

ADVANCED REPORTING



Looking to take your reporting activities to the next level by utilizing the HubSpot Reporting Add-on?

During this engagement, you'll work with a Technical Consultant to identify the key metrics pertinent to your business, and build powerful reports and dashboards to surface that information. Your Technical Consultant will talk you through the nuances of the HubSpot Reporting Add-on and cover all best practices in using the tool.

The Advanced Reporting package will provide your team with all the knowledge needed to build the reports management wants to see.

Let us help you uncover a deeper level of reporting on your Inbound Marketing initiatives.

PACKAGE FEATURES

- Dedicated Technical Consultant
- Four one-hour consulting sessions
- Revenue reporting, funnel reporting, dashboard creation
- Estimated delivery timeline: Less than 60 days
- Required: Familiarity with basic HubSpot software set-up and use
- \$1,000

Inbound Methodology



by HubSpot

This package is designed for customers who are familiar with the basics of the HubSpot tool but need assistance identifying and building the reports needed to track what's working and what's not working.

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What is included in the Advanced Reporting package?

Session 1: Identification of Key Metrics and Reporting Goals (1 hour)

- Identify your top three (3) reporting goals and the key metrics needed to evaluate the success of those goals.
- Receive pointed suggestions on common successful metrics and the reports and data needed to build relevant dashboards.

Session 2: Audit of Existing Web Forms and Lists (1 hour)

- Perform an audit of up to ten (10) web forms and the associated form properties to ensure relevant data is being captured.
- Provide suggested changes to data collection activities for easier reporting.

Session 3: Build Custom Reports (1 hour)

- Technical walk through of building your Reporting Add-on, Contacts, and Companies reports.
- Prescribe the specific custom reports needed to evaluate the previously identified key metrics.

Session 4: Planning and Building Dashboards (1 hour)

- Plan out a Marketing, Sales, and Executive Summary dashboard..
- If all necessary reports are complete, build out Marketing, Sales, and Executive Summary dashboards.

READY?

Great! To get started, contact your Customer Success Manager today.