Premium Content and Landing Page Results from last month

? QUESTIONS TO ANSWER

- What premium content offers did we develop this month?
- How productive were these offers in terms of leads?
- How and where were these offers promoted (on –site & off-site)?
- Landing page conversion rate?
- Visits to landing pages?
- What A/B tests did we run?

Reporting Tools: Landing Pages



EMAIL CAMPAIGN PERFORMANCE

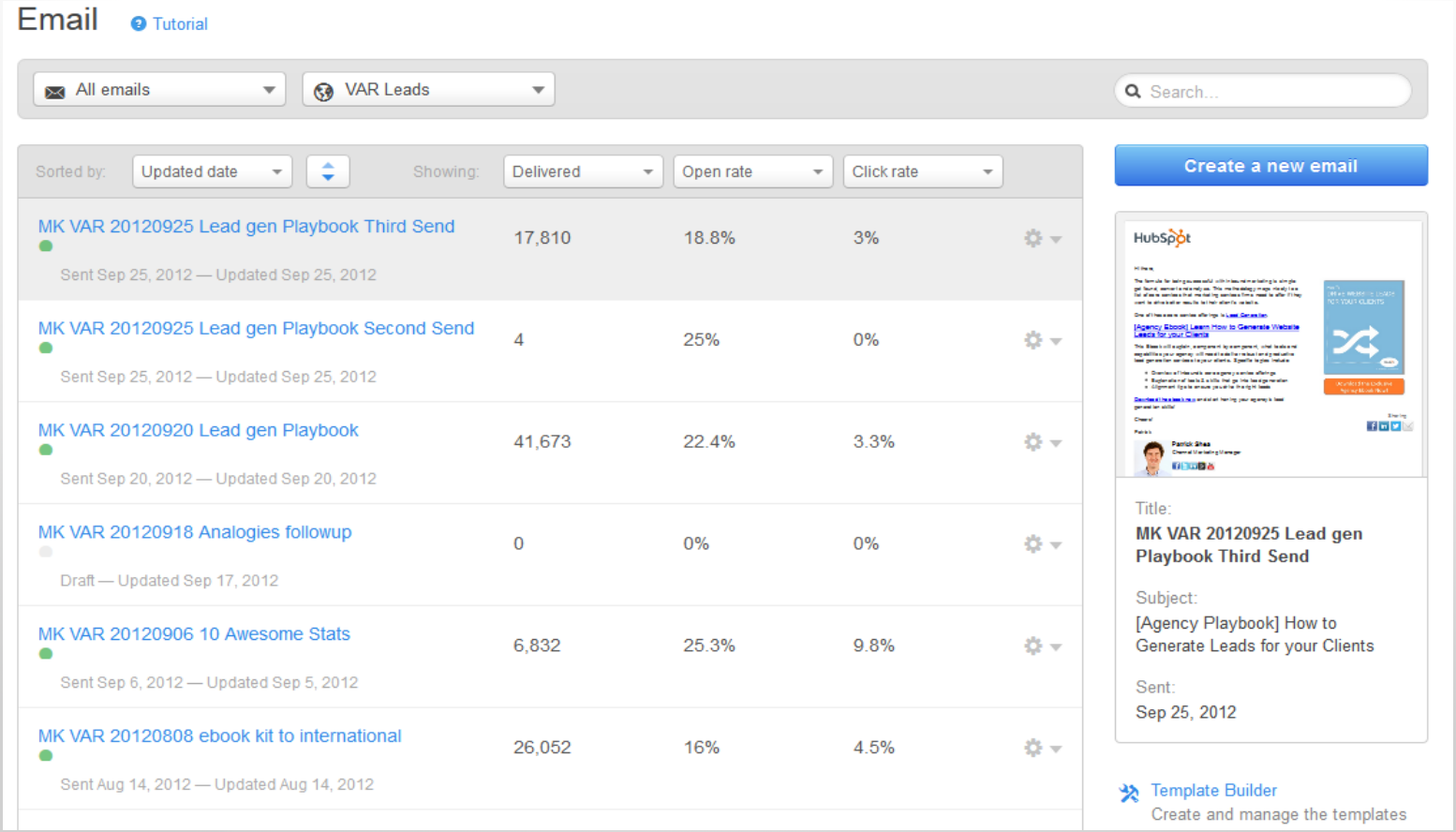
Y METRICS TO SHOW

- Premium Content Created
- Landing Pages supporting these sends
- Audiences targeted
- Previous Month's email performance

? QUESTIONS TO ANSWER

- How did email contribute to traffic and leads?
- How many emails were sent and to which lists were they sent?
- Performance of each send?
- Click through rate?
- Unsubscribe numbers?

Reporting Tools: Email Campaigns



RINSE
& REPEAT.

KEY TAKEAWAYS

1. To report on lead generation use the landing pages tool and the email tool

2. It is important to work with the client to define lead generation goals so that you can accurately share this information with them

REPORTING CUSTOMER GENERATION METRICS.

AGENDA

1 The tools to use to report on customer generation metrics includes the Workflows tool and the Sources tool

2 The Questions to ask and metrics to show

CUSTOMER GENERATION METRICS:
ARE GETTING THEM CUSTOMERS?

1. Lead Nurturing Performance (Workflows)
2. Overall Website Customer Acquisition

LEAD NURTURING PERFORMANCE

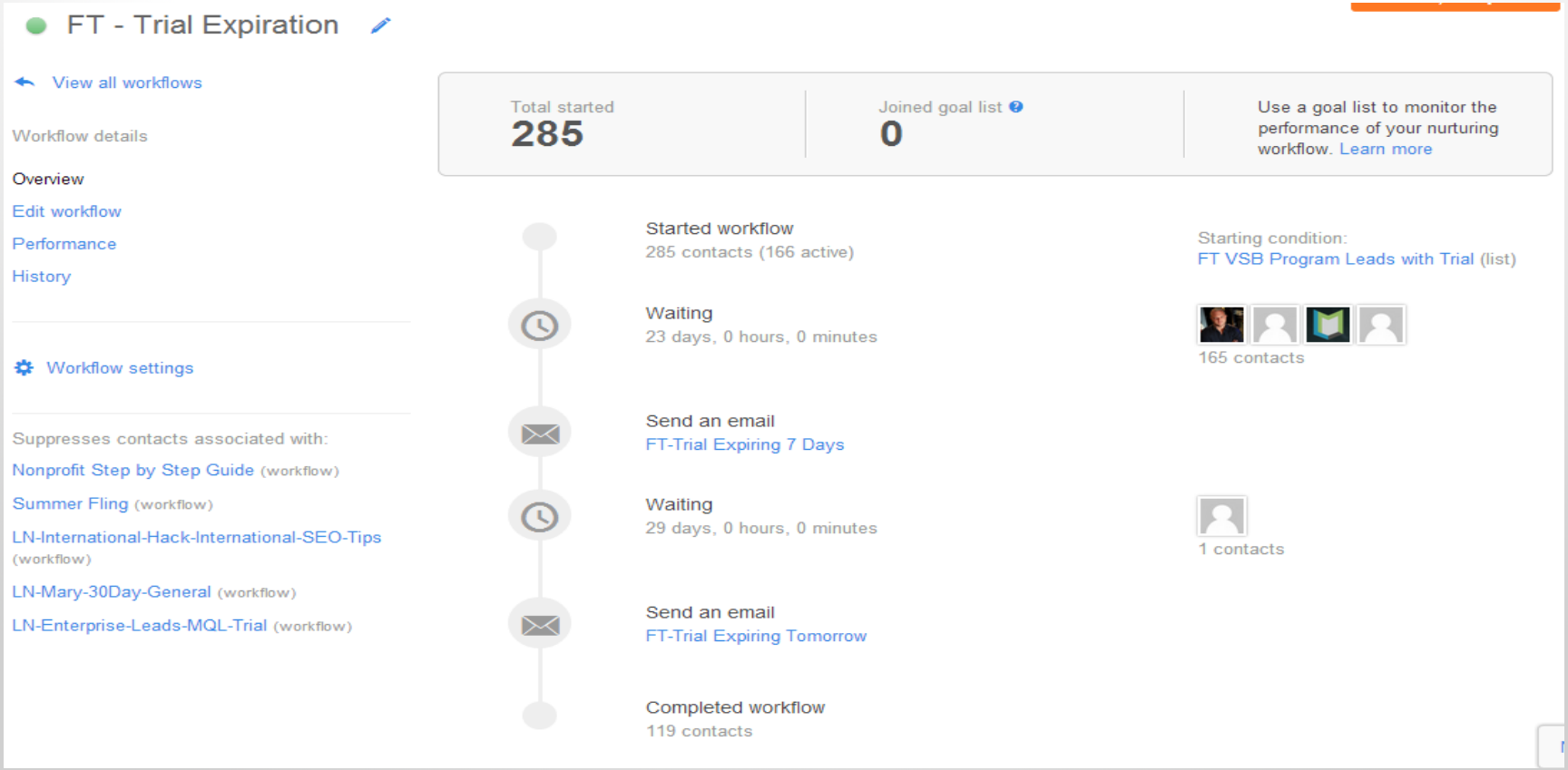
METRICS TO SHOW

- Themes of lead nurturing campaigns
- Premium content serving as trigger for lead nurturing campaigns
- Landing pages and secondary offers integral to campaigns

QUESTIONS TO ANSWER

- What lead nurturing campaigns were active this month?
- How many lead reconverts did lead nurturing drive?
- Click through for each LN email?
- Unsubscribes per LN campaign?
- Which other offers were used in LN?
- How many contacts reached the goal of the campaign?

Reporting Tools: Workflows



OVERALL WEBSITE CUSTOMER ACQUISITION

Y METRICS TO SHOW

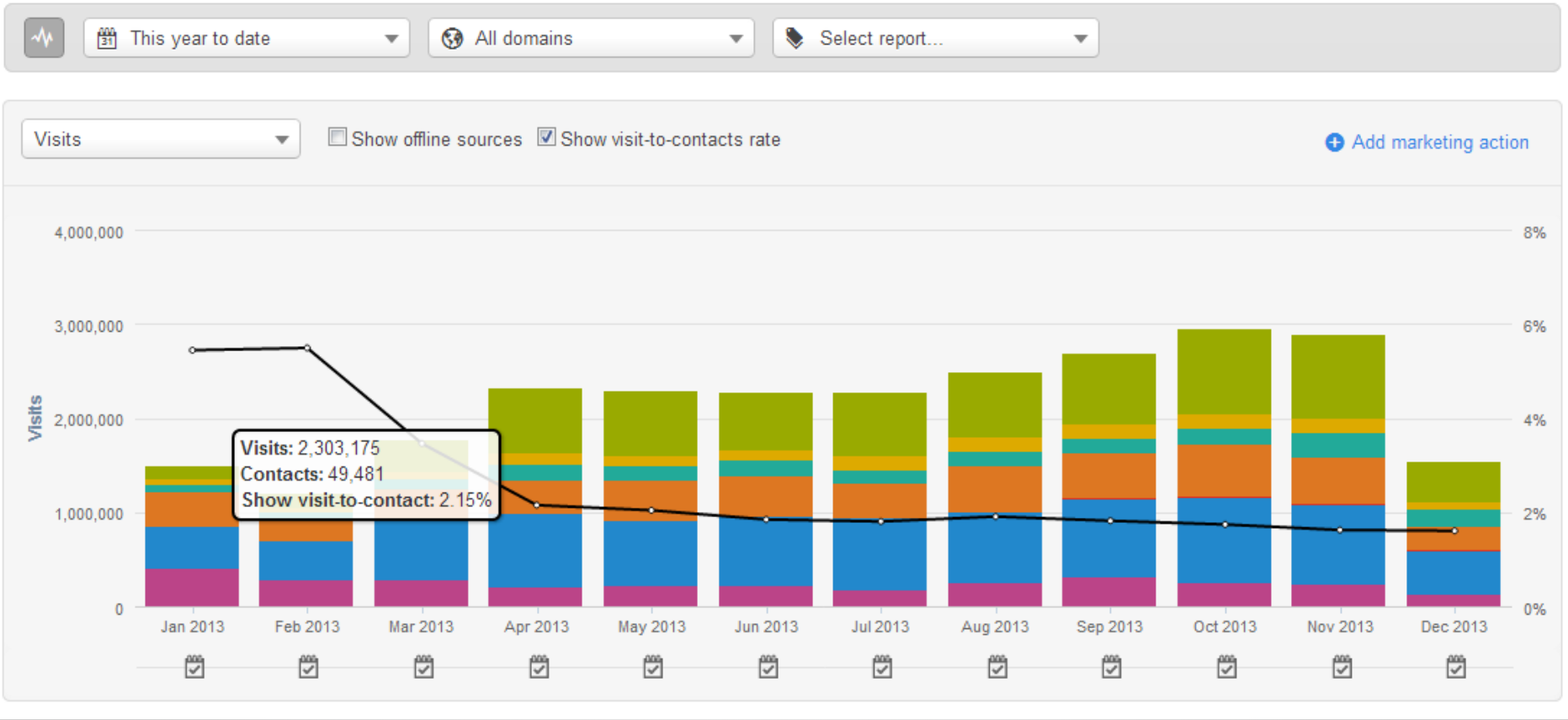
- Best performing pages
- Last month to this month
- Most impactful channels & content

? QUESTIONS TO ANSWER

- How many customers did inbound marketing drive?
- What campaigns or sources were the most impactful?
- Which channels have the best visitor to contact conversion rate?
- Customers originating from organic traffic?
- Lead nurturing campaigns most effective?
- Targeted email sends most responsible?

Reporting Tools: Sources

Source	Visits	%	Contacts	%	Customers	%
Organic Search Google, Bing, Yahoo, etc.	1,556,623	3.1%	47,765	1.8%	855	0.1%
Referrals Links on other sites	1,615,661	6.9%	111,696	0.5%	570	0.0%
Social Media Facebook, Twitter, LinkedIn, etc.	811,396	6.1%	49,288	0.7%	336	0.0%
Email Marketing Email links	3,095,595	3.4%	103,895	0.6%	636	0.0%
Paid Search Paid search advertisments	58,860	5.3%	3,090	2.6%	79	0.1%
Direct Traffic Manually entered URLs	5,194,099	1.9%	99,347	4.5%	4,420	0.1%
Other Campaigns Other sources	2,658,249	10.6%	281,615	0.3%	771	0.0%
Total	14,990,483	4.6%	696,696	1.1%	7,667	0.1%


This year to date
All domains
Select report...
Visits
Show offline sources
Show visit-to-contacts rate
Add marketing action
4,000,000
3,000,000
2,000,000
1,000,000
0
Visits
8%
6%
4%
2%
0%
Visits: 2,303,175
Contacts: 49,481
Show visit-to-contact: 2.15%
Jan 2013
Feb 2013
Mar 2013
Apr 2013
May 2013
Jun 2013
Jul 2013
Aug 2013
Sep 2013
Oct 2013
Nov 2013
Dec 2013

RINSE
& REPEAT.

KEY TAKEAWAYS

1. To report on customer generation use the workflows tool and the sources tool

2. It is important to work with the client to define customer generation goals so that you can accurately share this information with them

3. How will you get leads to customer information from your clients?