
PROVE

INBOUND ROI

BY

REPORTING RESULTS





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Improve your rank in search engines by finding and tracking your most effective keywords.



Blogging

Create blog content quickly while getting SEO tips and best practice pointers as you type.



Lead management

Track leads with a complete timeline-view of their interactions with your company.



Email

Send personalized, segmented emails based on any information in your contact database.



Social media

Publish content to your social accounts, then nurture leads based on their social engagement.

ABOUT THE AUTHORS



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INTRODUCTION

PROVE INBOUND'S ROI BY REPORTING RESULTS

“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
TopLine Results
HubSpot Gold Partner

Fact: the internet is an infinitely measurable place. Analytics tools such as HubSpot and Google Analytics, tracking URLs, social media insights, CRM integrations, and scores of other reporting mechanisms provide real-time data of online marketing 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, the numerical results are black and white. Pass or fail. Simple as that.

Undeniable & Quantifiable Proof of Success

The 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 your agency.

Chapter 1

Positioning Your Agency For Success



A PICTURE IS WORTH A THOUSAND WORDS

You set your agency up for success when you have the skills and capabilities to deliver on inbound marketing's five core services.

These services are each comprised of several tactical components. But to deliver real value and maximum impact for your clients, all those services must be executed together in the most effective way. More importantly, **reporting** on how all five contribute to your clients' online success **creates a powerful picture of your agency's value-add.**

The five core services of inbound marketing are:



Generating more qualified **traffic** to your clients' websites.



Generating leads by capitalizing on that traffic and offering relevant and valued premium content.



Generating customers from those leads with follow-up nurturing campaigns that pull them through the sales funnel, so your sales reps will convert them into customers.



Generating promoters from customers (and influencers) by continuing to delight them with loyalty campaigns so they become your most ardent advocates and fans, further pushing traffic into your funnel



Measuring, analyzing and reporting the results of the numerous online efforts that drive the first four services. Doing so lets you repeat your successes, and fine-tune underachieving campaigns to get better results.

Your clients and prospects need traffic, leads, and customers. When you show reports that connect the dots between your clients' goals and their inbound marketing activities, you paint a compelling picture that gives new meaning to the phrase "paint by number."

CLOSING THE LOOP - PROVING ROI

If you want to position your agency for long-term retainer deals, **closed-loop marketing must anchor your contracts.** Closed-loop marketing refers to a systematized way to track leads from initial source and first conversion all through the funnel to becoming a customer.

Closed-loop marketing shows the most efficient channels and provides actionable insight to make smart marketing investments for your clients. Without it, your reports will be littered with inconclusive theories and wild guesses.

Using closed-loop marketing lets you **measure all aspects of a client's online marketing efforts**, as well as **tie campaign efforts back** to the types of results clients ultimately **care most about: traffic, leads and customers.**

It doesn't matter whether all a client can do is something as simple as regularly entering in sales data into their marketing software and reports by hand, or using a more sophisticated automated process with APIs to connect their CRM system (e.g. Salesforce, SugarCRM, Basecamp, etc.) to marketing data.

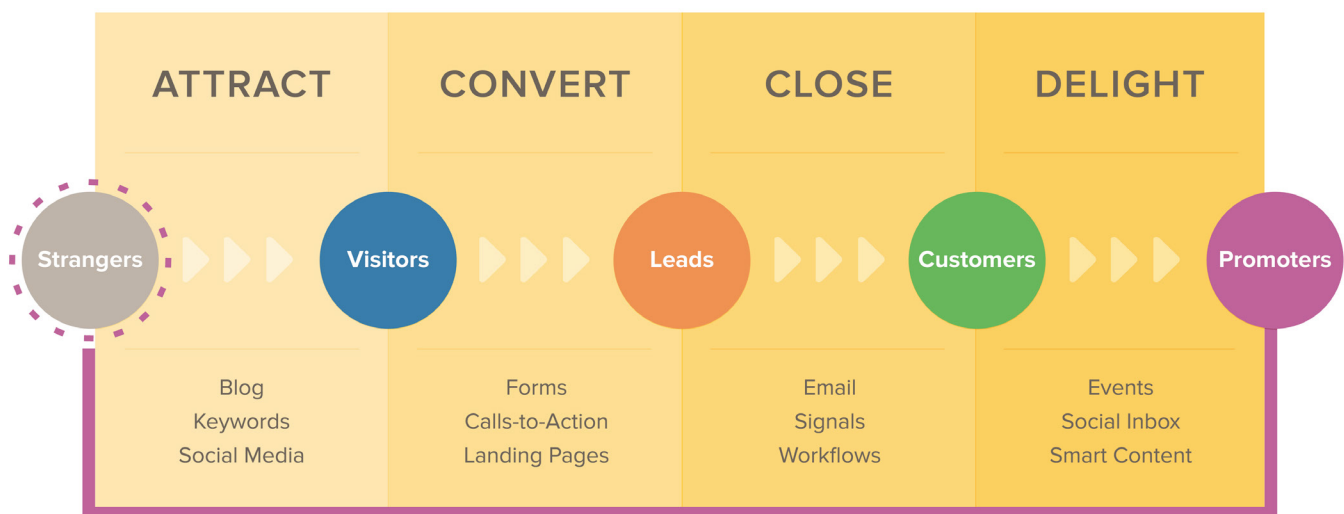
Closing the loop will set your agency apart from all the others because only you will be able prove the ROI of your inbound marketing efforts, while the best the competition can do is stumble around, show vanity statistics, tap dance, and mouth clichés when the hard questions come up.



FIRST, SOME CONTEXT

Successful inbound marketing relies on its laser focus on creating and sharing content. Content should be aimed at attracting specific buyer personas and satisfying their needs for useful information at the different stages along their decision journey. When successful, site visitors go from being complete strangers to delighted customers and promoters of your brand.

Inbound Methodology



by **HubSpot**

But most buyer personas' journeys aren't as neat or as simple as a straight line from the top of your funnel to its bottom. That's why a successful inbound marketing engagement requires:

- Carefully mapping buyer personas' information needs on their journey
- Following the inbound marketing methodology
- Delivering the five core inbound marketing services as effectively as possible

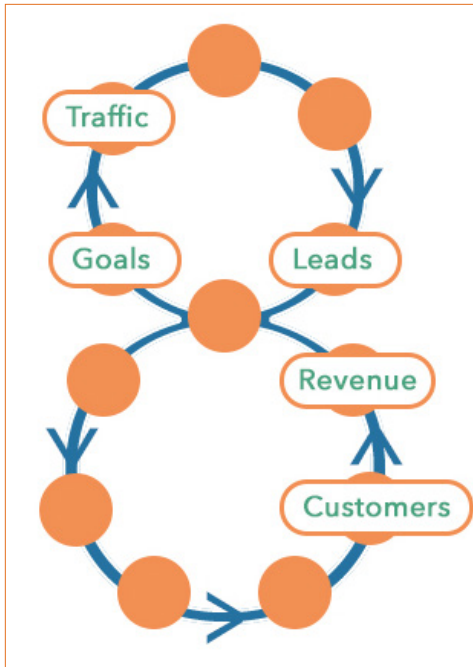
Marketing Funnel Stages <i>(Buyer Persona's Decision Journey)</i>	Inbound Marketing Methodology	Inbound Marketing Core Services	Measurement & Analysis
Top of the Funnel (Visitors)	Attract	Traffic Generation	
Middle of the Funnel (Leads)	Convert	Lead Generation	
Bottom of the Funnel (Customers)	Close	Customer Generation	
End of the Funnel (Promoters)	Delight	Brand Equity Generation	

As you can see, Measurement & Analysis is a core service that supports all the other stages and services. It is for this reason that the most successful agencies develop this as a core competency. You will only be able to deliver the results your clients are looking for if you can successfully track, measure, analyze and interpret the data being captured on all of the tactics you're executing.

RETURN ON MARKETING INVESTMENT (ROMI)

To artfully show ROMI means knowing which data to use when reporting — after all there are thousands of different statistics. The key is knowing **how** to report that information in such a way that your **client feels relieved, satisfied, and excited to do more**, while at the same time reinforcing his belief that **your agency is his most trusted marketing resource**.

You can do that most effectively when you **link your client's goals to specific key metrics to showing progress and results**. Underlying those top-level metrics will be other supporting stats that help you diagnose where the gaps and/or blocks are in the funnel.



Being disciplined in your analysis and reporting lets you confidently refine tactics using techniques such as A/B testing on CTAs, landing pages, images, premium content, and emails. Well-designed reporting can even reveal when you might need to re-examine your buyer personas.

With the discipline to reveal insights, with the ability to confidently connect the dots between goals and tactics, you'll be able satisfy your client's most pressing needs: traffic, leads and customers.

This is why, out of the five key inbound marketing services, **Measurement and Analysis** is the most important core competency to have. More than any other service you provide, **it blatantly demonstrates your expertise, and earns and reinforces your client's trust and respect.**

Chapter 2

TELL A COMPELLING STORY



DEVELOP THE STORY FRAMEWORK

Data and results: the fruits of your labor quantified. The proof in the pudding. Numbers will either prove your winning ways or send you back to the drawing board. But there's a whole lot more to telling a good inbound story. If you're not strategic in your approach, merely showing chart after graph will put your clients to [yawn] sleep.

MAKE THE STORY RIVETING

How you communicate the results of your inbound marketing efforts shapes your relationship and influences immediate next steps. **For the best effect, make the results you share flow like a story.** So before you start plotting the X & Y-axis for a monthly deck, make sure you're clear on the problems you're trying to solve for a client.

Why does this matter?

Because successful reporting is about telling a **juicy story**. A story so exciting and intriguing, your **client hangs on every word**. Remember, you're leading her into the promised land on a journey fraught with potentially unforeseen dangers. **Your job is to help her keep the faith!** Telling your client's story (and it is her story after all), and her accomplishments along the way (they are her accomplishments), is the best way to do that.

Here are the key components for creating a story to keep your client on the edge of her seat:

CHARACTERS YOU CAN RELATE TO

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

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 follow-up and targeted emails to turn leads into customers. Make sure your client understands this basic plot, and explain where the different initiatives and campaigns fit in. An educated client is a happy one.

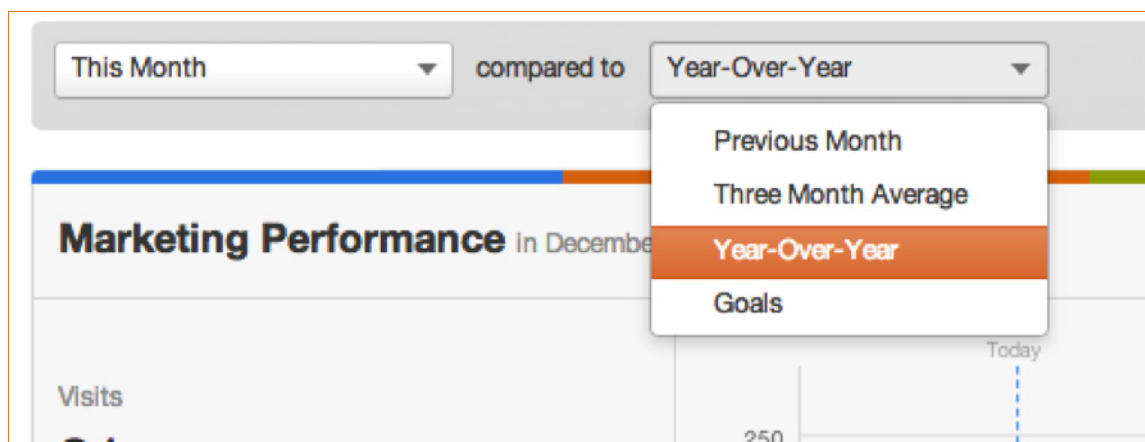
TELL IT IN THE RIGHT LANGUAGE

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

DETERMINE THE RIGHT TIME INTERVAL

What period of time are you reporting on? Are you showing overall progress for the year, or charts and graphs specific to a campaign you ran during the past month?

Create a meeting agenda that highlights both, but strive for **consistent comparisons by using the same time periods** (weekly, daily, monthly, etc.).



BUCKET EFFORTS BY CORE INBOUND MARKETING SERVICE

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

LINK PROGRESS TO GOALS

Give everything you present **the proper context: your client's goals.** Show how specific campaigns and tactics tie back to goals identified in your initial sales process with her. Continually remind your client that **her pain points are your focus.**

START HIGH LEVEL, GO GRANULAR

Show progress towards key goals first and share your thoughts on how the overall effort is progressing. Once **you've set the baseline, begin diving into specific data,** again aimed at your client's goals and grouped by service and strategy.

For instance, when you report on traffic generation (goals/inbound strategy/core service) show key metrics on how much traffic has increased, then delve deeper into supporting data such as traffic sources to show how the progress toward the goal is being made.

Chapter 3

GAME PLAN FOR SUCCESSFUL CLIENT MEETINGS



SKIP PROGRESS MEETINGS AT YOUR PERIL

Progress meetings with your clients are incredibly important. **They are the lifeblood of agency-client communication.** They let you and your client's teams get detailed updates and discuss what's working and what isn't. These meetings also help you build momentum and get buy-in from key stakeholders.

Here are four reasons they **must be a priority for your agency**:

A PATH TO REFERRALS

Your client should **walk away** from your progress meetings with at least **three sound bites** on **the impact your work is having on his business.** These snippets become the stories he swaps with friends and at cocktail parties and his local watering holes (real or online).

MOTIVATE TO COLLABORATE

You might have folks from the client's team helping create content. If so, **their participation needs to be publicly acknowledged.** Show the impact of their efforts and how they've helped drive strategic initiatives forward in a public setting — it will make them eager to do even more.

PATH TO UPSELLING

The transparency achieved through frequent reporting builds trust with your client. He feels in the loop and up-to-date. He becomes more and more enrolled in your joint success. And **the more knowledgeable he is about your efforts, the more likely he'll fight internally to get you more resources.**

MAINTAIN YOUR RETAINER

Assuming your strategies yield favorable and strong results over time, **frequent reporting reminds your client why he hired you.** This makes the decision to reach for his checkbook at the end of your contract a no-brainer.

PRESENTING ROI SUCCESSFULLY

Just because the charts look good, don't lose focus on in-person essentials. The agenda you set for your progress meetings, and how you work through that agenda, greatly influences the impact of your reports. **You've got the numbers, and an exciting story, now make the meeting count.**

HAVE A CLEAR AGENDA

Put together the agenda ahead of time. Consider how to split time between showing results, making recommendations and brainstorming next steps. Send this to your client ahead of time to see if there is anything else he wants to add.

MEET REGULARLY AND FREQUENTLY

Choose a recurring time that works best for your client, such as the first Tuesday of every month. Make sure you get the meeting on the calendars of all key stakeholders and team members. Also, see if it makes sense to piggyback your meeting with other key internal meetings.

MATERIALS

Once you've finalized your report deck for the meeting, send it to your client. Giving him time to digest the data ahead of time will create better questions, more productive conversations, and save you time in the long run.

CROWD CONTROL

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

OUTPUTS

Anticipate a possible “SO WHAT?” conversation and subtly make time for it at the end of your agenda. Use your conclusions and recommendations as the meat of the conversation, and engage the client team around what they think is working, what they think isn’t working, and why. Further clarify goals, create new ones. Take diligent notes and use these inputs in future campaign creation.

DEBRIEF

Know who your champions are on the client team and be sure to follow up with them one-on-one briefly after the meeting. Find out how they perceived the meeting. Use their perspective to gauge the client team’s temperature and adjust future meetings accordingly.

SUMMARY

You know what inbound marketing services you need to offer, you’ve designed your client’s story framework, and you’ve figured out your gameplan for productive client meetings.

Now let’s dig into what **strategic questions your monthly deck should contain answers to**, so you can provide both high-level and granular detail around your efforts and craft that story that will have your client’s team on the edge of their seats.

Chapter 4

THE METRICS YOUR CLIENTS MOST CARE ABOUT



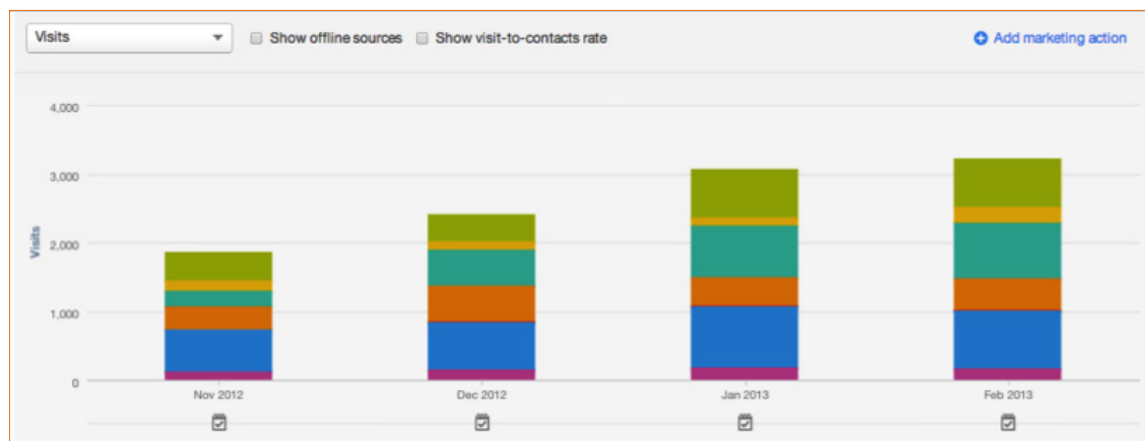
TRAFFIC GENERATION

1. SEARCH ENGINE OPTIMIZATION



SHOW THESE to set the 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)

Keywords [Tutorial](#) [Tour](#)

0 Keywords Ranked in Top 3	3 Keywords Ranked in Top 10	0 Contacts from Organic Last 30 Days	19 Organic Traffic Last 30 Days
--------------------------------------	---------------------------------------	--	---

☐ Actions

Sorted by:	Rank	Showing:	Visits	Rank	Difficulty	
<input type="checkbox"/>	problems i solve pc4media Added August 31st, 2011	0	6	19		
<input type="checkbox"/>	pc4media blog Added August 26th, 2012	0	9	58		
<input type="checkbox"/>	pc4media Added August 31st, 2011	0	10	81		
<input type="checkbox"/>	about pc4media Added August 31st, 2011	0	12	76		
<input type="checkbox"/>	"how to do keyword research" Added August 31st, 2011	0	100+	82		
<input type="checkbox"/>	"lead generation" blog Added August 31st, 2011	0	100+	70		

Add keywords

770
Total Keywords

1,000
Keyword Limit

Low
Estimated Savings

[Manage campaigns](#)
Choose topics that help you get more contacts and customers.

[Set your location](#)
Set country for calculating rank data. Currently set to Default.

[Export these keywords](#)



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

More Granular Data

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

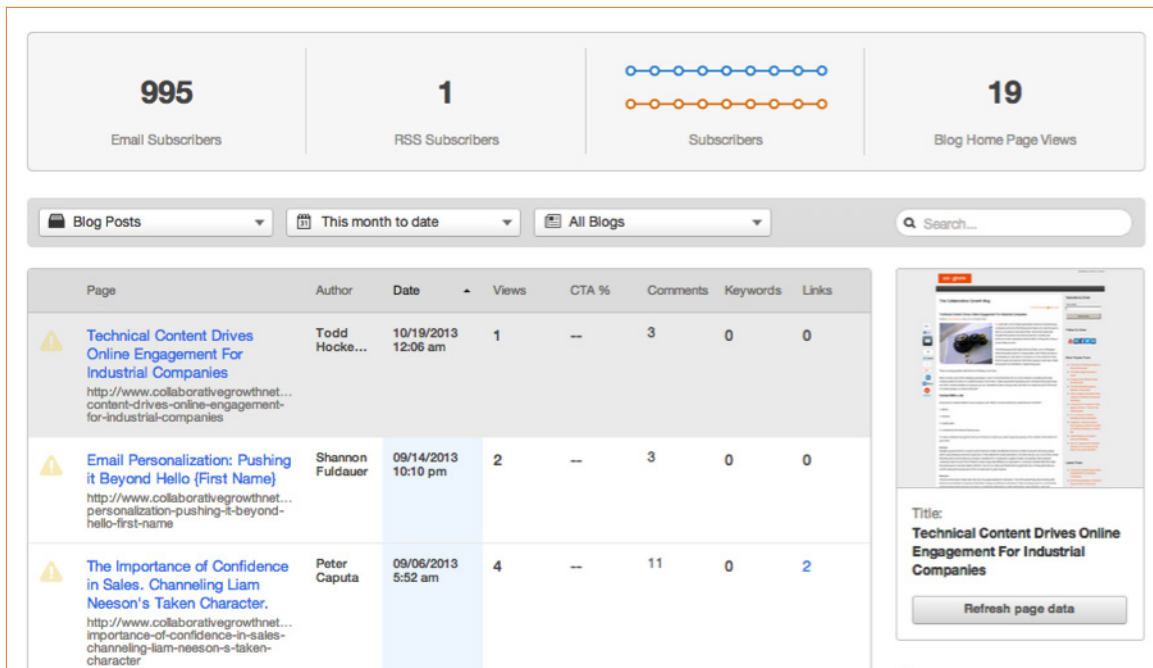
TRAFFIC GENERATION

2. BLOGGING & CONTENT CREATION



SHOW THESE to set the baseline

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



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



ANSWER THESE questions

High Level Findings

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

More Granular Data

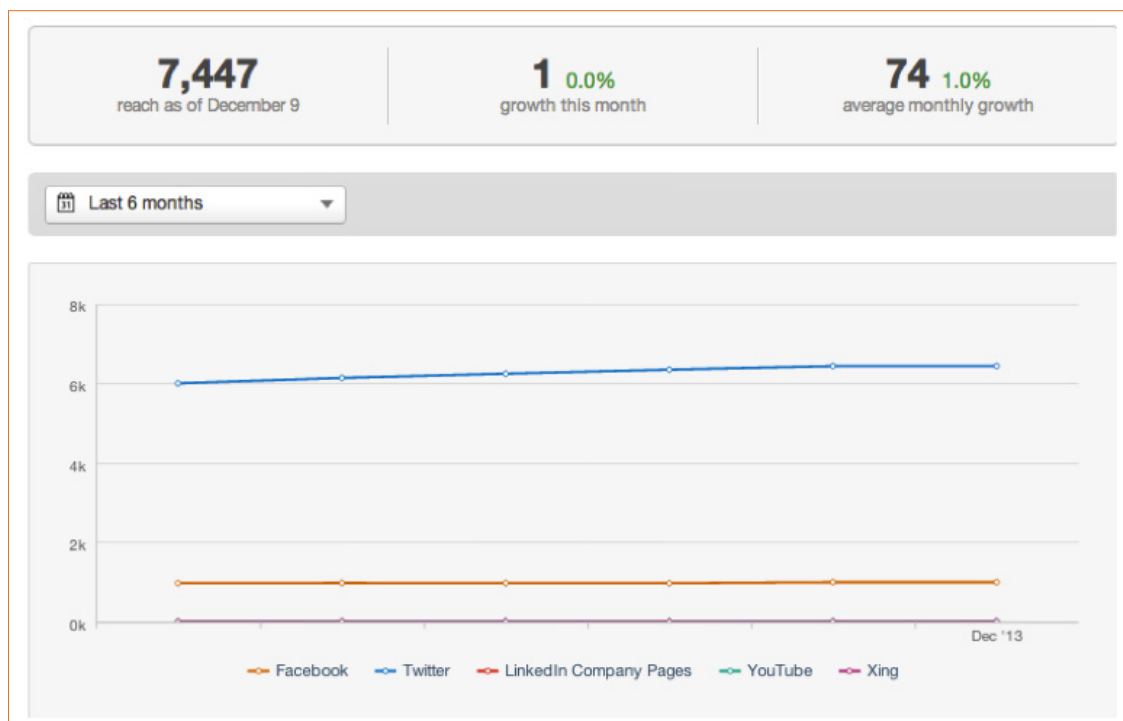
- How many blog articles got posted?
- Which were the month's top posts?
- Which topics/campaigns got the most visits? Most comments? Had the highest CTAs?
- Which formats performed the best?
- Which authors performed the best?
- Notable/number of inbound links?
- Note any comments worth highlighting

TRAFFIC GENERATION

3. SOCIAL MEDIA PUBLISHING

 **SHOW THESE** to set the baseline

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



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

**ANSWER THESE** questions**High Level Findings**

- How did social media contribute to traffic?
- How did social media contribute to leads? (@replies, retweets, new followers?)
- How did our social media reach grow/shrink?

More Granular Data

- How active were we on Twitter?
- 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)
- How active were we on YouTube (company followers, posts, likes)
- How active were we on Pinterest (company followers, posts, likes)

LEAD GENERATION**4. LANDING PAGE PERFORMANCE****SHOW THESE** to set the baseline

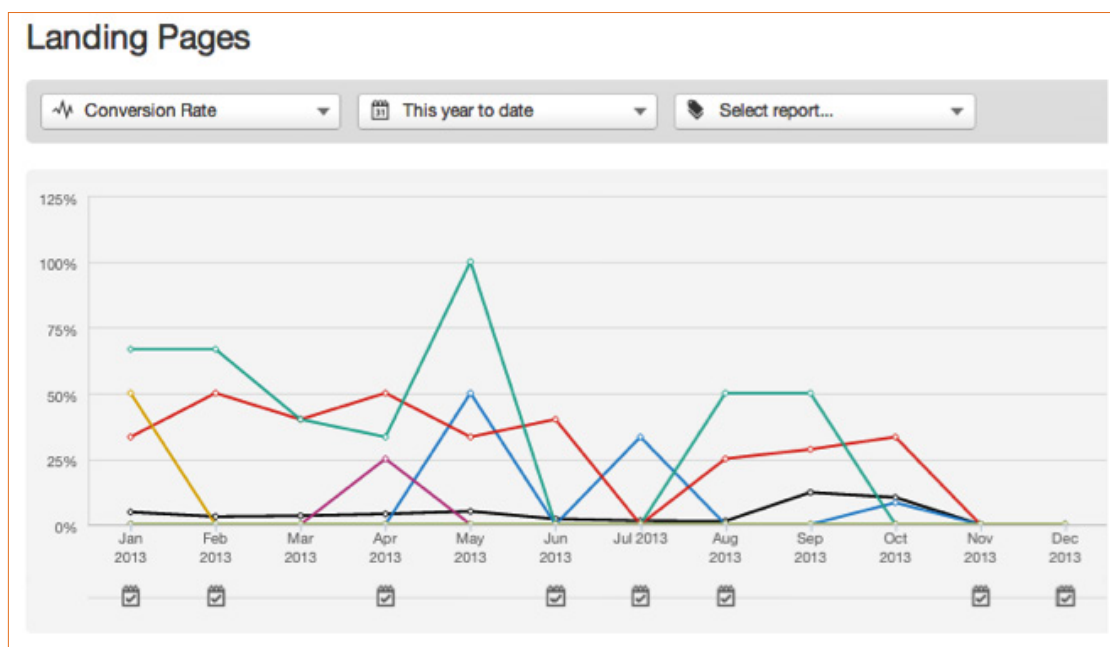
- Premium content created
- Landing pages created
- Premium content and landing page results from last month

**ANSWER THESE** questions**High Level Findings**

- What premium content offers did we develop this month?
- How productive were these offers in terms of leads?
- How and where were these offers promoted (on-site & off-site)?
-

More Granular Data

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



Marketers can create, publish, optimize and measure landing pages from within HubSpot. The different colors in the trend lines to the left represent unique landing pages.

LEAD GENERATION

5. TARGETED EMAIL CAMPAIGNS

 **SHOW THESE** to set the 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 were they sent?

More Granular Data

- Performance of each send?
- Click-through rate?
- Unsubscribe numbers?
- Subject line testing?
- List segmentation experiments?
- Any other testing worth nothing

CUSTOMER GENERATION

6. LEAD NURTURING PERFORMANCE

 **SHOW THESE** to set the 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?
- Clickthroughs 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?

CUSTOMER GENERATION

7. OVERALL WEBSITE CUSTOMER ACQUISITION

 **SHOW THESE** to set the baseline

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

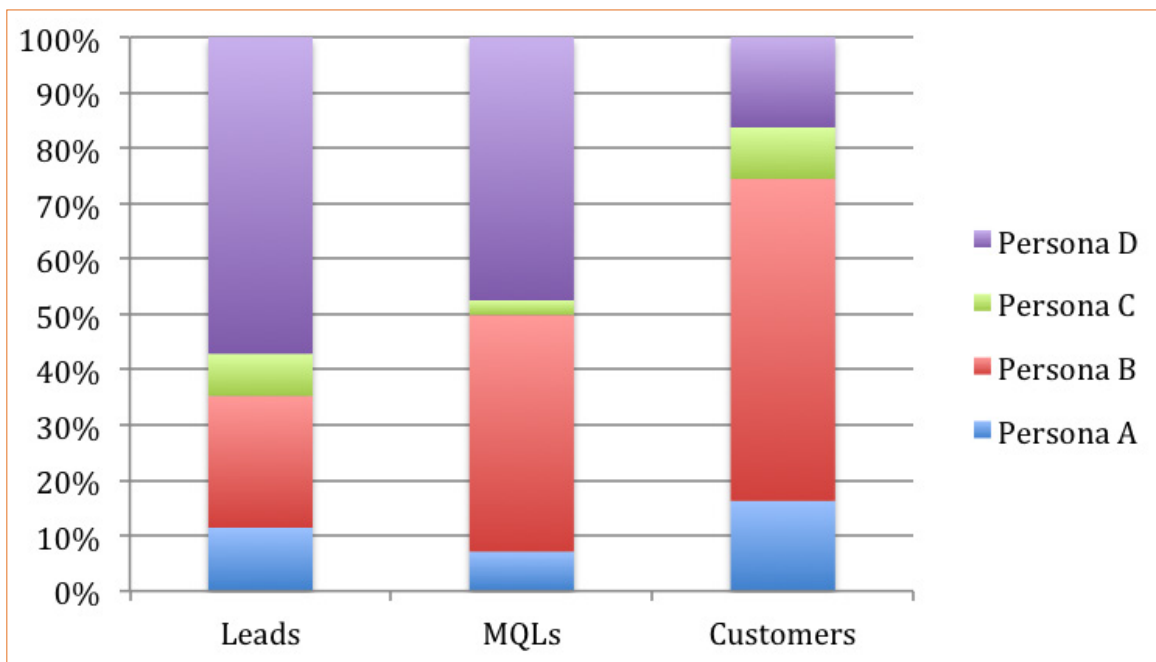
 **ANSWER THESE** questions

High Level Findings

- How many customers did inbound marketing drive over the defined time interval?
- What campaigns or sources were the most impactful in 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?



CONCLUSION

Online marketing tactics like social media and blogging have a shelf life for agencies. They can become one-dimensional efforts if they aren't 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. You can't **quantify your direct impact** unless you can tie it back to the end result.

Become a strategic marketing partner to your client, instead of a one-off vendor.

- Propose a strategy that **includes all aspects of online marketing**.
- **Develop services offerings** that align with the five core services outlined earlier.
- **Report back** to your client in a way that shows the **connectedness of inbound marketing to their goals**.

Communicating the ROI you're delivering in a meaningful way will build trust between your team and your client. Don't just send her a PowerPoint deck at the end of the month with thin, textbox commentary.

- Schedule time with her
- Show her what's been achieved
- Show her the roadmap behind the master plan
- Get her excited

Doing so **will earn you a long-term client relationship.**

ROI CHECKLIST

- ☒ [Monthly] Progress meetings scheduled with client
- ☒ Agenda developed
- ☒ Agenda sent to client with request for additions/changes
- ☒ Story framework complete
- ☒ Client goals crystal clear
- ☒ Metrics identified (charts, graphs, supporting imagery)
- ☒ Client's inbound marketing story is crafted
- ☒ [Monthly] Story deck complete with all "dots" connected
- ☒ Story deck with rich commentary sent to client
- ☒ Debrief on meeting with agency team
- ☒ Debrief on meeting with client champion(s)

SOFTWARE CAN HELP

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 five core services of inbound marketing, online marketing agencies can use HubSpot's:

- Content optimization system (Sites), blogging, search engine optimization (SEO), and social media tools to generate more traffic and leads from your website.
- Landing pages, call- to-action module and A/B testing functionality to drive better website lead generation.
- Segmentation, lead nurturing, and email marketing tools to get your web leads more sales-ready.
- Analysis tools to determine which 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

HubSpot Articles

Want more info? Here are a few of our most popular ROI and metrics articles and slide decks:

 [The 6 Marketing Metrics Your CEO Actually Cares About Cheatsheet](#)

 [Resources to Prove Marketing ROI in Under 100 Words](#)

 [How to Prove the ROI of Your Marketing](#)

 [15 Metrics Every Marketing Manager Should Be Tracking](#)

HubSpotters Standing By

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.