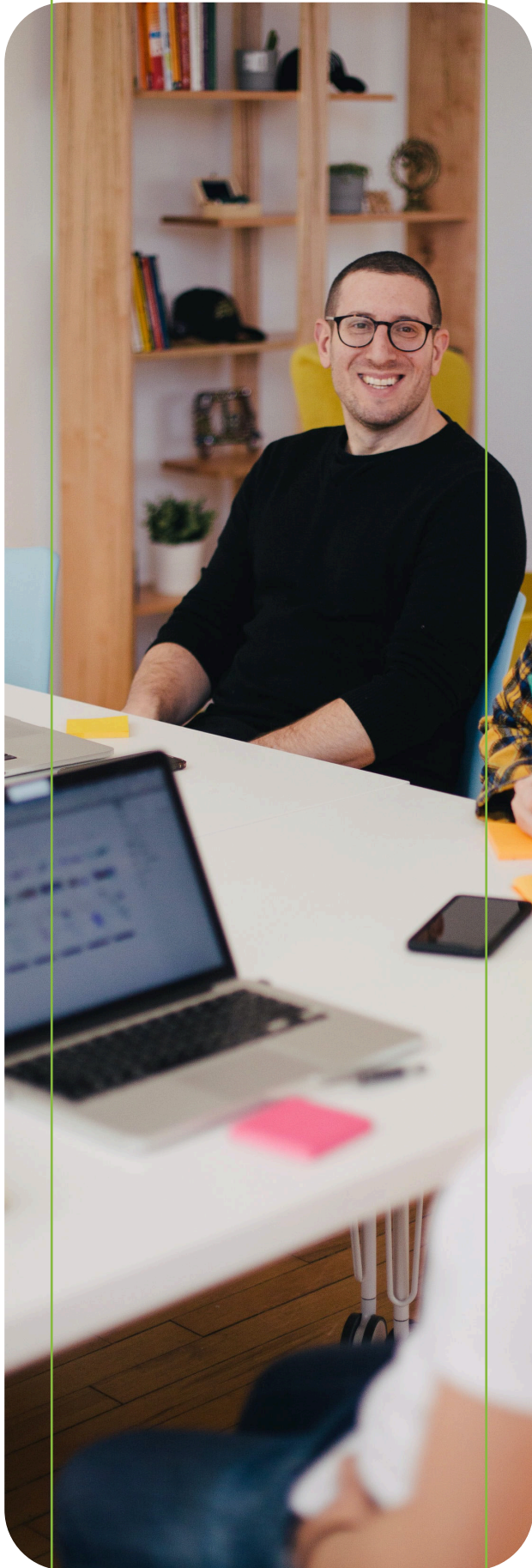


Nonprofit Guide to Revenue Reporting & Forecasting with HubSpot

Uncover the insights your organization might be missing with HubSpot's high-powered tools for revenue attribution, reporting, and forecasting.



When Every Dollar Counts, Attribution is Everything.

Each world- and life-changing action of your organization is fueled by the generosity of your donors. Without insights about what gets them to give, your small team will be struggling against the tide of over-marketing and under-targeting, expending valuable resources on intuition rather than real data-driven strategy.

Powered by comprehensive tracking tools in the Marketing and Sales Hubs, the revenue reporting and forecasting features of HubSpot enable your nonprofit to approach your planning with unprecedented clarity.

The Problems HubSpot Solves

We see nonprofits taking guesses all the time because their analytics are failing to inform solid strategy. They come to us reporting common problems that, with HubSpot's help, are easy to solve:

“Our donor data is spread out across multiple tools.” HubSpot allows you to centralize your donor data into a single source of truth. Information from every marketing and payment processing channel can be integrated into HubSpot and managed in one place.

“We don't know where donations are coming from.” With HubSpot's analytics, you can get down to the minutiae of where your donation-driving efforts are seeing the most success. Find out if your contributors are more likely to engage on desktop or mobile, if email marketing is more effective than social media, and so on.

“The typical donor's path to giving is unclear to us.” You're not alone. The donor journey is long, and varied, but HubSpot's multi-touch attribution tracks every step of the process so you can see patterns in contributor behavior and build a better strategy accordingly.

“There's not enough visibility into how our campaigns are going.” Your HubSpot dashboard and custom reports can instantly inform you about donor demographics, goal progress, attribution, and more. You can even compare your current performance to historical data to put your progress in context.

Sound familiar? It may be time to tap into the illuminating all-in-one analytics of HubSpot.



Building the Ultimate Revenue Reporting & Forecasting Toolkit

HubSpot has all the tools you need to skim the surface or dive deep into your donation data. Depending on your goals, budget, and overall strategy, the right build for you may be a combination of free HubSpot access, Starter-level services, or Professional and Enterprise solutions.

Top Tool Recommendations

These are the features you will need to maximize the revenue reporting and forecasting capabilities in HubSpot.

Feature	Hub	Level
Reporting Dashboard	All but Ops Hub	Any
Custom Report Builder	Any	Professional
Contact Create Revenue Attribution	Marketing	Professional
Multi-Touch Revenue Attribution	Marketing	Enterprise
Revenue Forecasting	Sales	Professional

For attribution, you have options. Think critically about the kinds of campaigns you're running.

Typically, multi-channel digital marketing campaigns benefit from a multi-touch attribution view so you can see every piece of your pipeline that a patron interacted with before making their decision to donate. They may have started on social media, read a few blogs on your website, interacted with your ads, then an email campaign finally convinced them to give. With first- and last-touch attribution, you would be able to see the social post that started it all or the email that sealed the deal, but not every interaction in between.

Pro Tip: There's a Tipping Point for Pricing in Marketing Hub Pro

Can't decide between the Professional and Enterprise levels for your Marketing Hub build? Consider the number of contacts you'll be marketing to. Your per-contact cost is actually going to be higher in the Professional tier than it would be in Enterprise. While the base price for Enterprise is higher, your marketing contact cost on Pro will ultimately equalize as you ramp up your audience. So, if you're marketing to the masses, it may make sense to level up.

Keep in mind, though, that you're charged by how many contacts you are actively marketing to, not how many contacts you could be marketing to. Do the math to see what makes sense for your situation and select a hub level that fits - you can always upgrade later! With HubSpot multi-touch attribution reporting, you can see it all.

Visualizing Success with Reports

Building custom reports is one of the easiest things you can do with your data in HubSpot, and with so much flexibility, your entire team will be in the know all the time. Here's how to use them:

Integrate & Assess

Even if you haven't gone all-in on HubSpot yet (but really, what are you waiting for?), you can rope in data from your other apps to streamline your analysis. Sending emails from another platform? We can still pull in open rate and click-through data for our reports. Setting up your ads in their native platforms? Good, keep doing that (it's the best way to do it) and we'll still be able to analyze the data in HubSpot anyway.

Bring Your Best:



Segment & Filter

Create cross-object reports that zero in on what matters most to you in a given moment. Pull in standard and custom objects - information like donor demographics or location, event attendance, interests, etc. - to present cross-sections of your audience.

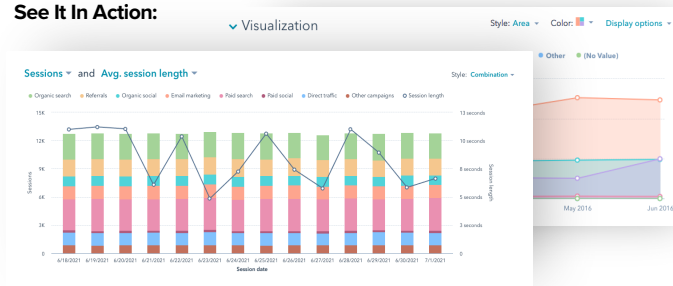
Apply It Now:

Create a report that starts with all of your donations. Then get granular about who is giving by layering in their engagement data. Are your top donors regularly reading your emails or not? Do repeat donors interact in more places than single-gift givers?

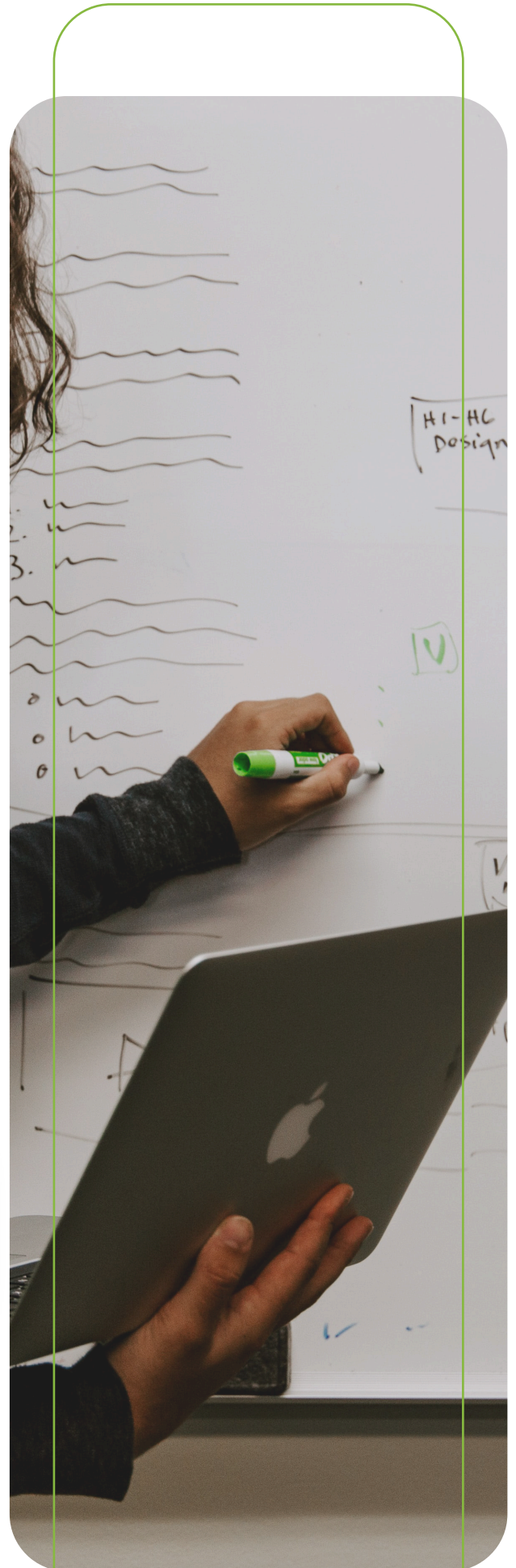
Customize & Create

Not only is it easy to surface the data you're looking for, but it's also a breeze to understand it clearly. HubSpot will make suggestions about how to visually organize your reports based on the data you plan to display, simplifying presentations and data communication.

See It In Action:



Need help creating custom report templates that communicate your most critical data? Ask your [HubSpot onboarding partner](#) for a tutorial on how to take your reports to the next level fast.



3 Steps to Preparing & Applying Projections

Getting ahead of when and how donations will come to you is a critical step in achieving sustainability and stability as an NPO. Here's how HubSpot helps you knock it out of the park:

1. Brining in all of your data

Reporting, analytics, and forecasting all count on one key piece: your data. Step one in hacking your nonprofit marketing process is making sure all your data is going to one expertly crafted dashboard. There are hundreds of native integrations and webhooks that can connect your different systems to HubSpot.

If there isn't a way, there's a workaround. Even for tricky or obscure platforms, we can come up with a way to bring your data together. It may take some creativity or a few manual elements, but unifying all your information under one roof is worth it.

2. Picking out the patterns

Before we can predict the future, we need to see what's worked before. Regularly assessing your donor behaviors will give you a roadmap for future revenue - if you know where to look and how to approach what you find.

Your contributors are giving you clues. Regularly assessing your donor's behaviors will give you a roadmap for future revenue, if you know where to look and how to approach what you find. Based on what's already occurring, HubSpot can help you forecast for what comes next.

3. Creating campaigns that convert

You have everything you need to build highly personalized campaigns customized to your contributors: in-depth data, revenue attribution, donation habits, and more. Now you can use HubSpot to automatically condition your contacts for more giving!

We Know All the Tricks for Tracking & Planning with Projections

To make HubSpot work for you exactly how you need it to, it's always better to have some help on your side. We regularly migrate nonprofits into HubSpot from other tools or optimize the use of HubSpot for nonprofits already using the tool.

Solve your dynamic set of variables with the help of experts who have:

- Custom-designed report templates and data dashboards
 - Personalized HubSpot build outs
- Implemented strategic revenue tracking improvements
- Built super-segmented and automated nonprofit email campaigns to boost donor contributions

Pair up with a Diamond Partner and start doing more good in HubSpot.

Onboarding ★ **Ongoing Management** ★ **Implementation** ★ **CMS Web Design**