

HubSpot Reporting Quickstart Guide

Unlock the full potential of your HubSpot reports to drive informed decisions across marketing, sales, and customer success with our step-by-step guide.



- 1. Identify your questions** — Determine the key business questions your reports need to answer. This clarity will focus your reporting efforts and ensure relevance. Don't just build reports for the sake of it.
- 2. Determine necessary data** — We see too many people rush through this: Decide what data you'll need to collect to build helpful reports. It might involve setting up custom properties or integrating with other systems to ensure comprehensive data gathering.
- 3. Don't get carried away** — Avoid creating unnecessary reports. Focus on those that provide answers important to your business goals.
- 4. Simplify your approach** — Keep your reports uncluttered by focusing only on essential metrics and visualizations that drive decision-making.
- 5. Prioritize data quality** — Make sure that your reports are based on accurate and complete data, using the necessary integrations and custom properties. When people get this step wrong, it's usually their biggest obstacle to having useful reports. It's also one of the most common HubSpot issues we fix for clients.
- 6. Use pre-built vs. custom reports** — Use HubSpot's pre-built reports where possible, customizing them to meet your needs before jumping into building complex custom reports. Learn HubSpot's capabilities through its simpler tools before using the Custom Report Builder.
- 7. Build your reports** — Start creating reports that answer your identified questions. Begin with HubSpot's pre-built reports and customize as needed to fit your specific requirements.
- 8. Choose the right visualizations** — Select visualizations that clearly represent your data and make insights easy to understand at a glance. Check your report filters to make sure they're showing you the correct data periods and criteria.
- 9. Automate dashboard reporting** — Configure your dashboards to automatically update and send key data to relevant stakeholders, ensuring everyone is aligned and informed. Organize related reports on the dashboards to tell a comprehensive story of your business operations and performance.
- 10. Leverage advanced features (Enterprise users)** — Use Customer Journey Analytics to gain deep insights into how customers interact with your business.
- 11. Collaborative reporting** — Work together with teams across your organization to build and refine reports, making use of diverse insights for a well-rounded analysis.
- 12. Monitor lifecycle stages** — Use lifecycle stages effectively to track and analyze the progress of leads through your sales funnel.

Need help? Consider scheduling a free consultation with our HubSpot experts at Simple Strat to ensure your reporting is set up to provide powerful, actionable insights. Our team can help you avoid common errors and make the most of your HubSpot investment.

