

# Nonprofit Guide to Revenue *Reporting* & *Forecasting* with HubSpot

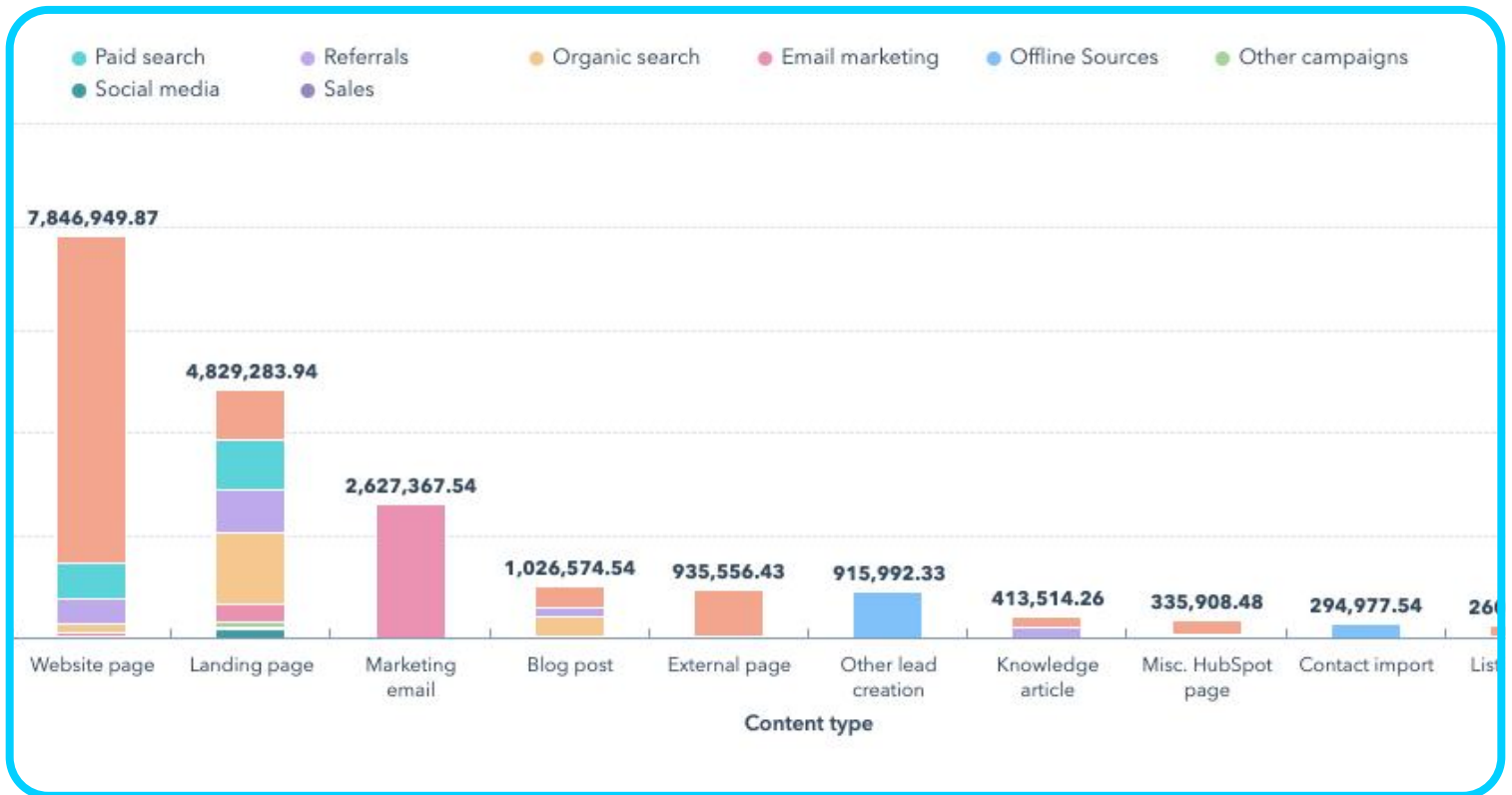
*Uncover the insights your organization is missing with HubSpot's high-powered tools for revenue attribution, reporting, and forecasting.*



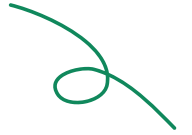
## When Every Dollar Counts, *Attribution is Everything*

Each world- and life-changing action of your organization is fueled by the generosity of your donors. Without insights into what motivates them to give, it is likely your team will struggle with over-marketing, under-targeting, misattributing efforts, or a combination of these issues, wasting valuable resources on intuition rather than real data-driven strategies.

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



## The Problems *HubSpot Solves*



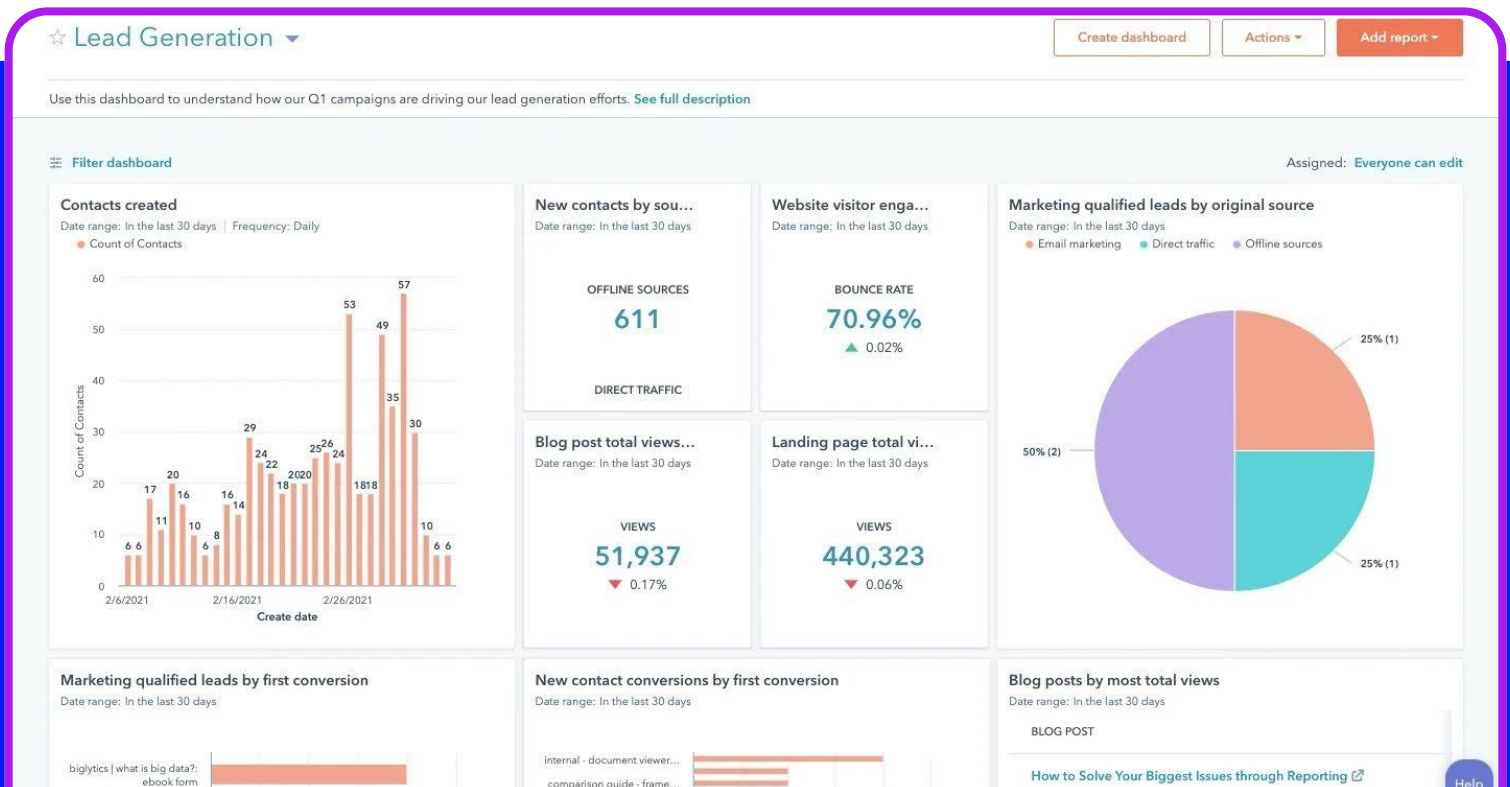
We see nonprofits taking guesses all the time because their analytics, tracking, and attribution aren't up to the task. They come to us reporting common problems that, with HubSpot's help, are easy to solve:

**"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.

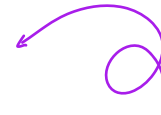
**"We don't know where donations are coming from."** With HubSpot's analytics, you can get down to the minutiae of where your donation-driving efforts are seeing the most success. Find out if your contributors are more likely to engage on desktop or mobile, if email marketing is more effective than social media, if donors are more likely to give after visiting a particular web page, and more.

**"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 doing."** 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.



# Building the Ultimate *Revenue Reporting & Forecasting Toolkit*



HubSpot has all the tools you need to either 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.

## Our Top Tool Recommendations

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

Feature	Hub	Level
Custom Report Builder	Any	Any
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 tier that fits - you can always upgrade later!



The screenshot shows the HubSpot CRM Platform website. At the top, there are navigation links for 'Software', 'Pricing', and 'Resources', along with a 'Talk to Sales' button. The main heading is 'The HubSpot CRM Platform' with a subtext: 'All of HubSpot's marketing, sales CRM, customer service, CMS, and operations software on one platform.' Below this, there are two buttons: 'Free HubSpot CRM' and 'Overview of all products'. The main content area features five product cards: 'Marketing Hub' (Marketing automation software, Free and premium plans), 'Sales Hub' (Sales CRM software, Free and premium plans), 'Service Hub' (Customer service software, Free and premium plans), 'CMS Hub' (Content management system software, Premium plans), and 'Operations Hub' (Operations software, Free and premium plans). At the bottom, there is an 'App Marketplace' section with the text 'Connect your favorite apps to HubSpot. See all integrations'.



## Visualizing Success with *Reports*

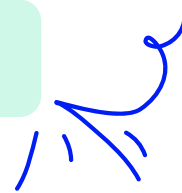
Building custom reports is one of the easiest things you can do with your data in HubSpot, and with so much flexibility, your entire team will be in the know all the time. Here's how to use them:

01 Integrate & Assess

02 Segment & Filter

03 Customize & Create

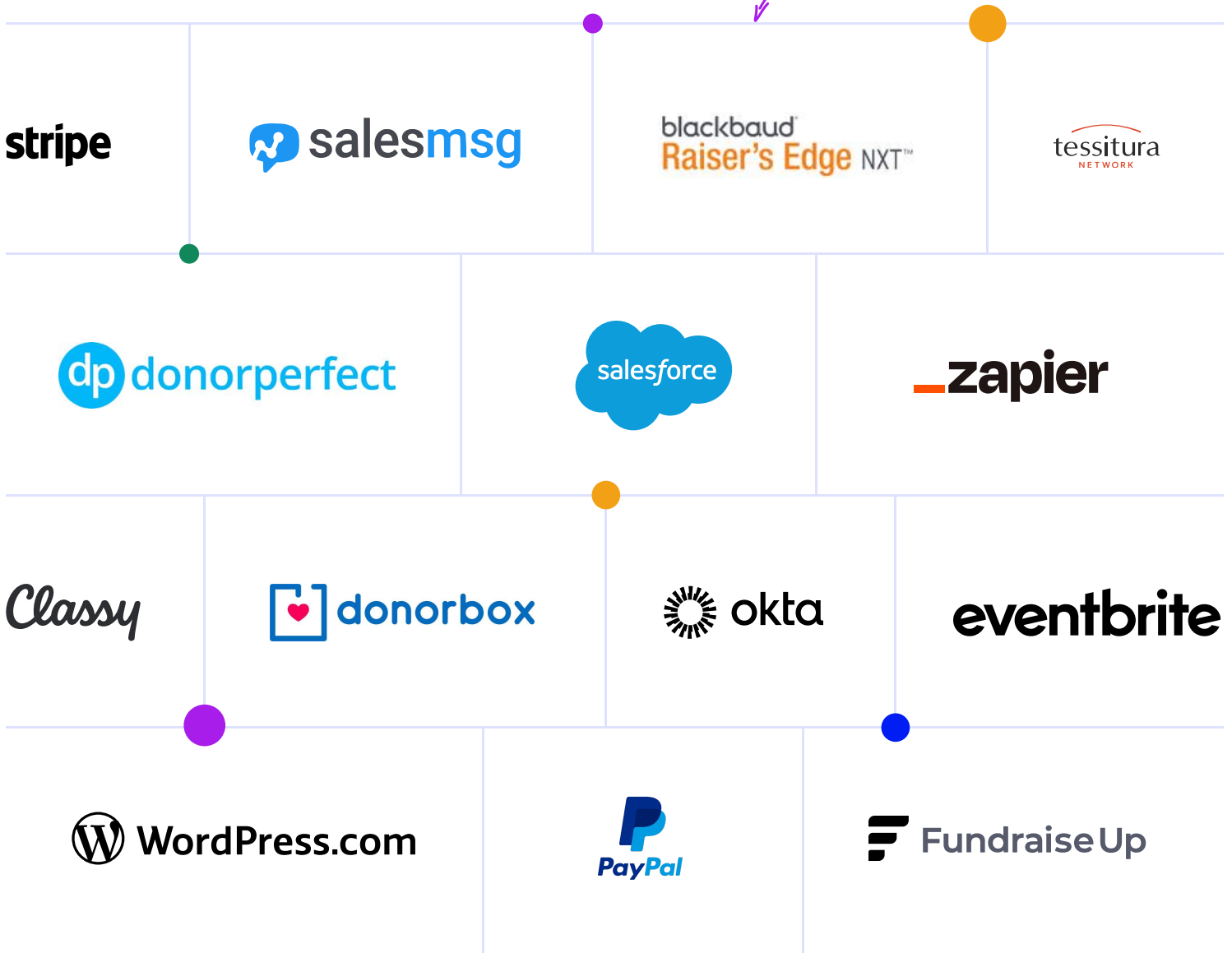
04 Three Steps to Preparing & Applying Projections



## 1. Integrate & Assess

One of the most powerful tools that HubSpot offers is the ability to integrate with the apps you need to run your organization and streamline your analysis. Using an event platform to track registrations? We can pull that data into HubSpot for your reports through native or custom integrations. Setting up your ads on their native platforms? Good, keep doing that (it's the best way) - and just integrate it with HubSpot.

### Bring Your Best Tools Inside HubSpot:

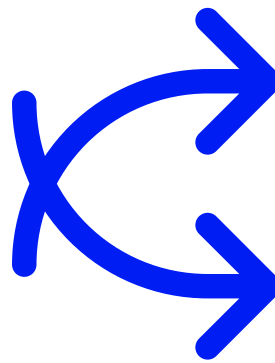


## 2. Segment & Filter

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

### Here's a Quick Application:

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? Do repeat donors interact in more places than single-gift givers? If you can't easily build a report like this with your current tools...that's a problem!



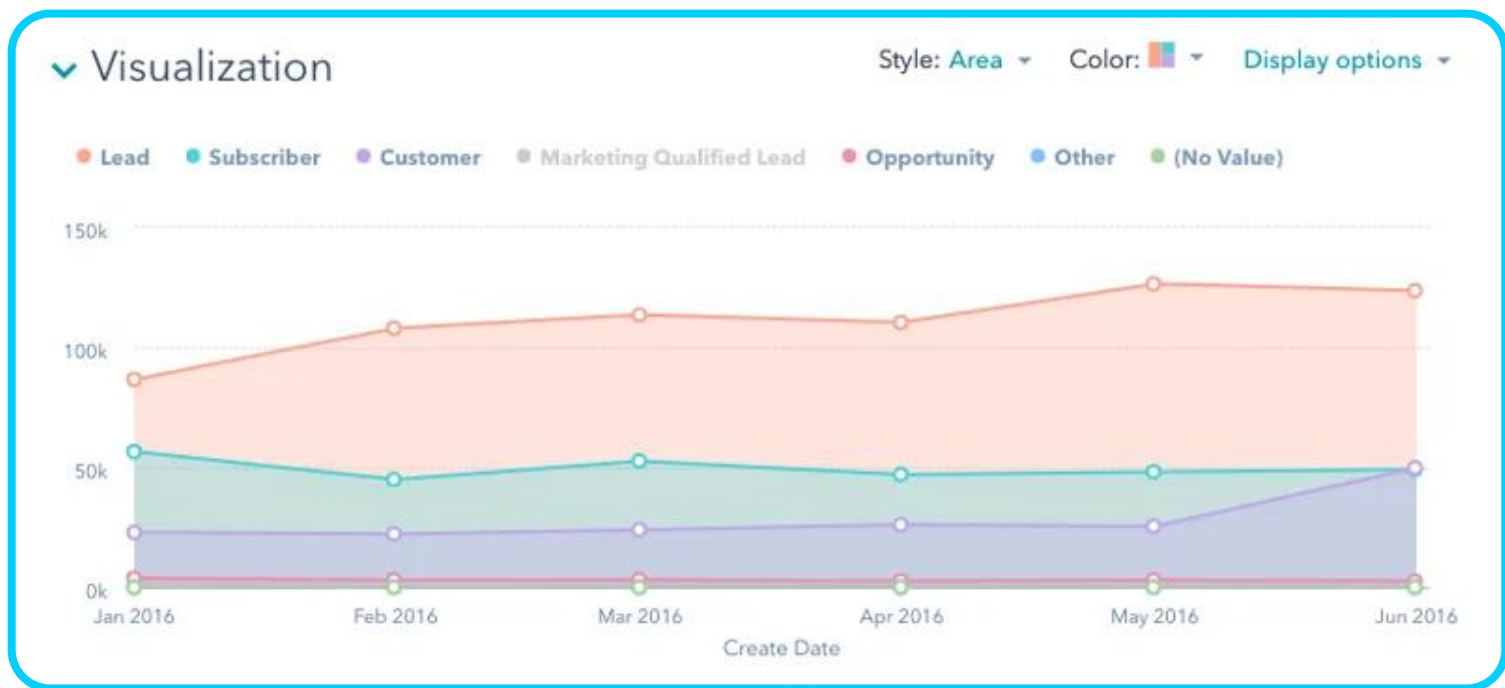


### 3. Customize & Create

Not only is it easy to surface the data you're looking for, but it's also a breeze to understand it clearly. HubSpot makes 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.



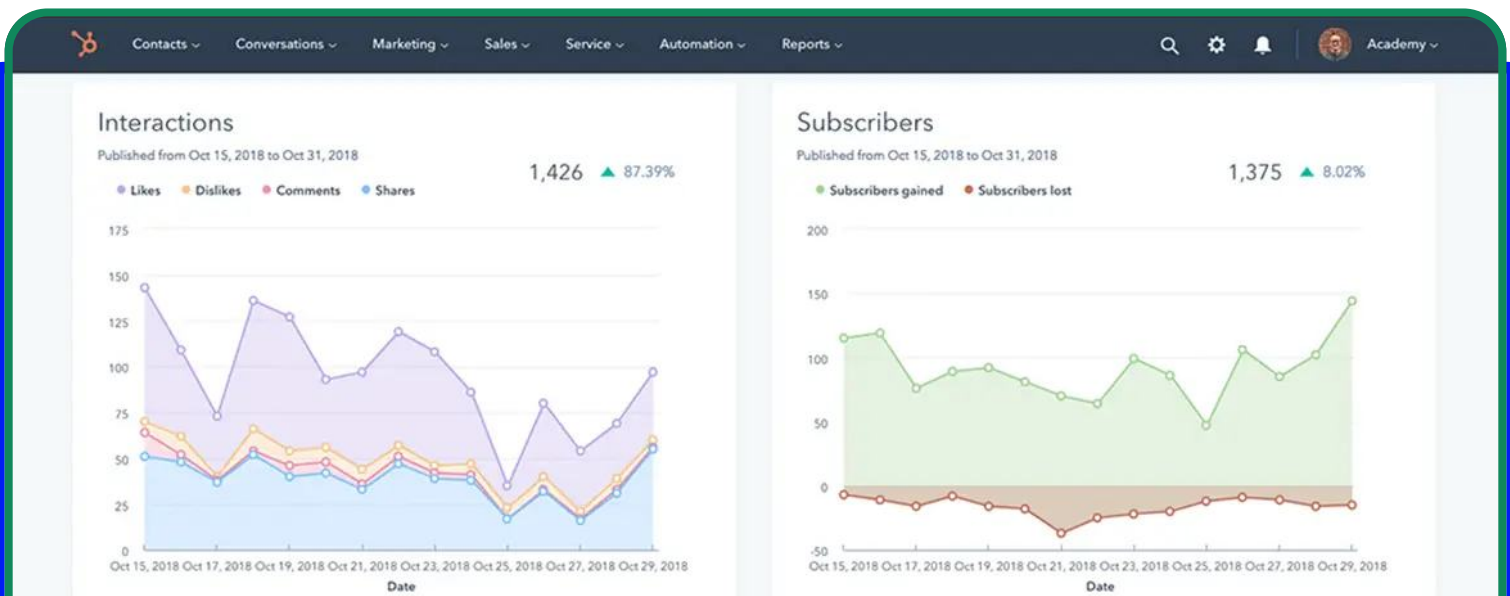
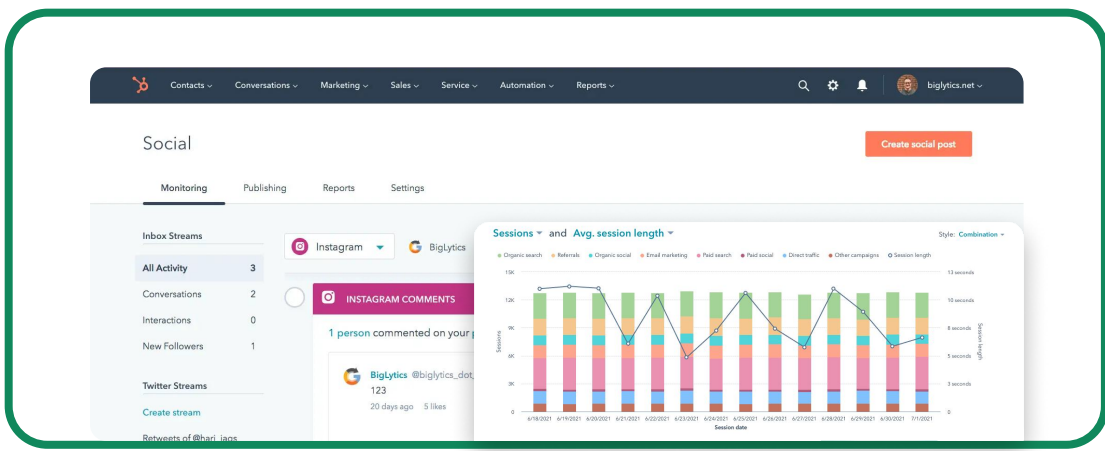
## 4. Three Steps to Preparing & Applying Projections

Getting projections for when and how donations will flow in is a critical step in achieving sustainability and stability as an organization. Here's how HubSpot helps your knock it out of the park:

### 1. Linking all of your data

Reporting, analytics, and forecasting all rely on one thing: your data. So step one in getting your reporting and analytics house in order is ensuring that all of your data is being fed to one expertly crafted dashboard. There are hundreds of native integrations and webhooks that can connect your different systems to HubSpot, and that's what you'll need if you want to stop toggling between tools to view all of your data in one place.

**And 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 you can predict the future, you need visibility on what has worked before. Regularly assessing your donor behaviors gives you a roadmap to predict future revenue - if you know where to look and how to approach what you find.

**Your contributors are giving you clues.** Do your donors tend to give a certain time of year or in association with a certain type of campaign? Your data should tell you, and you can craft your future engagements accordingly. Do they visit specific webpages before donating? Are they super engaged on social media in the run-up to a gift? Forecasting is all about picking out these leading indicators.



### 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.



Visualization Style: Table ▾ Display options ▾

HUBSPOT OWNER	COUNT OF DEALS	AVERAGE DAYS TO CLOSE
Open Account	920	106.34
Shane	240	49.24
Amy	232	42.28
Greg	203	18.86
Kristy	199	24.93





< Prev 1 2 3 4 5 Next >

# 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 software or optimize the use of HubSpot for nonprofits already using the tool.



Tackle your revenue tracking woes the help of experts who have:

-  Custom-designed report templates and data dashboards for leading national organizations
-  Personalized HubSpot build outs for nonprofits large and small
-  Implemented strategic revenue tracking improvements for the most demanding of finance teams
-  Built super-segmented and automated nonprofit email campaigns that boost donor engagement

Want to discuss how you can do more good with HubSpot? [Let's talk!](#)

Constituent Engagement

Online & Offline Marketing

Systems Integration

CMS Web Design

Constituent Relationship Management

Process Optimization