Gaining Powerful Insights with HubSpot Reporting

Reporting Prerequisites

1. Does the information even exist? (in the correct data structure!)
2. Are there defined 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 "**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?

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?

denamico

Before creating detailed, segmented reports - 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?

Questions for a Custom Report Request Form

- Date of request
- Report requestor
- New report or modification of existing report
- Date report is needed
- Report description
- Desired report title
- Who is the report for? (Department name, individual)
- What question are you trying to answer?
- What work will be done?
- What decision will you make with this report / what work will you execute with this report (Watch TCHUG May 2022 Virtual Meeting for great discussion on this topic.
- Type of output requested (HubSpot, PDF, Excel, etc.)
- Do you want the report as a visualization or a table?
- How often will this question need answered?
- How often will this work be done?
- How often should it be refreshed?
- Do you want this report to filtered or sliced by time? What time units? (Daily, Weekly, Monthly, Quarterly, Annually)
- What data fields do you want included?
- How should the data be sorted?

denamico

- Should any data values be aggregated (Sum, Average, Difference, etc.)
- What filters should be applied (properties to use to narrow results)
- Other comments?
- If you are already producing this report in another system/format, attach here

Suggested Terms and Conditions of the Custom Report Request Form:

1. Upon receipt of this request form an assessment of the development time needed to product the report will be made, and a change order form may be sent to you for approval if the required work goes above the scope of your existing project.
2. Once the report has been completed and sent to you, you must test the report and advise your [Reporting Admin Title] of any changes to the report in writing/emial
3. Any changes must be advised within 7 calendar days of receipt of the completed report otherwise we will consider the report to have been completed to your satisfaction.
4. Any further changes will have to be requested on a new modification request form and may be chargeable.