

# HOW TO REPORT INBOUND ROI

SHOWCASING THE ONLINE MARKETING  
DATA YOUR CLIENTS CARE ABOUT MOST



HubSpot

A Publication of



## ABOUT THE AUTHORS



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INTRODUCTION

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PROVE INBOUND'S ROI  
BY REPORTING RESULTS



## DICTIONARY DEFINITIONS / INTRODUCTION

The word REPORT is two different parts of a speech: a noun and verb. How you incorporate the best practices around each usage will determine how effectively the impact of your agency's work is communicated to your client teams. Here's more on how Webster breaks it down:

### NOUN

The noun usage refers to a physical document or chart that, in some way, tracks progress against a goal. It's a PowerPoint deck or three ring binder of charts. A page-turning representation of what team efforts have yielded to date.

### VERB

The verb usage refers to the manner in which you update, present or explain progress to a group of people. It's conference room theatre. A performance that adds (or subtracts) credibility from the projects and initiatives you discuss.

But it's a combination of the two – a compendium of results presented in a compelling way – that truly builds momentum. For online marketing agencies, these status meetings and monthly decks are how you quantify your accomplishments and prove progress is being made towards your clients goals.

### NOUN+ VERB



“ Online agencies get hired because of the strategies they create. Not tactics they present. Uncover a client’s goals in the sales process, and through regular reporting, connect your results back to these goals. That’s the secret to retainer selling. ”

*Todd Hockenberry, Top Line Results  
HubSpot Partner Agency*

Fact: the internet is an infinitely measurable place. Analytic packages like HubSpot and Google, tracking URLs, social media insights, CRM integrations and scores of other reporting mechanisms provide real-time readouts of online efforts. This indisputable truth translates into two realities for online marketing agencies:



...>

### **Instant Accountability for Underperformance**

Whether the goal is an uptick in website traffic from SEO changes, or a number of new leads from an eBook offer, numerical results are black and white. Pass or fail. Simple as that.

1

...>

### **Undeniable & Quantifiable Proof of Success**

Percent by which a goal was exceeded can be easily tracked for an online campaign. Doing so will prove the worth of the methods used and bolster the credibility of the agency in charge.

2

# CHAPTER 1

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# MUST HAVE REPORTING MECHANICS



## MOTIVATION / MUST HAVE MECHANICS

Progress meetings with your clients are incredibly important. They are the lifeblood of agency-client communication. They allow client teams to get detailed updates and have discussions around what is working and what is not. These meetings also help agencies build momentum and attain buy-in from key stakeholders. Here are four reasons they should be a priority for your agency:



### A Path to Referrals

Your customers should walk away from your status meetings with a few sound bytes on the impact your work is having on their business. These snippets become the stories they swap at cocktail parties.



### Motivate to Collaborate

You might have folks from the client team helping create content. The participation of these folks needs to be paid off. Showing them the impact of their efforts and how they've helped drive strategic initiatives forward in a public setting will encourage them to do more.



### Path to Upselling

The transparency achieved through frequent reporting will build trust with your client. They will feel in the loop and up to date. Having them well-versed in your efforts will reduce resistance when you advocate for more resources.



### Maintain your Retainer

Assuming your strategies yield strong results, frequent reporting reminds your clients why they hired you. This makes the decision to reach for their checkbook at the end of your 6-month agreement an easier one.





# CLOSED-LOOP MARKETING ANALYTICS / MUST HAVE MECHANICS

Marketing agencies who want to position themselves for long-term retainer deals should have closed-loop marketing anchor their proposals. Closed-loop marketing refers to an integrated system which tracks leads from their initial channel and first conversion all the way to becoming a customer.

Closed-loop marketing allows you to see which channels are most efficient and gives you actionable insight to make smart marketing investments for your clients. If you don't have the pieces in place to enable closed-loop your readouts will be littered with inconclusive theories and wild guesses.



Using closed-loop marketing will allow you to measure all aspects of your clients' online marketing efforts, as well as tie campaign efforts back to the types of productivity clients ultimately care most about: Traffic, Leads and Customers. This will provide you with results that are both compelling and comprehensive.



## CHAPTER 3

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# THE STORY OF YOUR VALUE-ADD



## REPORT ON GOALS / TELLING THE STORY



Data and results: the fruits of your labor quantified. The proof supposedly in the pudding. Numbers will either prove your #winning ways or send you back to the drawing board. But before you start plotting the X & Y-axis for a monthly deck, make sure you're clear on the problem you are trying to solve for a client.

Inbound marketing is the online manifestation of perhaps marketing's oldest positioning principles. Answers to these questions become the bedrock foundation that inbound marketing gets built upon:

*WHO ARE YOU?* ◀.....  
*WHAT DO YOU DO?* ◀.....  
*WHO DO YOU DO IT FOR?* ◀.....

Agencies that manage inbound marketing for a client need to take the answers to these questions and break them down into keywords that define the different pieces of a client's product set or value proposition. They then need to build content, optimize a website and construct targeted marketing campaigns that satisfy the biggest internet business challenges:

.....➤ GET MY WEBSITE FOUND  
.....➤ GET ME LEADS FROM MY WEBSITE  
...➤ GET ME CUSTOMERS FROM MY WEBSITE?



## KILLER COMPONENTS / TELL A STORY

Ask the questions on the previous page, and use inbound to drive results from the answers. When those results come in, how you communicate them will shape your relationship and influence immediate next steps. Make the results you share flow like a story. Here's how you can craft the story of inbound marketing's evolution and return on investment:

1

### Characters You Can Relate To

Make sure you reference the goals identified in the the sales process frequently in your status meetings. Reporting on campaigns, tactics and execution methods will be infinitely more impactful to your client if they clearly understand why what they're seeing matters. It will also make you appear on task and focused on their business.

2

### Have a Compelling Plot

Inbound marketing is a methodology built on a repeatable process. It also has a plot. Drive more traffic to a website, then from that traffic, generate leads with premium content offers. Then from those leads, use followup and targeted emails to turn leads into customers. Make sure your client understands this basic plot, and explain where your different initiatives fit in. An educated client is a happy one.

3

### Told in the Right Language

Is your client a small business owner, or a marketing executive at a larger company? Use language and slides that best match their level of sophistication. Put your graphs, charts and conclusions into insights and recommendations they can understand. Doing so will reduce hesitancy and build trust.



## CONSISTENT METHODS / TELL A STORY

### Determine the Right Time Interval

What period of time are you reporting on? Are you showing overall progress, or charts and graphs specific to a campaign run over the past month? Create a meeting agenda that highlights both, but strive for consistent comparisons by using the same timestamps.

4

### Bucketize Efforts by Service

While you may want to lead off with something the team did in social media, be conscious of where social media fits within their larger strategy. It is used to drive traffic. Group tactics together and show a cohesive set of numbers around each set of services you provide.

5

### Link Progress to Goals

Give everything you present the proper context: your clients goals. Show how specific efforts tie back to goals identified in your sales process. Continually remind them that their pain points are your focus.

6

### Start High Level, Go Granular

Show progress towards key goals first and your thoughts on how the overall effort is progressing. Once a baseline is set, begin diving into specific and tactic-by-tactic data.

7

## CHAPTER 4

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# THE METRICS YOUR CLIENTS MOST CARE ABOUT

## KILLER COMPONENTS / TELL A STORY



Agencies tell the best story when they have the skill sets and capabilities to deliver Inbound Marketing's 4 Core Services. These services are each comprised of several tactical components. But to execute in a way that delivers real value and maximum impact all need to be performed together. Reporting on how all four contribute to online success will create a powerful picture of your agency's coordinated marketing efforts.

⋮

The first core service of inbound marketing is the ability to generate traffic to a website. Second, agencies should be able to tell clients they can develop premium content and capitalize on that traffic by offering lead generation services. Third, agencies need to be able to construct targeted follow-up campaigns at those leads intended to convert online leads to sales. Lastly, analysis and measurement needs to be a core competency of any online agency. Being able to dig into the results of all the numerous online efforts the above three encapsulate is critical. Doing so will allow agencies to repeat successes, and fine-tune underachieving campaigns to get better results.

⋮

Your clients and prospects need traffic, leads and customers. We know what service packages need to be offered in order to deliver the results they want. Now let's dig into what strategic questions your monthly decks should contain answers to so you can provide both high-level and granular detail around your efforts.

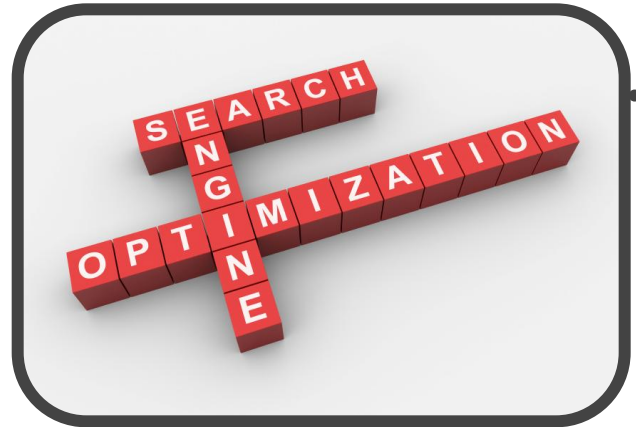
⋮





# SEARCH ENGINE OPTIMIZATION

/ GET ME FOUND



## SHOW THESE to Set a Baseline:

- Pages that got optimized
- Keywords specifically targeted
- Traffic from previous months for comparison

## ANSWER These Questions:

### High-Level Findings

- How much did traffic increase or decrease as a result of the SEO changes/improvements?
- What were the main drivers?  
(Show relevant campaigns and efforts)
- How did this affect leads and customers?  
(if applicable)

### More Granular Data

- How much did organic traffic increase?
- Which keywords performed the best?
- Which keywords are still lagging?
- Have our rankings improved?
- Did key pages improve?
- Did our Cost-Per-Click increase or decrease?

HubSpot's Keywords app can help you track and benchmark key SEO data.

Keyword	Searches	Difficulty	Visits	Leads	CPC	Rank
<input type="checkbox"/> marketing software	4,400	68	131	3	\$7.12	2
<input type="checkbox"/> marketing tools	6,600	90	124	7	\$2.41	5
<input type="checkbox"/> marketing resources	1,000	79	106	4	\$1.83	1
<input type="checkbox"/> marketing videos	1,000	72	102	2	\$2.72	1
<input type="checkbox"/> marketing automation	4,400	90	95	2	\$6.27	5
<input type="checkbox"/> marketing analytics	2,400	87	88	2	\$3.55	3
<input type="checkbox"/> marketing webinars	320	72	88	11	\$1.82	1





# BLOGGING & CONTENT CREATION

## / GET ME FOUND



### SHOW THESE to Set a Baseline:

- Examples of blogs written
- Keywords specifically targeted
- Performance of blog in previous months

### ANSWER These Questions:

#### High Level Findings

- Has traffic to the blog helped over all site traffic?
- What leads have come from links and call to actions on the blog?

#### More Granular Data

- How many blog articles got posted?
- Which were the month's top posts?
- Which topics performed best?
- Which formats performed the best?
- Which authors performed the best?
- Notable/number of inbound links?
- Any comments worth highlighting?

HubSpot offers a blogging platform and in-depth blogging analytics.

Introducing Social Media Publishing by HubSpot <a href="#">🔗</a>	2 weeks ago	Meghan Keaney Anderson	2	0	229
Calling all Boston Developers! Announcing HubSpot Hackathon2 Thursday 2/16 <a href="#">🔗</a>	3 weeks ago	Adrian Mott	2	0	161
Are You Ready to "Go Mobile"? New Marketing Book Shows You How! <a href="#">🔗</a>	1 month ago	Jeanne Hopkins	1	1	322
HubSpot Marketing Automation Ranked Best in Overall Value by Gleanster Research <a href="#">🔗</a>	1 month ago	Meghan Keaney Anderson	0	0	298
New HubSpot App Ties Adwords Campaigns to the Bottom Line <a href="#">🔗</a>	2 months ago	Meghan Keaney Anderson	2	0	396
Five Pearls of Marketing Wisdom <a href="#">🔗</a>	2 months ago	Jeanne Hopkins	10	0	2,159
HubSpot Helps UK Startup Marketers: Lesson - Keywords RULE! <a href="#">🔗</a>	2 months ago	Kirsten Knipp	0	0	133



# SOCIAL MEDIA PUBLISHING / GET ME FOUND



## SHOW THESE to Set a Baseline:

- People who participated
- Platforms used
- Reach and other pertinent social numbers from previous months

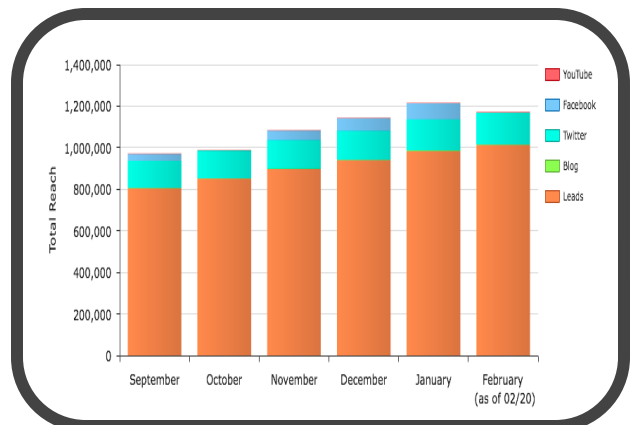
## ANSWER These Questions

### High Level Findings

- How did social media contribute to overall traffic?
- How did social media contribute to overall leads?
- How did our social media reach grow or shrink?

### More Granular Data

- How active were we on Twitter? (@replies, retweets, new followers?)
- How active were we on Facebook (likes, comments, fans)
- How active were we on LinkedIn? (company followers, posts, etc.)
- How active were we on Google+ (company followers, posts, likes)



HubSpot's social media tool publishes, tracks interactions and measures reach.



# LANDING PAGE PERFORMANCE

## / GET ME LEADS



### SHOW THESE to Set a Baseline:

- Premium content created
- Landing pages created
- Premium content and landing page results from last month

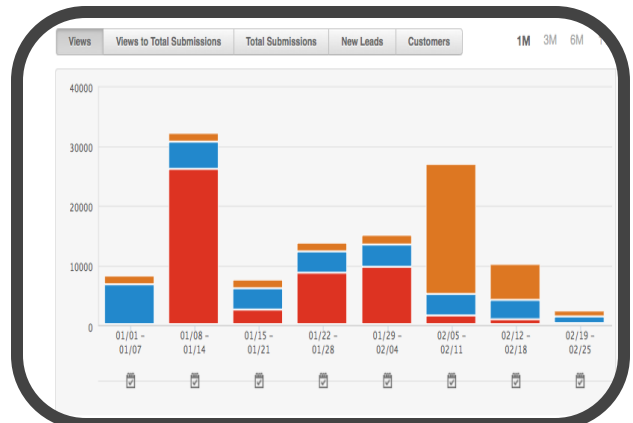
### ANSWER These Questions

#### High level Findings

- What premium content offers did we develop?
- How productive were those offers in terms of leads?
- How and where were these offers promoted?

#### More Granular Data

- Landing page conversion rate?
  - Visits to landing pages?
  - What A/B tests did we run?
- Outcomes?
- Secondary CTAs on landing pages?
  - Secondary CTAs on thank you pages?



Marketers can create, publish, optimize and measure landing pages from within HubSpot.



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# TARGETED EMAIL CAMPAIGNS

## / GET ME LEADS



### SHOW THESE to Set a Baseline:

- Premium content promoted
- Landing pages supporting sends
- Audiences targeted
- Previous month's email performance

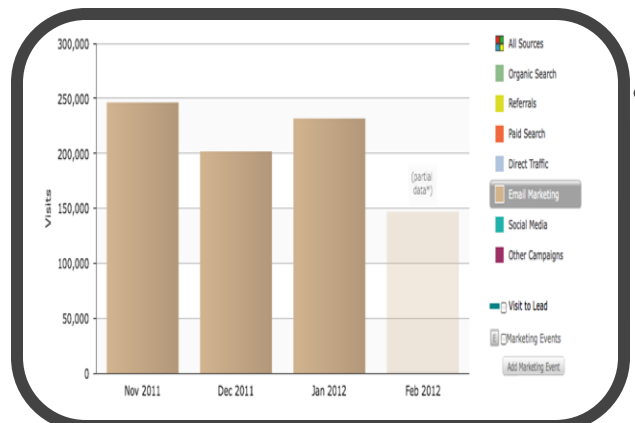
### ANSWER These Questions:

#### High level Findings

- What was promoted using email this month
- How did email contribute to traffic and leads?
- How many emails were sent and to which lists?

#### More Granular Data

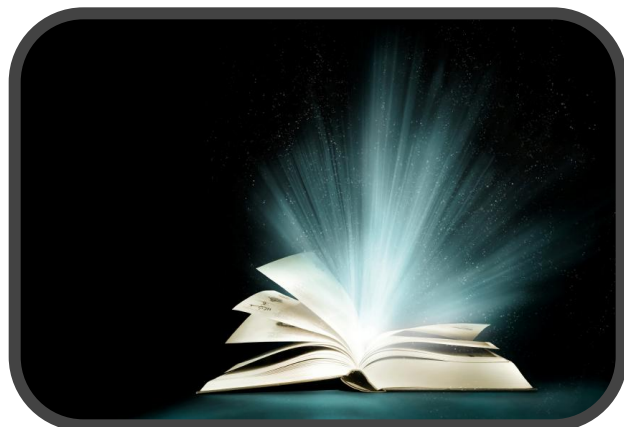
- Performance of each send?
- Click through rate?
- Unsubscribe numbers?
- Subject line testing?
- List segmentation experiments?
- Any other testing worth noting?



Marketers can create, send and analyze email effectiveness in HubSpot.



# LEAD NURTURING PERFORMANCE / GET ME CUSTOMERS



## SHOW THESE to Set a Baseline:

- Themes of lead nurturing campaigns
- Premium content serving as trigger for lead nurturing campaigns
- Landing pages and secondary offers integral to campaigns

## ANSWER These Questions:

### High Level Findings

- What lead nurturing campaigns were active this month?
- How many lead reconverts did lead nurturing drive?

### More Granular Data

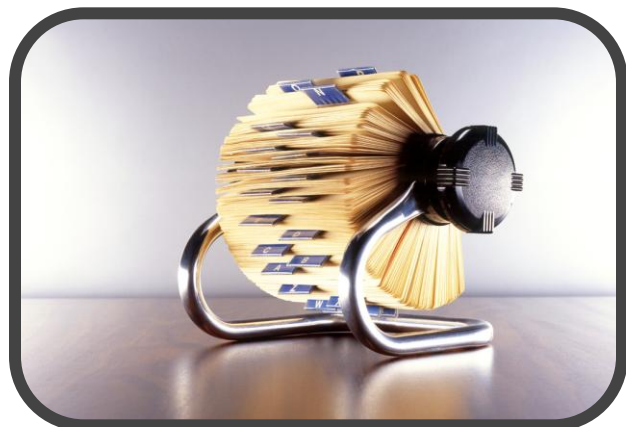
- How did LN drive the average lead score up?
- Click through for each LN email?
- Unsubscribes per LN campaign?
- Which other offers were used in LN?
- What tests were done?
- How were existing LN campaigns modified to improve performance?

Campaign: VAR Program			
<a href="#">Hide emails</a>   <a href="#">Create new email</a>   <a href="#">Settings</a>   <a href="#">Reports</a>   <a href="#">Duplicate</a>   <a href="#">Send test emails</a>			
STATUS	SUBJECT LINE	TIMING	
On (Turn off)	<b>Selling Tools for Marketing Agencies</b> Unique clicks: 16.62% ... <a href="#">more</a>	Day 1	<a href="#">Edit email</a> <a href="#">Preview</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
On (Turn off)	<b>Educational Resources for Marketing Agencies</b> Unique clicks: 7.87% ... <a href="#">more</a>	Day 3	<a href="#">Edit email</a> <a href="#">Preview</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
On (Turn off)	<b>How 3 Marketing Agencies Grew Their Business</b> Unique clicks: 10.3% ... <a href="#">more</a>	Day 5	<a href="#">Edit email</a> <a href="#">Preview</a> <a href="#">Duplicate</a> <a href="#">Delete</a>

Lead nurturing campaigns can be built, managed and measured within HubSpot.



# OVERALL WEBSITE CUSTOMER ACQUISITION / GET ME CUSTOMERS



## SHOW THESE to Set a Baseline:

- Best performing content
- Most effective customer segment
- Most impactful keywords & content

## ANSWER These Questions:

### High Level Findings

- How many customers did inbound marketing drive over the agreed upon time interval?
- What campaigns or sources were the most impactful in this lead to customer conversion?
- Which persona segments were the most responsive to our content?

### More Granular Data

- Customers originating from organic traffic?
- Customers originating from the blog?
- Customers originating from social media?
- Lead nurturing campaigns most effective?
- Targeted email sends most responsible?

## CHAPTER 5

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# GAMEPLAN FOR A SUCCESSFUL MEETING



## PRESENTING ROI / MEETING SUCCESS

Marketing agencies shouldn't lose focus on those in-person essentials just because their charts look good. As referenced in earlier chapters, the agenda you set for your update meetings, and how you work through that agenda will greatly influence the impact your reports have. You've got the numbers, you've got the story, now make the meeting count.

1

### Have a Clear Agenda

Put together an agenda for your meeting ahead of time. Consider how you split time between showing results, making recommendations and brainstorming next steps. Send this along to your client ahead of time to see if there is anything he or she wants to add.

2

### Make Them Frequent

Choose a time that works best for your client, and try to make it a recurring event. Make sure it gets on the calendars of all key stakeholders and team members. Also, see if it makes sense to piggyback your meeting with any key internal meetings.





3

### Materials

Once you've finalized your deck for the meeting, send it along to your client. Allowing them time to digest the data ahead of time will create better questions and discussion, and save you time in the long run.

4

### Crowd Control

Give thought to the agenda of your meeting, and coach folks at the beginning to adhere to a format you set. Ask people to take notes and save questions until the end. This will allow you to run through your findings and hypothesis without interruption.

5

### Outputs

Save time on your agenda for a SO WHAT conversation. Use your conclusions and recommendations as the meat of the conversation, but engage your client team around what they think is working and what is not working. Further clarify goals and create new ones. Take diligent notes and use these inputs in future campaign creation.

6

### Debrief

Know who your champion is on the client team and be sure to loop in with them briefly following your meeting. How were things perceived from where they were sitting? Use their perspective to gauge the team's temperature and adjust accordingly.

CONCLUSION

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PITCH STRATEGY+REPORT  
RESULTS, SOFTWARE HELPS

## PITCH+REPORT STRATEGY/ CONCLUSION



Online marketing tactics like social media and blogging have a shelf-life for agencies. They are one-dimensional efforts that never quite get tied back to Big Picture results in a meaningful way. Did the blog convert the amount of leads sales needed this month? Was the customer count from social media up or down? You'll be clueless unless you know the lead and customer numbers. If you don't know those numbers, you won't know if what you're doing needs tweaking. You cannot quantify your direct impact unless you can tie it back to the end result.

Be a strategic marketing partner to your clients, not a one-off vendor. Propose a strategy that includes all aspects of online marketing. Develop services offerings that align with the Four Core Services outlined earlier in this eBook, and report back to your clients in a way that shows the connectedness of inbound.

Communicating the ROI you are delivering in a meaningful way will build trust between your delivery team and the end clients. Don't just send off a PowerPoint deck at the end of the month with thin, textbox commentary. Schedule time with them. Show them what has been achieved. Show them the roadmap of where you're going, or the blueprint behind the master plan. Get them excited. Doing so will earn you a long-term client relationship.





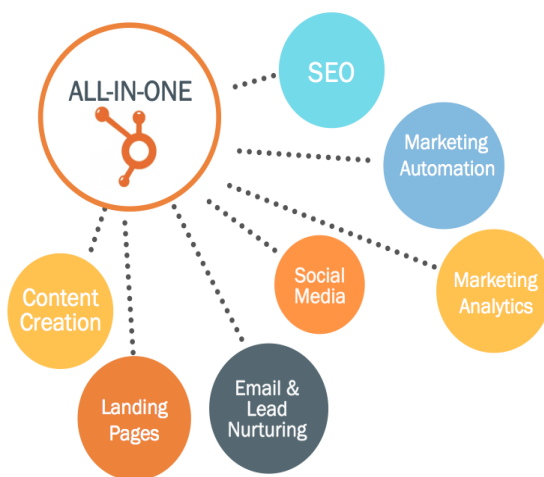
## SOFTWARE CAN HELP / CONCLUSION



Inbound marketing's best practices are built into HubSpot. HubSpot is a software platform that helps you create, publish, and promote your content as well as measure and analyze the traffic, leads and customers it helps convert.

HubSpot simplifies your marketing by pulling everything together you need to grow your business. Tangential to the Four Core services of inbound marketing, online marketing agencies can:

1. Use HubSpot's content management system (CMS), blogging, search engine optimization (SEO), and social media tools to generate more traffic and leads from your website.
2. Use HubSpot's landing pages, call-to-action module and testing functionality to drive better website lead generation.
3. Use HubSpot's segmentation, lead nurturing, and email marketing tools to get your web leads more sales-ready.
4. Use HubSpot's analysis tools to determine which marketing campaigns are generating leads, to qualify leads by sale-readiness, and to tailor content for greater impact.



[Request a Guided Agency Tour of HubSpot's All-in-One Marketing Software](#)

# MORE RESOURCES

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## MORE RESOURCES / HUBSPOT

Our Channel Account Managers help hundreds of online services agencies understand how the Four Core service offerings of inbound marketing can help them earn more retainer clients and grow their business.

[Request a Strategic Consultation](#) to Learn How Inbound can Help your Agency Grow.

Get a guided tour of our all-in-one marketing software, and learn how HubSpot can help you deliver and report jaw-dropping inbound marketing results to your clients.

[Request a Guided Agency Tour](#) of HubSpot's All-in-One Marketing Software.

