

Reporting Add-on Tips & Tricks

Love the idea of building custom dashboards for your team, but not quite sure how to get started? It's your lucky day. The Reporting Add-On comes pre-loaded with dozens of curated templates to get you up and running.

If you have something a bit more custom, build a report from scratch instead. After clicking “Add Report” from your dashboard, find “Build from Scratch” on the left-hand side. You'll be transported into the report builder, which enables you to create custom reports on the properties your team values most.

In the next few pages, we'll lay out some of our favorite reports to build from scratch, and show you exactly how to set them up.

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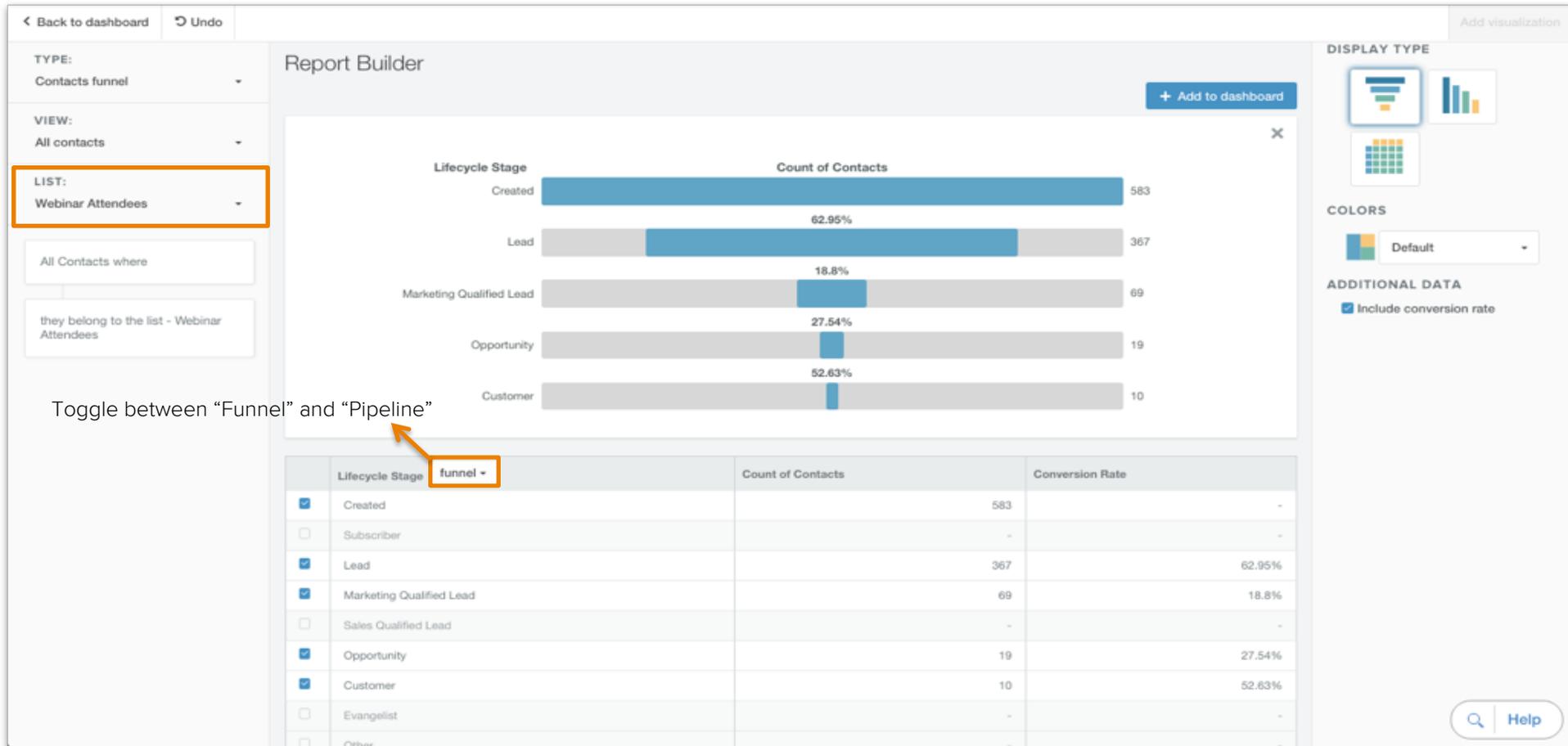
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Here are a few recommended practices that will help you get the most out of the Reporting Add-On:

- 1) Familiarize yourself with creating [Lists](#) in HubSpot Marketing. Make lists for your most important segments in order to filter reports and gain better insights into your contacts database.
- 2) If you use HubSpot CRM, get comfortable with setting up [Views](#) for your Contacts, Companies, and Deals. If you haven't used Views before, take a gander at this handy help document.
- 3) Connecting your CRM to HubSpot will enable you to run sales reports within the Reporting Add-On. To activate the [HubSpot CRM](#), check out this guide. If you use Salesforce, set-up [Account and Opportunity Syncs](#) to report on company and deal data.
- 4) Creating [Buyer Personas](#) is a pivotal part of an Inbound Marketing strategy. If you haven't yet constructed Personas and built them into your HubSpot portal, take a look here.
- 5) Explore HubSpot's [Default Properties](#) to understand what you're provided with out of the box or [Create Custom Properties](#) unique to your business.

Marketing



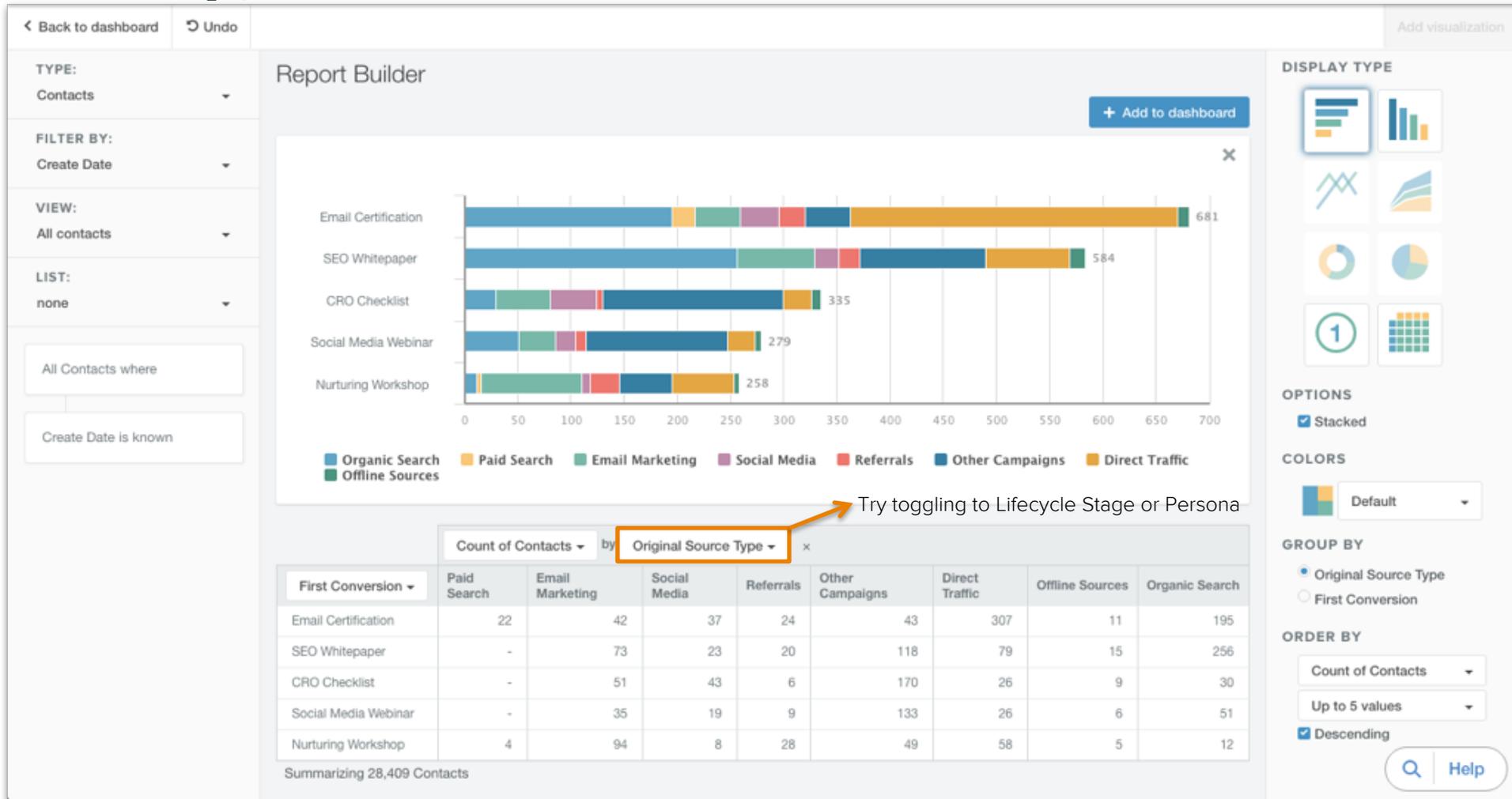
Toggle between "Funnel" and "Pipeline"

funnel

Use this report to determine the conversion rates of contacts from lead to customer. To get started, try reporting on a smaller segment of your database using the list builder and the following criteria:

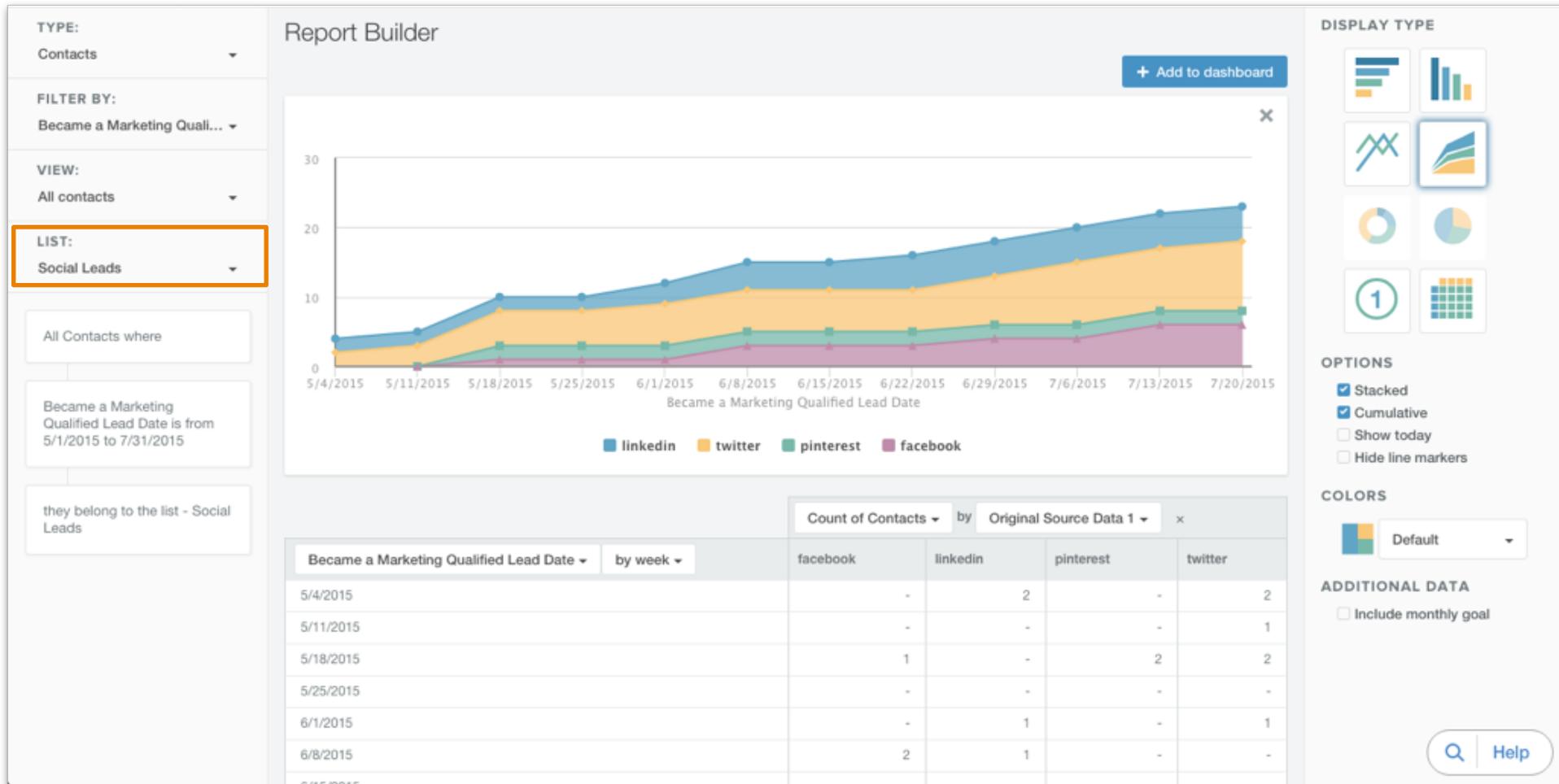
“Form Submission | contact has filled out | (Specific Form)” or **“Contact Property | Recent Conversion | contains | Webinar”** or any other key segment defined by a list (e.g. industry or persona-based).

Pro Tip: Toggle from “Funnel” to “Pipeline” in order to get a full view of contacts, regardless of how they moved from stage to stage (e.g. contact jumps from lead to customer).



Which channels are bringing the most leads to your best top-of-funnel offers? If you find that a certain offer is doing well with a particular channel, double down on that channel in your promotion. To dig deeper into a specific segment of your database (e.g. persona), filter by a list.

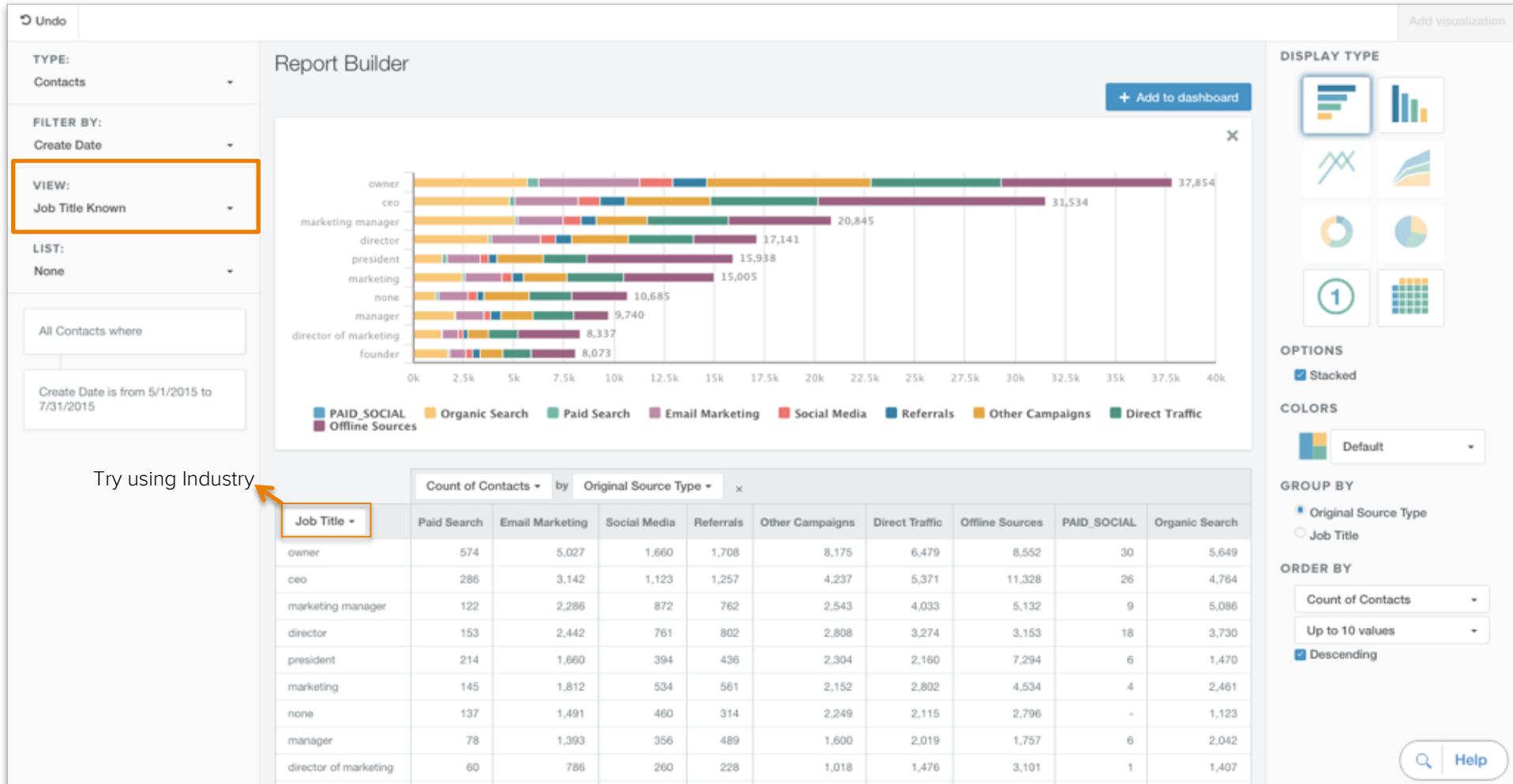
Pro Tip: If you see “No Value”, create a list with the criteria “Contact Property | First Conversion | is known”.



Which social platform brings in the most high-quality leads over time? To create this report, you'll first need to create a list of social-sourced leads using the following the criteria:

“Contact Property | Original Source Type | is equal to | Social Media”

Pro Tip: Try running this report with other lists based on different original sources (e.g. **Email Marketing**). Not sure what Original Source Drill-Down 1 & 2 mean? Find out [HERE](#).



Are you targeting a specific type of individual or industry (e.g. custom property or form field)? How are those decision-makers finding your website? Use this report to find out.

Pro Tip: If you see “No Value” under the “Job Title” column, create a list or view with the criteria, “Contact Property | Job Title | is known” and filter the report.

TYPE: Contacts

FILTER BY: Create Date

VIEW: All contacts

LIST: None

All Contacts where

Create Date is from 5/1/2015 to 7/31/2015



DISPLAY TYPE

OPTIONS: Stacked

COLORS: Default

GROUP BY: Persona, Create Date

Help

Try swapping in First Conversion Date

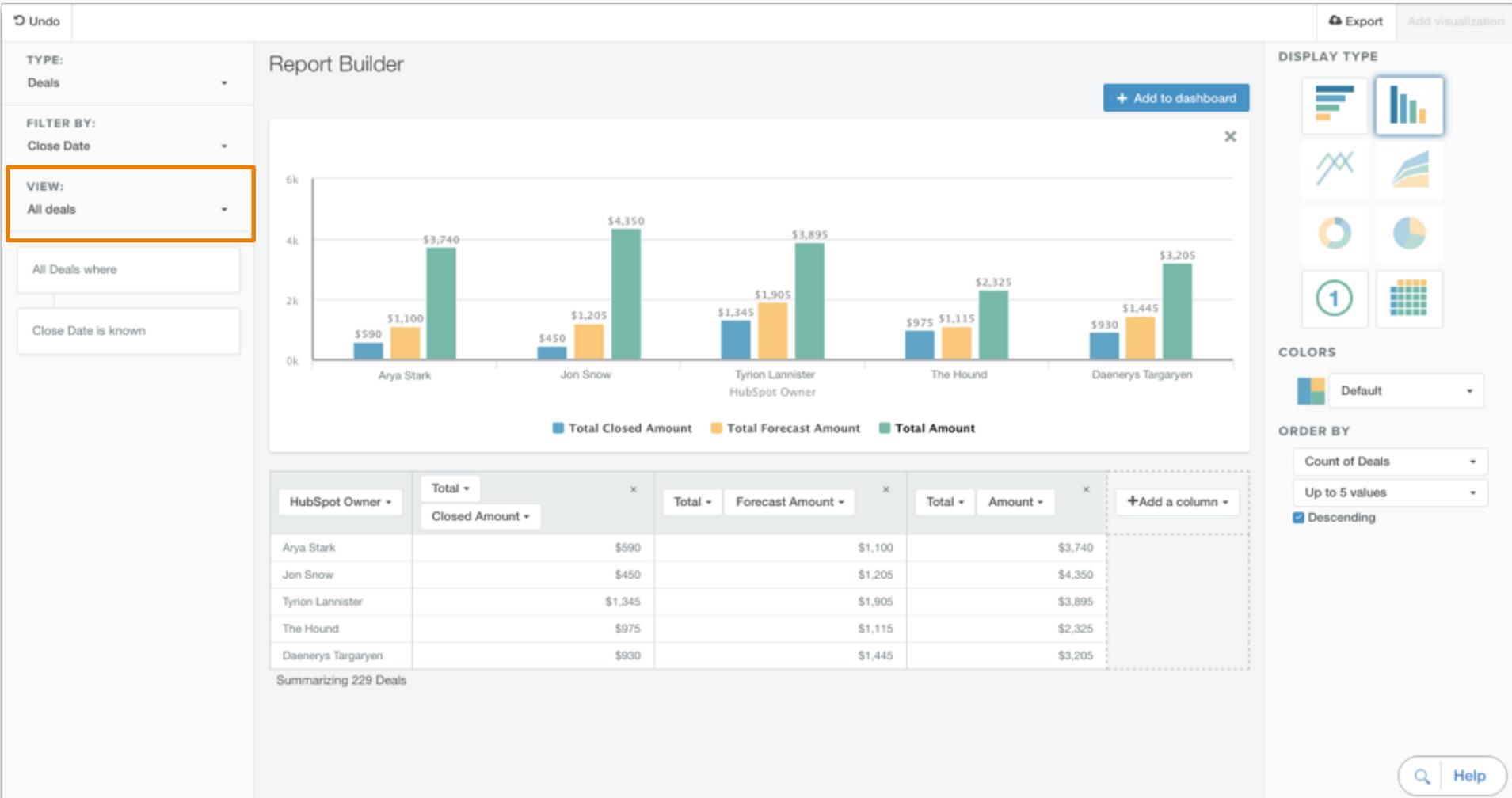


Create Date	Count of Contacts by Persona									
	1:10	11:200	200+	experiment	international	media	non-profit/edu	outbound	var	
4/27/2015	461	463	88	31	1,466	-	92	-	200	
5/4/2015	1,865	2,228	705	175	6,675	-	682	3	1,511	
5/11/2015	2,066	2,018	814	176	7,141	-	925	-	1,494	
5/18/2015	1,887	1,837	689	153	8,306	-	689	-	1,387	
5/25/2015	1,625	1,545	504	136	6,516	-	395	-	1,291	
6/1/2015	1,626	2,377	641	153	6,553	2	461	1	1,427	
6/8/2015	2,014	2,979	692	229	8,155	-	637	-	1,609	
6/15/2015	2,269	2,635	837	293	9,294	-	939	-	1,866	
6/22/2015	2,494	2,852	965	330	7,993	-	1,227	-	1,889	
6/29/2015	1,606	1,386	361	164	7,322	1	397	-	1,153	

Which persona is growing the fastest? Has that trend changed over time? Use this data to determine patterns in your lead gen efforts. Identify a poorly-represented segment and build your next offer with that segment in mind.

Pro Tip: Try changing “Create Date” to “First/Recent Conversion” in the first column to see which offers each persona is engaging with – this will allow you to pivot and target more effectively.

Sales



Which of your reps are in line to have the best month? Use this report to find out.

“**Closed Amount**” represents what each rep has sold so far.

“**Forecast Amount**” is their projection --- weighted by the percentage associated with the current deal stage.

“**Amount**” is the total amount of deals slated to close in the time frame you set.

Pro Tip: Filter by a view within HubSpot CRM (e.g. specific segment, pipeline, or team).

← Back to dashboard
↶ Undo
Export
Add visualization

TYPE:
Deals

FILTER BY:
Close Date

VIEW:
All Deals

All Deals where

Close Date is from the current month so far

Report Builder

Update on dashboard

Quota New Business Existing Business

DISPLAY TYPE

OPTIONS

Stacked

Cumulative

Show today

Hide line markers

COLORS

Default

ADDITIONAL DATA

Include monthly quota

Include monthly goal

🔍 Help

Measure revenue by week, month, or quarter

Close Date ▾ by day ▾

Close Date ▾	Total ▾	Closed Amount ▾	by Deal Type ▾	
5/1/2016			New Business	Existing Business
5/2/2016		\$2,920	\$250	\$1,485
5/3/2016		\$1,355		\$1,565
5/4/2016		\$3,890		\$1,135
5/5/2016		\$1,912.50		\$687.50
5/6/2016		\$2,170		\$883
5/7/2016		\$150		-
5/8/2016		\$360		\$65
5/9/2016		\$2,815		\$1,695
5/10/2016		\$3,095		\$505

Try toggling to HubSpot Owner

Is your team measuring up to a defined monthly goal/quota? In this report, the amount of revenue closed within your selected timeframe is plotted and can even be segmented by “Deal Type” or “HubSpot Owner”.

Note: Quota or Monthly Goals can only be added to current time frames (e.g. this month, quarter, or year).

Pro Tip: “Deal Type” is a default deal property in HubSpot. Customize its values to fit the needs of your team.

Back to dashboard Undo
Export Add visualization

TYPE: Deals

FILTER BY: Close Date

VIEW: All deals

All Deals where

Create Date is from the current month so far

Report Builder

+ Add to dashboard
X

HubSpot Owner	Appointment Set	Appointment Completed	Buyer Journey Confirmed	Working Upgrade	Closed Won	Closed Lost	Total
John Lennon	56	20	3	4	23	3	109
Paul McCartney	7	12	29	12	21	15	96
Ringo Starr	22	4	-	-	50	6	82
George Harrison	36	9	3	-	23	7	78
Bruce Springsteen	35	4	-	-	34	2	75

Summarizing 887 Deals

DISPLAY TYPE

Bar chart

Line chart

Area chart

Pie chart

Donut chart

Table

OPTIONS

Stacked

COLORS

Default

GROUP BY

Deal Stage

HubSpot Owner

ORDER BY

Count of Deals

Up to 5 values

Descending

Switch to Amount to see revenue →

Count of Deals

 by Deal Stage

Which of your reps have the most deals in the works? How close are those deals to closing? Use this report to drum up a bit of friendly competition between your reps as they track each other's progress over time.

Pro Tip: Customize your deal stages to align with your sales process. Not sure how? Find out [HERE](#).

< Back to dashboard
↶ Undo
Export
Add visualization

TYPE:
Deals

FILTER BY:
Create Date

VIEW:
All deals

All Deals where

Create Date is from the current year so far

Report Builder

Update on dashboard
×

HubSpot Owner	Average Time in Stage - Appointment Set	Average Time in Stage - Appointment Completed
Tiger Woods	a month	16 days
Rory McIlroy	7 days	14 days
Happy Gilmore	a month	13 days
Phil Mickelson	13 days	11 days
Jordan Spieth	22 days	19 days

HubSpot Owner	Average Time in Stage - Appointment Set	Average Time in Stage - Appointment Completed	+Add a column
Tiger Woods	a month	16 days	
Rory McIlroy	7 days	14 days	
Happy Gilmore	a month	13 days	
Phil Mickelson	13 days	11 days	
Jordan Spieth	22 days	19 days	

Summarizing 7,519 Deals

DISPLAY TYPE

OPTIONS

Show totals row

ORDER BY

Count of Deals

Up to 5 values

Descending

Q Help

Where are your reps running into bottlenecks? In the report above, it looks like Happy is fantastic at continuing the conversation after the appointment, but has a tough time executing the appointment in the first place.

Note: This report is only available if you use HubSpot CRM to track your sales process.

Pro Tip: Add additional columns to the chart for your other deal stages.

Undo
Export Add visualization

TYPE: Deals

FILTER BY: Create Date

VIEW: All deals

All Deals where

Create Date is known

Report Builder

+ Add to dashboard

HubSpot Owner	Messages Website Chat	HubSpot Toll Free	HS CRM Welcome Email	Live Chat
Lebron James	6	13	9	-
Steph Curry	7	6	11	1
Kobe Bryant	6	11	5	-
Dwyane Wade	5	9	7	-
Brian Scalabrine	7	8	4	1

Summarizing 229 Deals

DISPLAY TYPE

OPTIONS Stacked

COLORS Default

GROUP BY ISC Source HubSpot Owner

ORDER BY Count of Deals Up to 5 values Descending

Swap in Closed Amount Count of Deals by Deal Source

In order to hit quota, reps need to be creating deals. This report shows you the volume of opportunities created by each rep, broken down by a **custom property** our HubSpot reps use called “Deal Source”.

Note: “Deal Source” must be manually inputted each time a rep creates a new deal.

Pro Tip: Change “Count of Deals” to “Closed Amount” or “Forecast Amount” to see revenue by source.

Need some help perfecting your dashboard?

We're here to take you the rest of the way! Click the button below, then fill out the form to get in touch with a HubSpot Product Specialist.

Get in Touch