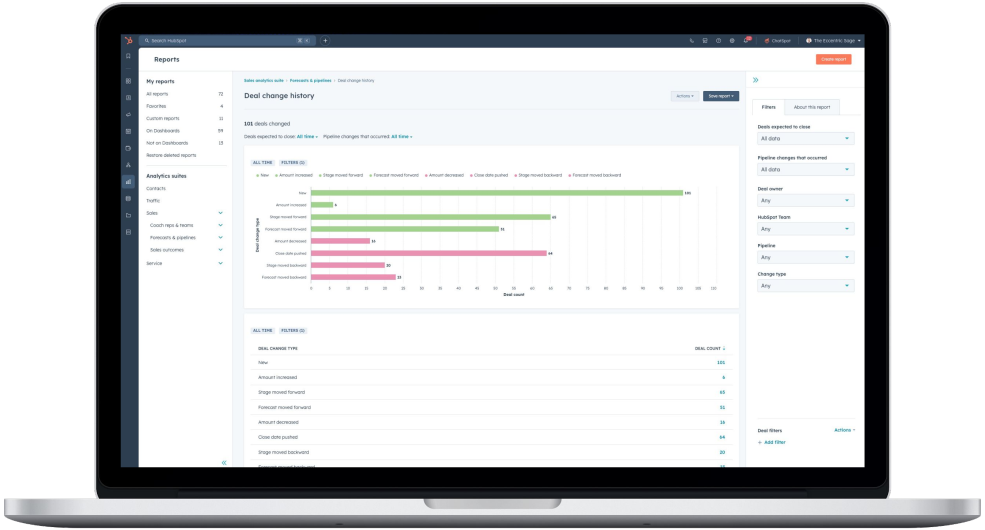
Reporting Cheat Sheet

A Scavenger Hunt of HubSpot Reports and Reporting Tools

By: Kyle Jepson



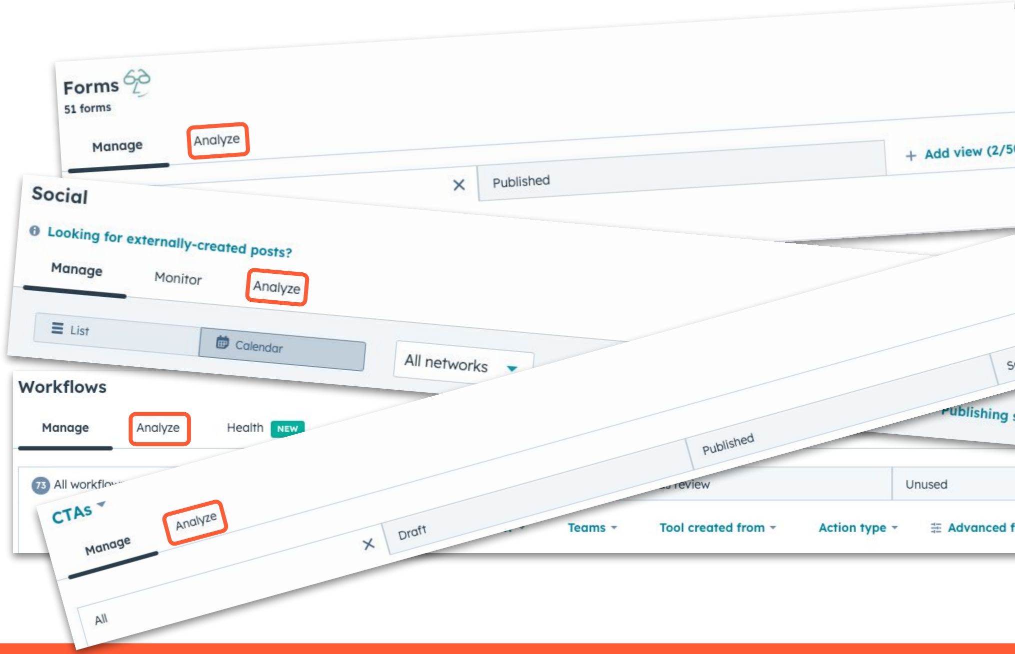
Index

Some Tools Have Reports Built In

Before you hop straight into the Reporting menu in the main navigation, take some time to familiarize yourself with the reports that are built into many HubSpot tools. If you're looking for data related to a specific tool or asset, it will usually be easier to get this information from the tool itself than by building a custom report or searching the reports library.

The “Analyze” Tab

Many tools have an “Analyze” tab on their index page. This tab typically includes aggregated data across all assets inside that tool. For example, the Analyze tab in the social tool shows engagement for all social posts across all channels for a specific time frame.



Tools with an “Analyze” tab:

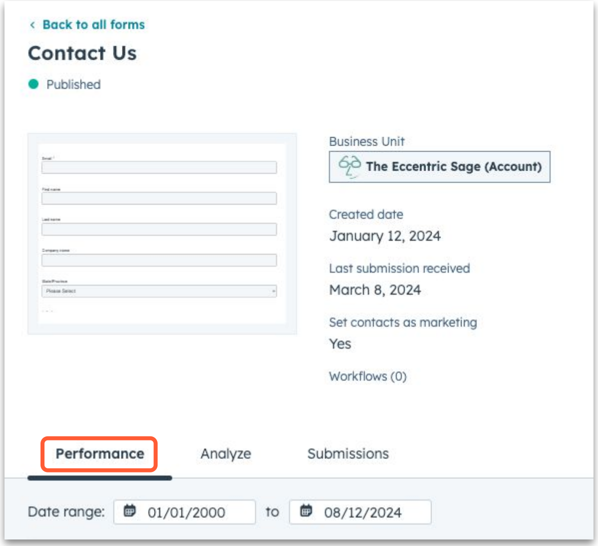
- Ads
- CTAs
- Email
- Knowledge Base
- Playbooks
- Podcasts (beta)
- Sequences
- SMS
- Social
- Workflows

Website Pages, Landing Pages, Blog, and Templates have an “Analyze” button on the index page that links out to standard reports.

TOP

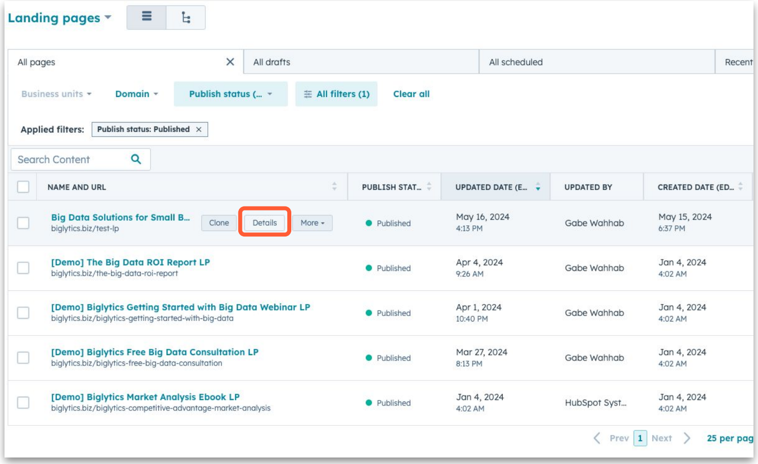
“Performance” and “Details”

Many tools have built-in reports to show the performance of a particular asset. Sometimes these reports are tucked away, but they always give rich insights. The bulleted list on the next page tells you which tools have these reports and how to find them.



Assets with reports on their “details” page:

- Blog posts
- Chatflows
- Feedback surveys (select “Details” from the “Action” menu, then click the “Analyze” tab)
- Forms (click the form’s name to see its details)
- Knowledge base
- Landing pages
- Website pages
- Workflows (select “View details” from the “More” menu)

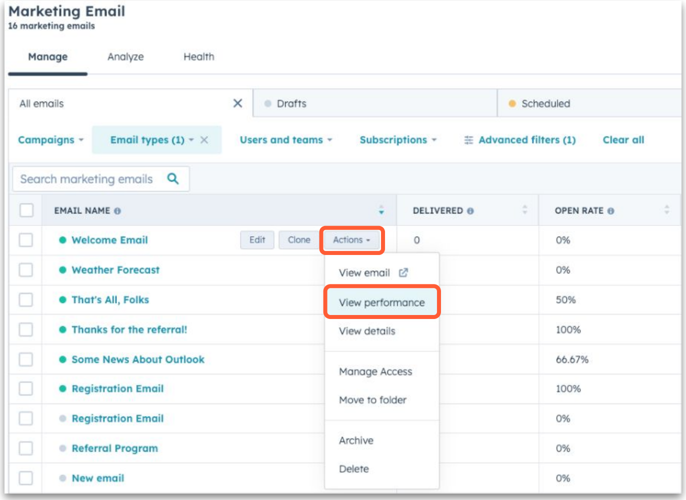


Social posts also have a “details” page, but it doesn’t have visualizations on it. Instead, it gives raw numbers.

TOP

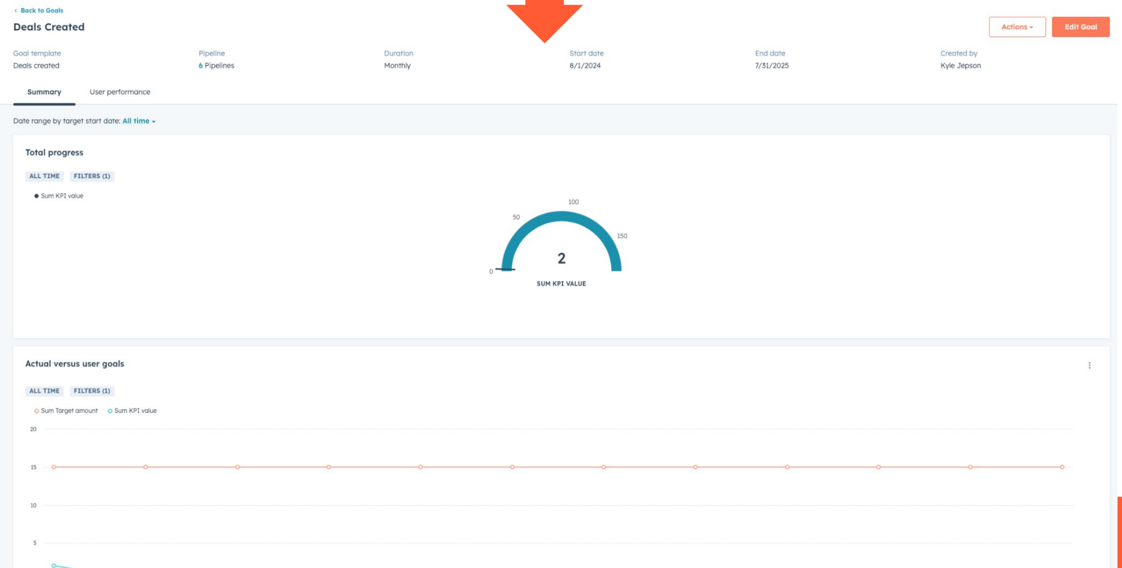
Assets with a “View Performance” option under their “Action” menu:

- Campaigns
- Email
- Lists (Select “Performance” under the “More” menu)
- SMS



Goals have reports that you can see by clicking on the goal’s name

GOAL NAME	TEMPLATES	TEAMS	USERS	TOTAL GOAL (2025)
Deals Created Edit	Deals created	–		180 deals

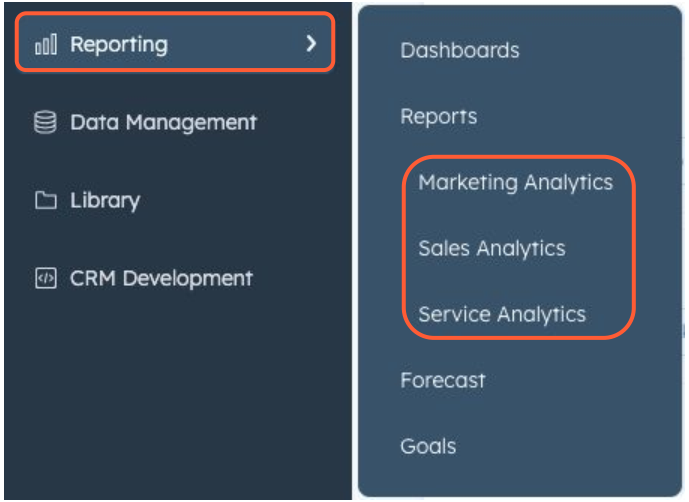


Analytics Suites and the Reports Library

In addition to the built-in reports in various tools, HubSpot also has a large library of pre-built reports, ready for you to add to your dashboards. Before you decide to build your own custom report, take a look and see if you can find what you're looking for in these libraries.

Analytics Suites

Under the reporting menu, there are three analytics suites — one for marketing, one for sales, and one for service. Here, you'll find a host of helpful pre-built reports for you to use.



Marketing Analytics

Advanced Reporting

- Multi-touch attribution
- Customer journeys

Channel Performance

- Ads
- Forms

Web Traffic Analysis

- Sources
- Pages
- UTM Parameters
- Device types
- Countries
- Browser

CRM Insights

- Contacts

Sales Analytics

Coach Reps & Teams

- Call outcomes
- Chats
- Completed activities
- Deals created
- Lead funnel
- Lead response time
- Meeting outcomes
- Prospecting activities
- Tasks completed
- Team activity timeline
- Time spent in deal stage

Forecasts & Pipelines

- Deal change history
- Deal funnel
- Deal pipeline waterfall
- Deal push rate
- Forecast category
- Historical snapshots
- Quota attainment
- Weighted forecast category
- Weighted pipeline forecast

Sales Outcomes

- Average deal size
- Deal loss reasons
- Deal revenue by source
- Deal velocity
- Deals won & lost
- Revenue (beta)
- Sales velocity

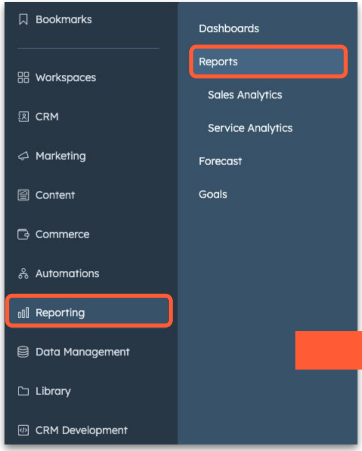
TOP

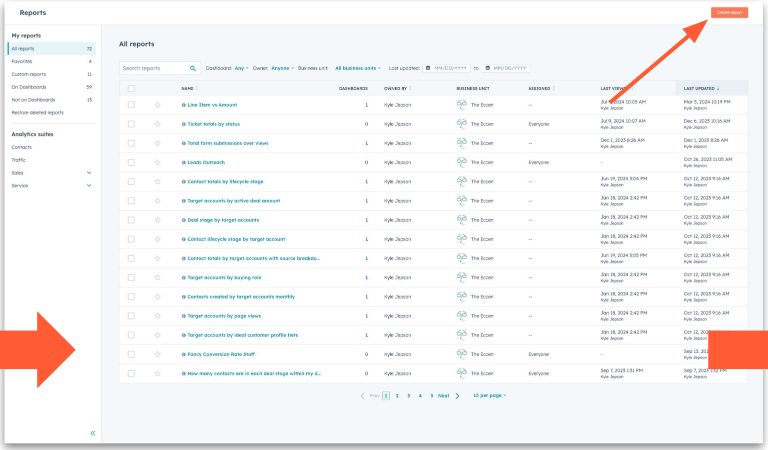
Service Analytics

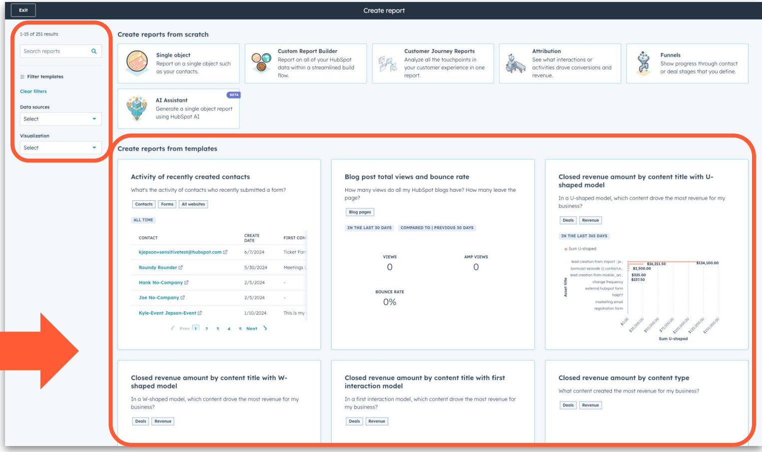
- Customer satisfaction score (CSAT)
- Average time to close ticket
- Chat wait time
- Support volume
- Time in ticket pipeline status

Reports Library

When you go to the reports creation page, you land on a searchable, filterable list of ready-to-go reports, built for you by HubSpot. There are literally hundreds of reports here, so before you create a report for yourself, always check to see if the report you're looking already exists.







TOP

Data sources in the report library:

CRM

- Calls
- Target accounts
- Tasks
- Contacts
- Products/Line items
- Revenue
- Meetings
- Subscriptions
- Companies
- Forecast
- Tickets
- Deals
- Documents

Inbox

- Conversations
- 1-to-1 email
- Templates
- Chats
- Facebook messenger

Marketing

- Campaigns
- CTAs
- Social
- Ads
- Forms
- Marketing emails

Websites

- All websites
- Landing pages
- Website pages
- Blog pages
- Knowledge articles

Automation

- Sequences
- Workflows
- Feedback surveys

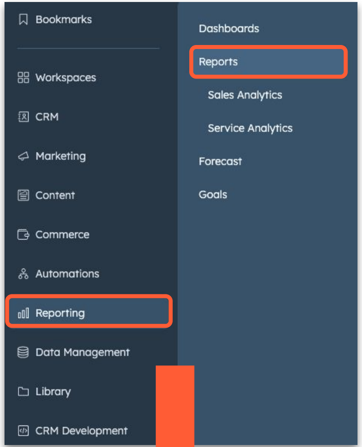
Sample Reports

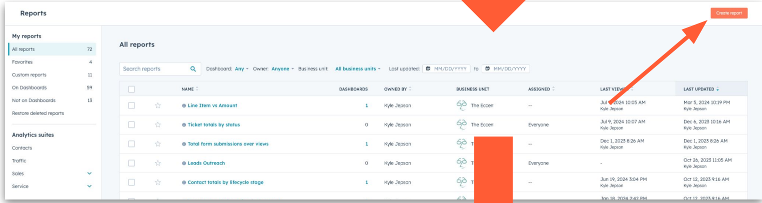
A hidden gem inside the Custom Report Builder is a library of sample reports. These make a great starting point for building your own report, and sometimes they'll serve your purposes without any customization at all.

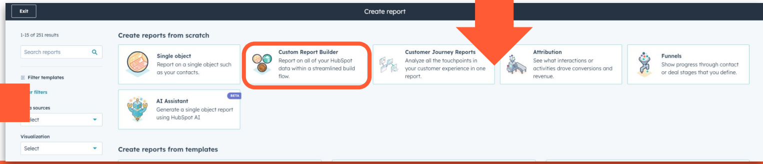
Now in beta, Customer Journey Reports also have sample reports you can begin with.

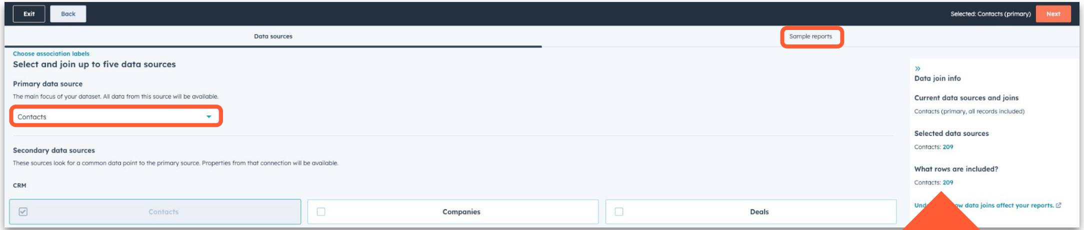
Sample Reports

To access the sample reports, navigate to the custom report builder, select your primary data source, and then click the “Sample Reports” tab to see the available reports for that data source.



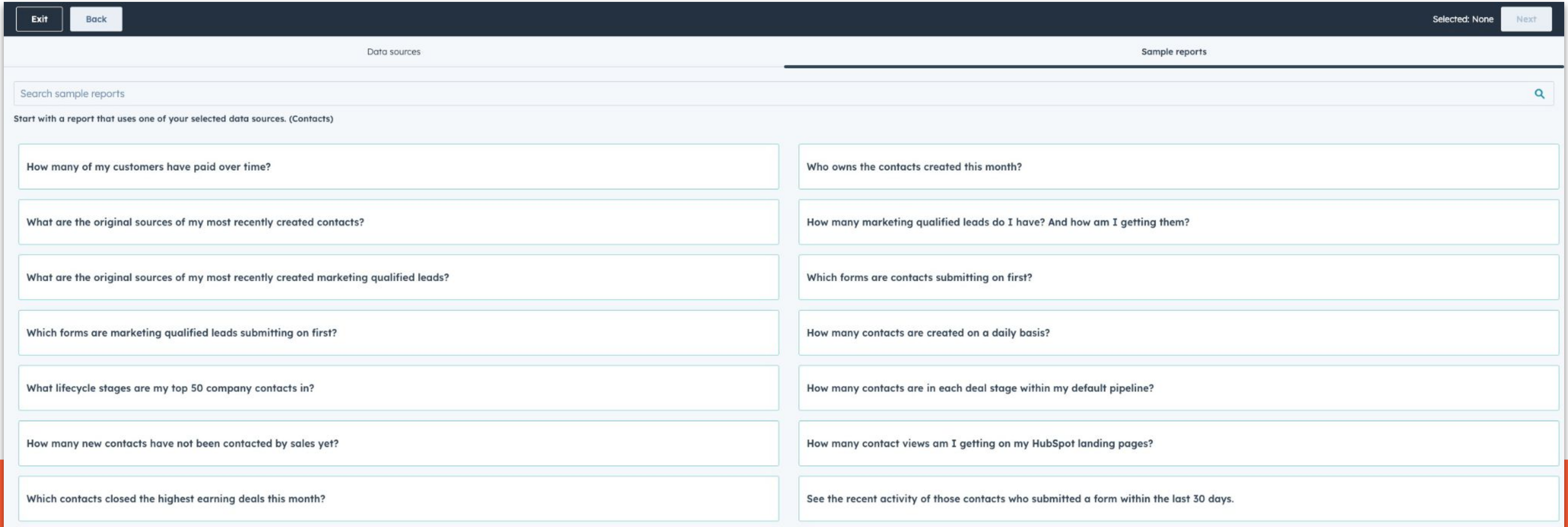






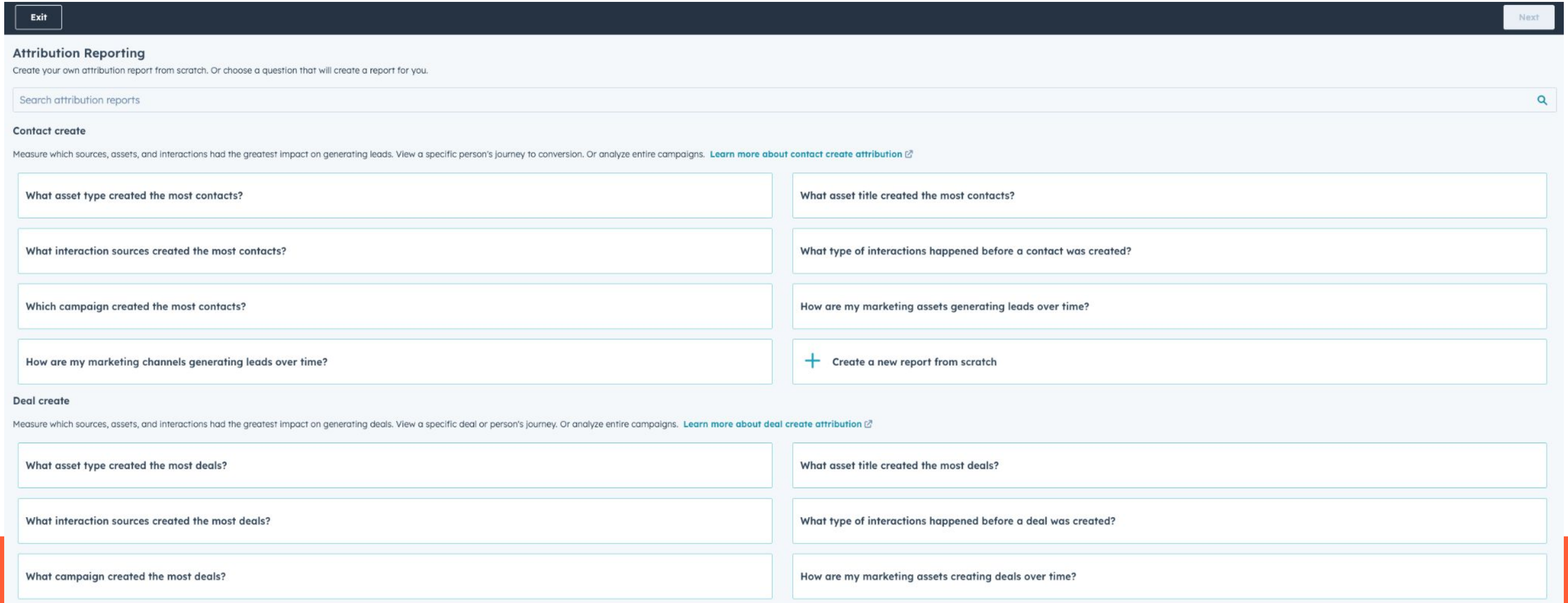
Sample Reports

Something I really love about these sample reports is that they're named based on the questions they're meant to answer. It might be worth your time to look through these sample reports and see if you can find any questions that you haven't thought to ask!



Sample Reports

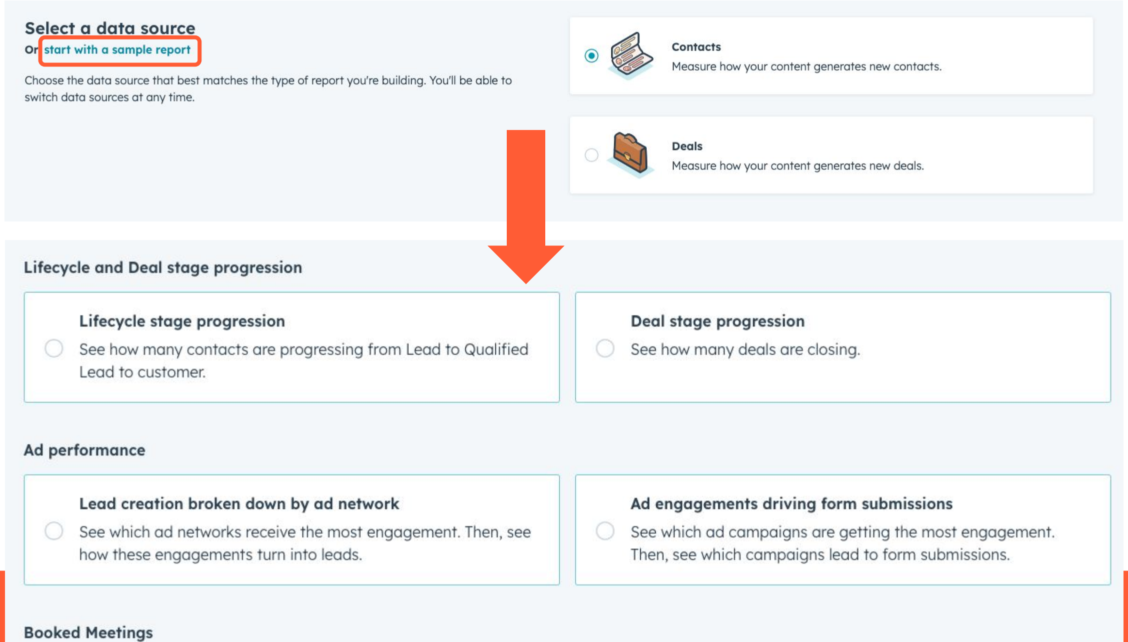
When you build an Attribution Report, the default is to start with a sample report:



TOP

Sample Reports

You can also find sample reports in Custom Journey Reports (currently in beta).



Make the Bots Do Your Reporting

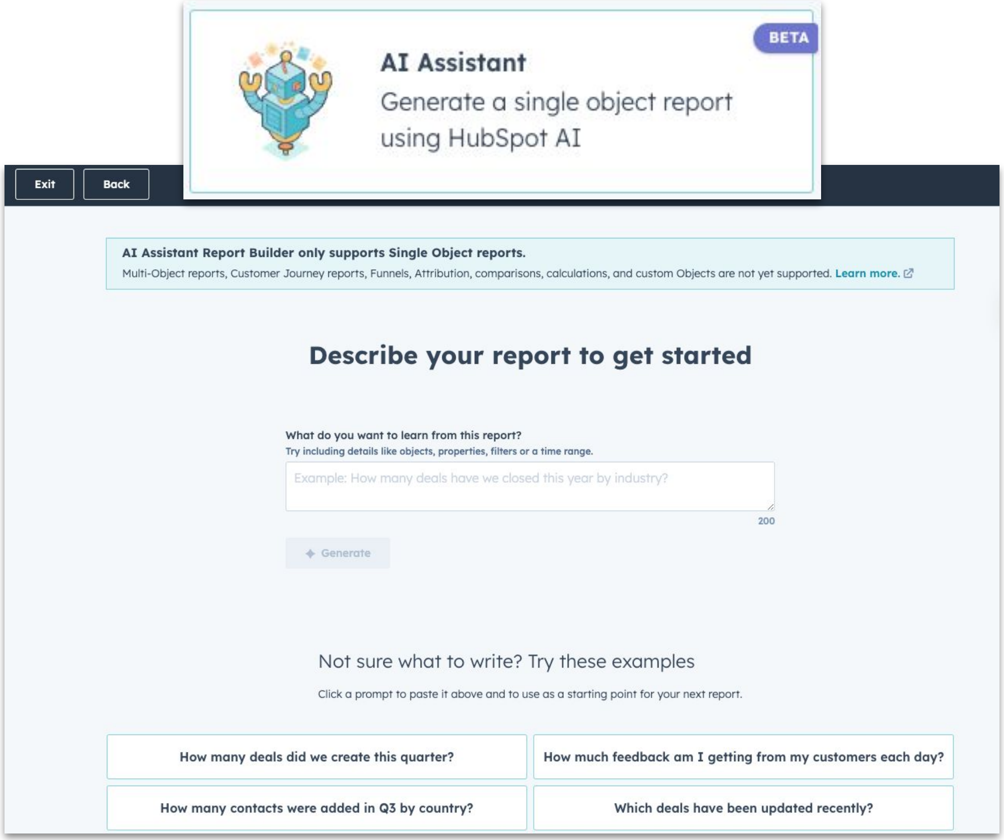
It’s still early days for AI-powered report creation, but it doesn’t hurt to try – especially if you (like me) aren’t especially confident in your ability to choose the right data sources and visualizations. Plus it’s so much easier to refine something further rather than starting from scratch!

AI Assistant

If you're not exactly sure how to build the report you're looking for or you have a question but don't know where to begin, let AI get you started!

Simply input your reporting question (or check out some suggestions!) and then you can either refine the AI's output further or take it into the single object builder to customize on your own.

Please note this currently only supports Single Object reports. We plan on adding more report types in the future and appreciate your feedback on generated reports.



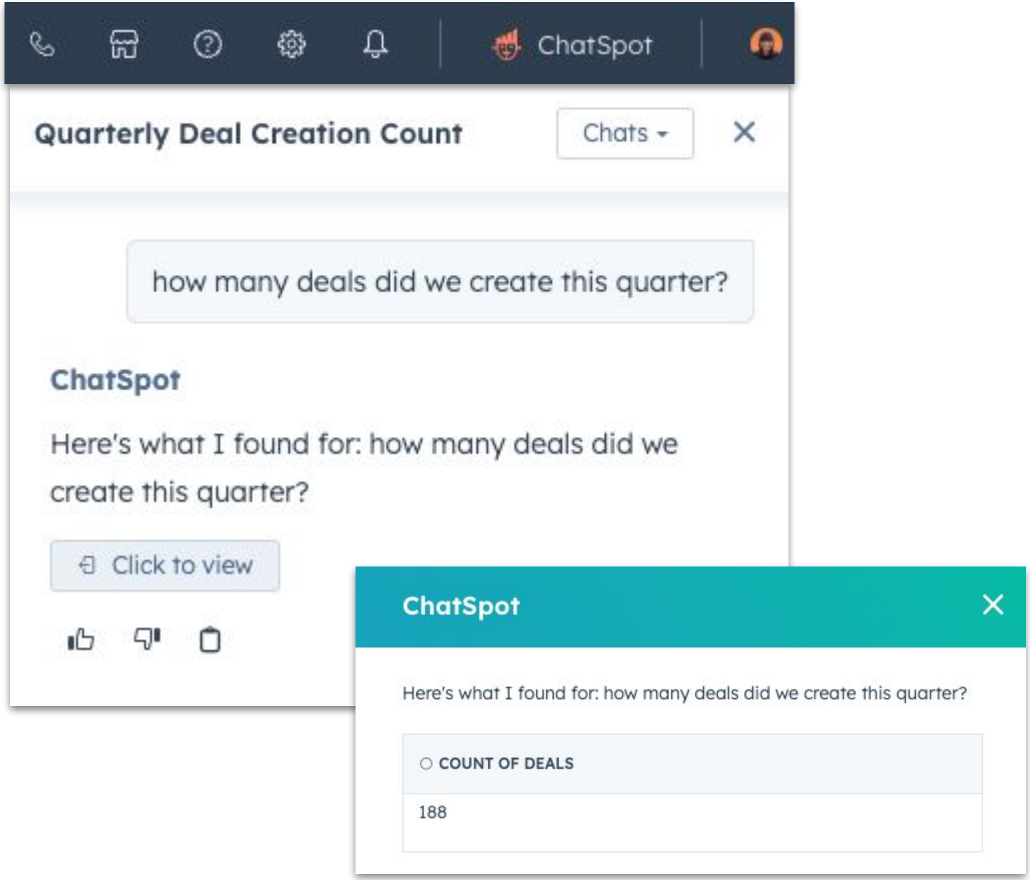
This slide was created by Grace Fisher

ChatSpot

You can also ask ChatSpot your reporting questions!

Be sure to check out the prompt templates as well to explore more of ChatSpot's capabilities.

Please note this has the same capabilities as the AI Assistant.



This slide was created by Grace Fisher

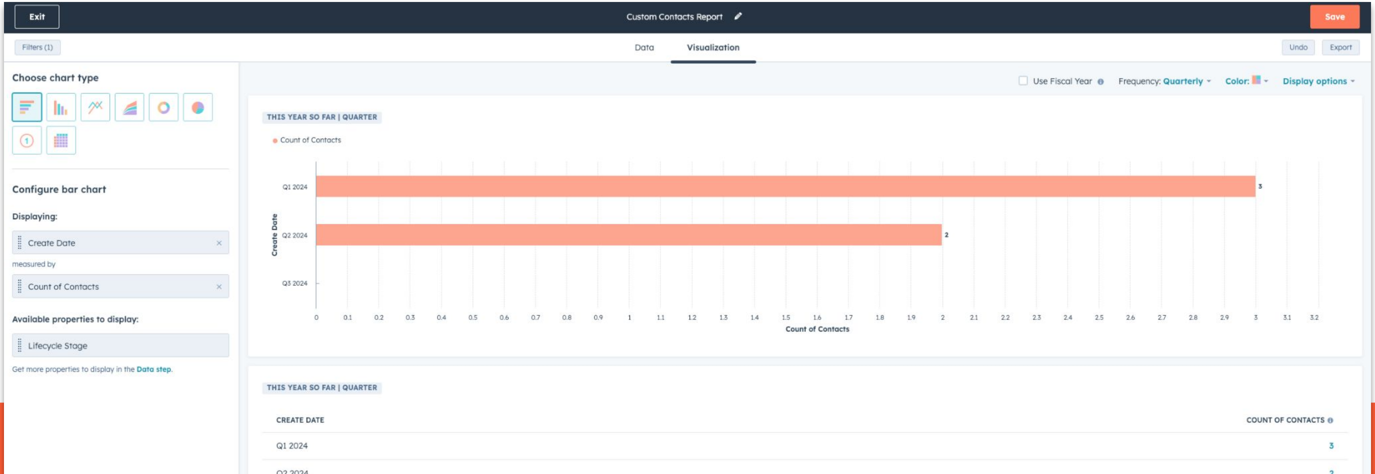
Building Reports from Scratch

Once you’ve exhausted all other available options, it’s time to explore HubSpot’s tools for building reports from scratch. If you’re a reporting ninja, you probably jump to this step first – but if you’re a reporting ninja, why on earth are you reading this cheat sheet?

TOP

Single Object

The single-object report builder is HubSpot's simplest tool for building reports. If you're building a report that only involves one object (for example, contacts), this is a great place to start, particularly if you're new to building reports. However, if you have experience with data analytics and report building, you might consider using the Custom Report Builder even for single-object reports because it has far more features.



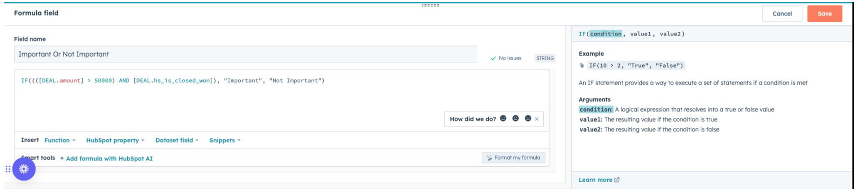
TOP

Custom Report Builder

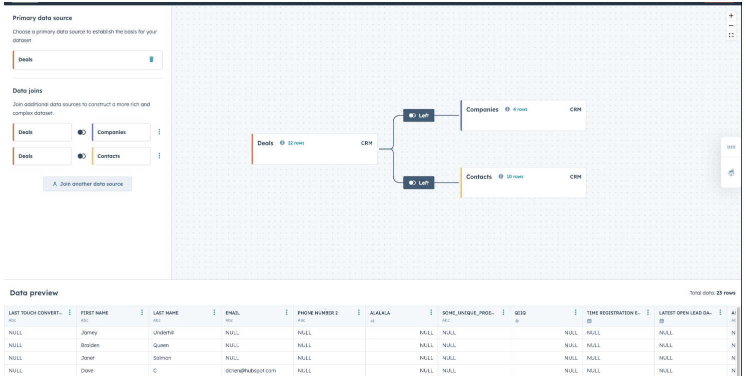
The custom report builder is HubSpot's most powerful and flexible reporting tool. You can use multiple data sources and a variety of visualizations, set aggregations and limits on properties, and even create calculation fields on the fly. It's also the default tool using Operations Hub's Datasets features, which you can use to curate custom tables for your team's reporting needs.

Datasets

Datasets allow the most flexibility for users to create powerful reports with a table of re-usable calculations, filter sets and joins to provide consistency across your reporting experience.

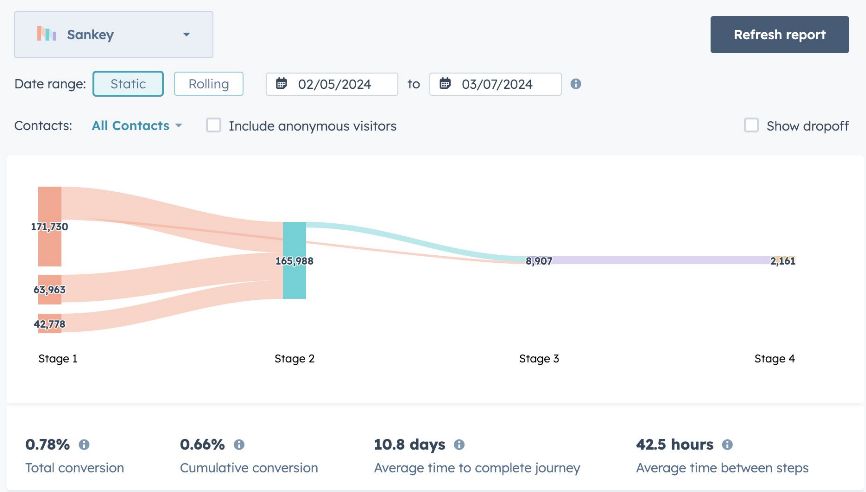


IMPORTANT OR NOT I...	COMPANY NAME	COMPANY DOMAIN NA...	COMPANY PHONE NU...	DEAL NAME	DEAL AMOUNT	DEAL STAGE	DEAL CLOSE DATE
Not Important	West Elm	NULL	NULL	West Elm - Magazine Fro...	145,811	Closed Lost (closedlost)	07/26/2021
Not Important	Restoration Hardware	NULL	NULL	Restoration Hardware - ...	16,000	Closed Won (closedwon)	09/07/2021
Not Important	NULL	NULL	NULL	CB2 - Banner Ad (Novem...	162,982	Proposal Sent (contracts...	07/15/2021
Not Important	NULL	NULL	NULL	Binghamton Campus To...	5,000	Closed won (5006444)	NULL
Not Important	NULL	NULL	NULL	Undergraduate Open Ho...	5,000	Qualified to buy (500644...	NULL
Not Important	NULL	NULL	NULL	Perigold - Annual Event	29,882	Opportunity Identified (...	06/05/2021
Not Important	NULL	NULL	NULL	Oneonta Campus Tour 3...	10,000	Closed won (5006444)	NULL
Not Important	NULL	NULL	NULL	Wayfair - Magazine Fron...	33,435	Opportunity Identified (...	06/05/2021



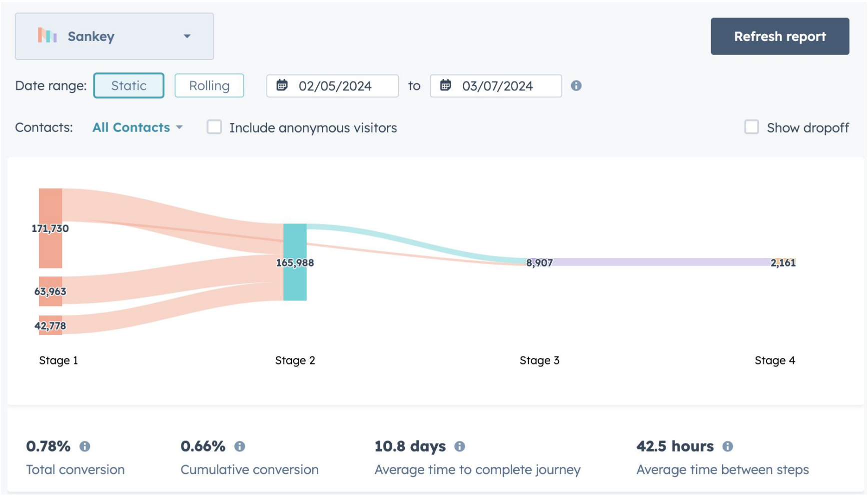
Customer Journey Reports

Beautiful Sankey charts to show you all the steps your customers took (or skipped!) on their way from Point A to Point B.



Funnels

Similar to customer journey reports but only for pipeline changes (lifecycle stage for contacts and companies, deals and lead stages for deals and leads).



TOP