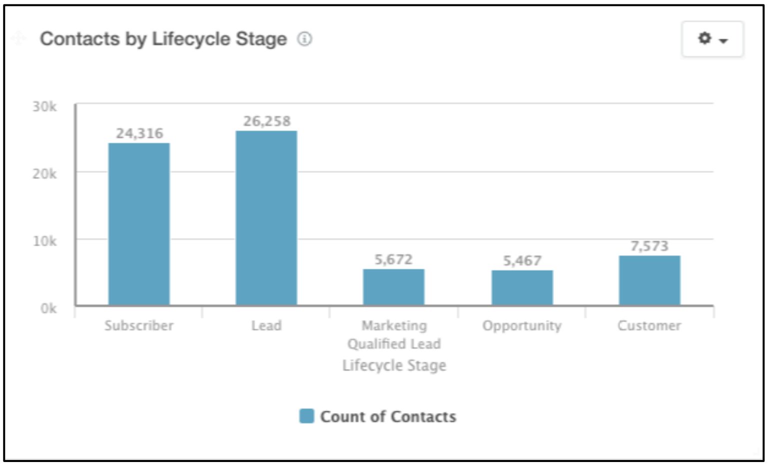
General Best Practices Using the Reporting Add-on

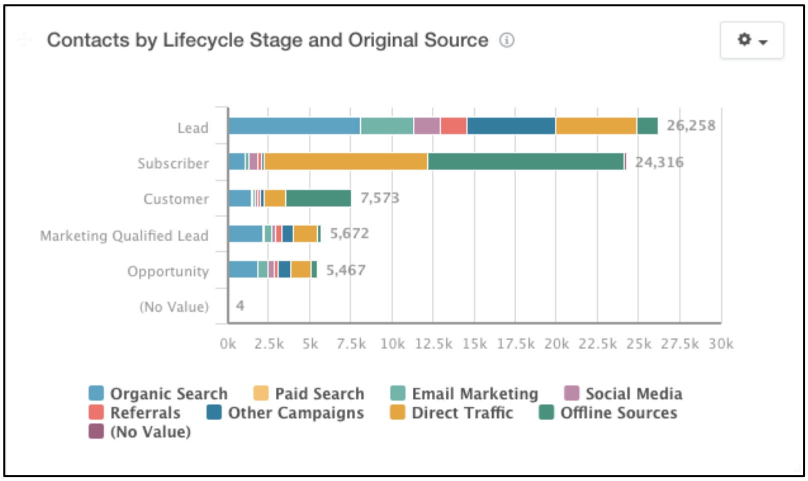
1. **Use the templated reports.** These are reports that our marketing and sales teams at HubSpot have found valuable. By using these reports, you will start to get used to the new app as well as how you should report.
2. **Add a visualization to your report.** The chart view is great, but sometimes it just helps to have that bar or line graph.
3. **Set goals.** After you decide a metric is important for you, set a goal for you to hit over a month (or another time period you are measuring). You can then put that goal into the report.
4. **Email reports to others on your team.** The beauty of the dashboards you can create is that you can be transparent with others on your team. Make sure they are viewing the reports and your progress toward your goals by setting it up to email them with these reports on a regular basis.
5. **Resize your reports.** The more important a report is to you, the bigger it should be. You can resize your reports right from the dashboard.
6. **Rearrange your reports.** If you have a couple of reports that are the most important to you, it may make sense to put them at the top of your dashboard.
7. **Create new dashboards.** Think about how many dashboards makes the most sense for your team to have. You may want to have a dashboard per team or you want to have a dashboard for your marketing team and a dashboard for your sales team.
8. **Rename your reports.** We will give you a suggestion for a name, but you can name your reports whatever makes the most sense to your team.
9. **Create a custom report based on lists or views.** An important part of reporting is making sure you properly segment before reporting.
10. **Report on multiple dimensions.** In the Report Builder, you can build a custom report that is based on multiple pieces of criteria.

Marketing Best Practices Using the Reporting Add-on

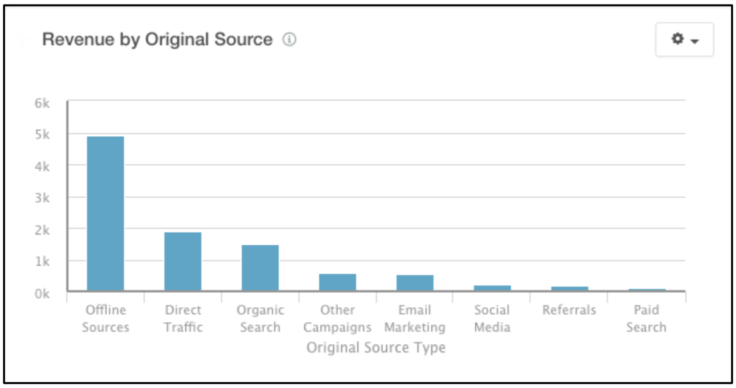
Contacts by Lifecycle Stage.
Run a report based on the different Lifecycle Stages to identify what area of your funnel you should do more marketing.



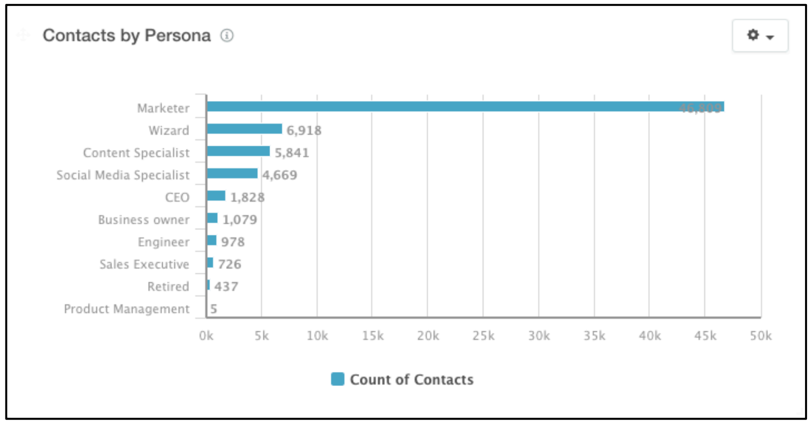
Contacts by Source with Lifecycle Stage.
Run reports broken down by source to see how your contacts have grown over time but also how many visits, leads, MQLs, and customers you have generated as a result of different channels.

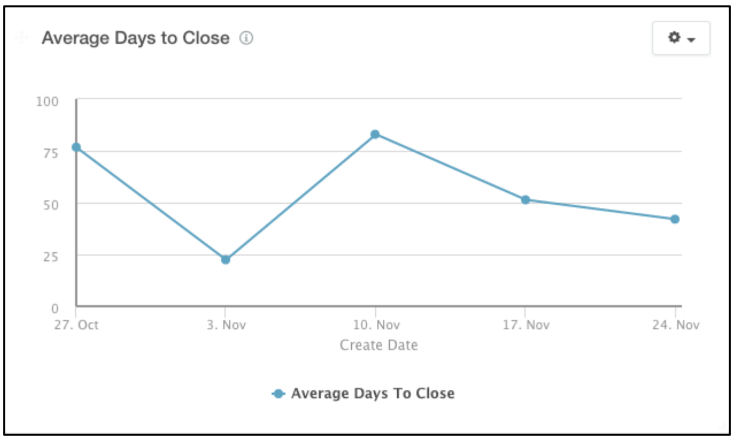


Revenue Reports by Recent Conversion or Original Source Type.
Run reports that show revenue generated to see what marketing efforts are driving revenue for your company.



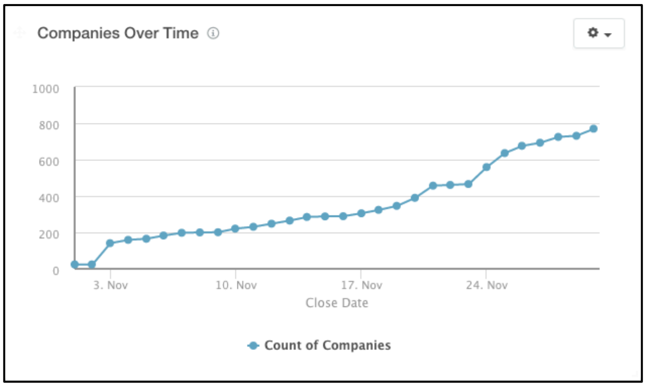
Contacts by Persona.
Run a report segmented by different personas to see how they have grown over time.

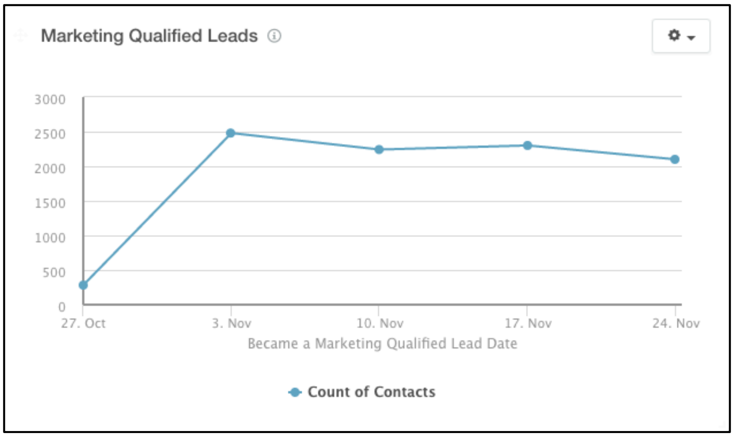




Companies by Average Days to Close.
Run a report broken down by Average Days to Close to see what marketing efforts lead to closed business quicker than others.

Companies Over Time.
If you are a B2B business, run a report based on the number of companies your business has generated over time.





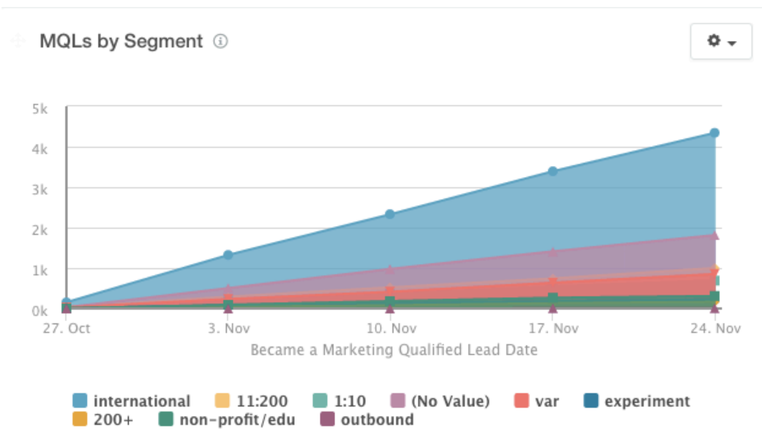
Contacts by Lifecycle Stage Filtered to MQL.
Run a report to show how many MQLs you are generating over time.

Contacts by Recent Conversion and Lifecycle Stage.

Run a report that shows the recent conversion before becoming a customer. This will help you understand what your contacts are converting on right before they become a customer.

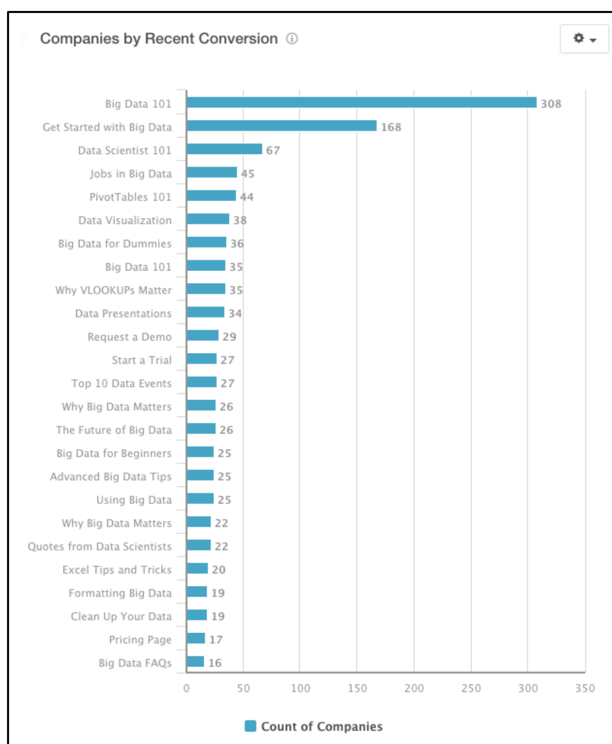
Recent Conversion by Lifecycle Stage

Recent Conversion Date	Getting Started with Big Data	Big Data FAQs	101 Stats about Big Data	Excel for Beginners	Intro to Big Data	PivotTables for the Data Nerd	Use Excel on a Mac vs. PC	Bi Q
4/13/2014	50	18	27	32	41	57	13	
4/20/2014	32	24	15	43	23	33	17	
4/27/2014	22	15	41	15	17	22	37	
5/4/2014	12	17	22	23	42	15	22	
5/11/2014	52	22	31	17	20	21	13	
5/18/2014	34	18	15	24	52	19	21	



MQLs by Segment.

Run a report that shows how many MQLs you are generating by segment. This will help you see what part of your target audience you should focus on.

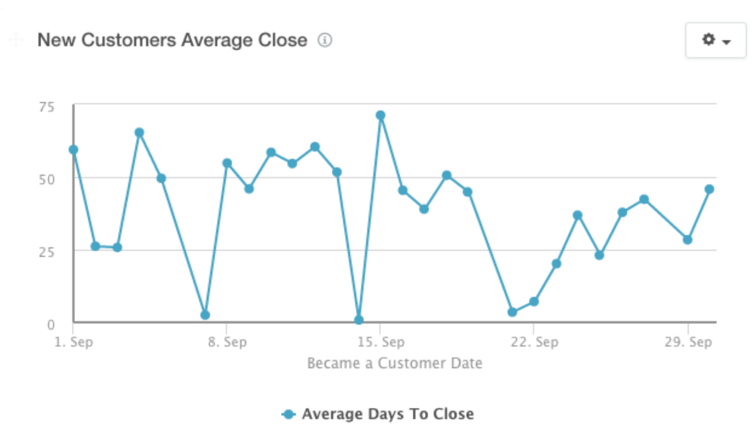


Companies by Recent or First Conversion.

Run reports that show how you have generated new contacts but also how you have closed companies. This will give you better insight into how you are generating new business.

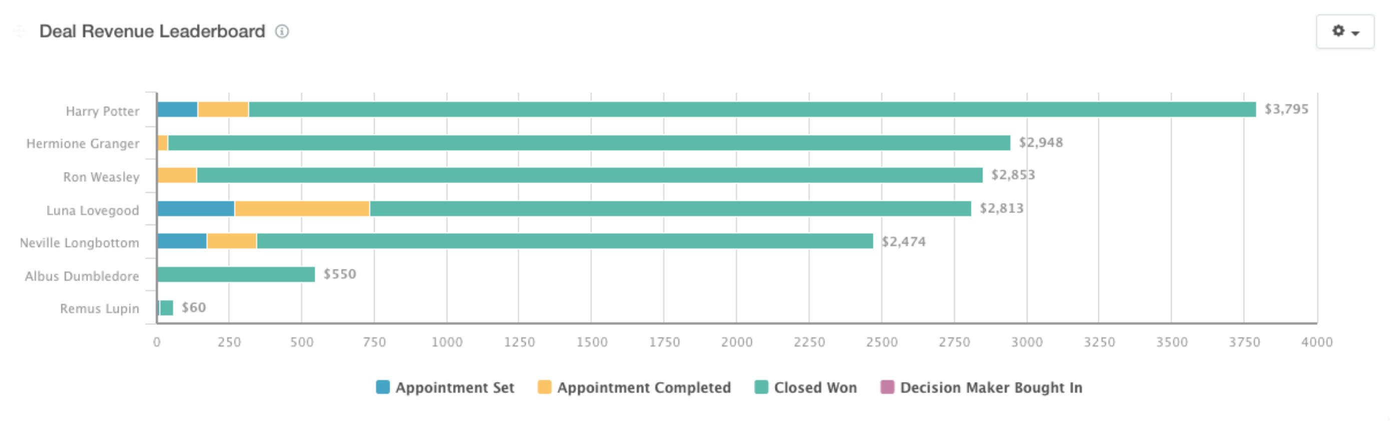
Sales Best Practices Using the Reporting Add-on

Deals Closed vs. Goal. See the revenue already generated and how far you have to go to reach your goal by the end of the month.



New Customers Average Close. Of the deals that were won this month, how long are they in the sales process? If you've set goals for length of the sales cycle, easily keep track of how close you are to your target.

Deals Revenue Leaderboard. See the team's pipeline broken out per rep. See who has the most revenue in each stage in a given month.



Deal Revenue per Stage by Deal Type.

How many of your deals are new business vs. recurring business? How many deals do you have for each product line? In each industry? Using the customized Deal Type field, you can see a breakdown of your pipeline with context.

Deal Revenue per Stage by Deal Type

Deal Type	Appointment Set	Appointment Completed	Closed Won
Upgrades	$50	$100	$650
New Business	$10	$20	$200
Existing Business	$100	$500	$2,000
Totals	$160	$20	$620

Closing Deals

HubSpot Owner	Closed Lost	Appointment Set	Appointment Completed	Closed Won
Harry Potter	1	1	1	7
Hermione Granger	1	2	10	18
Luna Lovegood	1	5	3	13
James Hylas	2	4	2	7
Draco Malfoy	1	2	3	9
Sirius Black	2	1	1	4
Remus Lupin	1	2	2	9

Closing Deals.

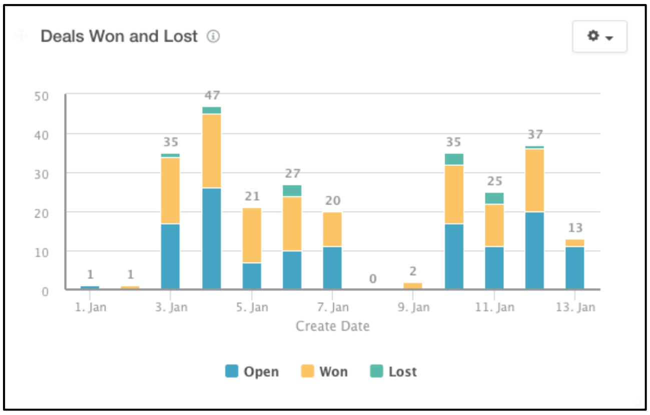
See all the deals in your pipeline, broken down by deal stage for each rep. If it's later in the month, you'll want higher numbers in the later stages.

Deal Forecast.

Want to see deals in their various stages with their revenue amount? This report displays the revenue leaderboard in an easy to read table.

Deal Forecast

HubSpot Owner	Appointment Set	Appointment Completed	Closed Won
Harry Potter	$10	$20	$450
Hermione Granger	$25	$200	$1,190
Ron Weasley	$20	$100	$1,215
Luna Lovegood	$25	$200	$600
Sirius Black	$50	$100	$1,430
Remus Lupin	$75	$125	$200
Draco Malfoy	$100	$300	$435
Totals	$305	$1,045	$5,470

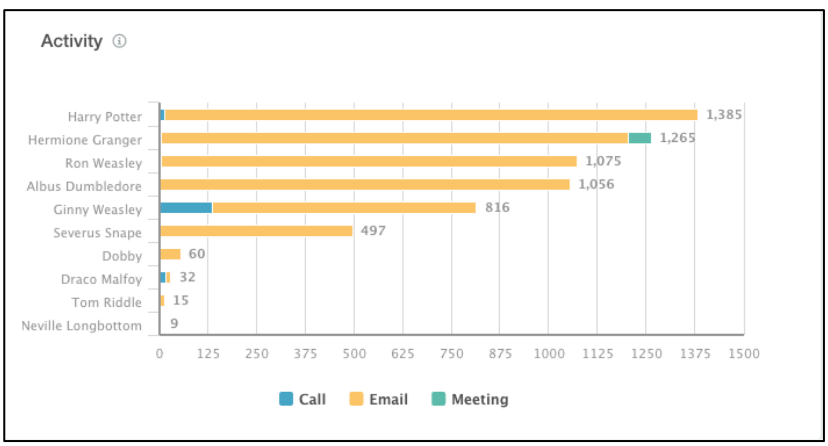


Deals Won and Lost. See a complete picture of all your deals in a given month - both closed business and lost opportunities. Trends here will help you determine if there's a problem in the process.

New Deals Created. See all the new deals created this month for each rep and how much that contributes to the overall forecast.

New Deals Created

HubSpot Owner	Count of Deals	Sum of Forecasted Amount	Sum of Closed Amount
Harry Potter	15	$13,300	$10,300
Hermione Granger	9	$11,000	$9,500
Ron Weasley	7	$9,000	$7,500
Albus Dumbledore	5	$7,525	$5,000
Ginny Weasley	4	$5,060	$5,000
Luna Lovegood	4	$3,000	$3,250
Neville Longbottom	1	$2,000	$1,250
Remus Lupin	1	$5,500	$0



Activity Leaderboard. See how many engagements (calls, emails, meetings) each rep is completing each month.

Productivity. See how many meetings, notes, and tasks are being logged in the system.

Productivity

CALL	EMAIL	MEETING	NOTE
608	15,245	11	88

TASK
9,090