



REPORTING, DASHBOARDS & ANALYTICS

Project Summary & Background

HubSpot Reporting is a central dashboard that combines all of your **marketing and sales** reports into **one** interface. It allows both marketing and sales to see all of the metrics they are accountable for as well as their progress toward those initiatives in one place.

This document is a review of the basic dashboard and details on how this feature will evolve and grow.

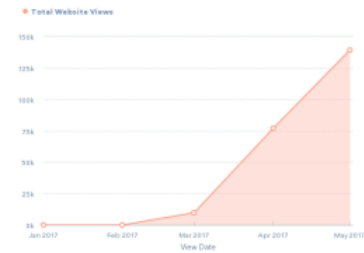
Reviewing the Basics

Hubspot Website Basics Reporting Dashboard
(need to activate Hubspot account and be logged in to view)

Click [this link](#) to view a pdf of the dashboard

Date range: This year so far

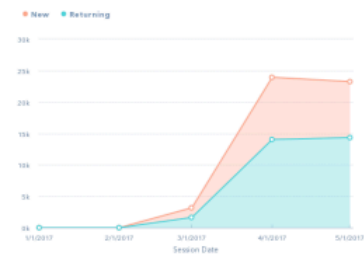
Website Views



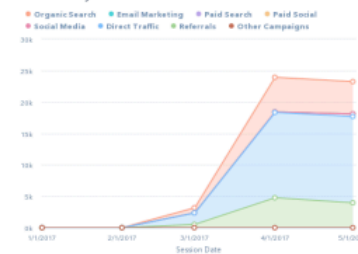
Top Blog Posts

NAME	TOTAL VIEWS
1. How's the Electrical Distributor in...	19
2. How Much is Enough Training?	7
3. Delivering Training That Matters	5
4. How do we get to the INTENT of...	3
5. 5 Tips on Recruiting Through Soc...	3

Sessions



Sessions by Source



Current Situation

Many Metrics-All Lack Cohesiveness in Reporting, Goals and Member Journeys Online & Offline

(Google Analytics, Informz, CRM, IMIS Reports, Event Attendance, Tagging, Ads, etc.)

- Requires many hours to make analytics reports
 - more time is spent in the document creation instead of analyzing data for organizational goals
- Lacks closed-loop reporting
 - offline, online, sales, visits, known email, anonymous user, social, website data per member is not known
- Lacks customized dashboards, goals and insights per team

Closed-loop Reporting-More Than Google Analytics

Reports that show the full lifecycle of a member or lead
(all properties including: website, email, social, button clicks, time spent on page, purchase history, etc.)

HubSpot vs. Google Analytics		
Feature	HubSpot	Google
Traffic Reporting	X	X
View Referring Sites	X	X
Page Views	X	X
Conversion Rates	X	X
Sources	X	X
Lead Behavior	X	
Buyer's Journey	X	
Closed Loop Reporting	X	

Closed-loop Reporting

Reports that show the full lifecycle of a member or lead

(all properties including: website, email, social, button clicks, time spent on page, purchases made, forms completed, sales calls, visits, and much more)

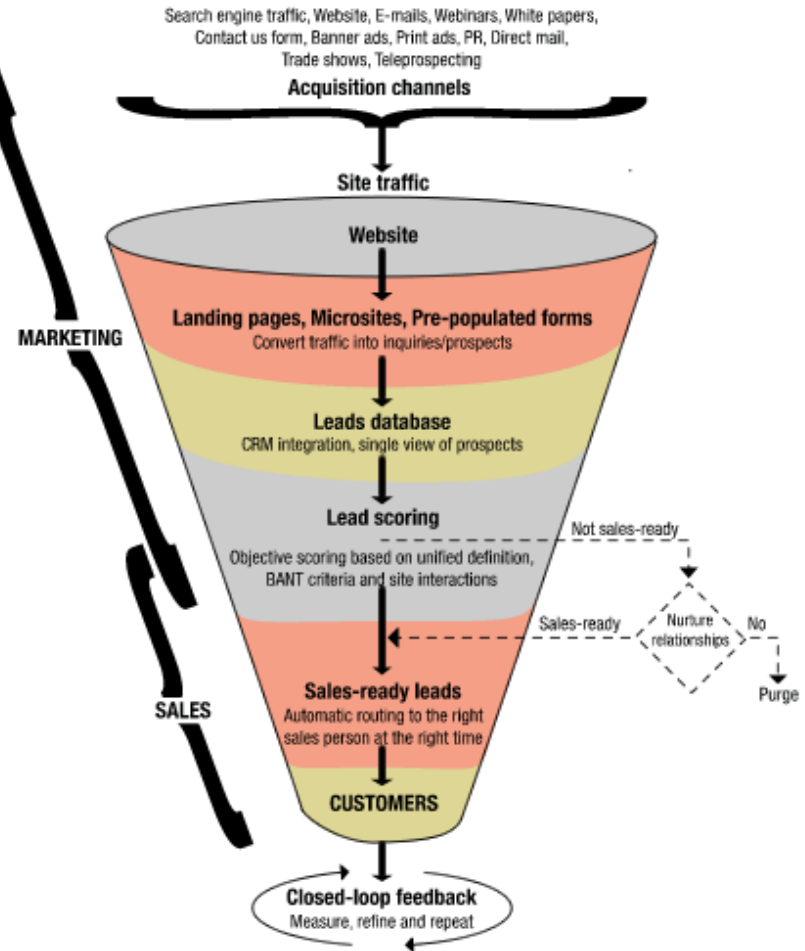
A Closed-loop Analytics Reporting Model: A closed-loop analytics dashboard model is important to review the full lifecycle of a member's activity on our website and to begin to study user behaviors that indicate a purchase-ready member verse a member in an awareness phase researching products or services of membership. A Hubspot dashboard combined with a CRM merges offline contact and online user tracking data to paint a full picture of how a member interacts with NAED both on the website and offline (includes the NAED scorecard metric and key accounts).

The dashboard can begin to see patterns of pages, social posts or forms that users typically interact with before becoming a sales-worthy lead or purchasing a product (online conversion) or making a consulting phone call.

Closed-loop Reporting-Big Picture

NAED is not necessarily using Hubspot reports to primarily generate leads, but rather to nurture relationships, respond to customer needs and have an online presence that delivers member solutions.

Optimized Lead Generation System



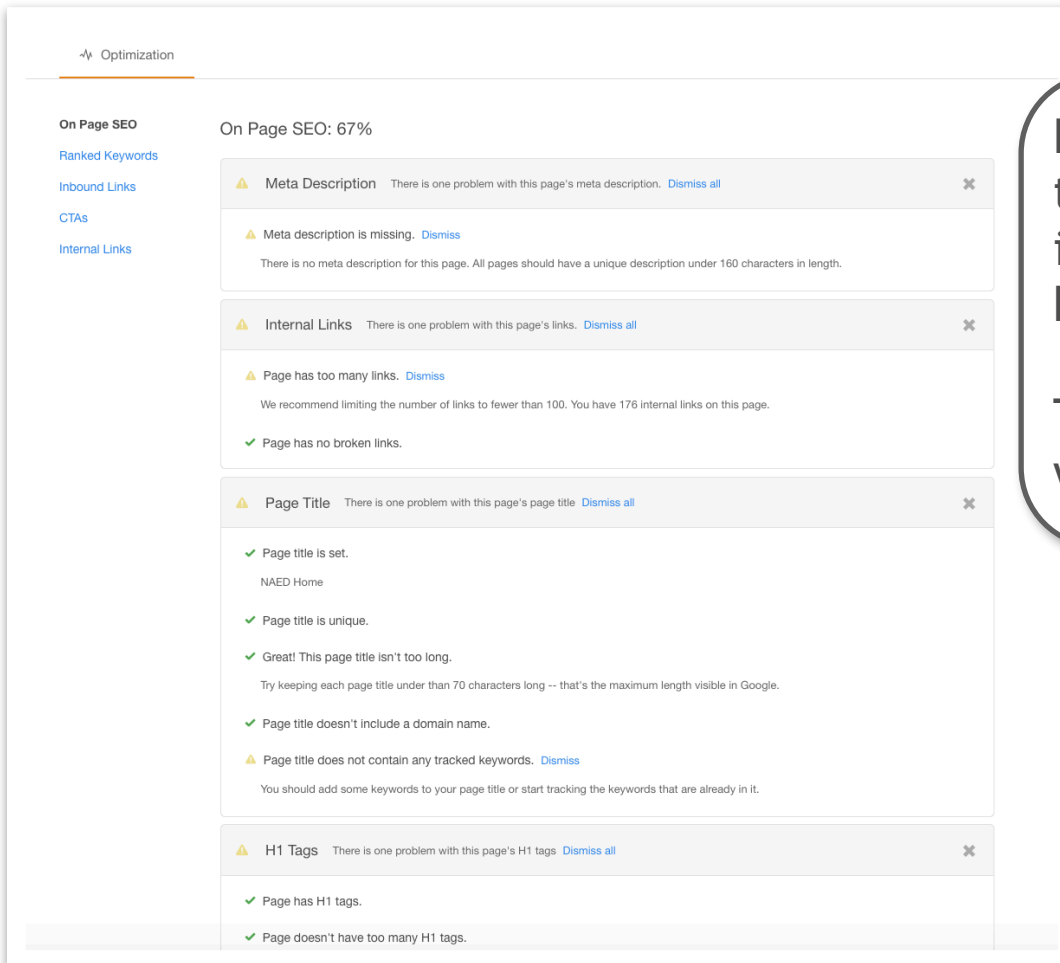
Show Me the DASHBOARD!

The dashboard is ready to be viewed, but it's just the basics...Get excited, but hang tight there's so much work in the background to get the foundation built!

- Moving the current website out of RiSE CMS (Content Management System)
 - This is a large workload that will take a lot of time (3-4 months at least), but SEO efforts will be seen in the basic analytics within a year from integrating
 - *I thought we just upgraded!* We did-but RiSE isn't a CMS platform made to handle inbound marketing easily, especially at this level
 - There's no extra cost to rebuilding our site in Hubspot CMS-just a lot of dedicated hours to get it done right and optimized
- Basic SEO (Search Engine Optimization)
 - All the promises made in [this document](#) will still come true
 - Now that we have Hubspot CMS as an alternate to RiSE CMS, this is the best way to execute it,
by migrating and going through each page and cleaning up the search properties

What Does Cleaning SEO Per Page Mean?

(a lot of tedious, background work that results in higher-ranking pages on Google)



The screenshot shows the HubSpot Optimization dashboard for a page. The overall On Page SEO score is 67%. The dashboard is divided into sections for different SEO factors:

- Meta Description:** There is one problem with this page's meta description. Issues include: "Meta description is missing" and "There is no meta description for this page. All pages should have a unique description under 160 characters in length."
- Internal Links:** There is one problem with this page's links. Issues include: "Page has too many links" (176 internal links, recommended to be fewer than 100) and "Page has no broken links" (checked).
- Page Title:** There is one problem with this page's page title. Issues include: "Page title does not contain any tracked keywords" and "Page title does not include a domain name".
- H1 Tags:** There is one problem with this page's H1 tags. Issues include: "Page has H1 tags" (checked) and "Page doesn't have too many H1 tags" (checked).

Here's an example of the SEO score and issues on JUST our homepage.

There's this much SEO work on every page!

Key Learnings From Basic Report

- These basic website metrics will all increase after the SEO and website foundational work is complete-guaranteed!
- Business goals should not be based on these metrics-the metrics will become execution and tactics for arriving at / supporting desired business goals
- **Organic search** is the recommended priority and key insight
 - Organic search is the dashboard leader in website traffic
 - This means SEO clean-up, foundation, and quality content with targeted keyword strategies
- The dashboard will eventually grow to be the holistic (closed-loop) and only source of reporting data
 - Custom dashboards can be built to report on ANY goal, ANY company, ANY member
 - Custom dashboards can be created for EVERY department director
 - Data, insights and analytics will be shared by all...*at the right time*