WORK SHEET

Worksheet: Building Custom Reports in HubSpot

Objective: Complete this worksheet to practice creating custom reports that use all your data.

Exercise: Build a Custom Report in HubSpot

Step 1: Get to the builder

From any HubSpot dashboard or from your Reports screen, click Add report then Create custom report.

Step 2: Choose your data set

Do you want to report on contacts? Companies? Deals? Activities? Products? Tickets? Or more than one at once?

Step 3: Pick your selected properties

Which specific data points do you want to report on? A default property like lifecycle stage or industry? Or a custom property of your own?

Step 4: Add your filters

You likely don't want to see every contact or deal in your report. Use required or other filters to whittle down to isolate the data that is relevant to the question you're seeking to answer.

Step 5: Create your visualization

Choose the properties you'd like to display on your chart by dragging and dropping them into the builder. Then, choose your preferred visualization type.

Step 6: Save your report

Click Save, and decide whether you'd like to add your report to a dashboard, or have it live on its own.

What does your report show? What data sets and properties did you select?

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Build It: Practice it in Marketing Hub

1. Leads by first conversion & original source

This report helps you understand which forms are generating the most leads and where those leads are coming from. Select “Became a Lead Date” for the Required filter, and “First Conversion” for the Other Filter.

Instructions:

- Navigate to “Reports” > “Reports.”
- In the top-right, click “Create custom report.”
- Choose “Single data set.” Select “Contacts.”
- Under “Properties,” select “First Conversion,” “Original Source,” “Became a Lead Date,” and “Lifecycle Stage.”
- Under “Filters,” set “Became a Lead Date” to “This year.” Under “Other filters,” set “First conversion” to “is known.”
- In the "Visualization" tab, select “Bar.” Drag “First Conversion” and “Original Source” up to the “Displaying” area. Measure the properties by “Count of Contacts”
- Click “Save” to add your report to your list of saved reports.

Pro tip: Try swapping “Lifecycle Stage” in for “Original Source.” How does the report change?

What are your top three performing forms?

What content offers are sitting behind these forms?

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What stage of the buyer's journey do each of these top-performing forms align with?

What traffic source is driving the most conversions to each of these forms?

2. MQLs by Social Channel

This report helps you understand which social networks (e.g. Facebook) bring you the most qualified leads. It uses a property called "Original Source Drill-Down."

Instructions:

- Navigate to "Reports" > "Reports."
- In the top-right, click "Create custom report."
- Choose "Single data set." Select "Contacts."
- Under "Properties," select "Original Source Drill Down 1" and "Became a Marketing Qualified Lead Date."
- Under "Filters," set "Became a Marketing Qualified Lead Date" to "this year so far." Under "Other filters," set "Original Source" to "is any of: Social Media."
- In the "Visualization" tab, select "Area." Drag "Original Source Drill Down 1" and "Became a Marketing Qualified Lead Date" up to the "Displaying" area. Measure the properties by "Count of Contacts."
- Click "Save" to add your report to your list of saved reports.

Pro tip: Use the other original source properties to break your MQLs down by other channels. For example, break down your referral MQLs by their referring URL.

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List your goal of marketing qualified leads generated month over month for each of your social channels.

Compare the current performance of each of your social channels against the goals you've set. How do your results compare to the goals you've set?

Which social channel is creating the most marketing qualified lead dates? Does this align with your expectations? Why or why not?

Which social channel is creating the least amount of marketing qualified lead dates? Does this align with your expectations? Why or why not?

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Examine the trend of each social network. Is each network consistent, or do you notice spikes (positive or negative)? What could account for this behavior?

Do you notice any areas of opportunity for generating more marketing qualified leads across your social channels?

3. B2B? Build this report: Most engaged companies

This report helps you understand which companies are most engaged, using the total number of page views, form submissions, and emails opened as a measure.

Instructions:

- Navigate to “Reports” > “Reports.”
- In the top-right, click “Create custom report.”
- Choose “Across data sets.” Select “Contacts” and “Companies.”
- Under “Properties,” select “Name (Company),” “Create Date (Company),” “Number of Pageviews (Contact),” “Number of Form Submissions (Contact),” “Marketing email opened (Contact).”
- Under “Company Filters,” set “Create date” to “is less than: 31 days ago.”
- In the "Visualization" tab, select “Table.” In the “Configure table” dropdown menu, select “Summarized data table.” In the “Displaying” area, drag “Name (Company),” and measure the property by “Number of Pageviews (Contact),” “Number of Form Submissions (Contact),” “Marketing email opened (Contact).” Make sure each of these properties is set to total.
- Click “Save” to add your report to your list of saved reports.

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Pro tip: Want to see all the companies in your database, not just those created in the last month? Choose a different time frame in your filters.

List the top three companies with the most contacts in your CRM.

List the top three companies with the most form submissions in your CRM.

List the top three companies with the most email opens in your CRM.

Take a look at the companies you've listed above. Do any stand out? Are they all the same three companies? Do any of the listed companies surprise you?

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Deeper dive: Pick one of the companies listed above. Using their contacts as a guide, determine what types of content employees of that company are interacting with and the emails they are opening. What stage in the buyer's journey are these contacts? If they are already customers, how are you continuing to provide value with your content?

Build It: Practice it in Sales Hub

1. Deals closed vs goal by type

The deal type default property separates out new vs. existing business.

Use this chart to see which you're doing more of, compared to your overall revenue goals.

Instructions:

- Navigate to "Reports" > "Reports."
- In the top-right, click "Create custom report."
- Choose "Single data set." Select "Deals."
- Under "Properties," select "Amount," "Deal Type," and "Close Date."
- Under "Filters," set "Close Date" to the last 30 days. Under "Other Filters," set both properties "Deal Type" and "Deal owner" to "is known."
- In the "Visualization" tab, select "Area." Drag "Close Date" and "Deal Type" into the "Displaying area." Measure by "Amount," set to "Total."
- Under the "Display options," select the checkbox next to "Include Monthly Report Goal."
- Click "Save" to add your report to your list of saved reports.

Pro tip: Out of the box, deal type includes two values: new and existing business.
You can customize it to your own use case by adding values in your "Property Settings."

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Based on the visualization, are you currently on track to hit your charts?

Is your revenue growth steady or are you noticing any spikes? What could account for this type of trending?

What percentage of your revenue is coming from new revenue? Recurring revenue?

Brainstorm: What other ways could you customize the deal type property to give more insight to your business? List your ideas below.

2. Average deal size by industry

This report shows you which industry produces the highest-value deals. Take this data into account when building your team and coaching your reps.

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Instructions:

- Navigate to “Reports” > “Reports.”
- In the top-right, click “Create custom report.”
- Choose “Across data set.” Select “Companies” and “Deals.”
- Under “Properties,” select “Industry (Company)” “Amount (Deal),” and “Deal owner (Deal).”
- Under “Company Filters,” set “Industry” to “is known.” Under “Deal Filters,” set “Deal Owner” to “is known” and “Close date” to the preferred date range.
- In the "Visualization" tab, select “Column.” Drag “Industry (Company)” to the “Displaying” area, followed by “Amount (Deal)” set to “Average.”
- Click “Save” to add your report to your list of saved reports.

Pro tip: Swap out “Industry” for other properties that you’re curious about. What about company size? Or region?

What industries are your company’s greatest source of revenue? Does this align with your expectations?

Swap out industry for company size. What size companies are your greatest source of revenue?

Swap out industry for region. What regions are your greatest source of revenue?

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3. Total pipeline by persona

Personas are an important part of an inbound strategy. Use this report to find out which contact personas are worth the most revenue to your company.

Instructions:

- Navigate to “Reports” > “Reports.”
- In the top-right, click “Create custom report.”
- Choose “Across data set.” Select “Contacts” and “Deals.”
- Under “Properties,” select “Amount (Deal)” and “Persona (Contact).”
- Under “Contacts Filters,” set “Persona” to “is known.” Under “Deal Filters,” set “Amount” to “is known” and the “Create date” to the desired date range.
- In the "Visualization" tab, select “Pie.” Drag “Persona (Contact)” to the “Displaying” area, followed by “Amount (Deal),” set to “Total.”
- Click “Save” to add your report to your list of saved reports.

Pro tip: Try out different chart types. Which one do you prefer?

Which contact personas are generating the most revenue for your company? The least revenue?

Build It: Practice it in Services Hub

1. Average time to close by rep

You don’t want to rush your customers through their service issues, but you don’t want to drag your feet either. Use this report to gauge how long your reps are taking to close tickets.

Instructions:

- Navigate to “Reports” > “Reports.”
- In the top-right, click “Create custom report.”
- Choose “Single data set.” Select “Tickets.”

- Under “Properties,” select “Ticket owner” and “Time to close.”
- Under “Filters,” set “Create date” to the “this year so far.” Under “Other Filters,” set “Ticket status” to the desired closed categories (you may have custom properties here).
- In the "Visualization" tab, select “Bar.” Drag “Ticket owner” to the “Displaying” area, followed by “Time to close” set to “Average.”
- Click “Save” to add your report to your list of saved reports.

Pro tip: For a different view of your reps’ response time, swap out “Time to Close” with “Time to First Email Reply.” What can you learn from the new report?

Which of your service agents are taking the longest amount of time to close tickets?

Which of your service agents are taking the shortest amount of time to close tickets?

2. Tickets by source over time

Are you staffing your channels correctly? Use this report to see how the mix of ticket sources -- chat, web, phone, etc. --- changes over time.

Instructions:

- Navigate to “Reports” > “Reports.”
- In the top-right, click “Create custom report.”
- Choose “Single data set.” Select “Tickets.”
- Under “Properties,” select “Create date” and “Source.”
- Under “Filters,” set “Create date” to “This year so far.” Under “Other filters,” set “Source” to “is known.”

- In the "Visualization" tab, select “Column.” Drag “Create date” and “Source” to the “Displaying” area, followed by “Count of Tickets.”
- Click “Save” to add your report to your list of saved reports.

Pro tip: Try “Category” instead of “Source.” What does this new report show?

Which channel is generating the most influx of tickets this quarter?

Swap the “Create date” to “is last: quarter.” How does this compare to the channel that generated the most tickets last quarter?

Deeper dive: Swap out the “Create date” property with the “Time to first agent reply date” and set it to average. Are these within the SLAs set by your team?

3. Tickets by company region

Are you supporting your international customers in the right way?

Are your time zones staffed correctly?

Use this report to find out.

Instructions:

- Navigate to “Reports” > “Reports.”
- In the top-right, click “Create custom report.”
- Choose “Across data set.” Select “Companies” and “Tickets.”

- Under “Properties,” select “Region (Company).”

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- Under "Ticket Filters," select "Close date" and set to the desired date range. Under "Company Filters," select "Region" is known.
- In the "Visualization" tab, select "Donut." Drag "Region" to the "Displaying" area, followed by "Count of Tickets."
- Click "Save" to add your report to your list of saved reports.

Pro tip: Change the colors of your report using the picker in the upper-right.

What is the percentage of tickets generated by each of your regions? How does this inform your staffing needs?

Swap out "Region" for a property like "Priority." What percentage of tickets do you have in each priority?

Swap out "Priority" for a property like "Category." What percentage of tickets do you have in each category?