BUILDING THE SALES & MARKETING KPI DASHBOARD IN HUBSPOT

A Marketing Operations Case Study - turning executive reporting requirements into a live, self-updating dashboard

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PROJECT OVERVIEW

TruBlue's CEO needed consistent, board-ready visibility into sales and marketing performance - without relying on manual reports. I took his KPI requirements and translated them into a live HubSpot dashboard that aligns each metric across Annual, Weekly, and Monthly views, plus a dedicated Pre-Sales view.

THE PROCESS AT A GLANCE

1. **Gather CEO requirements** >
2. **Map & build for every cadence** >
3. **Build each KPI report** >
4. **Assemble the dashboard** >
5. **Deliver to leadership**

Tools used: HubSpot Custom Report Builder - HubSpot Dashboards - Deal/Contact Properties

THE REQUIREMENTS, FROM THE CEO

These are the exact KPI categories and cadences defined by TruBlue's CEO for board-level reporting.

S&M KPIs - Weekly

Pro and Adventure

- # of leads generated
- % leads converted
- $$ of new pipeline additions
- Closed Won %
- Forecast update

S&M KPIs - Monthly

Pro and Adventure

- Same 5 KPIs, monthly cadence
- Forecast by region: NDB, RR, Direct Deals
- Top 20 distributors
- All other distributors
- Pro all up

Pre-Sales KPIs - Weekly

Pro (year one)

- # of total direct targets
- % of targets being worked
- % of targets moved to leads
- # of target channel partners
- % of partners being worked
- % converted to partner

BUILDING THE REPORTING FOUNDATION

Before building out each KPI, I mapped every metric to HubSpot data and set up the dashboard structure to support Annual, Weekly, and Monthly comparison side by side.

1

Map to HubSpot

Each KPI was mapped to a specific object, property, and report type - contact/deal properties for lead and pipeline metrics, deal stage and close data for Closed Won %, and custom properties for forecast targets.

2

Build for Every Cadence

Each report was built three times - Annual, Weekly, and Monthly - using the same underlying definition, so the numbers are directly comparable across time frames.

3

Assemble the Dashboard

All three cadences for every KPI live together on one dashboard, giving leadership an apples-to-apples view of current pace versus plan.

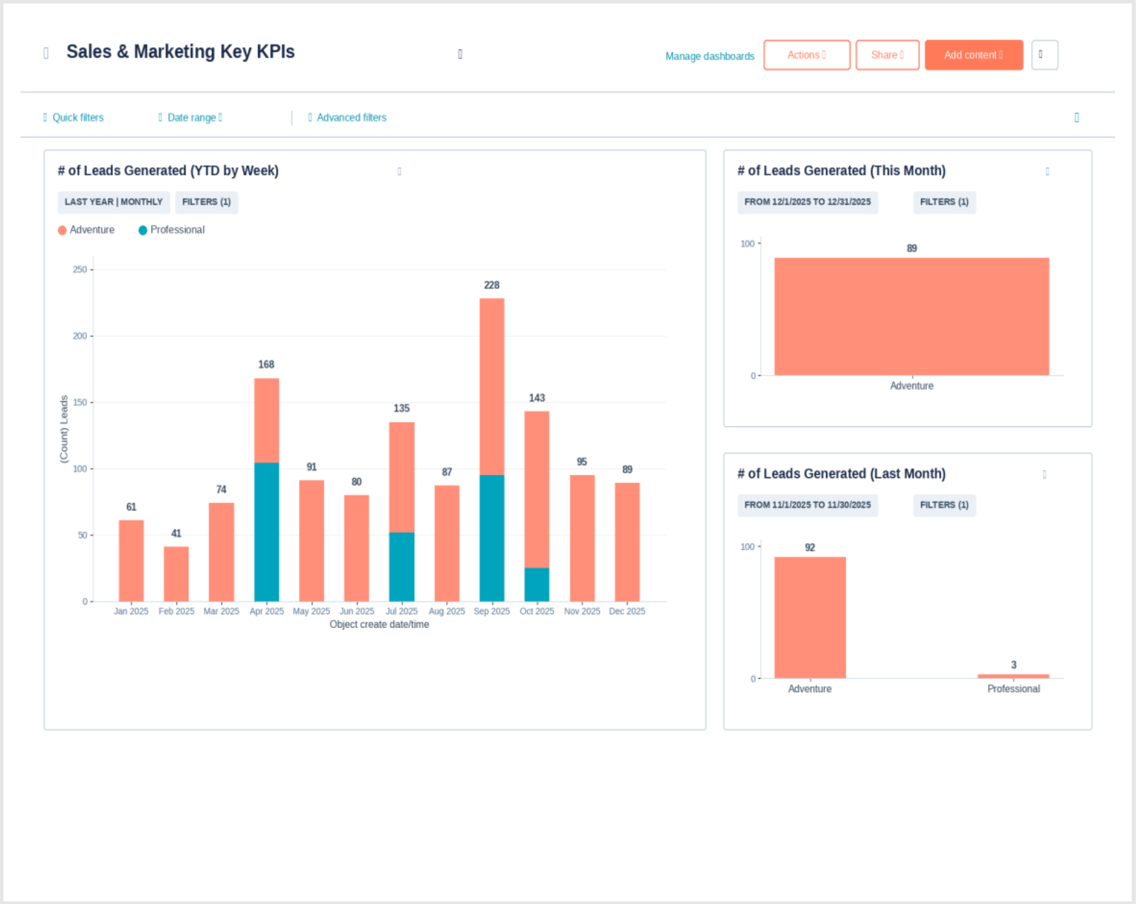
TruBlue TECHNOLOGIES

KPI 1

KPI 1: # of Leads Generated

- All marketing leads and form fills - the core indicator of the quantity and quality of marketing activity.

- Built as three aligned reports - Annual, Weekly, and Monthly - so leadership can compare current pace against the year at a glance.



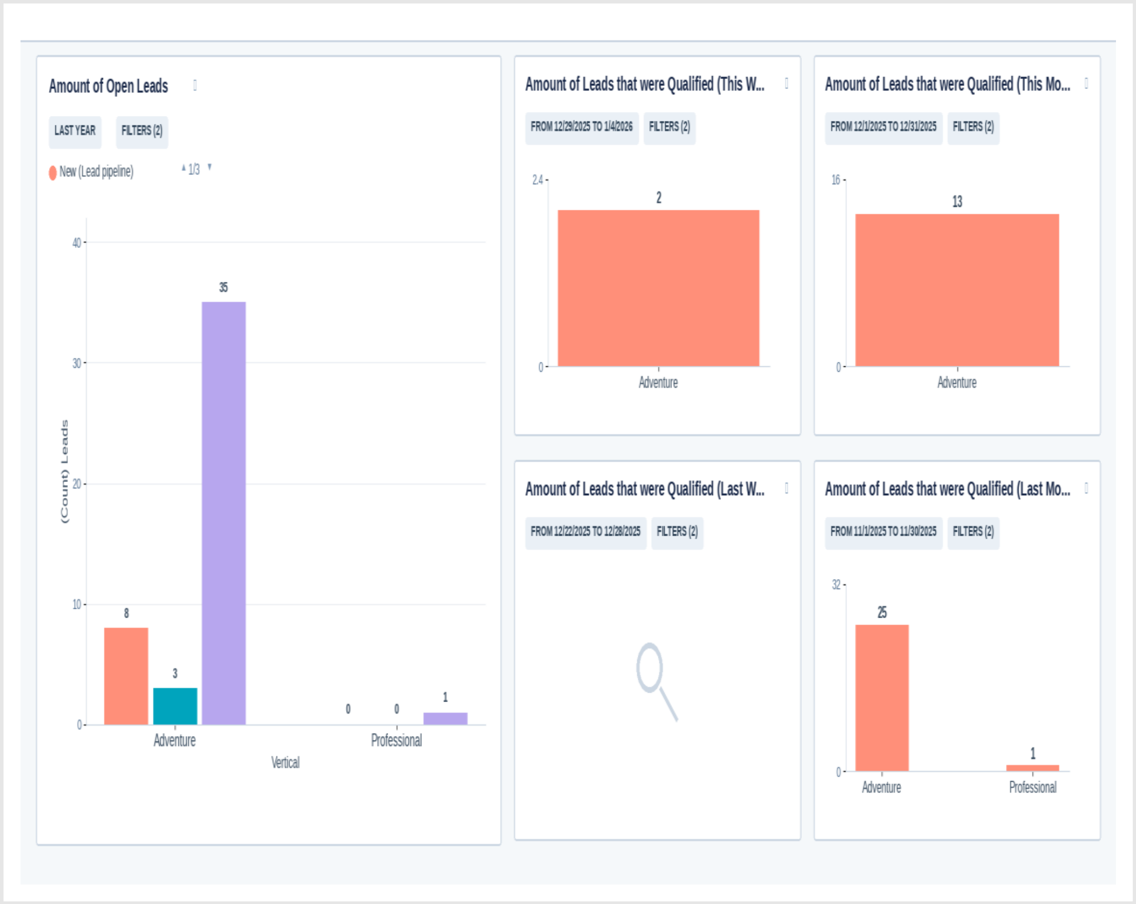
Live dashboard: YTD by Week (Annual), This Month, and Last Month views for # of Leads Generated. Static dates used for portfolio use only.

KPI 2

KPI 2: % Leads Converted

- Calculated as converted leads divided by total open leads - an indicator of lead quality and the quality of sales follow-up activity.

- Shown across the same three cadences, so a dip in any single week or month is immediately visible against the annual trend.



Live dashboard: Amount of Open Leads by Vertical, plus Leads Qualified for This Week, This Month, and Last Month. Static dates used for portfolio use only.

KPI 3

KPI 3: $$ of New Pipeline Additions

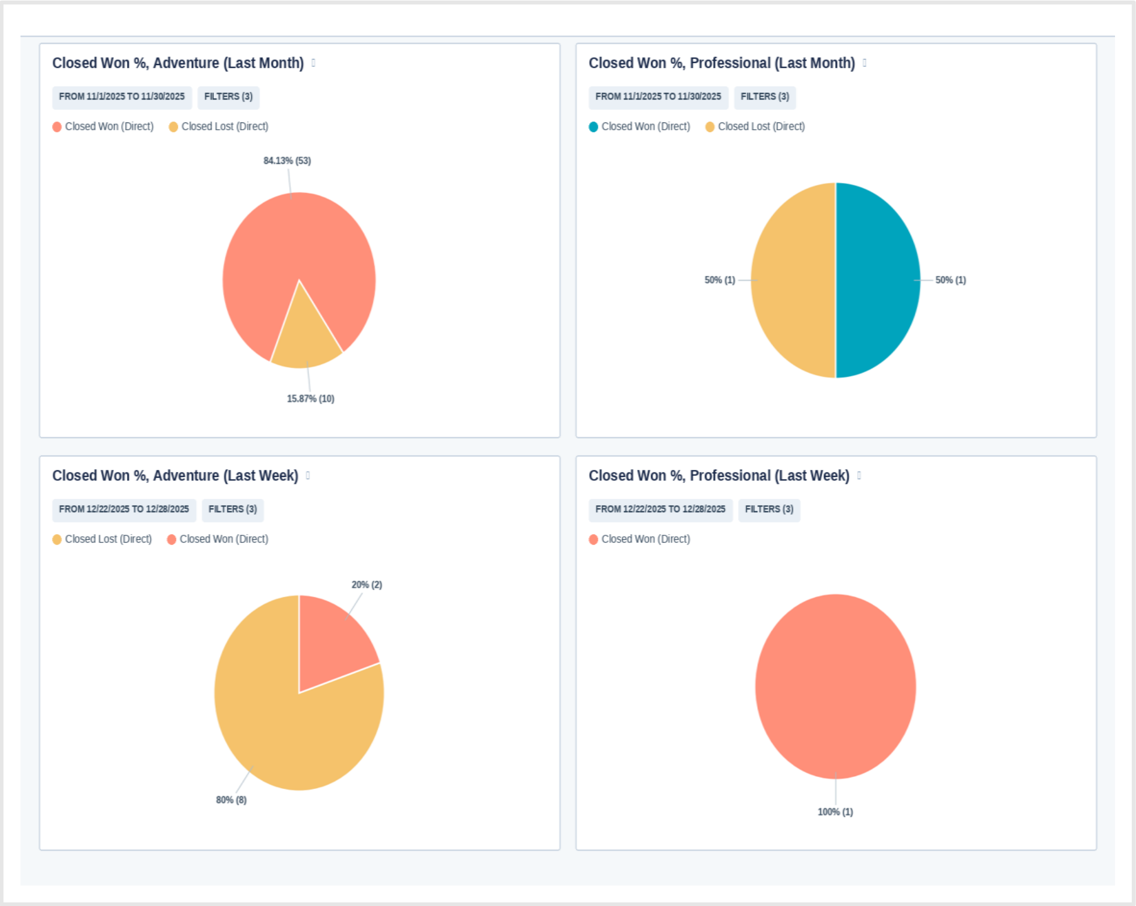
- Total dollars added to pipeline - the indicator of whether marketing and sales activity is generating enough $$ to support the targets.
- The Annual / Weekly / Monthly layout makes it easy to see whether a given week is tracking ahead of or behind the pace needed for the year.

Live dashboard: $$ of New Direct Pipeline Additions - YTD by Week, This Month, and Last Month, by Vertical. Static dates used for portfolio use only.

KPI 4

KPI 4: Closed Won %

- Closed won deals divided by total closed - the indicator of whether the team is driving enough $$ to hit the period's target.
- Comparing weekly and monthly close rates against the annual number quickly surfaces whether a slow week is a blip or a trend.



Live dashboard: Closed Won % by Vertical (Adventure, Professional) for Last Month and Last Week. Static dates used for portfolio use only.

KPI 5

KPI 5: Forecast Update

- Remaining deals in the pipeline for the period, weighted against open deal value - the indicator of whether there's enough in the pipeline to hit target.

- The monthly view adds a breakdown by region and distributor, while the Annual/Weekly/Monthly layout keeps the roll-up consistent at every level.

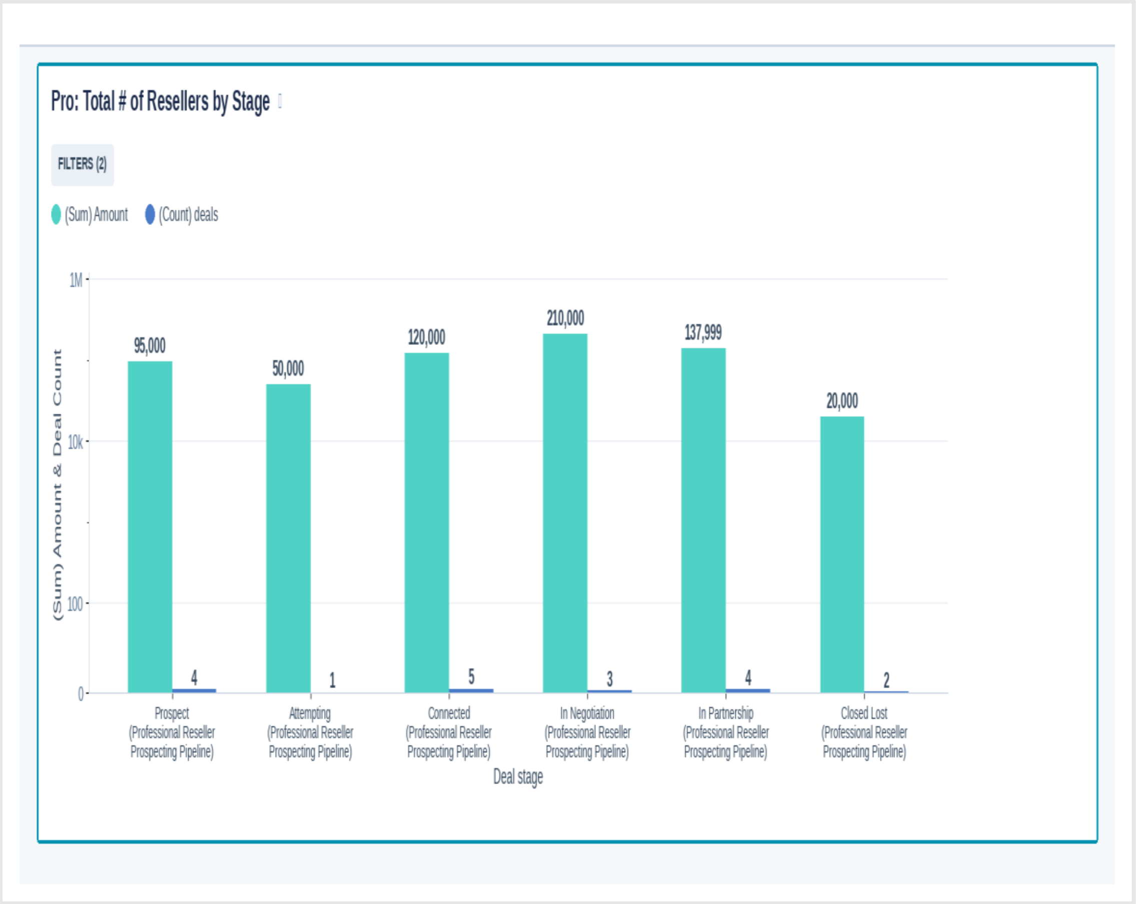
Live dashboard: Direct Pipeline Update by deal stage weighted amount, Adventure and Professional (Monthly). Static dates used for portfolio use only.

PRE-SALES

Pre-Sales Dashboard

PROFESSIONAL VERTICAL ONLY

- A dedicated weekly pre-sales dashboard for Pro tracks total direct targets, % of targets being worked, % of targets moved to leads, target channel partners, % of partners being worked, and % converted to partner.
- This gives leadership early visibility into the top of the pre-sales funnel, ahead of the KPIs on the main dashboard.



Professional vertical only: reseller prospecting pipeline by deal stage (Sum Amount and Deal Count). Static dates used for portfolio use only.

RESULTS & IMPACT

Leadership now gets a consistent, self-updating view of the metrics that matter most - no manual pulls, no version drift.

Board-ready reporting

Weekly and monthly KPIs are always current, with zero manual spreadsheet work.

Consistent definitions

Every metric is built exactly to the CEO's original definition - no ambiguity in how numbers are calculated.

Apples-to-apples trends

Annual, Weekly, and Monthly views sit side by side for every KPI, making pace-vs-plan instantly visible.

Scalable framework

New KPIs or business lines can be added to the same dashboard structure as TruBlue grows.