# Welcome!

Twin Cities HubSpot User Group is a community of HubSpot software customers and thought leaders. This group meets to discuss product updates, learn new best practices, and network with each other.

# About Denamico

Denamico is a Diamond Tier HubSpot Solutions Partner in Minneapolis.

We have hosted Twin Cities HUG events since 2014.

# Today's Hosts

**Tiffany Cavegn**
Denamico
Director of Project Management
RevOps Educator

**Bradley Hofbauer**
Denamico
Director of Digital
Enablement

# Virtual Housekeeping



- You control your camera and audio.
- We ask that you stay on mute while not speaking.
- We welcome you to join in at any time with questions or comments.
- We'll have time at the end for you to share any reporting tips that you may have.

# Agenda

The best way to set yourself apart as a HubSpot Expert is to create reports that give you powerful insights that drive growth at your company.

Before you find yourself sifting through 75 meaningless reports, learn how to ask the right questions about how the report will be used.

Bradley and Tiffany will lead you through a framework to create insightful reports to equip you to lead growth at your company.

1.  Reporting Prerequisites

2.  Ask the Right Questions

3.  Reporting Requirements

4.  LIVE Example Reports

# Reporting Prerequisites

1.  Does the information even <u>exist</u>? (in the correct data structure!)

2.  Are there <u>defined</u> work activities and processes for how the information is populated and managed?

3.  Could you draw (yes, like on a piece of actual paper) what you would want to see?

# What "**WORK**" questions to ask?

Will the "report" support <u>actionable work</u> that is associated with:

- Customer acquisition / conversion?

- Customer retention / satisfaction?

- Revenue change?

- Cost reduction?

- Employee happiness / retention / success?

# What "**DECISION**" questions to ask?

Will the "report" help me understand <u>a cause</u> of:

- Customer acquisition / conversion?

- Customer retention / satisfaction?

- Revenue change?

- Cost reduction?

- Employee happiness / retention / success?

# Can you answer the following:

Last month (April):

1. How many people looked for your product or a product like yours? (SEO and market research)

2. How many people came in your "front door" (website visits, ad clicks, calls, chats, emails, physical visits, blog visits)?

3. How many people made contact with a sales person?

4. How many unique customers made a purchase?

5. How many people become a new customer?

# Reporting Requirements

1. Who is the report for?

2. What question are you trying to answer?

3. What decision will be made / work will be done?

4. How often will this decision need to be made or changed?

5. How often will this work be completed?

# **LIVE** Demo - Example Reports

# Resources

There are many lessons about reporting in the HubSpot Academy and it's worthwhile to search the catalog for "reports" - it will return many short lessons on specific reporting topics in addition to the larger courses list here.

HubSpot Academy

- HubSpot Reporting

- Building Custom Reports in HubSpot

- Setting Up Your HubSpot Account for Custom Reporting

- Key Marketing Reports in HubSpot

HubSpot Knowledge Base for Reporting

INBOUND is an annual event, powered by HubSpot, that unites thought leaders from over 161 countries across marketing, sales, customer success, and revenue operations.

Join us for our first-ever hybrid event, taking place September 6th - 9th, 2022.

For more information and to register, visit inbound.com.

# Q3 HUG



**Date/Topic: TBD /Hopefully In-Person!!**

TCHUG members will be notified leading up to the event.

events.hubspot.com/twin-cities

# Questions?
# Contact Us

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