Custom Report Builder

HubSpot

The Opportunity

A successful business must be able to track progress toward goals, make smart decisions about what strategies to employ, and measure ongoing performance of their team and tactics. To do this, they need a tool that collects their data in one place and allows them to manipulate and visualize that data in a meaningful way. The custom report builder delivers these requirements with full data access and an accompanying powerful workspace.

Start with Business Goals *Should I build this report?*

The purpose of any report should be to help you track progress and make decisions related to business goals. From the highest level to the least, business goals fall into one of three categories: strategic, tactical, or operational. To validate if a report should be built, ask, "Will this help you understand or make decisions at any of the following levels?"

Strategic	Tactical	Operational
Tracks progress toward high-level OKRs and KPIs	*Shows performance of the tactics employed to execute the strategy*	*Measures ongoing performance of the teams that support the tactics*
Why: Understand if adjustments are needed to the organization's overall strategy or the services it offers	Why: Helps make data-led business decisions about the team strategy and move past "using your gut"	Why: Find gaps in performance and identify opportunities to improve services or processes
When: Annual or quarterly	When: Quarterly or monthly	When: Monthly or weekly
Who: Director+	Who: Directors and managers	Who: Managers, team leads, individual contributors

Consider what you're looking to measure and which of the three categories it best represents. You should be able to tie the desired report to a specific business goal at that level, and tie that goal to each successively higher level on the strategic-tactical-operational scale.

Gather the Required Data *Can I build this report?*

Determine what data points are needed.

The various dimensions of information you seek will determine which individual data points you need. Customers may require deal amounts, form submissions, industries, events, or a host of other data points to build one single report.

Determine where that data is being captured.

Establish where that data is collected, and ensure it's from a clean and reliable source.

Standard Objects	*Custom Objects*	*Other Data Sources*
Many of the data points will be stored within HubSpot, including any default properties of:	If you've created a custom object, you can also pull these records into a report, based on their properties.	If you have data stored within other systems, you'll need to determine how to import it into HubSpot so it can be included in the report.
Contact Company Deal Ticket Activity		Integrations PieSync

Create the fields you need.

If using an integration, review the relevant [Knowledge Base article](#) or seek a Technical Consultant if help is needed to set up the necessary fields.

HubSpot doesn't always offer the exact properties needed to create a report. In those cases, follow this process:

(1) *Create the missing property*	(2) *Create a corresponding date*	(3) *Create a workflow "stamp"*
Be mindful about the object you choose; try to leverage existing properties as a point of reference (e.g. First page seen, Last marketing email name, etc.)	This will be an important way to filter reports and create lists that only look at specific segments.	If trying to answer a "Last x before y event" question (e.g. Last email before a contact became an MQL), make the custom property and date unknown and the more broad property (usually the HubSpot property) known.

(4) *Set date and copy name properties*	(5) *Create a workflow "washer"*
Set the date stamp to the moment it happened and copy the name of the asset (e.g. the email they opened) to the asset name you want to measure.	Because the "last x before y" changes over time, you'll want to create an If/Then branch that enrolls contacts in a separate "washer" workflow to keep this up to date. (Include re-enrollment triggers if updates are needed on a recurring basis.) Clear the date and name properties so they can reflect the most recent email they opened. Then enroll them in the original workflow.

Build the Custom Report   *How do I turn my raw data into a report?*

Follow the steps in this [Knowledge Base article](#) to build the report. A few additional tips for each step are listed below.

(1) Select up to five data sources

Data sources are groups of data and properties that are commonly associated based on a particular category.

💡 The report builder is based on existing associations in HubSpot. If an option is greyed out, it means it's not associated with your primary data source.

(2) Add fields

Select desired fields, including properties, event data, and other information relating to the data sources you add.

💡 Use the search bar to search across all selected data sources.

(3) Configure the report

Determine which data belongs on which axis, and choose how to break it down. The breakdown selection will show as the sections or categories in the report and help with visualization, grouping, and differentiation.

💡 X-axis (horizontal) usually corresponds to the written information or text field and acts as the independent variable. Y-axis (vertical) typically shows the numeric measurement of the X-axis information; shows the dependent variable.

(4) Add filters

Use ANY or ALL rules or more advanced AND / OR logic to further refine your data.

💡 For 3+ filter groupings, you have the option to apply a custom rule.

(5) Select a visualization

See the Appendix for pros and cons of various visualizations.

(6) Save the report and add it to a dashboard

💡 Professional customers can save up to 100 custom reports. Enterprise customers can save up to 500.

Appendix

Visualization Types

The type of information and how the data points relate to each other will determine which visualization is best for any specific report.

	Pros	Cons
Bar Graphs	Can easily compare several data sets and it's visually straightforward when someone reads it.	Can only be used with discrete data. Depending on the scale, it can emphasize an effect that isn't actually relevant.
Line Graphs	Quickly tell the range, minimum/maximum, and any gaps. Easily observe changes over a certain period of time.	Generally good only when you have <50 data values. It also requires that the range in your data not be too big.
Area Graphs	Great at showing how multiple, relative values change over time. Shows a share/breakdown when the total is known (e.g. 100%).	Can be difficult to understand and read, especially if the total of the values is constantly changing.
Donut/Pie Graphs	Useful for comparing the percentage of events that have occurred in a particular data set. Simple to understand.	Becomes less effective and more difficult to read with more data points and variables.
KPI Graphs	Simple and easy way to track an OKR or KPI.	Has little to no nuance or complexity to help make decisions.
Tables	Can show multiple variables with specificity. Can be useful in meeting the needs of various audiences. Help to cut across various units of measure.	Not visually appealing and makes consuming information more difficult. Not ideal for making quick decisions and tracking quick progress.