Custom Report Builder Challenge

HubSpot Academy

Introduction

Your data is as unique as your business. As a result, the data you're working with may not be accessible within the HubSpot analytics tools or found in the sample reports of the custom report builder. To ensure you're comfortable with the HubSpot report builder, we've compiled five customizable reports that will help you practice working with various HubSpot data sources. Can you build them all?

Accessing the HubSpot Custom Report Builder

Creating a report in the custom report builder can be broken down into the following steps:

1. **Select the report's data sources:** select the types of HubSpot data that the report will include.

⚡Helpful hint⚡

Not sure which field to choose? Hover over a field and select **View Property info**. A pop-up will appear that shows a description of the field, creation information, and how many records are currently using it.

2. **Add fields to the report:** select the specific property, event, and activity data to report on.
3. **Customize report filters:** set limits and boundaries for the fields you've added.
4. **Configure report visualization:** choose how you want data to be displayed.

⚡Helpful hint⚡

If you're not sure which chart type is best for your report, you can use the smart chart feature to get started. By enabling smart chart before adding your fields, HubSpot will automatically suggest chart type based on the fields you add. Once you select a recommended chart type, HubSpot will then automatically arrange the fields into recommended channels.

5. **Save or export the report:** make your report available for yourself and others to view, or export it to take your data offline.

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Build It: Leads by First Conversion and Original Source

This report helps you understand which forms are generating the most leads and where those leads are coming from.

What you'll need:

- Data source: Contacts
- Dimensions: First Conversion (x-axis), Original source (breakdown by)
- Measure: Count of Contacts
- Visualization (recommended): Vertical Bar

Analyze Your Report

What are your top three performing forms?

What content offers are sitting behind these forms?

What stage of the buyer's journey do each of these top-performing forms align with?

What traffic source is driving the most conversions to each of these forms?

🏆**Bonus Round** 🏆

Swap out Original Source for the Lifecycle Stage Property. How does the report change?

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Build It: MQLs by Social Channel

This report helps you understand which social networks (e.g. Instagram, TikTok) bring you the most qualified leads.

What you'll need:

- Data source: Contacts
- Dimensions: Became a Marketing Qualified Lead (x-axis), Original Source (Break down by)
- Measure: Count of Contacts
- Filters: Became a Marketing Qualified Lead Date is This year so far, Original Source is any of Social Media
- Visualization (recommended): Area graph

Analyze it

List your goal of marketing qualified leads generated month over month for each of your social channels.

Compare the current performance of each of your social channels against the goals you've set. How do your results compare to the goals you've set?

Which social channel is creating the most marketing qualified lead dates? Does this align with your expectations? Why or why not?

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Which social channel is creating the least amount of marketing qualified lead dates? Does this align with your expectations? Why or why not?

Examine the trends of each social network. Is each network consistent, or do you notice spikes (positive or negative)? What could account for this behavior?

Do you notice any areas of opportunity for generating more marketing qualified leads across your social channels?

Build It: Most Engaged Companies

This report helps you understand which companies are most engaged, using metrics such as the total number of pageviews, form submissions, and emails.

⚡**Helpful hint**⚡
Want to see all the companies in your database, not just those created in the last month? Choose a different time frame in your filters.

What you'll need:

- Data source: Contacts, Companies
- Dimensions: Name (Company)
- Measure: # of Pageviews (set to Total), # of Form Submissions (set to Total), Marketing Emails Opened (set to Total)
- Filters (Optional): Create date (Company) is less than 31 days ago
- Visualization (recommended): Table, Pivot Table

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Analyze it

List the top three companies with the most contacts in your CRM.

List the top three companies with the most form submissions in your CRM.

List the top three companies with the most email opens in your CRM.

Take a look at the companies you've listed above. Are they all the same three companies? Do any of the listed companies surprise you?

Deeper dive: select one of the companies listed above. Using their contacts as a guide, determine what types of content employees of that company are interacting with and the emails they're opening. What stage in the buyer's journey are these contacts? If they are already customers, how are you continuing to provide value with your content?

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Build It: Deals Closed Vs. Goal By Type

The deal type default property separates out new vs. existing business. Use this chart to see which you're doing more of, compared to your overall revenue goals.

⚡**Helpful hint**⚡
Deal type includes two values: new and existing business. You can customize it to your own use case by adding values in your *Property Settings*.

What you'll need:

- Data source: Deals
- Dimensions: Close Date (x-axis), Deal Type (Break down by)
- Measure: Amount or Amount in company currency
- Filters (Optional): Deal type is known, Deal owner is known. Close date is this month.
- Visualization (recommended): Area Graph, Line Chart (that way you can add a static goal line under Chart Settings)

Analyze it

Based on the visualization, are you currently on track to hit your charts?

Is your revenue growth steady or are you noticing any spikes? What could account for this type of trending?

What percentage of your revenue is coming from new revenue? What about recurring revenue?

Brainstorm: What other ways could you customize the deal type property to provide more insight to your business? List your ideas below.

Build It: Average Deal Size By Industry

This report shows you which industry produces the highest-value deals. Take this data into account when building your team and coaching your reps.

What you'll need:

- Data source: Deals
- Dimensions: Industry (x-axis)
- Measure: Amount OR Amount in company currency (y-axis)
- Filters: Industry is known, (Optional) Close date is this quarter.
- Visualization: Vertical bar

Analyze it

What industries are your company's greatest source of revenue? Does this align with your expectations?

Swap out industry for company size. What size companies are your greatest source of revenue?

Swap out industry for region. What regions are your greatest source of revenue?

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Looking for more practice? Check out these additional reports to continue to build your skills in the custom report builder.

Custom Report Builder Bonus Round

Build It: Total Pipeline by Persona

Personas are an important part of an inbound strategy. Use this report to find out which contact personas are worth the most revenue to your company.

What you'll need:

- Data source: Contacts (primary), Deals (secondary)
- Dimension: Persona (Contacts)
- Measure: Amount or Amount in company currency
- Filters: Persona is known, (Optional) Close date is this quarter.
- Visualization: Pie Chart

Analyze your report:

Which contact personas are generating the most revenue for your company? The least revenue?

Build It: Average Time to Close by Services Rep

You don't want to rush your customers through their service issues, but you also want to solve for their needs quickly. Use this report to gauge how long your reps are taking to close tickets.

What you'll need:

- Data source: Tickets
- Dimension: Ticket Owner, Time to Close
- Measure: Count of Tickets
- Filters: Ticket status is (select the fields that you use to denote a closed ticket), Create date (Ticket) is This year so far
- Visualization: Horizontal Bar

⚡Helpful hint⚡

For a different view of your reps' response time, swap out "Time to Close" with "Time to First Email Reply." What can you learn from the new report?

Analyze it

Which of your service agents are taking the longest amount of time to close tickets?

Which of your service agents are taking the shortest amount of time to close tickets?

🏆Bonus Round 🏆

Swap out Time to Close with Time to First Email Reply. What can you learn from the new report?

Build It: Tickets by Source Over Time

Are you staffing your channels correctly? Use this report to see how the mix of ticket sources — chat, web, phone, etc. — changes over time.

What you'll need:

- Data source: Tickets
- Dimension: Create data (x-axis), Original Source (Break down by)
- Measure: Count of Tickets
- Filters: Create date (Ticket) is This quarter so far, Original Source is Known
- Visualization: Vertical Bar

Analyze your report

Which channel is generating the most influx of tickets this quarter?

Swap the "Create date" to "is last: quarter." How does this compare to the channel that generated the most tickets last quarter?

Swap out the "Create date" property with the "Time to first agent reply date" and set it to average. Are these within the SLAs set by your team?

Build It: Tickets by Company Region

Are you supporting your international customers in the right way? Are your time zones staffed correctly? Use this report to find out.

What you'll need:

- Data source: Companies (primary), Tickets (secondary)
- Dimension: State/Region (Company) - *This can be customized to whichever property you're currently using to track your regions.*
- Measure: Count of Tickets
- Filters: Create date (Ticket) is This quarter so far, State/Region is Known
- Visualization: Donut

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Analyze your report

What is the percentage of tickets generated by each of your regions? How does this inform your staffing needs?

Swap out Region for a property like Priority. What percentage of tickets do you have in each priority?

Swap out Priority for a property like Category. What percentage of tickets do you have in each category?