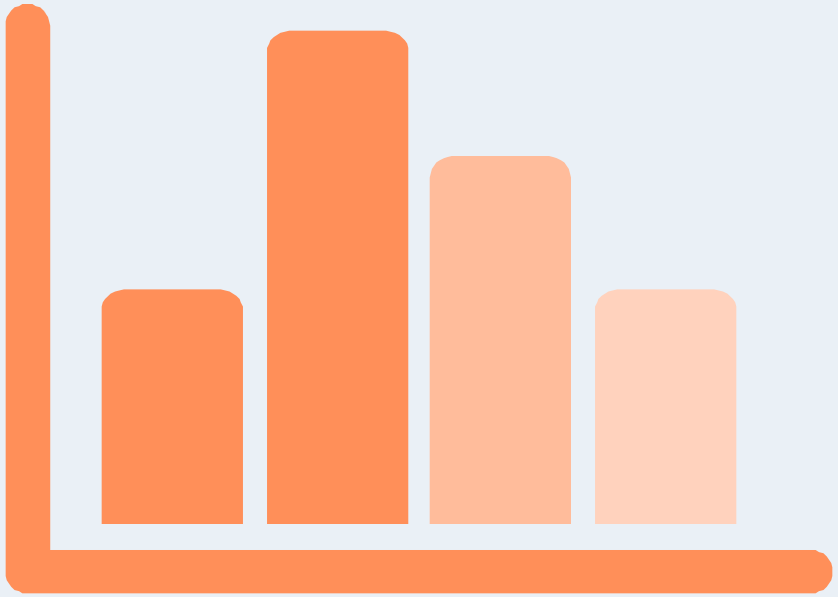
Managing Your Sales Team With the Reporting Add-on

HubSpot Academy

WHY IS REPORTING IMPORTANT TO SALES MANAGERS?

Reporting can help you identify the active needs of your team today as well as any potholes that may lie ahead.



Reporting can make it easier to work with:

- Your team.
- Your peers.
- Your manager.

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Reporting can tell you how **each member** is performing.

Source: PEXELS

Reporting will help you identify any
training opportunities across your team.
TOTAL BUSINESS GROWTH
100
90
80
70
60
50
40
30
20
10
INCREASE SALES OVER 20 YEAR PERIOD
Department Breakdown

Pair high performers with reps that may need a little

Buying behavior today **is constantly changing.**

Your reps should **always be learning.**

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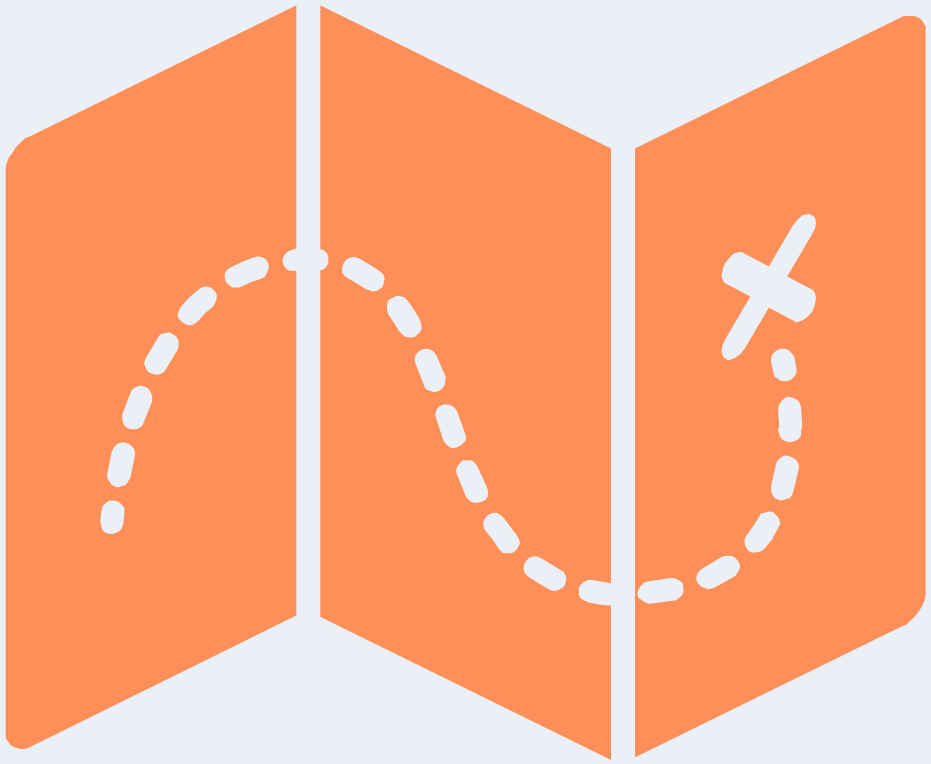

No matter the exact tactic you used, reporting can help **tell that story.**

So why is **reporting**
important to a sales manager?

Reporting enables you to understand how your team fits into the **larger picture** and direction of your company.

HOW DOES THE HUBSPOT REPORTING ADD-ON HELP YOU MANAGE YOUR SALES TEAM BETTER

The HubSpot Reporting Add-On

200 customizable dashboards

2000 customizable reports

Take a moment to think about the **type of information** you need in a day.

Source: PEXELS

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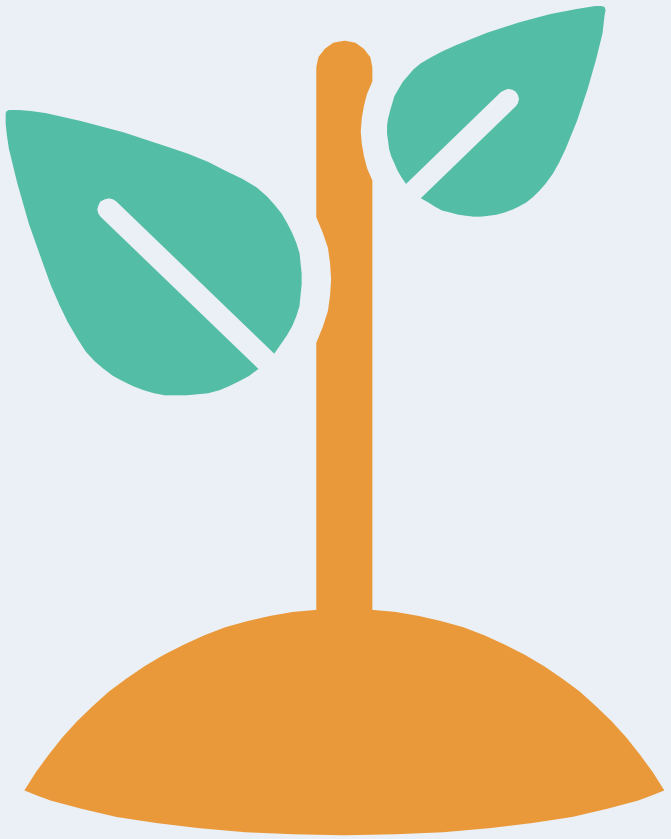
You need to know how every member of your team **is performing.**

You need to understand the **types of leads** they're working.

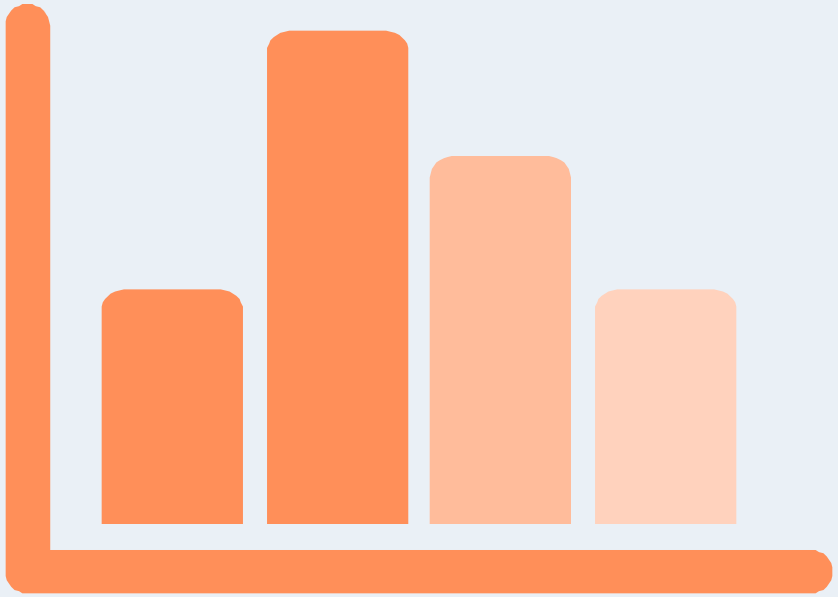


You need to know the **types of outreach** that work best for your customers.

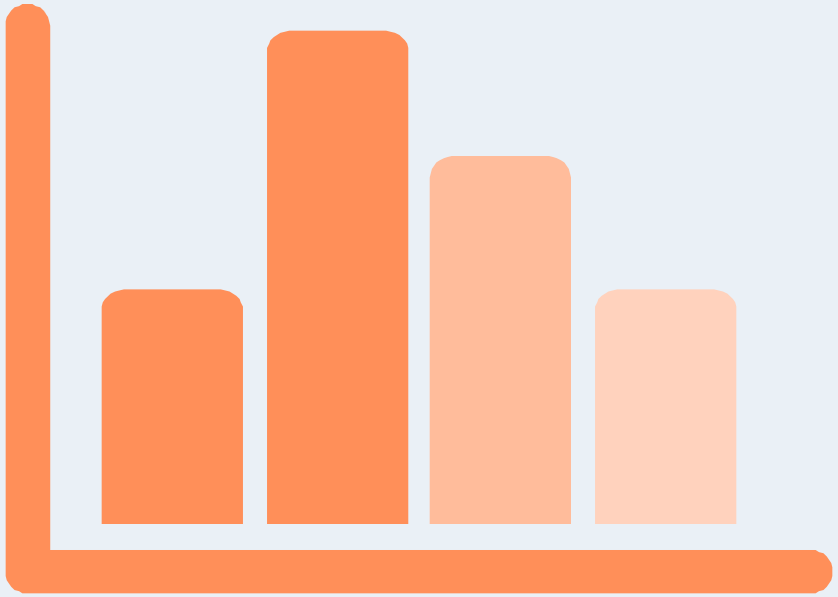
All your data can get the attention it needs.

HOW TO SET YOURSELF UP FOR SUCCESS WITH SALES REPORTING

What's the revenue goal of each rep?



How aggressive or realistic is that goal based on previous performance?



Your goals will typically fall into three buckets:

- Revenue
- Productivity
- Lead Generation

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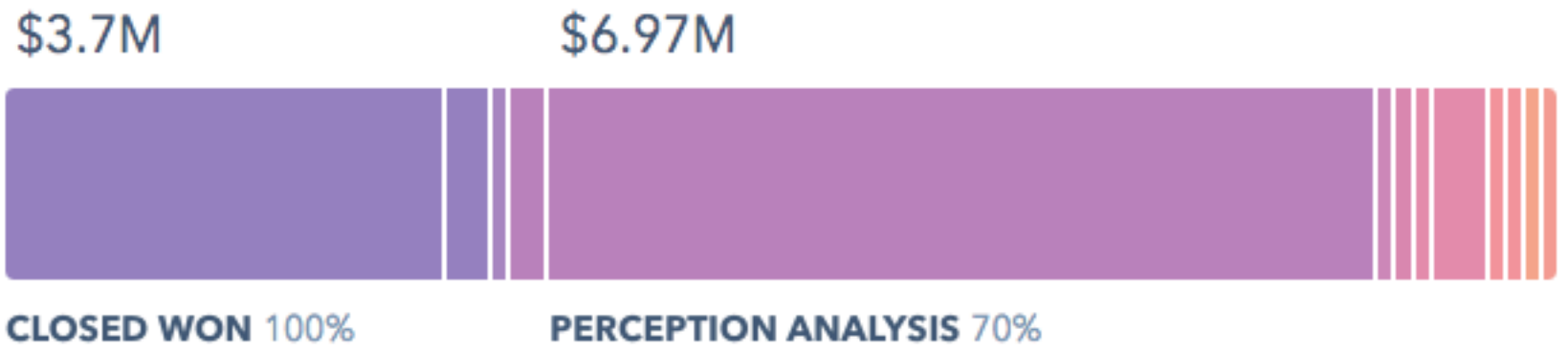
Deal Forecast

Set Quotas | Actions

Date range: All time Report settings

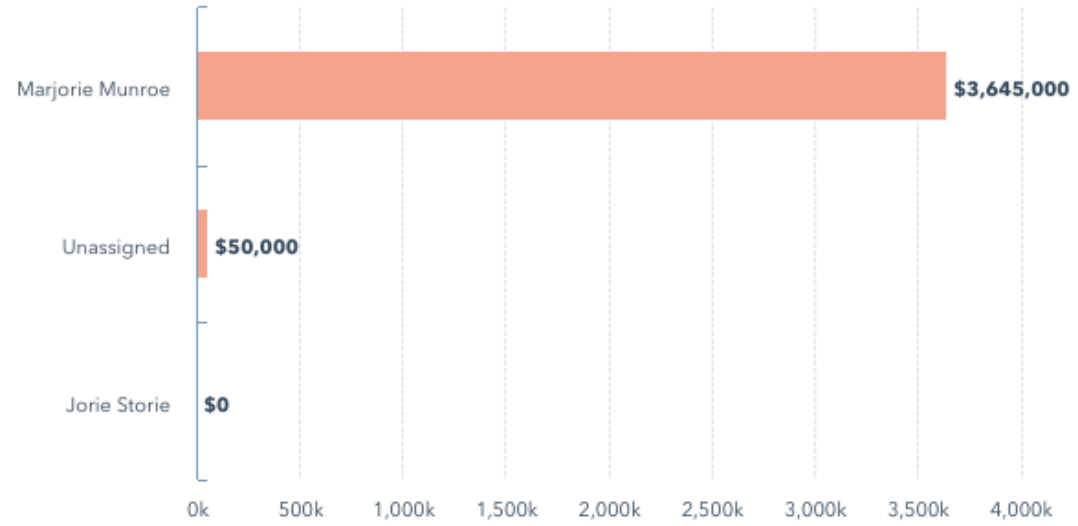
$11,981,030

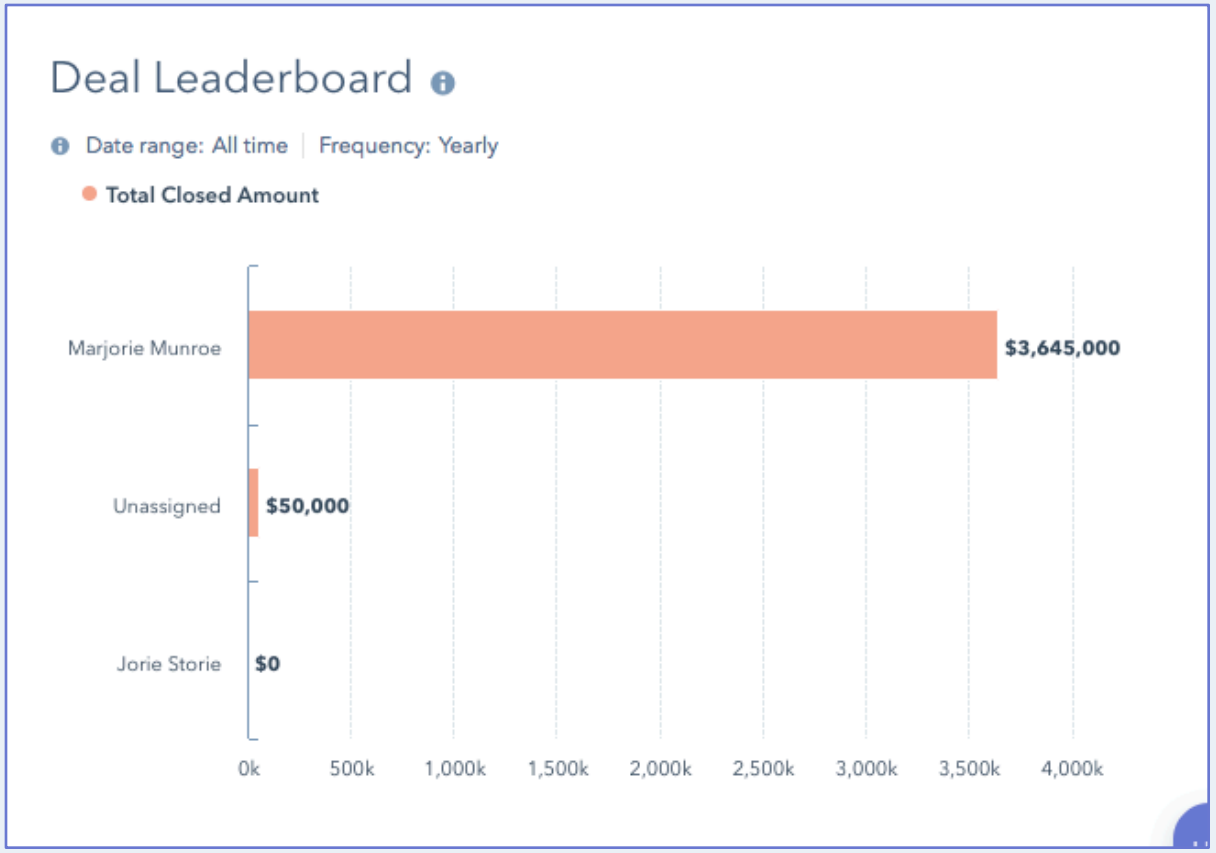


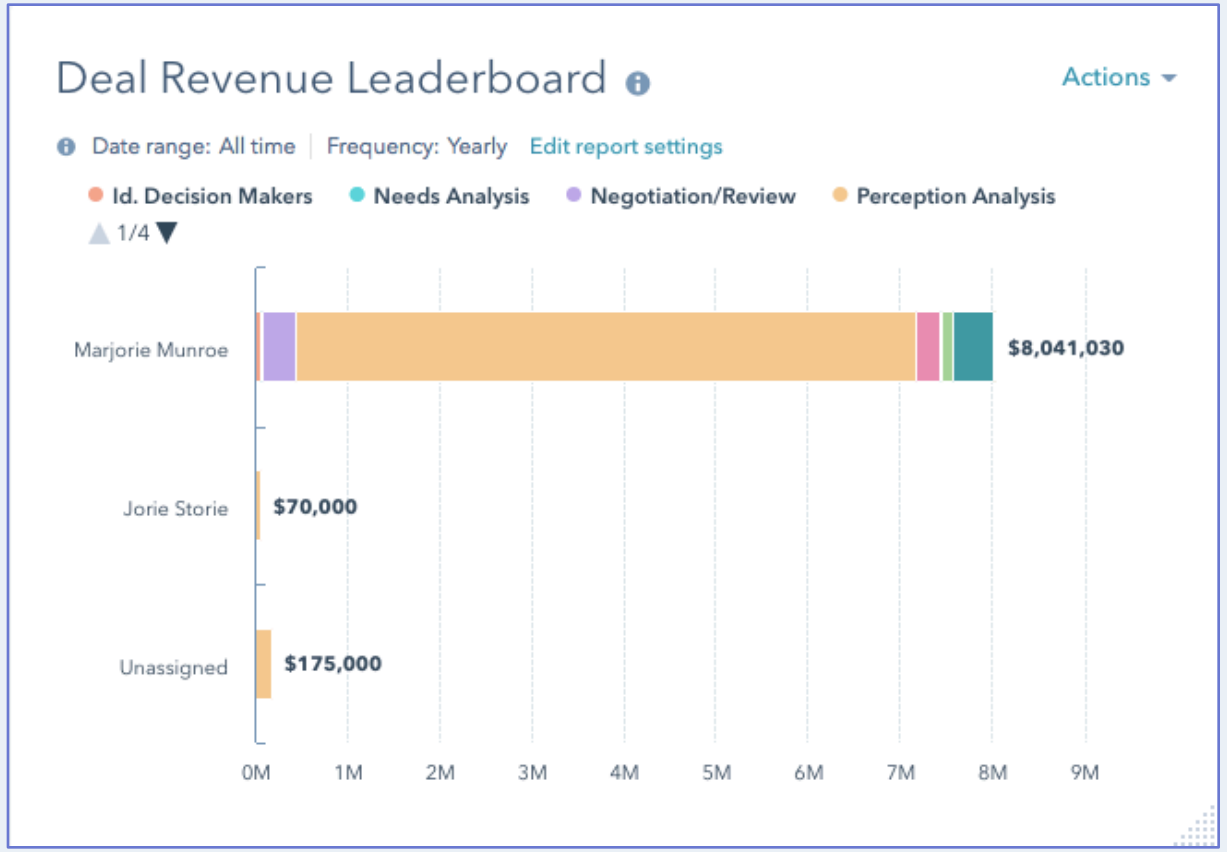
Deal Leaderboard

Date range: All time | Frequency: Yearly

Total Closed Amount



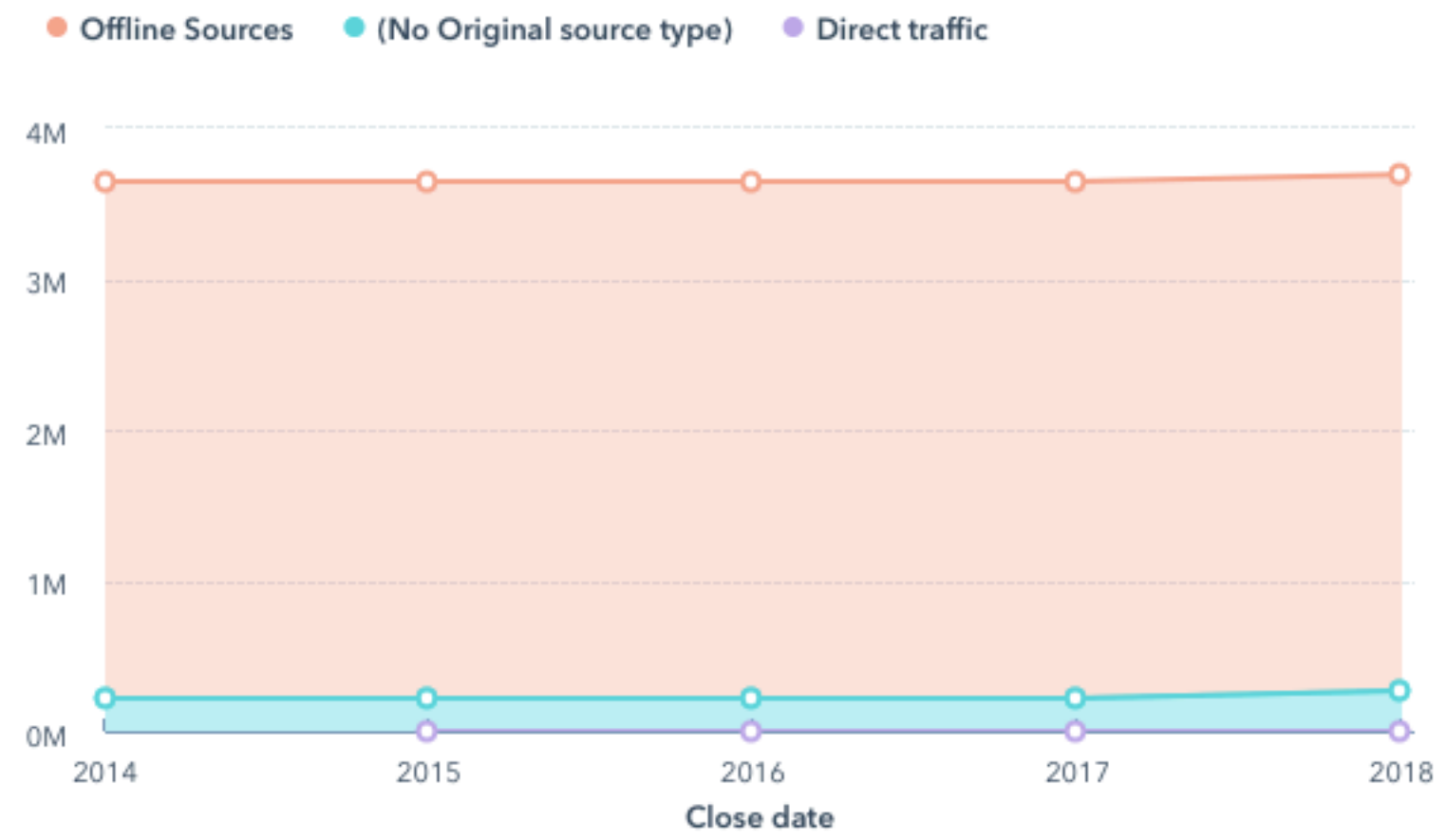

Deal Leaderboard
Date range: All time | Frequency: Yearly
Total Closed Amount
Marjorie Munroe
$3,645,000
Unassigned
$50,000
Jorie Storie
$0
0k
500k
1,000k
1,500k
2,000k
2,500k
3,000k
3,500k
4,000k


Deal Revenue Leaderboard
Actions
Date range: All time | Frequency: Yearly
Edit report settings
Id. Decision Makers
Needs Analysis
Negotiation/Review
Perception Analysis
1/4
Marjorie Munroe
$8,041,030
Jorie Storie
$70,000
Unassigned
$175,000
0M
1M
2M
3M
4M
5M
6M
7M
8M
9M

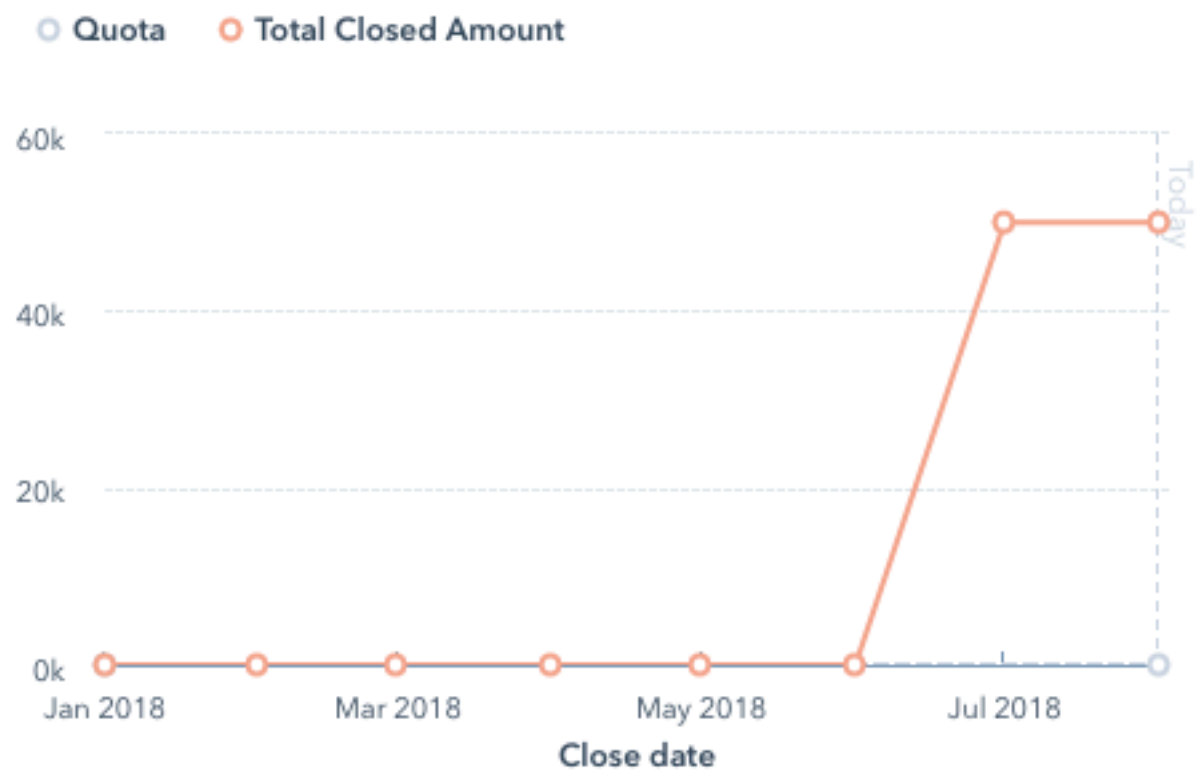
Closed Revenue by Source

Actions

Date range: All time | Frequency: Yearly Edit report settings



Deals Closed vs Goal



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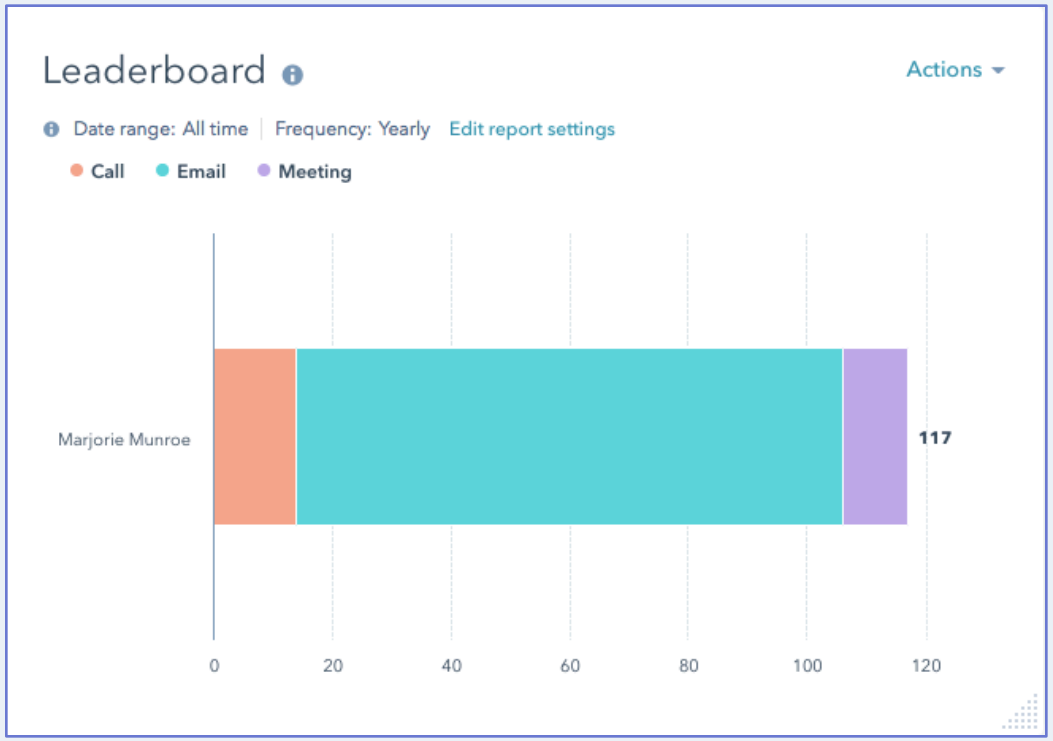
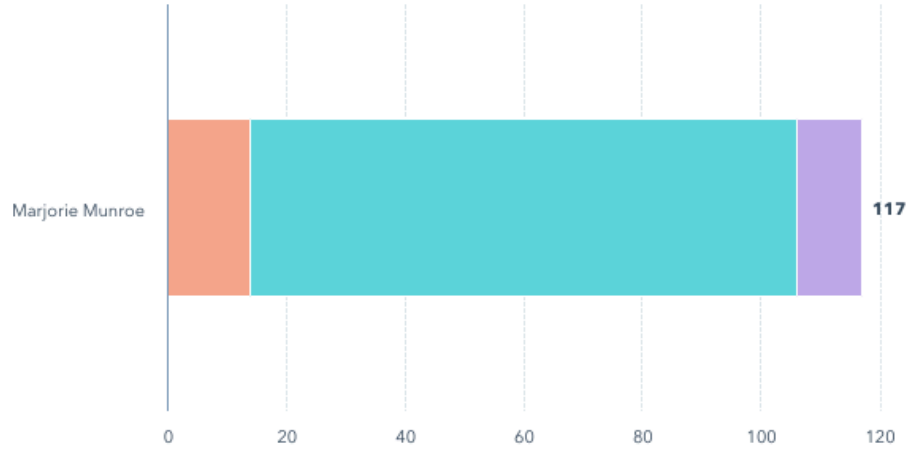

Leaderboard
Actions
Date range: All time
Frequency: Yearly
Edit report settings
Call
Email
Meeting
Marjorie Munroe
117
0
20
40
60
80
100
120

Leaderboard

Actions

Date range: All time | Frequency: Yearly Edit report settings

Call Email Meeting



Sales Performance

Actions

Date range: This entire month | Compared to last month Report settings

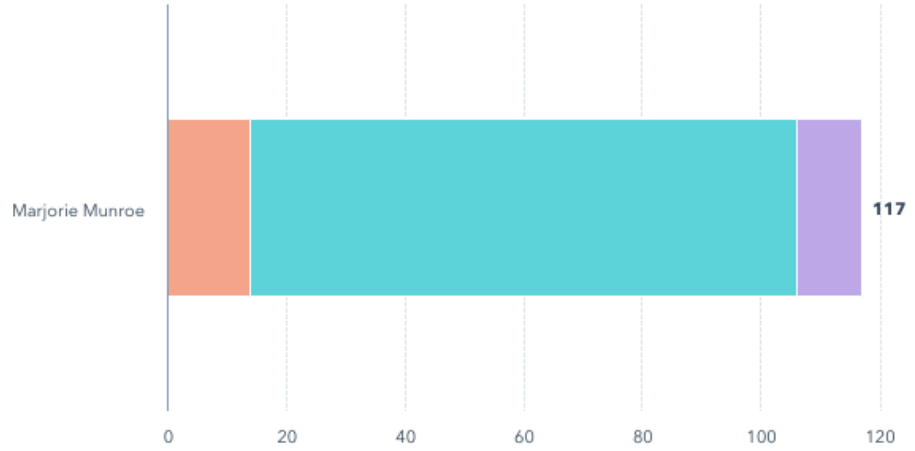
CONTACTS CREATED	CONTACTS ASSIGNED	CONTACTS WORKED	NEW DEALS CREATED	DEALS CLOSED WON
0	0	0	0	0
▼ 100%	▼ 100%	No change	▼ 100%	▼ 100%

Leaderboard

Actions

Date range: All time | Frequency: Yearly Edit report settings

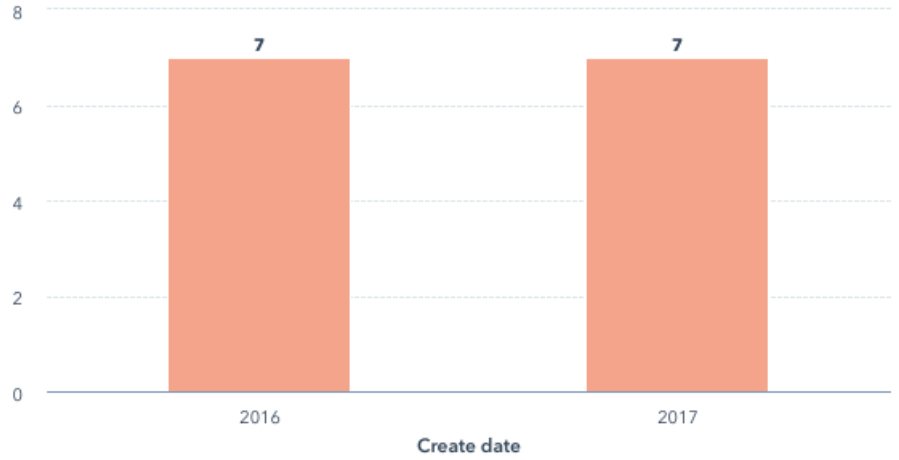
Call Email Meeting



Total Calls

Date range: All time | Frequency: Yearly

Count of Engagements



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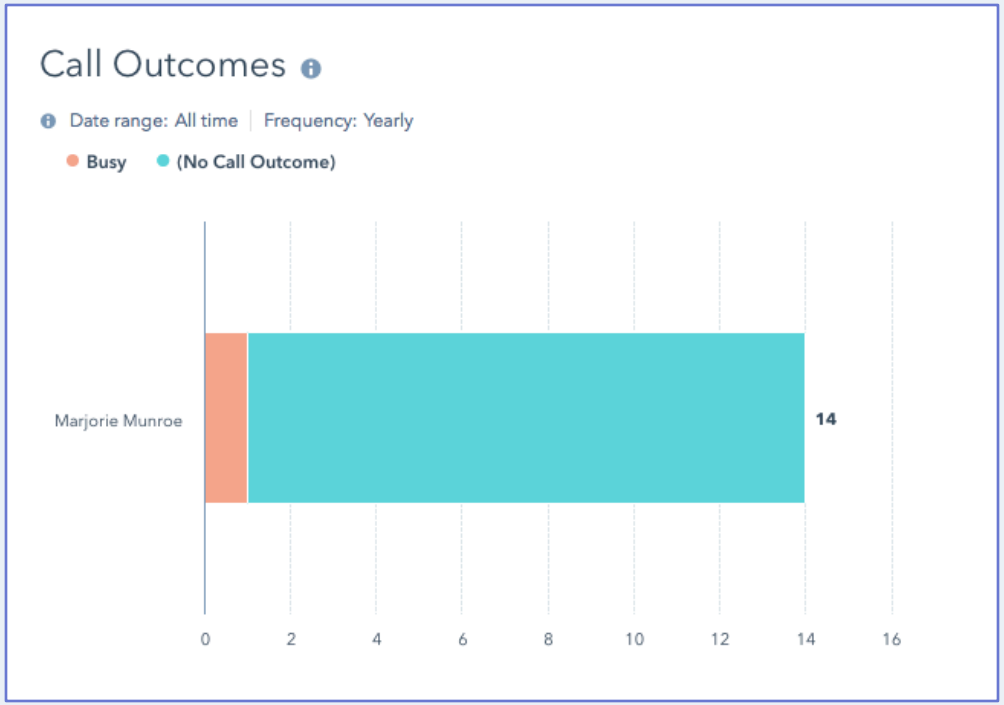
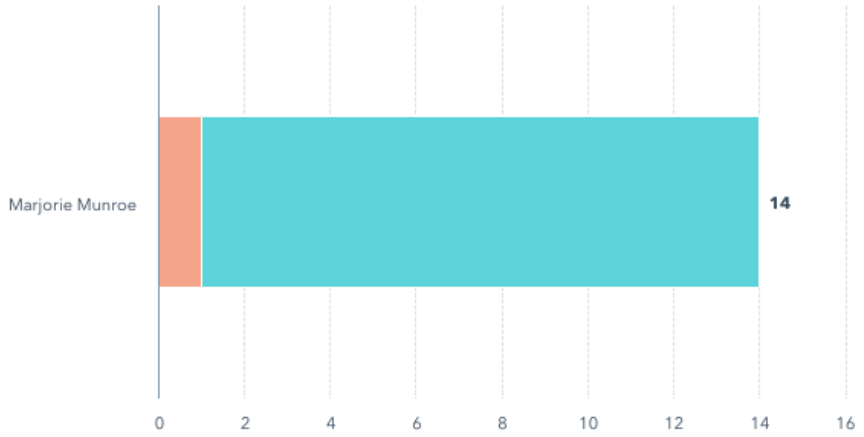

Call Outcomes
Date range: All time | Frequency: Yearly
Busy
(No Call Outcome)
Marjorie Munroe
14
0
2
4
6
8
10
12
14
16

Call Outcomes

Date range: All time | Frequency: Yearly

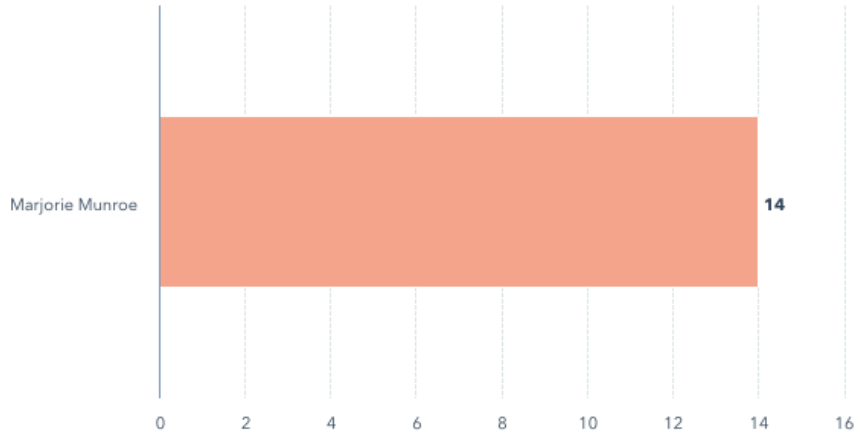
Busy (No Call Outcome)



Calls Made by Rep

Date range: All time | Frequency: Yearly

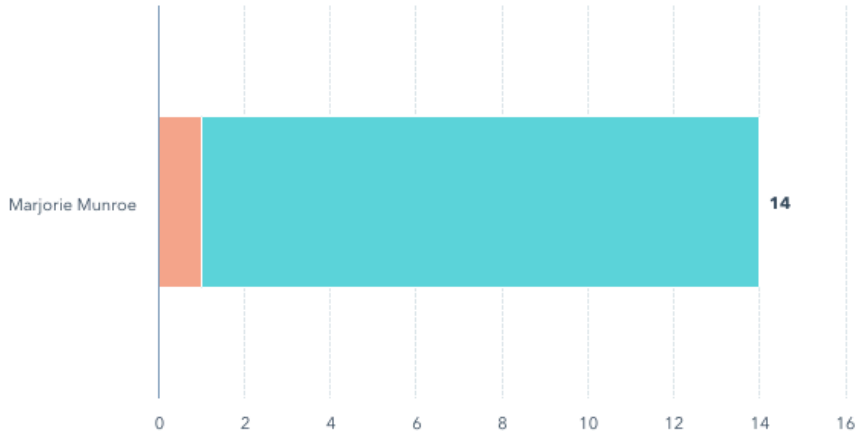
Count of Engagements



Call Outcomes

Date range: All time | Frequency: Yearly

Busy (No Call Outcome)

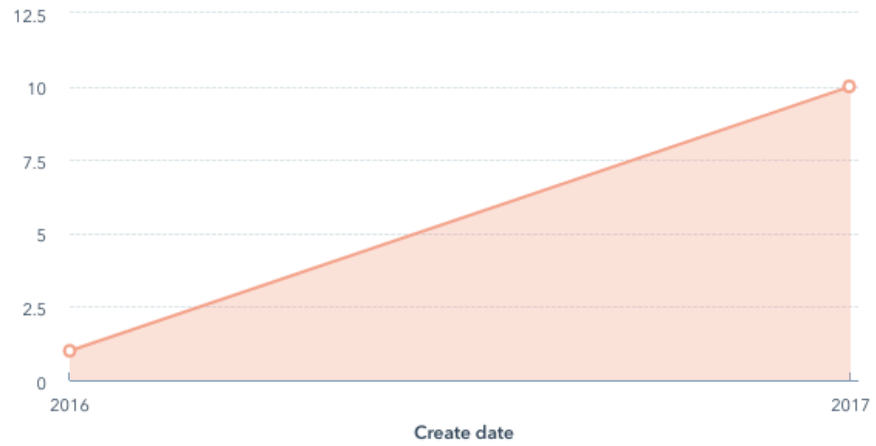


Total Meetings Booked

Actions

Date range: All time | Frequency: Yearly Edit report settings

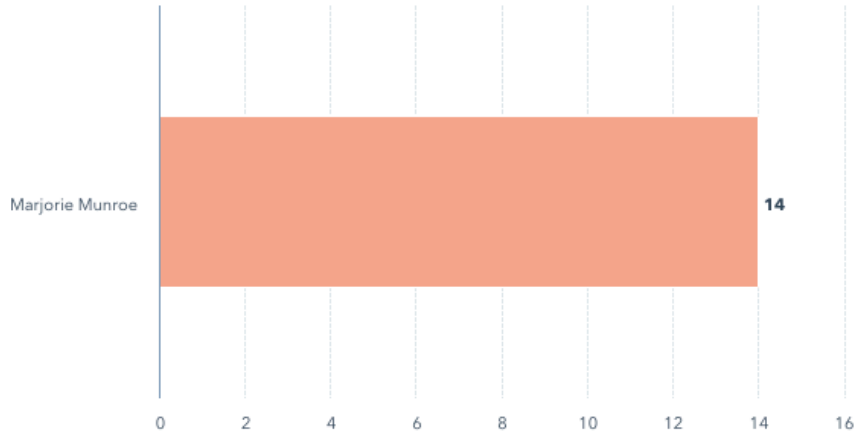
Count of Engagements

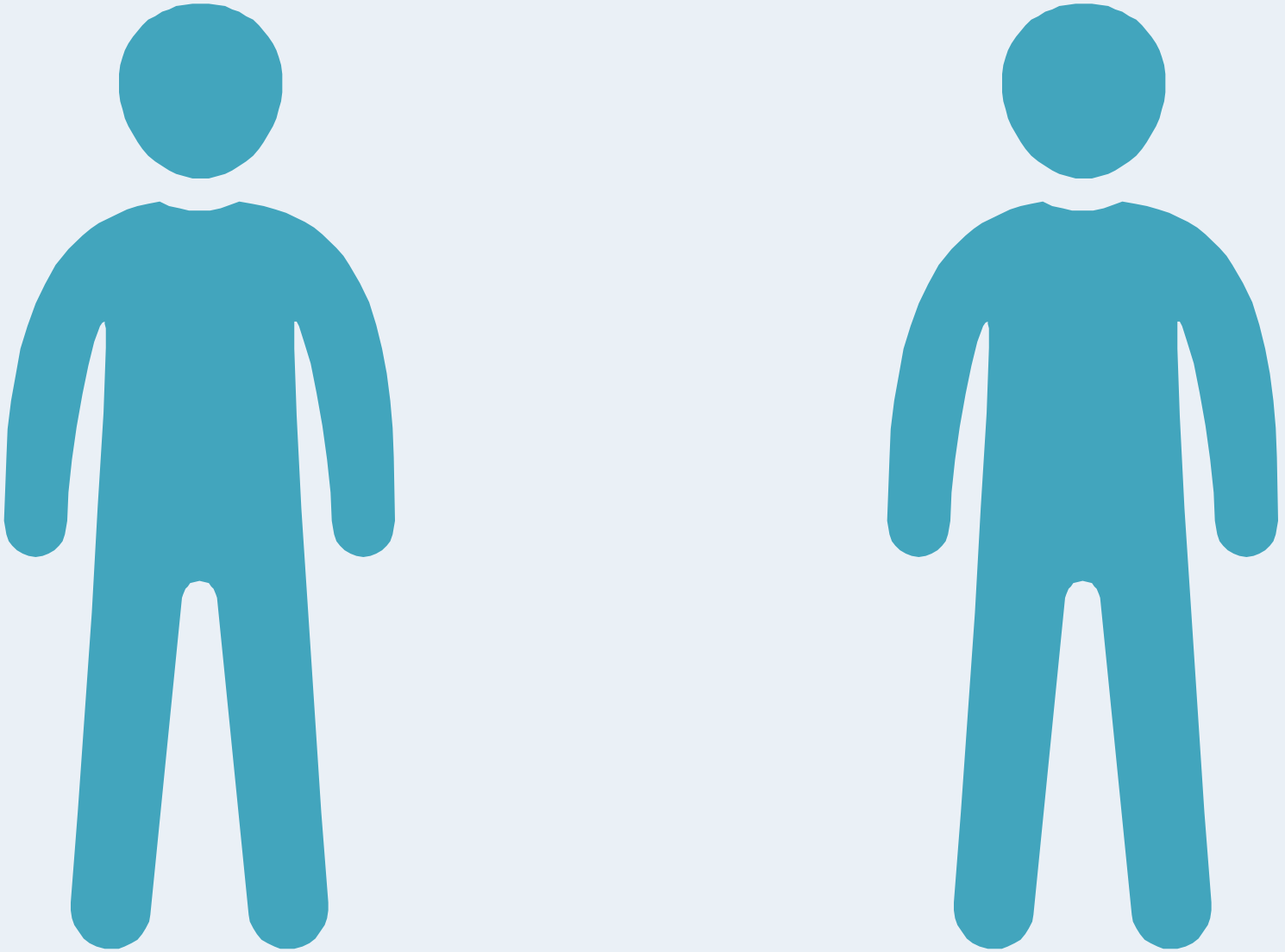


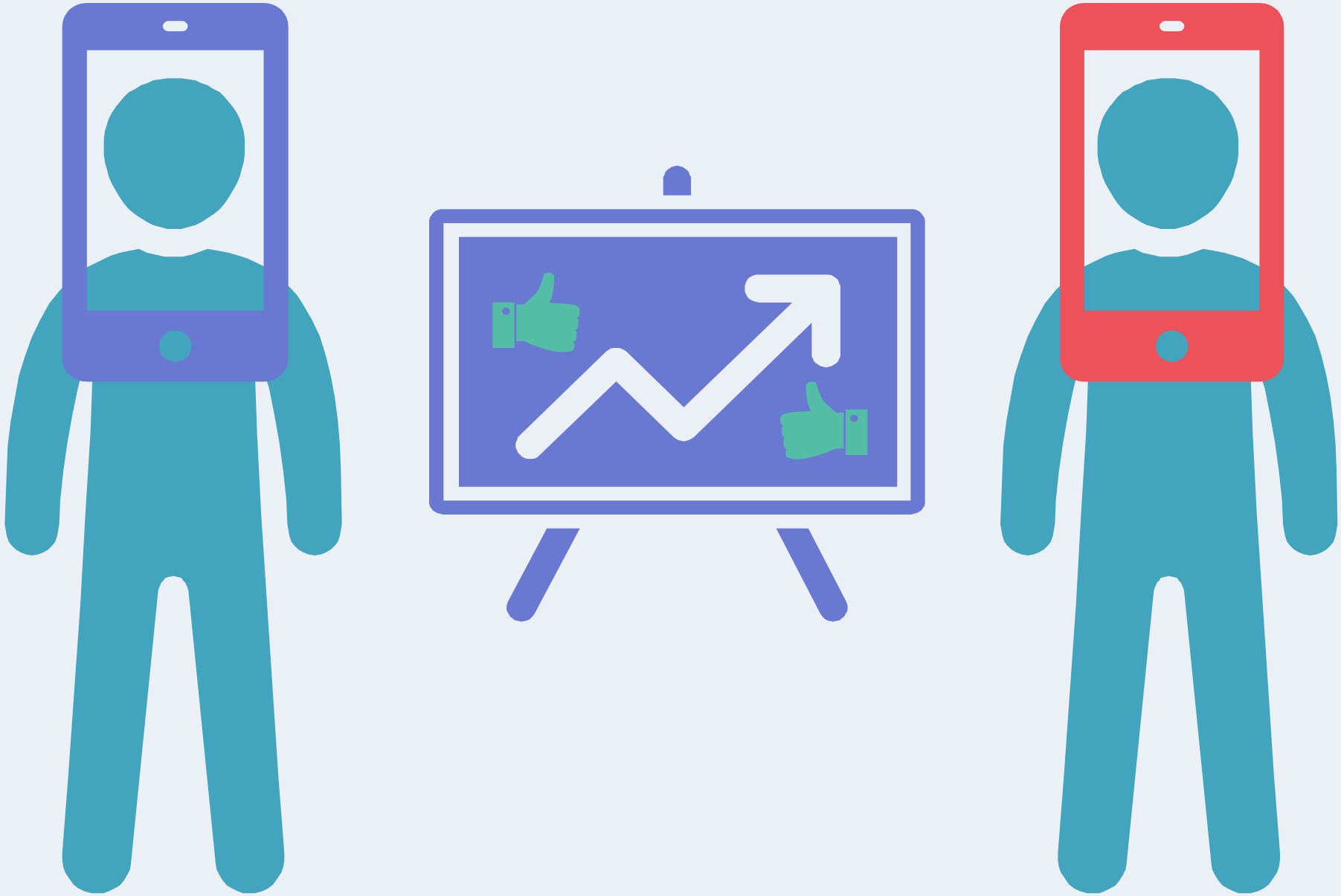
Calls Made by Rep

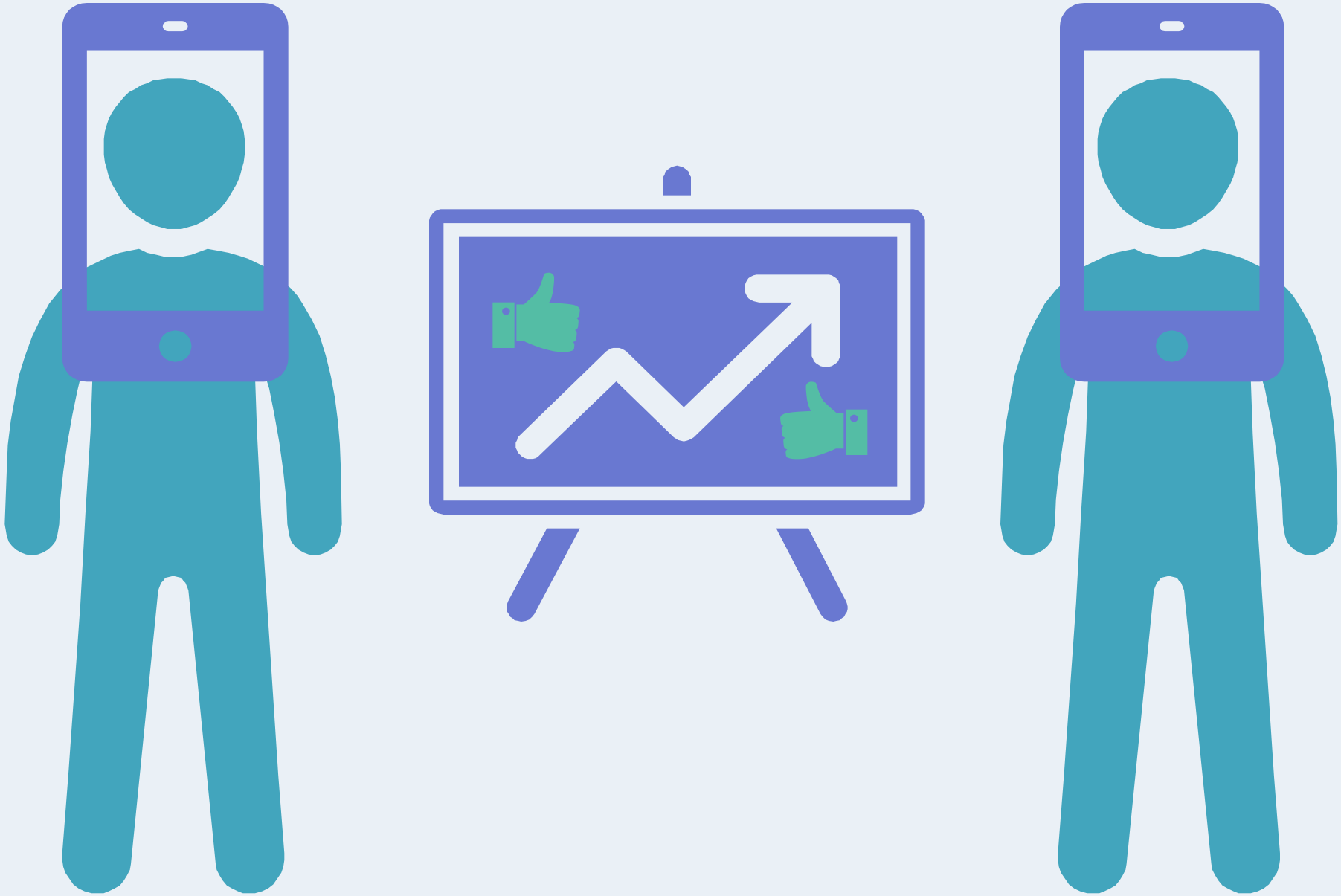
Date range: All time | Frequency: Yearly

Count of Engagements









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Contact Lifecycle Funnel
Actions
Date range: All time
Frequency: Yearly
Edit report settings
Lifecycle stage
Count of Contacts
Conversion
Created
181
0.55%
Marketing qualifie...
1
100%
Customer
1

Contact Lifecycle Funnel

Actions

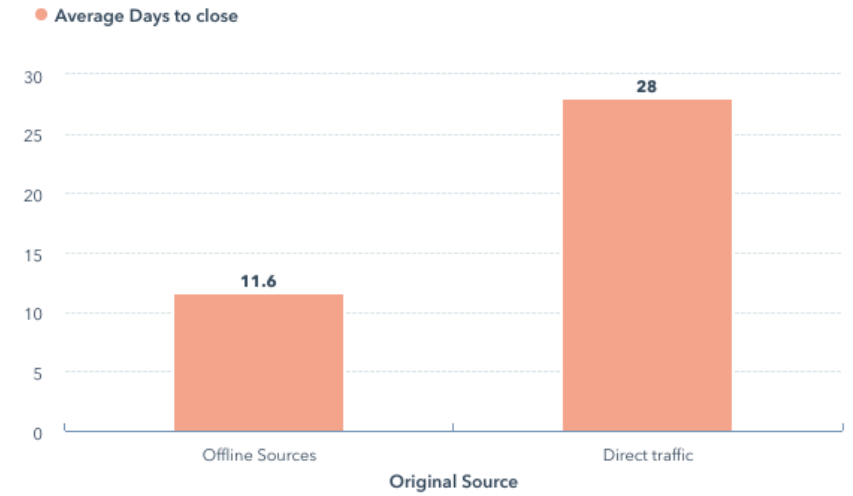
Date range: All time | Frequency: Yearly Edit report settings

Lifecycle stage	Count of Contacts	Conversion
Created	181	0.55%
Marketing qualifie...	1	100%
Customer	1	

Average Days to Close

Actions

Date range: All time | Frequency: Yearly Edit report settings



Contact Lifecycle Funnel

Actions

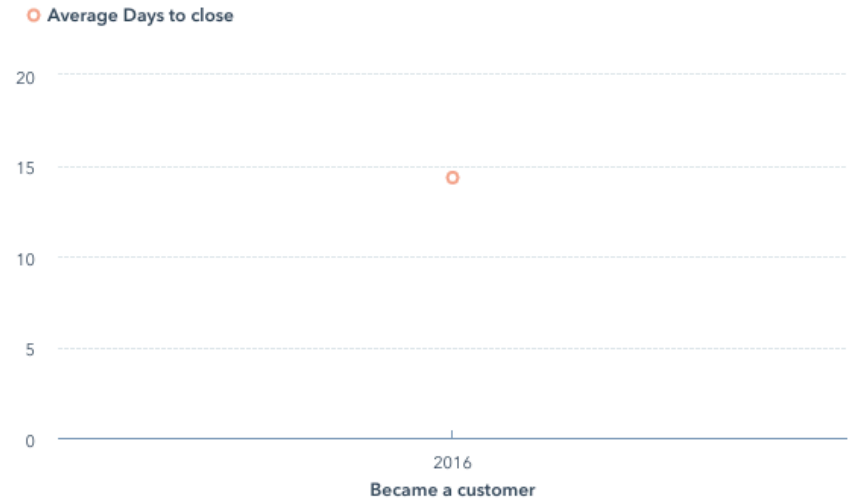
Date range: All time | Frequency: Yearly Edit report settings

Lifecycle stage	Count of Contacts	Conversion
Created	181	0.55%
Marketing qualifie...	1	100%
Customer	1	

New Customers Average Close

Actions

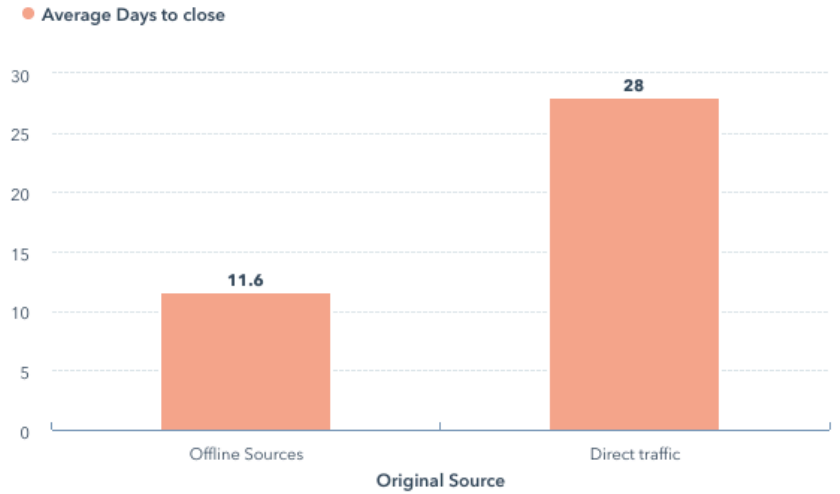
Date range: All time | Frequency: Yearly Edit report settings



Average Days to Close

Actions

Date range: All time | Frequency: Yearly Edit report settings



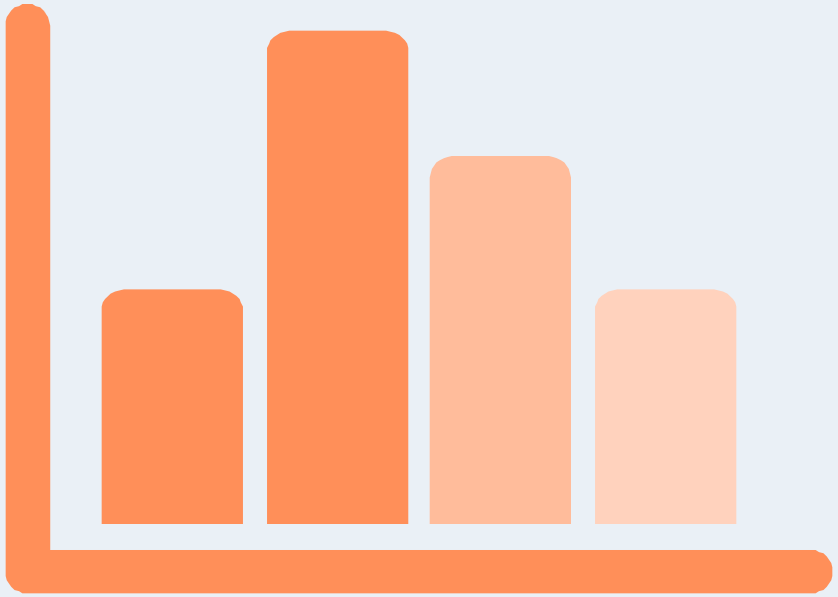
“We want to increase the number of sales demos booked by 15% by December 31st.”

PRO TIP:

Have them take a moment to write it out.

This helps you get a sense of what's working for your team, what's not, and any areas where you can provide additional value or coaching.

You want to ensure you're using reports that showcase the key data points to monitor the health of your team's process.



Over time, you may want several dashboards to set and track multiple initiatives.

CUSTOMER EXAMPLE: FOUND.

Found.

Found. Methodology

It always begins with a conversation. We take time to understand your problems, plans and aspirations.

Our team will design a custom set of solutions to support your growth. Beyond coworking, we give you access to strategic advisors, coaches, and our network of investors & partners.

We check in regularly to monitor your growth and challenges so we can match the support we provide.

"We couldn't see where our best fit customers were coming from and what their journey looked like. We didn't know how we were closing customers."

– Itai Boublil
CMO, Found.

The lack of visibility left Itai
unable to **forecast revenue.**

“The goal was to connect the sales activities and the marketing activities”

– Ruben Hamilius
Head of Marketing, Found.

Provide the sales team with
information on the prospects.

Give the marketing team valuable feedback on resulting conversion rates.

400%

increase in year-over-year revenue

SOURCE: Found.

200%

increase in organic traffic in just the first 7 months

SOURCE: Found.

Found. identified the need for a complete marketing and sales solution **that would scale** with their growing business early in their journey.

THANK YOU.

HubSpot Academy