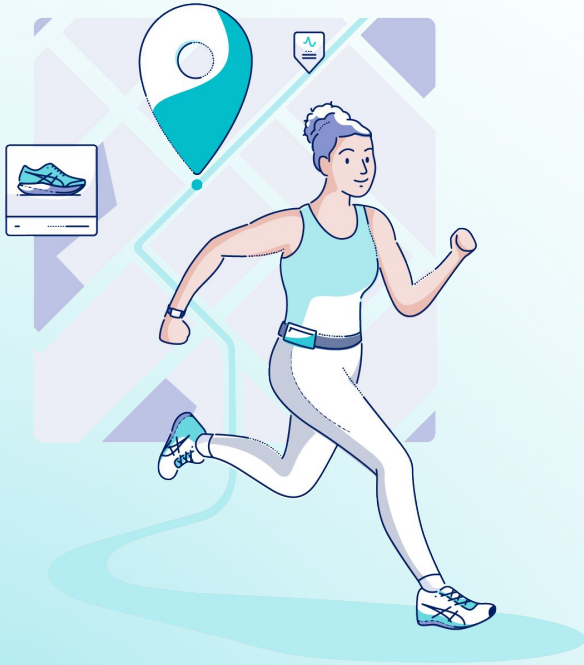


HubSpot Dashboards and Reporting Training Deck

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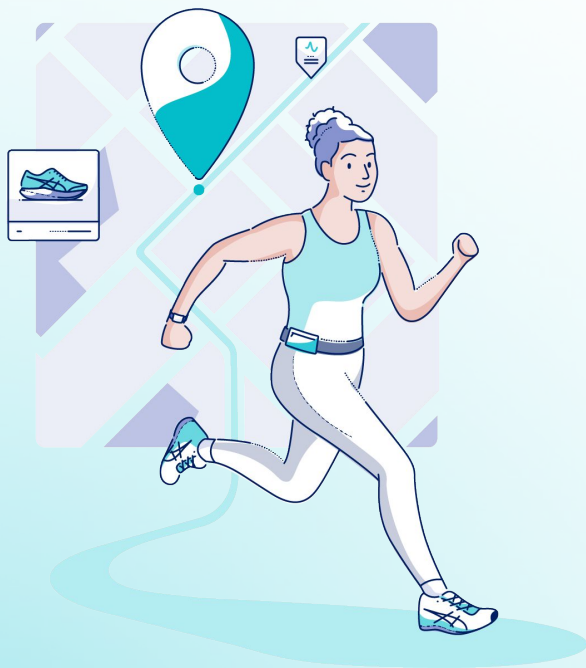
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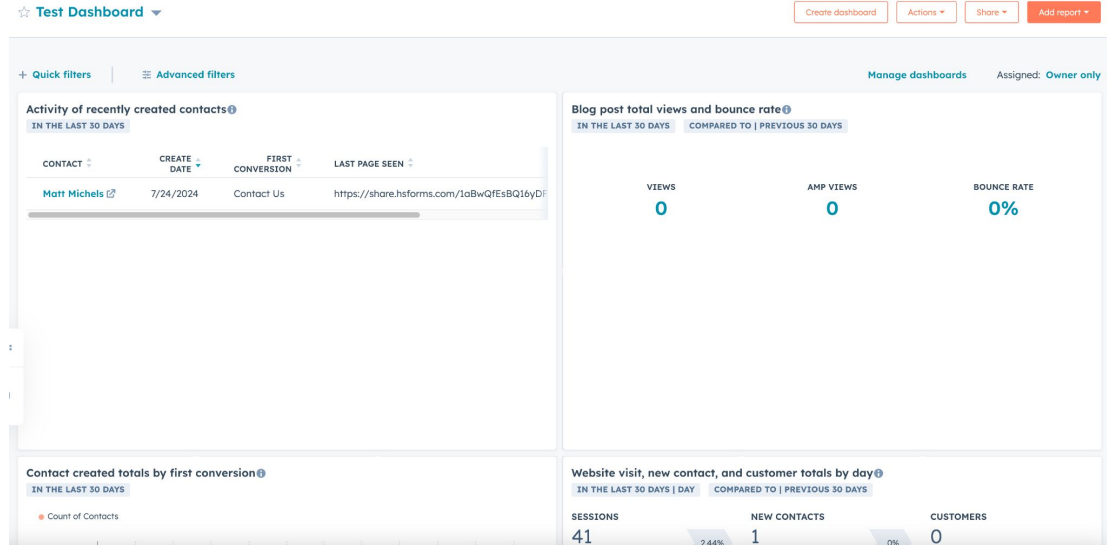
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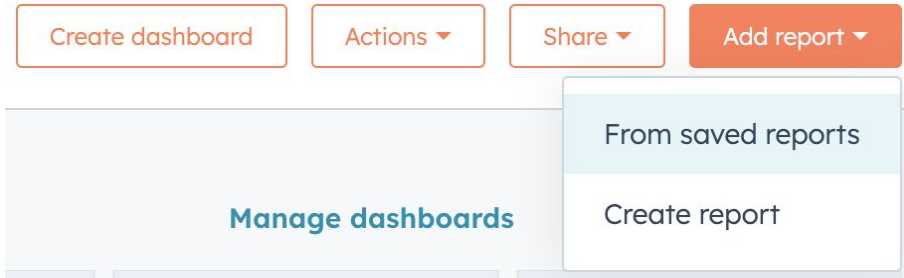
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Dashboard Overview

- Dashboards are essentially repositories for your HubSpot reports
- Multiple dashboards can be created and house reports unique to what specific information you wish to track
- Can add up to 30 reports per dashboard
- To create a new dashboard:
 - Go to “Reporting” > “Dashboards” in the left-hand menu
 - Click “Create Dashboard” near the top right corner of the page.
 - Select whether you’d like to create a dashboard from scratch, or from a HubSpot template
 - Name your dashboard, and edit who can view/edit the dashboard



Adding Reports to a Dashboard



- To add a new report to your dashboard, click the “Add report” button in the upper right corner of the dashboard
- You can choose to either add a report that was previously created to your dashboard, or create a new report

Creating a New Report

- You have two options when it comes to creating a new report:
 - Creating a report from scratch
 - Creating a report from templates provided by HubSpot
- Custom reports include:
 - Single Object Report
 - Custom Report Builder
 - Customer Journey Report
 - Attribution Report
 - Funnels Report
- Template reports are centered around specific data sources such as:
 - Contact/Company/Deal records
 - Conversations
 - Ads
 - Website Data
 - Automations

Create reports from scratch



Single object

Report on a single object such as your contacts.



Custom Report Builder

Report on all of your HubSpot data within a streamlined build flow.



Customer Journey Reports

Analyze all the touchpoints in your customer experience in one report.



Attribution

See what interactions or activities drove conversions and revenue.



Funnels

Show progress through contact or deal stages that you define.

Create reports from templates

Activity of recently created contacts

What's the activity of contacts who recently submitted a form?

Contacts Forms All websites

IN THE LAST 30 DAYS

CONTACT

CREATE DATE

Blog post total views and bounce rate

How many views do all my HubSpot blogs have? How many leave the page?

Blog pages

IN THE LAST 30 DAYS

COMPARED TO | PREVIOUS 30 DAYS

Single Object Report

The screenshot shows a web interface for a 'Custom Contacts Report'. At the top, there is a dark header bar with 'Exit' on the left, 'Custom Contacts Report' in the center, and 'Next' on the right. Below the header, there are tabs for 'Filters (1)', 'Data', and 'Visualization', along with 'Undo' and 'Export' buttons. The main content area is divided into a left sidebar and a central table.

Properties
Add properties to build this report with the data you want. Data you select here can be visualized in the next step.

Selected properties

- Create Date
- Lifecycle Stage

[Add Contact Property](#)

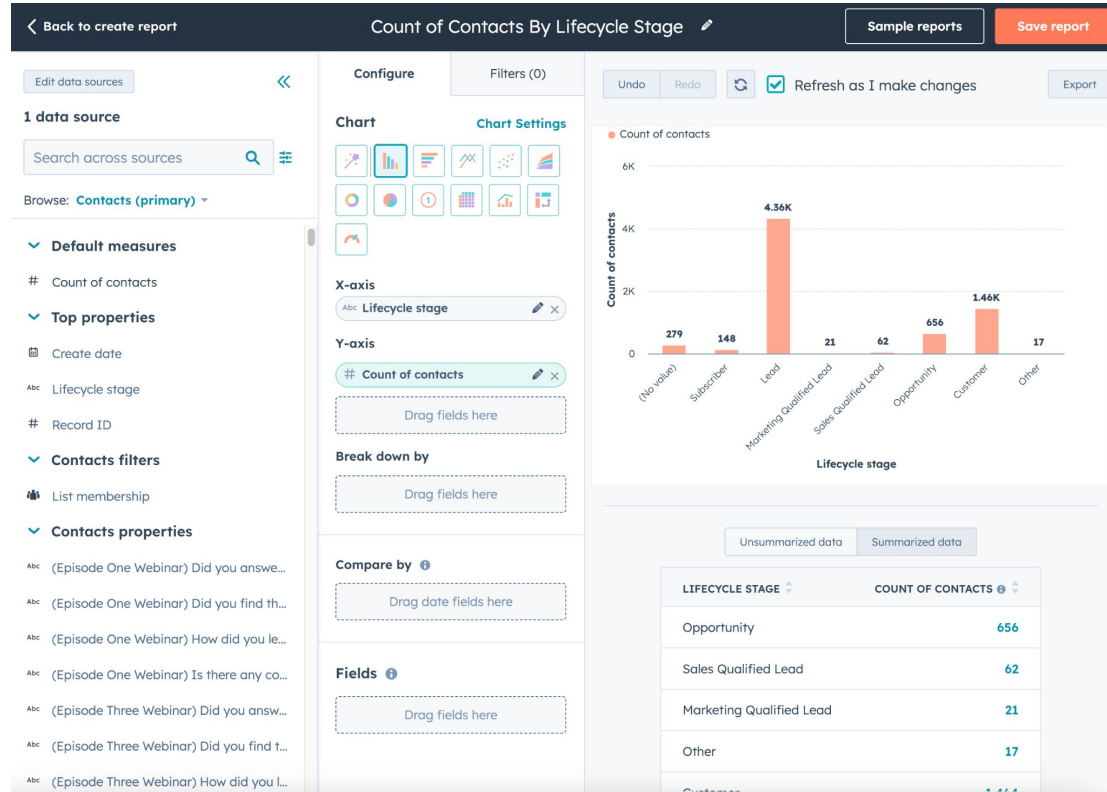
THIS QUARTER SO FAR

CONTACT	CREATE DATE	LIFECYCLE STAGE
ian.hubbard@atom.com.au	6/27/2024	Customer
darlene.regali@atom.com.au	6/27/2024	Customer
joel@nbsteam.com.au	6/27/2024	Lead
joe@nbsteam.com.au	6/27/2024	Lead
Alessio Basone	6/27/2024	Lead
Louis Sammut	6/26/2024	Lead
ndecoulos@hubspot.com	6/26/2024	Customer
arainford@hubspot.com	6/26/2024	Customer
Sanaz Bassiri	6/26/2024	Lead

- Allows you to choose one data source to report on (i.e. Contacts, Companies, Deals, etc.)
- Allows you to only add properties associated with the data source to the report
- Great for creating simple reports for individual objects

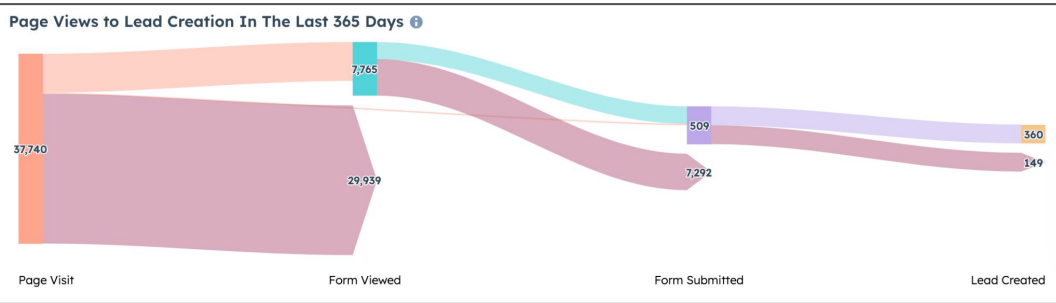
Custom Report Builder

- Allows you to add up to five data sources to your report
- Can add a mixture of different properties from the chosen data sources, allowing for more reporting customization
- Also includes a list of sample reports to use as a starting point
- Great for creating more complex reports that help answer more in-depth questions not possible by single object reports



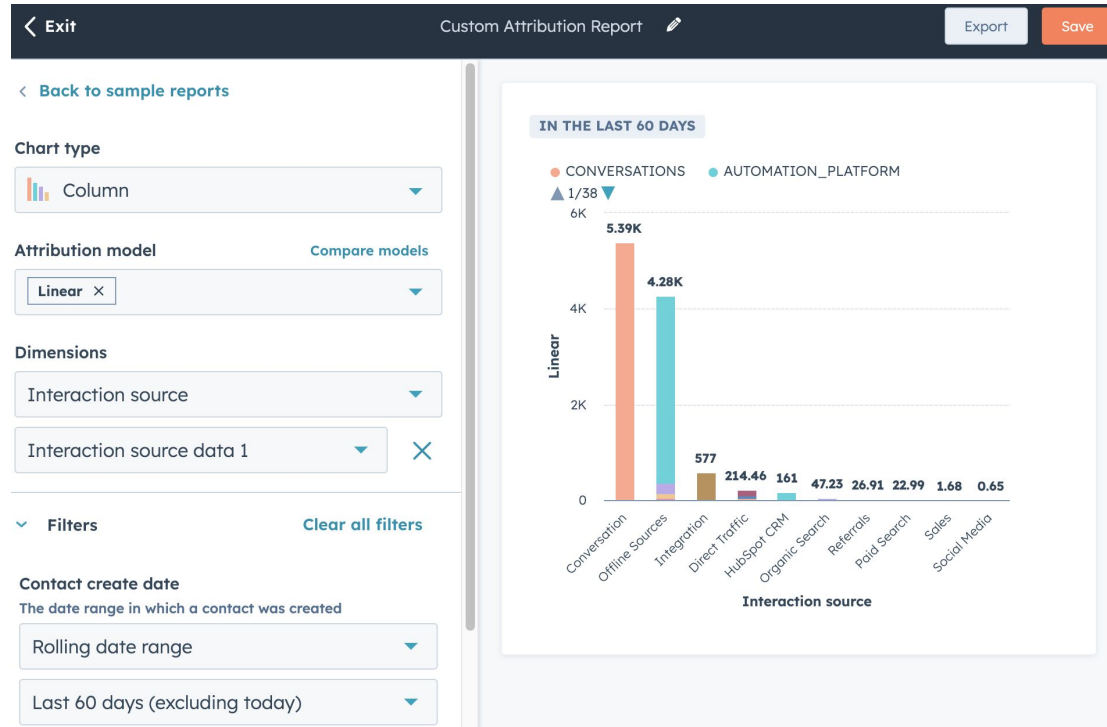
Customer Journey Report

- Report type that allows you to see how visitors behave, engage, and convert along specific customer journeys
- These journeys can include website interactions, paid ads interactions, marketing email engagement, and more
- The benefits of these kind of reports include:
 - Better understanding of how prospects move along specific journeys
 - Identifying areas of the customer journey that are working best or where friction is occurring
 - Measure and improve ROI



Attribution Reports

- Report type that allows you to see what helped drive specific conversions and revenue
- Can either create an attribution report from scratch, or use one of the many question-based sample reports to help get started
- Filters allow you to focus on specific asset types, business units, campaigns, contacts, and more
- Great for gaining a better understanding of what helped a business garner excellent results, as well as what can be further improved



Viewing & Filtering Report Settings

Closed Tickets by Ticket Sub Reason (Last 7 Days)

Summary

COUNT OF TICKETS

1,768

1/1

TICKET SUB REASON	COUNT OF TICKETS
Onboarding	11
Credit Card Charge Inquiry	7
Stripe Pending Approval	1
Payment Hold Audit	6
Payout Returned	2
Dispute/chargeback	6
Refund not received	2

Filters About

Reset filters

Date range

Rolling date range

Last 7 days (excluding today)

Compared To

No comparison

Ticket Sub Reason

Any

Ticket filters

Ticket Sub Reason is known

AND

- Once a report has been added to the dashboard, you can quickly view and make small adjustments to the report by hovering over the report and clicking the “View and filter” button near the top right of the report
- Can also use this to add a description to the report via the “About tab on the right hand side
- To make more detailed adjustments to the report, click the “Customize” button near the bottom

Adjusting Report Placement

- Once a report is added to a dashboard, you can adjust its placement by clicking and dragging the report
 - Note that the report will shift upwards if there is no report above it
- To adjust the size of the report, hover over the report and click and hold the bottom right corner of the report to increase or decrease the size of it

Average Ticket Reply Time By Ticket Type by Week (Last ...)

IN THE LAST 30 DAYS | WEEK

CREATE DATE	SUPPORT PIPELINE	SUBMISSIONS	CHARITY TAX RECEIPT PIPELINE	
5/27/2024	2.7 days	0 seconds	0 seconds	0
6/3/2024	47.5 hours	0 seconds	40.8 hours	
6/10/2024	3.3 days	0 seconds	3.7 days	
6/17/2024	2.8 days	0 seconds	25.6 hours	

Average Ticket Reply Time By Ticket Type (Last 7 Days)

IN THE LAST 7 DAYS | DAY

CREATE DATE	SUPPORT PIPELINE	CHARITY TAX RECEIPT PIPELINE	SUBMISSIONS	
6/24/2024	23.2 hours	7.7 hours	0 seconds	0
6/25/2024	16.5 hours	25.5 hours	0 seconds	0
6/26/2024	21.4 hours	0 seconds	0 seconds	0
6/27/2024	21.2 hours	0 seconds	0 seconds	0

Ticket Closed Totals by Rep (Last 30 Days)

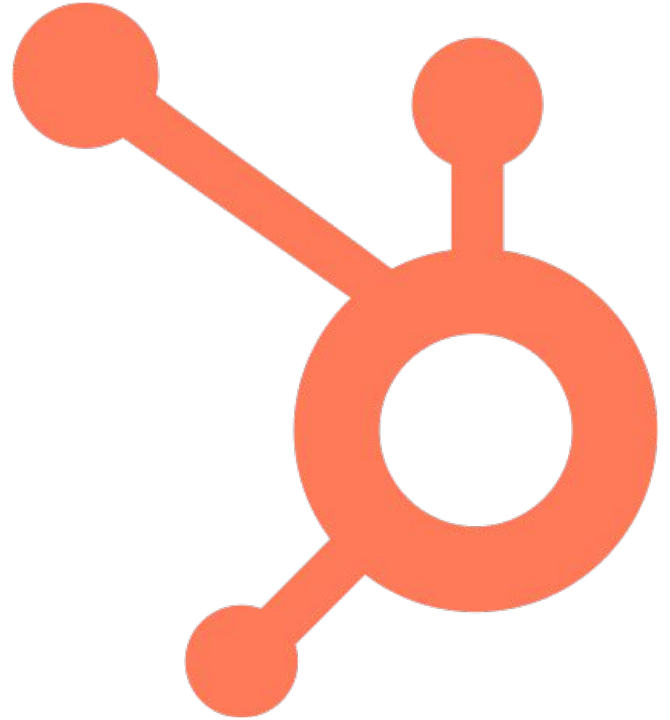
IN THE LAST 30 DAYS | WEEK

FILTERS (1)

CLOSE DATE	AUSTIN MIX	MATTHEW NICOLLE	SASHA S	ISABELLE MARIANO	KAITLYN M	HAYLEY H	RUACH PADHAL	VARUN BALU
5/27/2024	3	3	10	3	2	5	6	5
6/3/2024	18	25	61	36	21	65	20	33
6/10/2024	13	15	58	13	13	22	29	24
6/17/2024	0	0	3	0	2	0	1	1

Additional HubSpot Resources

- [Create and manage your dashboards](#)
- [Customize your dashboard](#)
- [Use dashboard filters](#)
- [Embed external content on a dashboard](#)
- [Create Custom Reports](#)
- [Manage Reports in your reports list](#)
- [Use a report from the report library](#)



Thank you