CHARTER SCHOOL GROWTH FUND

Education Inbound

Reporting & Communicating Data Using HubSpot

June 7, 2024

Agenda

1. Understanding Your Audience: from the Board to the Recruiter
2. HubSpot Reporting Dashboard Overview
3. “Out of the Box” Reports
4. Understanding Custom Reports
5. What are the reports all networks should have (and understand) if using HubSpot
6. Discussion, Q&A
7. Next Steps

Understanding Your Audience

- **Executive/Board Objectives**
  - Understand recruitment funnel and conversions to target - at point in time and final state,
  - Year over Year changes and trends
  - ***Data to drive financial, staffing and capacity decisions***
- **Marketing Team Objectives**
  - Understand source of leads, engagement of leads, conversion of leads into applicants and into enrolled students
  - ***Data to drive decisions about content, campaigns, sources and workflows to increase leads, engagement and thus conversions***
- **Recruiting Team**
  - Understand precise status of leads/applicants, activity history and next expected actions
  - ***Data to drive specific activity from team members who have "boots on the ground" responsibility for weekly/monthly applications and/or enrolled students***

Vocabulary

Dashboard: A HubSpot dashboard is a customizable tool that integrates data from HubSpot features to track key metrics.

Object, Custom Object & Custom Property: HubSpot custom objects allow you to customize your CRM with additional fields and properties (objects) that are specific to your network.

“Out of the Box”: The reports that are already configured in HubSpot depending on what customer platform you are using (Starter, Pro, Enterprise)

Custom Report: Reports that you build that are unique to your organization and enable you analyze and visualize objects in relation to marketing, sales, and service activities.

Asset and Asset Type: Specific content created/uploaded in HubSpot like individual videos, blog posts, landing pages. Asset types are groups of assets like integrations, website pages, ads, landing pages, and blog posts.

Contact: Sometimes referred to as a Lead, but not to be confused with Lead object

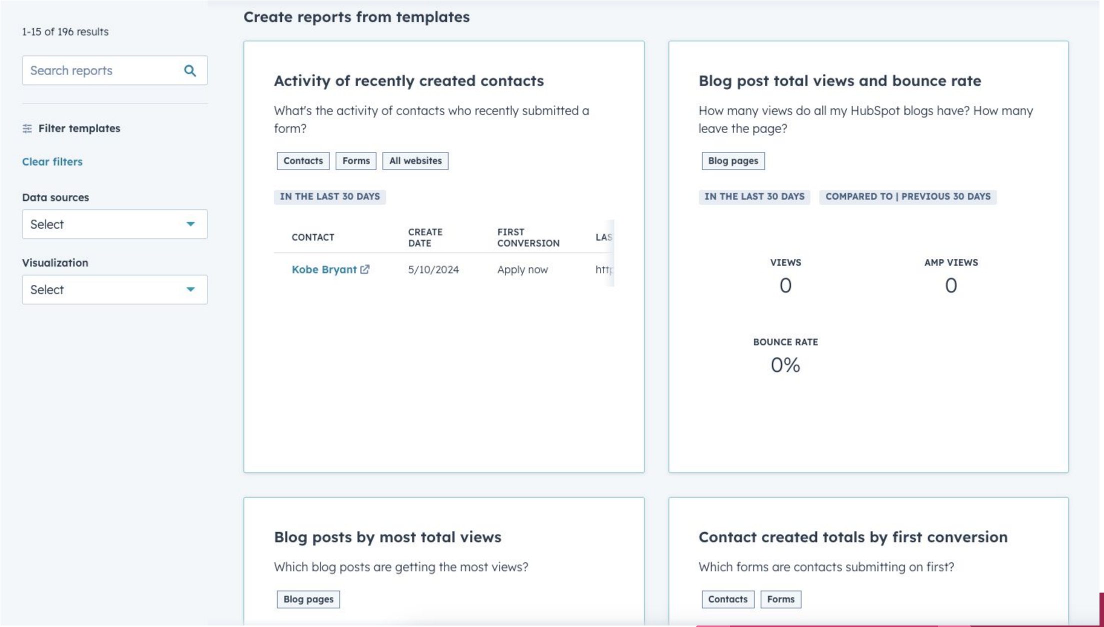
Attribution: Attribution in HubSpot is a tool that assigns credit to marketing assets and channels for converting visitors into customers and contacts.

The HubSpot Reporting Dashboard Overview

1. Overview
   a. Free — 3 dashboards, 10 reports per dashboard
   b. Starter — 10 dashboards, 10 reports per dashboard
   c. Pro — 25 dashboards, 30 reports per dashboard
      i. Custom reporting
      ii. Campaign reporting
      iii. Marketing asset comparison reporting
      iv. Contact create attribution reporting
   d. Enterprise — 50 dashboards, 30 reports per dashboard
      i. Behavioral event triggers reporting
      ii. Customer journey analytics (Marketing Enterprise)
      iii. Deal create attribution reporting
      iv. Revenue create attribution reporting

Out of the Box HubSpot Reports

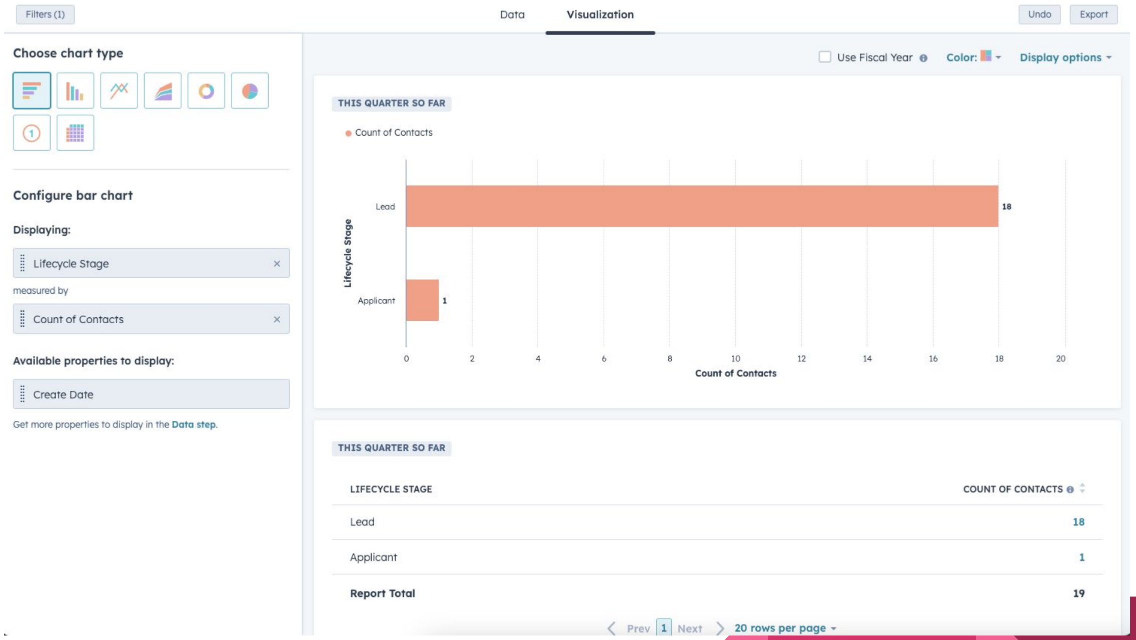
- HubSpot has 196 out of the box reports across all objects that can be implemented immediately.
- Search for what you want to report on or filter based on source and/or visualization
- Should handle standard reporting needs, but will not incorporate custom properties or objects



Single Object HubSpot Reports

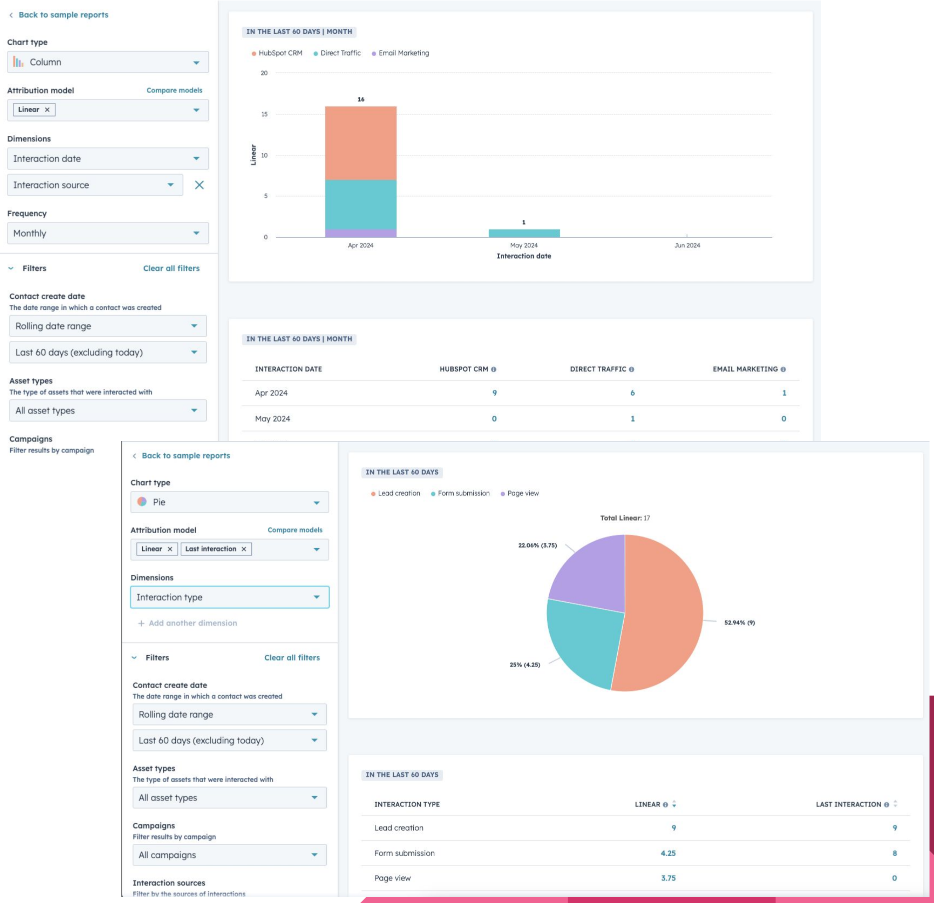
- Create simple reports based on a single object (ex. Contacts or Leads or Deals, etc.)

- Filter results, add properties, build a simple report



Attribution HubSpot Reports

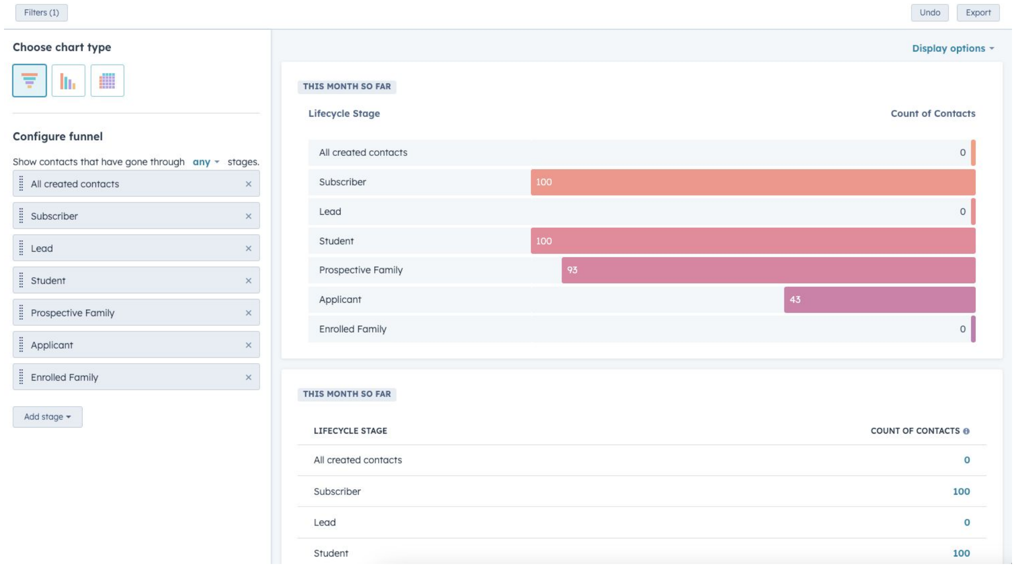
- **Answer the questions:**
  - What asset type created the most contacts?
  - What interaction sources created the most contacts?
  - Which campaigns created the most contacts?
  - How are my marketing channels generating leads over time?
  - What asset title created the most contacts?
  - What type of interactions happened before a contact was created?
  - How are my marketing assets generating leads over time?



Funnels HubSpot Reports

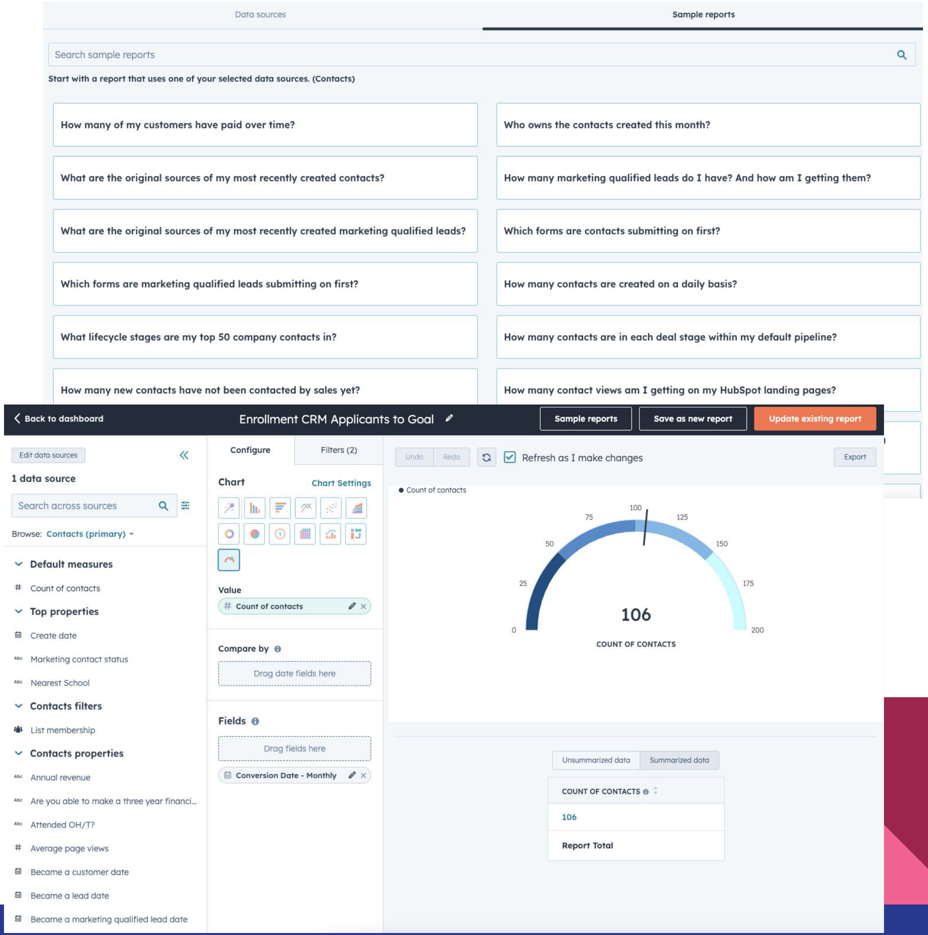
- Contact or deal funnel reporting
  - Contact — Lifecycle stage
  - Deal — Deal stage

- Report on movement throughout the funnel or at any stage



Understanding Custom Reports

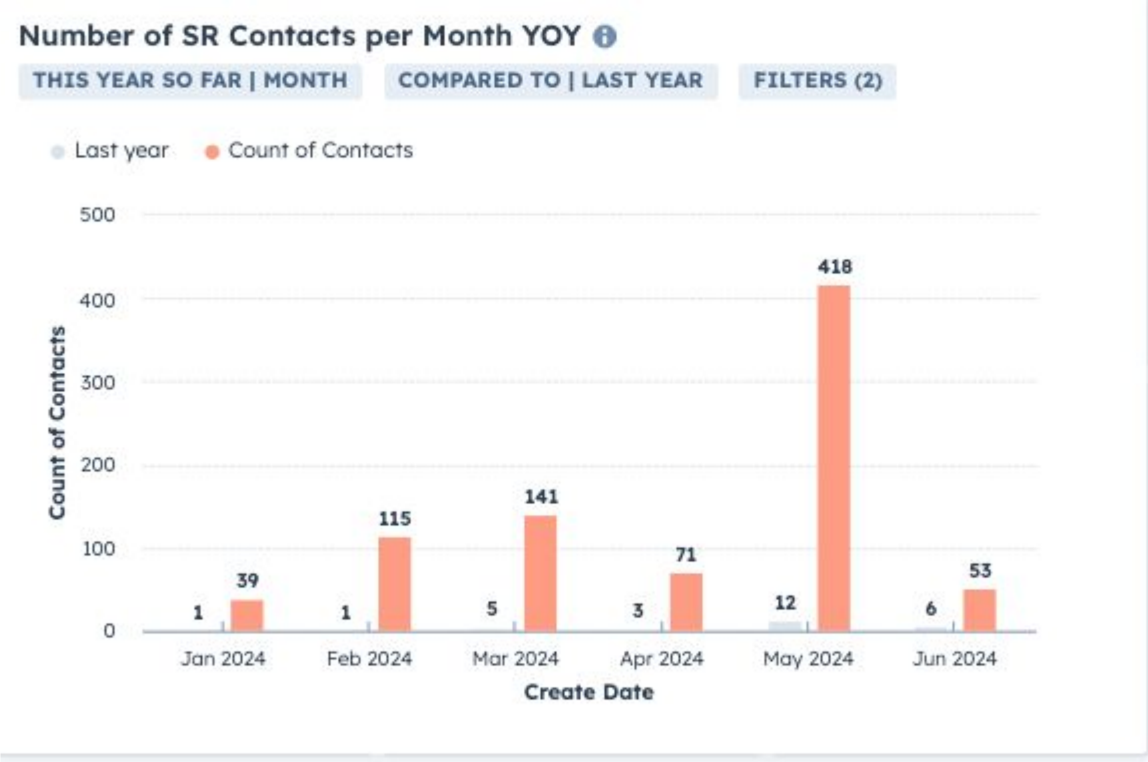
- How to think through your objective with a custom report
- What are the inputs/outputs
- Primary + secondary data source(s)
- Full control of report properties, chart type, axis, comparisons, fields for deeper dive, filters, and chart settings



Must Have Reports in the Charter Sector

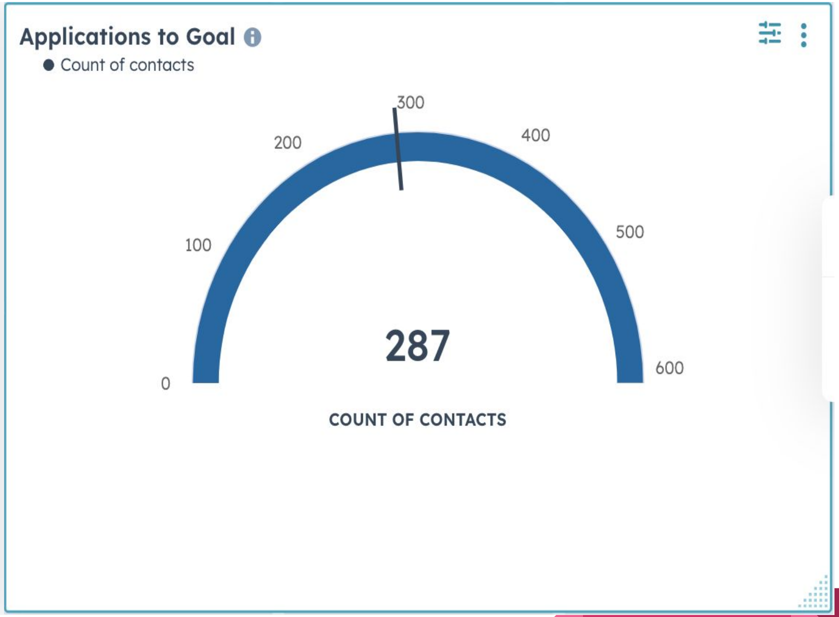
1. Year over Year Lead/applicant comparison
2. Contact/Lead *create* attribution (by campaign, by marketing channel, by marketing asset)
3. Contacts by… month/week/school/original source/latest source
4. Leads/Applicants to goal
5. Hot Leads Report
6. Contact/Lead Funnel Report
7. Productivity Report

Year Over Year Contacts (Leads) Created

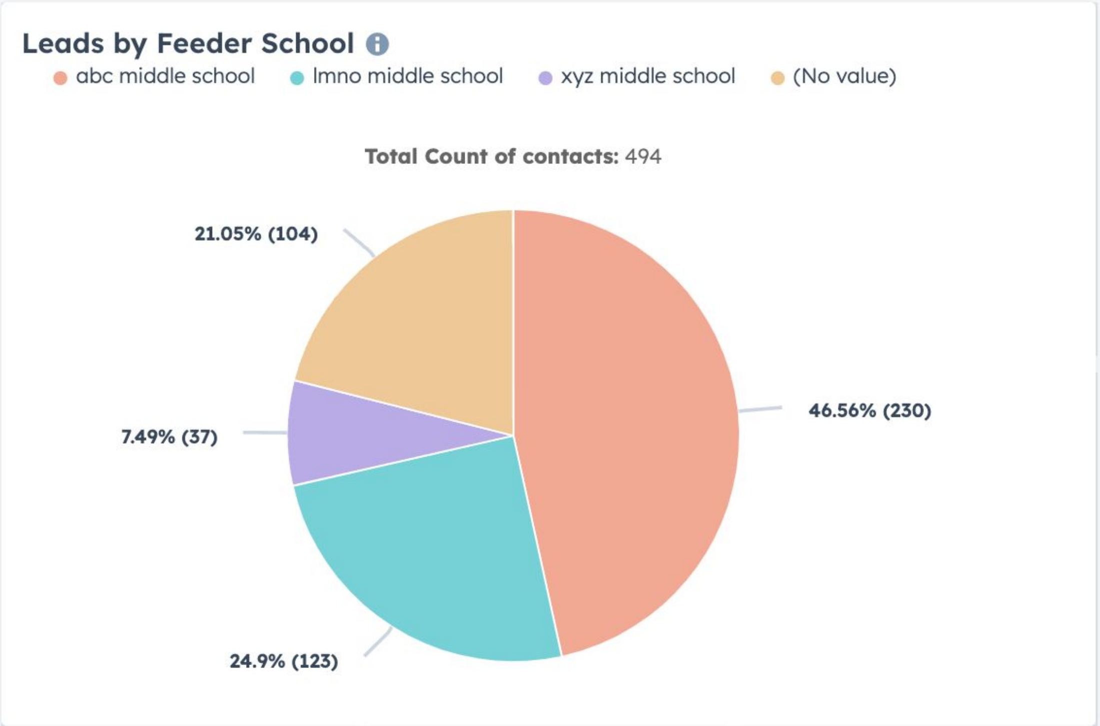


Year Over Year Meetings Booked

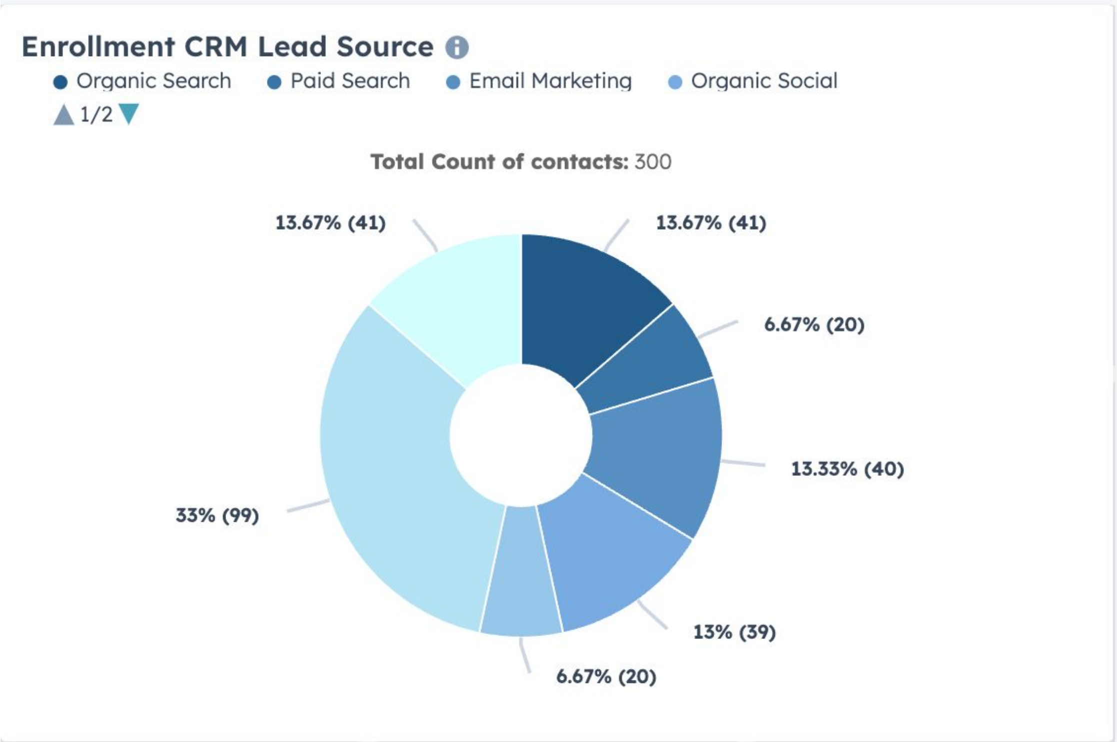
Leads/Applicants to Goal



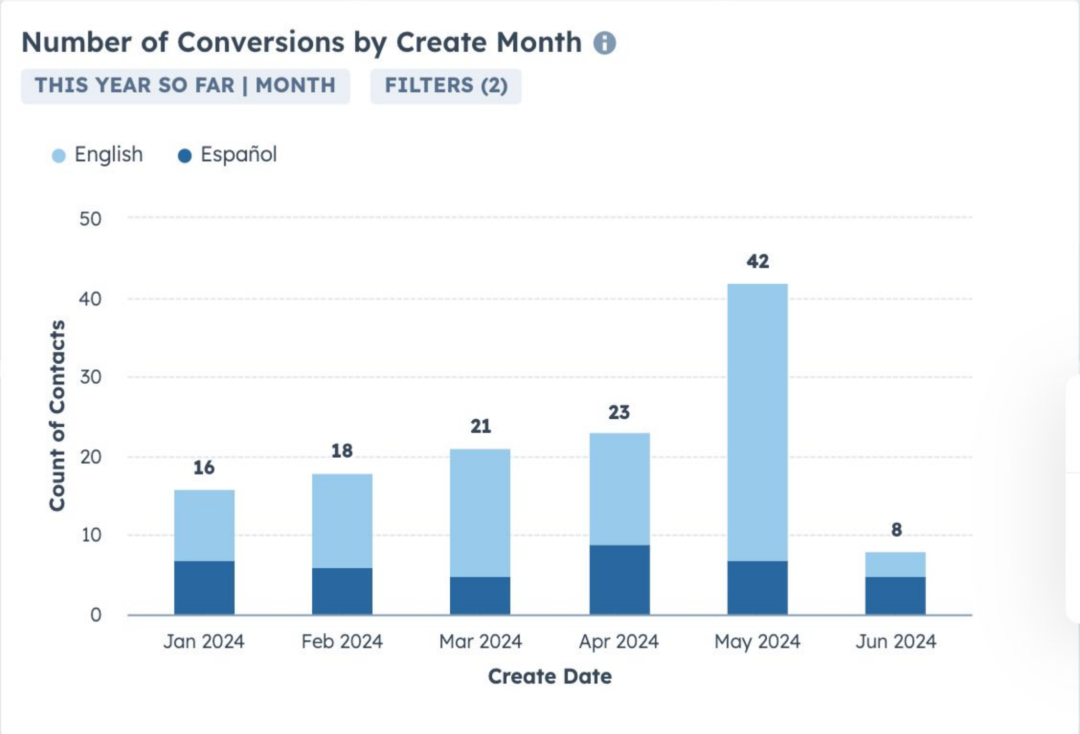
Leads by Feeder Schools



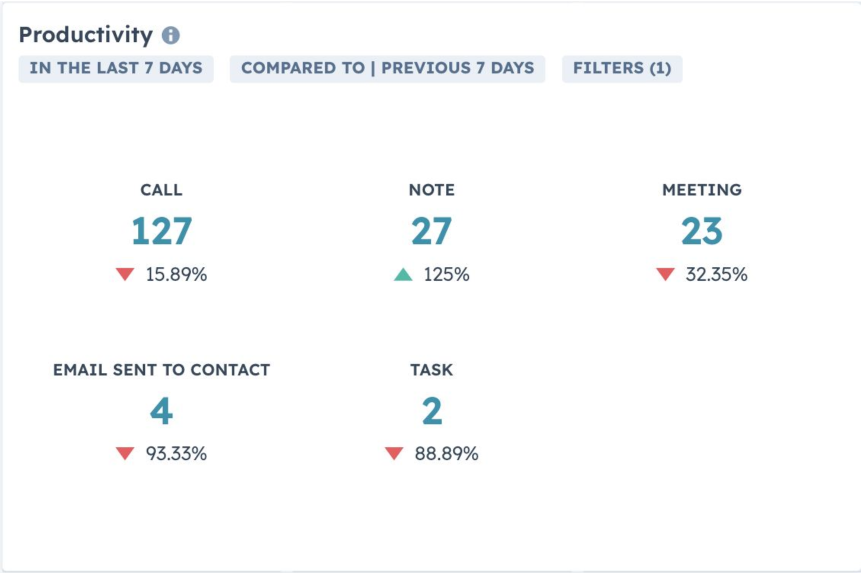
Leads by Source: Channel



Conversions

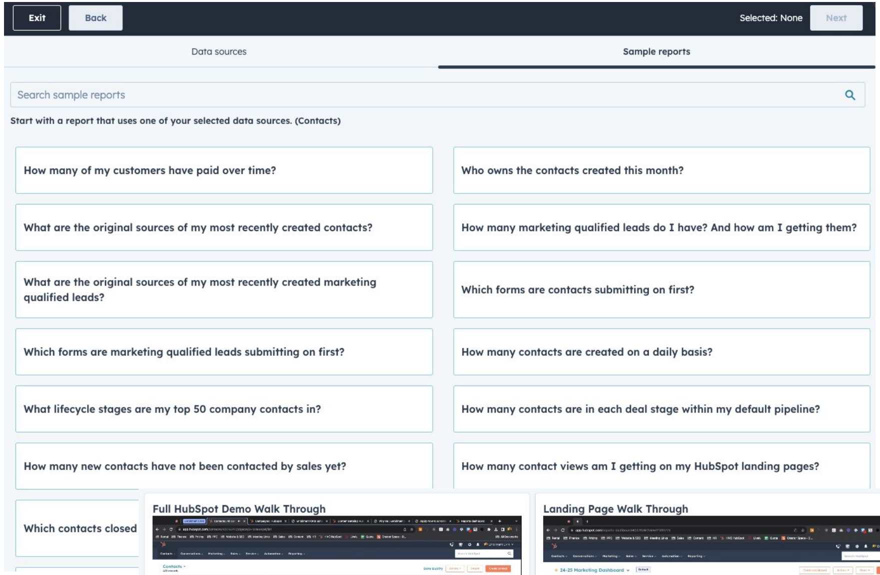


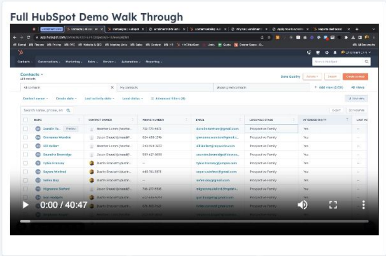
Productivity

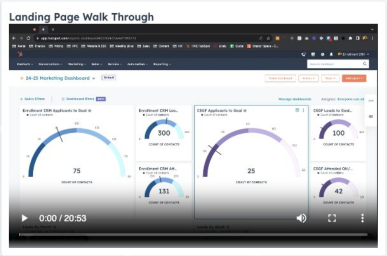


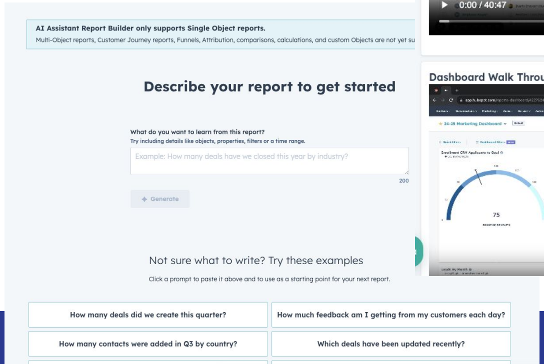
Expert Tips

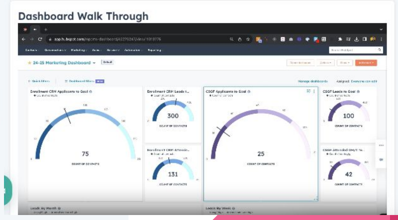
- Use Sample Reports in Custom Report Builder
- Betas
    - Opt into the AI Reporting Assistant Beta
- Cloning Dashboards
    - Create copies of each report
- Add images, text, and video
- Add external content
- TESTING

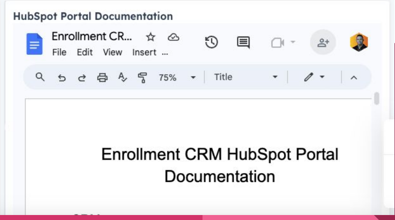












Discussion, Q&A

What’s Next

1. Direct Advisement: Submit your specific help with your reporting needs **here**! We’re here to help take a little work off your plate.
2. Reach out to others in the Community who may have similar challenges
3. Additional Workshops: Look for a short survey on your top priorities for smaller, hyper focused workshops to tackle some of the common HubSpot challenges.
4. Join the CSGF/COP Slack Channel!

What’s Next

Webinar Series in Complete!

1. The HubSpot Stack: What you get, what you need and what what are the trade-offs associated with these decisions in our charter-specific setting.
2. Achieving Excellence Using the Starter Customer Platform in the Charter sector
3. Achieving Excellence: Managing & Converting Leads in the Charter Sector
    a. PART 1: Configuring your HubSpot Instance for the Public Charter School Sector; Establishing a simple recruitment process using HubSpot: Landing Pages, Quick Apply Forms, Automations, Managing Data & Basic Reports
    b. PART 2: Using more complex workflows and personalization; Data Integrity & Data Management - keeping contacts and lists organized, removing non-active contacts
4. Reporting & Communicating Data using HubSpot for Student Recruitment