Video 1: What is a pipeline report?

In a world of ambitious sale targets, you don't always have time to go digging around for information. You just need to understand what's on track now and if there are any potential problem areas that could prevent you from hitting your numbers later.

That's where pipeline reports come in. Pipeline reports are reports that track the number of deals or contacts that have progressed through any of the selected stages within a specified time frame.

This type of insight helps you in two key areas when it comes to sales. One, pipeline reports help you track and measure the success of your current sales efforts. And two, pipeline reports help you understand the performance of your team. Let's dive into each of these in a little more detail.

First, pipeline reports help you track and measure the success of your current sales efforts. As a sales rep, you need to track both your successes and your failures. This way, you can clearly determine whether or not you're going to hit your quota. Also known as forecasting, using your data helps you plan your time accordingly. After all, if you're on track to hit your numbers, great; keep doing what you're doing. But if not, you can use pipeline reports to identify the moment a problem arises so that you can pivot.

Second, pipeline reports help you understand the performance of other members of your team. Why is this important? Well, maybe you understand what's working well for you. But what about the other sales reps on your team? You can use pipeline reports to collaborate with the other members of your team. You can compare your different sales tactics or techniques to determine which ones close the most deals. Maybe one person is the best qualifier or another the best closer.

Equipped with this knowledge, you can create a sales roadmap for your team's continued success. You can use this data to determine what strategies work well with your customer segment. At the same time, document and stay away from the actions where deals were lost. Take time to compile this information and share it with your team. Having an established roadmap can help ensure everyone in sales has the ability to crush their quota.

So whether you're trying to understand the present or to look ahead, pipeline reports can get you the right information when you need it most.

Video 2: Understanding the Differences Between Pipeline and Funnel Reports in HubSpot

There are two kinds of reports you'll use to measure your sales performance: funnel reports and pipeline reports. Although they look similar, these reports showcase slightly different data.

A pipeline report in HubSpot shows you contacts or deals who have had any of the selected lifecycle or deal stages, while a funnel report shows you only the number of contacts or deals in each stage that moved through the selected stages in order.

In this way, think of pipeline reports as your current snapshot. They track and help you measure the state of your current contacts or deals. Funnel reports, on the flip side, help you understand the movement between stages so that you can better optimize your sales process moving forward. Understanding the difference is important, as both will be key to creating and maintaining a healthy sales pipeline moving forward.

Video 3: How to create a custom funnel or pipeline report in HubSpot

In your HubSpot account, navigate to the "Reports" dropdown menu and then click "Reports."

On the top-right of the following screen, select “Create custom report.”

On the left, click “Funnels or pipelines.”

On the right, select “Contacts” or “Deals.” At the top-right, click “Next.”

At the top of the page of the following screen, click the pencil icon to name your report.

In the “Data” tab, click “Add filters” to select properties to compare across your records.

In the “Visualization” tab, click the chart you want to use for your data visualization. The chart types available will depend on the types of contact or deal properties selected for your report.

Use the “Add stage” dropdown menu to select more stages from your pipeline to include in your report. You can click X to remove any stages.

Use the “all” dropdown menu to visualize how records have moved through your pipeline stages.

Choose “any” to create a pipeline report. Pipeline reports show you the number of contacts or deals that have had any of the selected stages during the time period selected, regardless of the order their stages change.

Choose “all” to create a funnel report. While the pipeline report above will show you contacts or deals who have had any of the selected lifecycle or deal stages, funnel reports show you only the number of contacts or deals in each stage that moved through the selected stages in order.

You can continue to adjust your filters and visualizations in the report builder. Click the “Data” tab to adjust any properties selected in your report.

Once you've finished your report, click “Save” to add the report to your list of saved reports or add it to a dashboard.