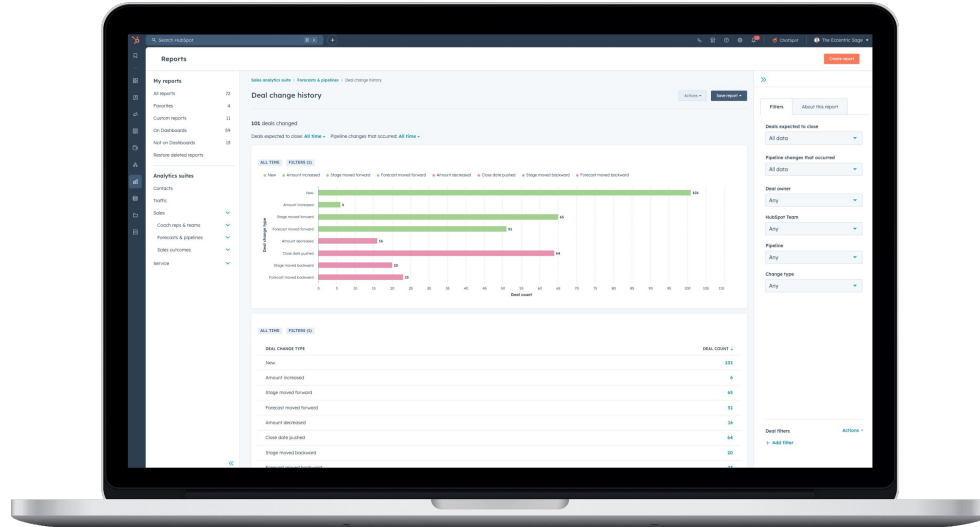


Reporting Cheat Sheet

A Scavenger Hunt of HubSpot Reports and Reporting Tools

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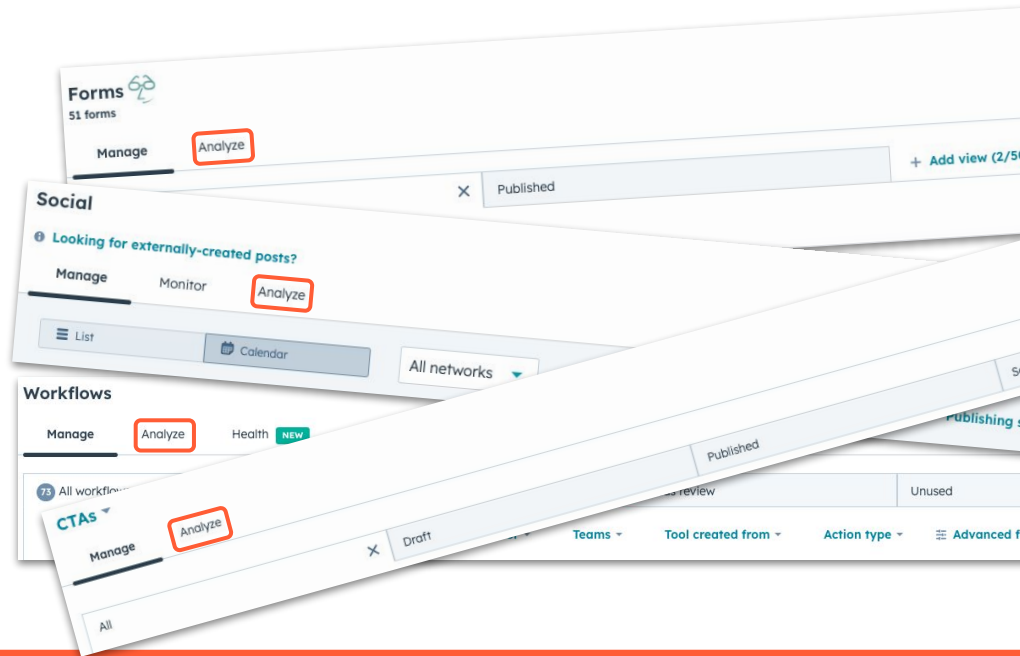
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Some Tools Have Reports Built In

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.

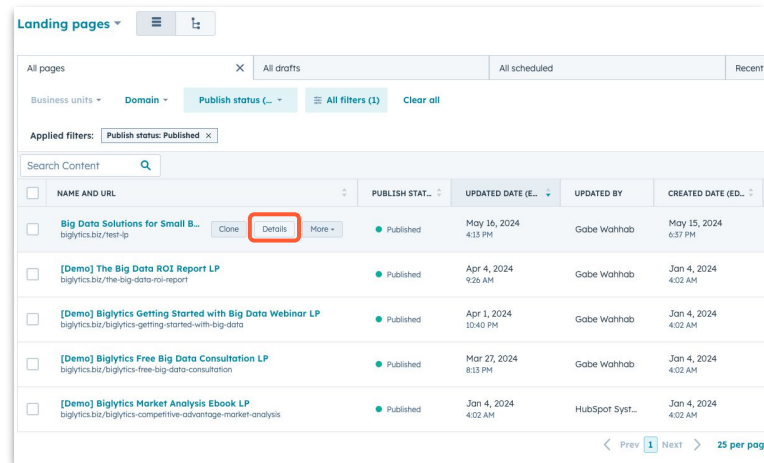
“Performance” and “Details”

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.

The screenshot shows a web interface for a form titled "Contact Us". At the top left, there is a link "< Back to all forms". Below the title, it says "Published" with a green dot icon. On the left side, there is a preview of the form with fields for Name, Email, Phone, and Address. On the right side, there are details for the form: Business Unit (The Eccentric Sage (Account)), Created date (January 12, 2024), Last submission received (March 8, 2024), Set contacts as marketing (Yes), and Workflows (0). At the bottom, there are three tabs: "Performance" (highlighted with a red box), "Analyze", and "Submissions". Below the tabs, there is a date range selector showing "Date range: 01/01/2000 to 08/12/2024".

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)



The screenshot shows a web application interface for managing landing pages. At the top, there's a 'Landing pages' header with a menu icon and a list icon. Below this, there are tabs for 'All pages', 'All drafts', 'All scheduled', and 'Recent'. A filter bar shows 'Business units', 'Domain', 'Publish status' (set to 'Published'), and 'All filters (1)'. A search bar is labeled 'Search Content'. The main table has columns: 'NAME AND URL', 'PUBLISH STAT.', 'UPDATED DATE (E...)', 'UPDATED BY', and 'CREATED DATE (ED...)'. The first row is highlighted, and its 'Details' button is circled in red. The table lists several landing pages, all with a 'Published' status.

	NAME AND URL	PUBLISH STAT.	UPDATED DATE (E...)	UPDATED BY	CREATED DATE (ED...)
<input type="checkbox"/>	Big Data Solutions for Small B... biglytics.biz/test-ip	Published	May 16, 2024 4:33 PM	Gabe Wahhab	May 15, 2024 6:37 PM
<input type="checkbox"/>	[Demo] The Big Data ROI Report LP biglytics.biz/the-big-data-roi-report	Published	Apr 4, 2024 9:26 AM	Gabe Wahhab	Jan 4, 2024 4:02 AM
<input type="checkbox"/>	[Demo] Biglytics Getting Started with Big Data Webinar LP biglytics.biz/biglytics-getting-started-with-big-data	Published	Apr 1, 2024 10:40 PM	Gabe Wahhab	Jan 4, 2024 4:02 AM
<input type="checkbox"/>	[Demo] Biglytics Free Big Data Consultation LP biglytics.biz/biglytics-free-big-data-consultation	Published	Mar 27, 2024 8:13 PM	Gabe Wahhab	Jan 4, 2024 4:02 AM
<input type="checkbox"/>	[Demo] Biglytics Market Analysis Ebook LP biglytics.biz/biglytics-competitive-advantage-market-analysis	Published	Jan 4, 2024 4:02 AM	HubSpot Syst...	Jan 4, 2024 4:02 AM

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

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

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

Marketing Email
16 marketing emails

Manage Analyze Health


All emails X Drafts Scheduled

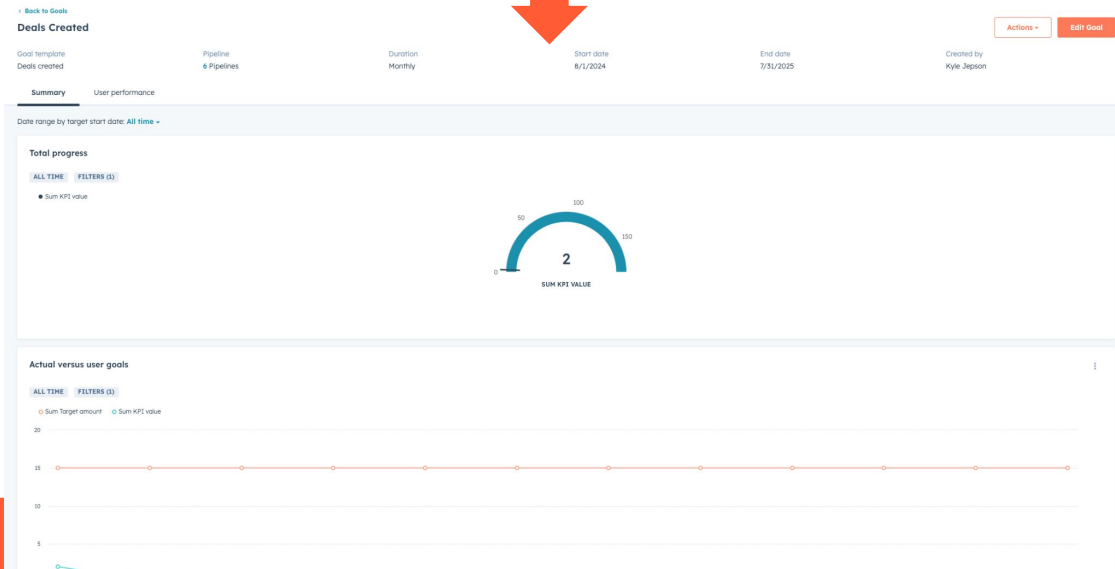
Campaigns Email types (1) X Users and teams Subscriptions Advanced filters (1) Clear all

Search marketing emails

<input type="checkbox"/>	EMAIL NAME		DELIVERED	OPEN RATE
<input type="checkbox"/>	Welcome Email	Edit Clone Actions	0	0%
<input type="checkbox"/>	Weather Forecast	View email		0%
<input type="checkbox"/>	That's All, Folks	View performance		50%
<input type="checkbox"/>	Thanks for the referral!	View details		100%
<input type="checkbox"/>	Some News About Outlook			66.67%
<input type="checkbox"/>	Registration Email	Manage Access		100%
<input type="checkbox"/>	Registration Email	Move to folder		0%
<input type="checkbox"/>	Referral Program	Archive		0%
<input type="checkbox"/>	New email	Delete		0%

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

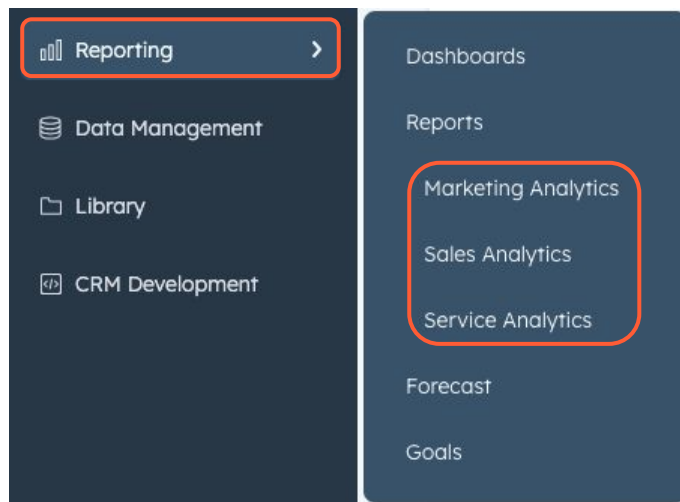


Analytics Suites and the Reports Library

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

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.

The image illustrates the navigation path to the HubSpot Reports Library. It consists of three screenshots:

- First Screenshot:** The HubSpot navigation sidebar is shown. The 'Reporting' option is highlighted with a red box.
- Second Screenshot:** The 'All reports' page is displayed. A red arrow points from the 'Create report' button in the top right corner to the 'Create report' page.
- Third Screenshot:** The 'Create report' page is shown. A red arrow points from the 'Create reports from templates' section to the 'Create reports from scratch' section.

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

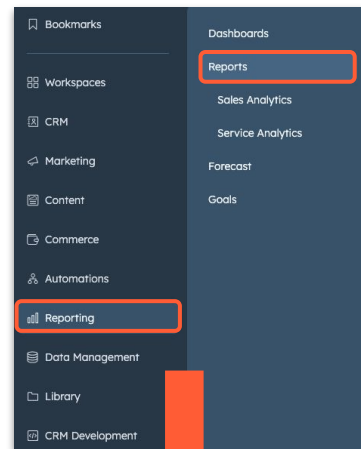
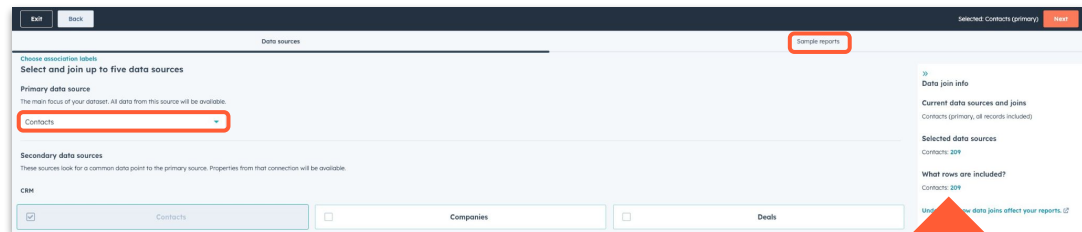
Sample Reports

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.

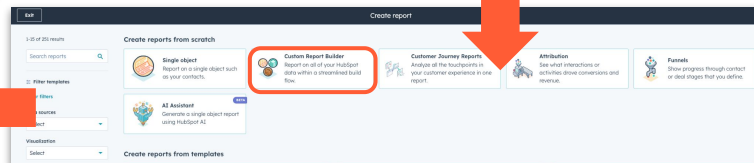
Sample Reports

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.



This screenshot shows the 'All reports' table. The table lists various reports, including 'Line Item vs Amount', 'Folder trends by status', 'Total Item Subscriptions over views', 'Leads Outreach', and 'Custom trends by lifecycle stage'. A red arrow points from the 'Sample reports' tab in the previous image to this table.

Name	Dashboard	Owner	Business Unit	Business Unit	Assigned	Last Viewed	Last Updated
Line Item vs Amount	1	Mike Johnson	The Store	Europe	Mike Johnson	May 15, 2024 10:08 AM	May 15, 2024 10:08 PM
Folder trends by status	0	Mike Johnson	The Store	Europe	Mike Johnson	May 15, 2024 10:07 AM	May 15, 2024 10:08 AM
Total Item Subscriptions over views	0	Mike Johnson	The Store	Europe	Mike Johnson	May 15, 2024 10:08 AM	May 15, 2024 10:08 AM
Leads Outreach	0	Mike Johnson	The Store	Europe	Mike Johnson	May 15, 2024 10:08 AM	May 15, 2024 10:08 AM
Custom trends by lifecycle stage	1	Mike Johnson	The Store	Europe	Mike Johnson	May 15, 2024 10:08 AM	May 15, 2024 10:08 AM



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!

The screenshot displays a web interface for selecting sample reports. At the top, there's a dark navigation bar with 'Exit' and 'Back' buttons on the left, and 'Selected: None' and 'Next' buttons on the right. Below this, the interface is split into two main sections: 'Data sources' on the left and 'Sample reports' on the right. The 'Sample reports' section contains a search bar labeled 'Search sample reports' and a magnifying glass icon. Below the search bar, a message reads 'Start with a report that uses one of your selected data sources. (Contacts)'. The main area of the 'Sample reports' section is a grid of 14 report questions, arranged in two columns of seven. Each question is enclosed in a light blue box with a thin border. The questions are:

- How many of my customers have paid over time?
- Who owns the contacts created this month?
- What are the original sources of my most recently created contacts?
- How many marketing qualified leads do I have? And how am I getting them?
- What are the original sources of my most recently created marketing qualified leads?
- Which forms are contacts submitting on first?
- Which forms are marketing qualified leads submitting on first?
- How many contacts are created on a daily basis?
- What lifecycle stages are my top 50 company contacts in?
- How many contacts are in each deal stage within my default pipeline?
- How many new contacts have not been contacted by sales yet?
- How many contact views am I getting on my HubSpot landing pages?
- Which contacts closed the highest earning deals this month?
- See the recent activity of those contacts who submitted a form within the last 30 days.

Sample Reports

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

Exit

Next

Attribution Reporting

Create your own attribution report from scratch. Or choose a question that will create a report for you.

Contact create

Measure which sources, assets, and interactions had the greatest impact on generating leads. View a specific person's journey to conversion. Or analyze entire campaigns. [Learn more about contact create attribution](#)

What asset type created the most contacts?

What interaction sources created the most contacts?

Which campaign created the most contacts?

How are my marketing channels generating leads over time?

What asset title created the most contacts?

What type of interactions happened before a contact was created?

How are my marketing assets generating leads over time?

+

Create a new report from scratch

Deal create

Measure which sources, assets, and interactions had the greatest impact on generating deals. View a specific deal or person's journey. Or analyze entire campaigns. [Learn more about deal create attribution](#)

What asset type created the most deals?

What interaction sources created the most deals?

What campaign created the most deals?

What asset title created the most deals?

What type of interactions happened before a deal was created?

How are my marketing assets creating deals over time?


↑
TOP


Sample Reports

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

Select a data source
Or **start with a sample report**

Choose the data source that best matches the type of report you're building. You'll be able to switch data sources at any time.

☒  **Contacts**
Measure how your content generates new contacts.

☐  **Deals**
Measure how your content generates new deals.

Lifecycle and Deal stage progression

☐ **Lifecycle stage progression**
See how many contacts are progressing from Lead to Qualified Lead to customer.

☐ **Deal stage progression**
See how many deals are closing.

Ad performance

☐ **Lead creation broken down by ad network**
See which ad networks receive the most engagement. Then, see how these engagements turn into leads.

☐ **Ad engagements driving form submissions**
See which ad campaigns are getting the most engagement. Then, see which campaigns lead to form submissions.

Booked Meetings

↑
TOP

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.

Exit

Back



AI Assistant
Generate a single object report using HubSpot AI

BETA

AI Assistant Report Builder only supports Single Object reports.
Multi-Object reports, Customer Journey reports, Funnels, Attribution, comparisons, calculations, and custom Objects are not yet supported. [Learn more.](#)

Describe your report to get started

What do you want to learn from this report?
Try including details like objects, properties, filters or a time range.

Example: How many deals have we closed this year by industry?

200

Generate

Not sure what to write? Try these examples

Click a prompt to paste it above and to use as a starting point for your next report.

How many deals did we create this quarter?

How much feedback am I getting from my customers each day?

How many contacts were added in Q3 by country?

Which deals have been updated recently?

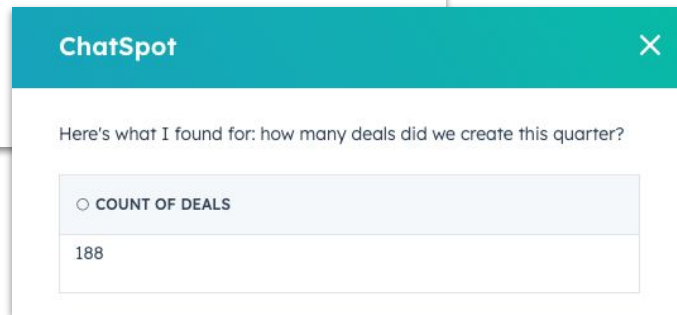
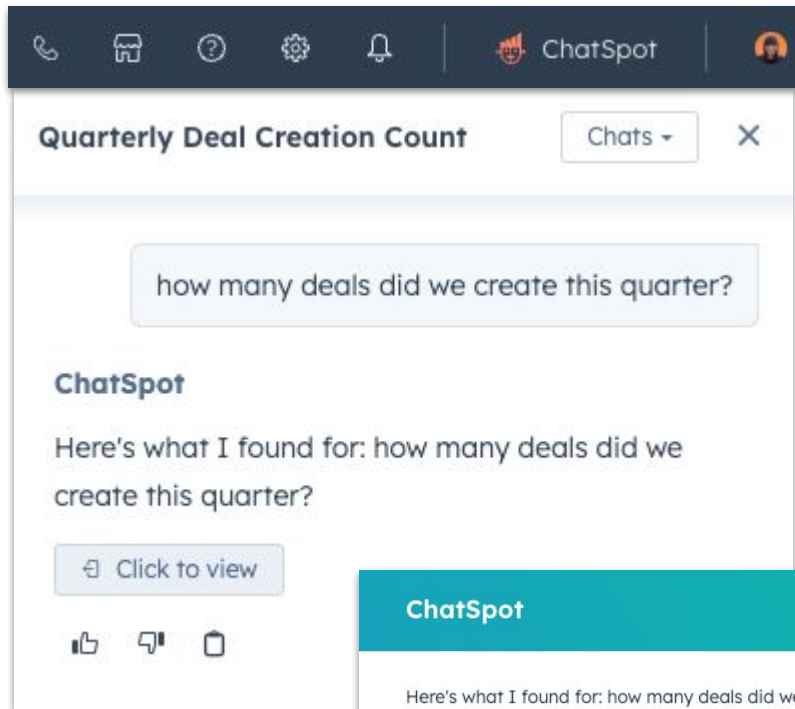
Make the bots do your reporting

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.

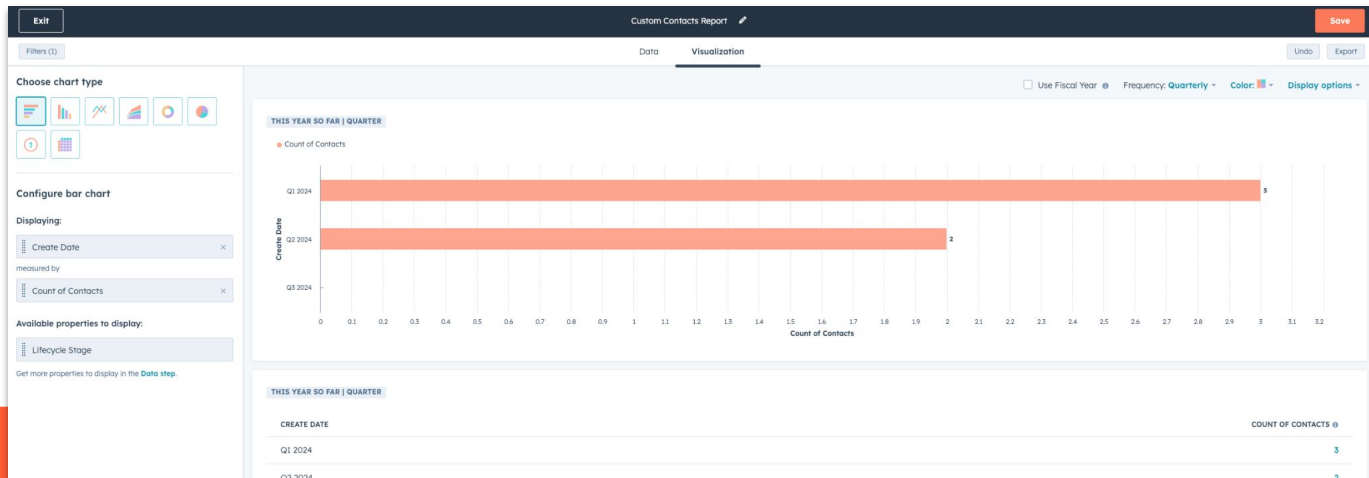


Building Reports from Scratch

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?

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.



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.

Formula field

Field name: Important Or Not Important

IF(((DEAL.amount > 50000) AND (DEAL.is_is_closed_won)), "Important", "Not Important")

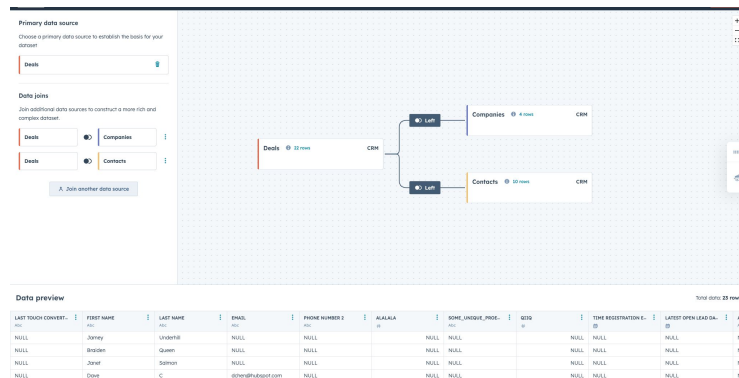
Insert Function - MultiStep property - Dataset field - Brackets -

Smart tools - Add formula with HubSpot AI

How did we do? ● ● ● ●

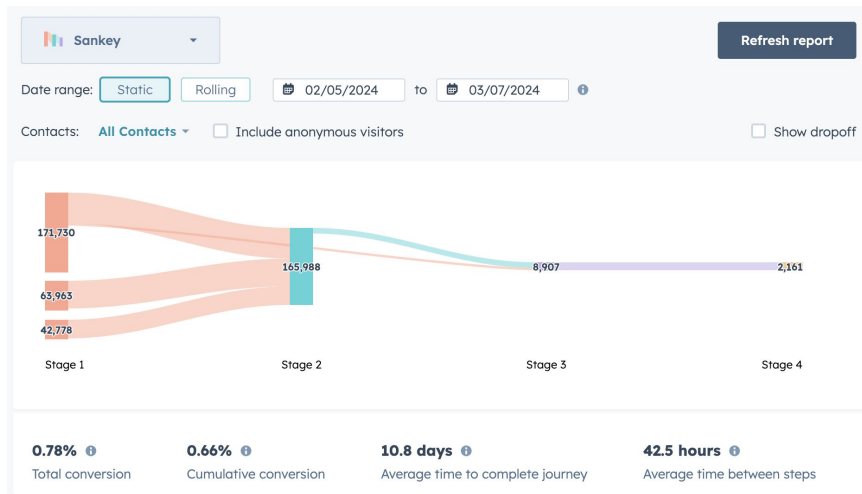
Learn more

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 (5008444)	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	Oreonto Campus Tour 3...	10,000	Closed won (5008444)	NULL
Not Important	NULL	NULL	NULL	Wayfair - Magazine Fro...	35,435	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).

