Data Model & Enablement

Executive Summary

What Is This Page About?

This page serves as a comprehensive guide for how the company tracks, defines, and reports on all key sales and marketing activities. It ensures everyone is using the same playbook, so data is accurate, reliable, and actionable.

Why Does This Matter?

- **Consistency:** Everyone uses the same terms and calculations, so reports are accurate and comparable.
- **Clarity:** You know precisely what each metric means and how it's calculated.
- **Trust:** Data is reliable for making business decisions.

Key Concepts Explained Simply

1. Metrics & Reports

- **Metrics** are numbers that show how well things are going (like how many leads you got, or how many deals you closed).
- **Reports** organize these metrics into useful views, such as the number of new customers acquired this month or the speed at which deals are closing.

2. The Funnel

- The “funnel” is the journey from someone first hearing about your company to becoming a paying customer.
- Stages include:
  - **Lead** (someone interested)
  - **MQL** (Marketing Qualified Lead – more likely to buy)
  - **SQL** (Sales Qualified Lead – ready for sales)
  - **Opportunity** (a real sales chance)
  - **Customer** (they purchased!)

3. Data Standards

- **Naming:** Use the same names consistently (e.g., always refer to it as “Leads”).
- **Grain:** The level of detail (e.g., per person, per company, per deal).
- **Time Basis:** When things are counted (e.g., when a deal is created vs. when it’s closed).
- **Ownership:** Who is responsible for each metric.

4. Systems Used

- **HubSpot** is the central system for tracking all this data.
- **Financial systems** are used for tasks such as revenue and retention.

What’s Included in the Document?

Types of Reports

- **Lifecycle Report:** Tracks how individuals progress through the sales funnel.
- **Pipeline & Revenue Report:** Displays new deals and incoming revenue.
- **Marketing Engagement:** Measures the effectiveness of marketing activities (ads, emails, events).
- **Sales Motion:** Looks at sales activities and how quickly deals move.
- **Retention & Growth:** Tracks how many customers stay, leave, or buy more.
- **Attribution:** Figures out which marketing or sales activities led to results.
- **Data Quality:** Checks for missing or bad data.
- **ICP & Persona Insights:** Looks at which types of customers are most valuable.
- **Quarterly Narrative:** Summarizes what’s working and what’s not.

How Does HubSpot Track These Metrics?

How Does HubSpot Track These Metrics?

1. HubSpot as the Main System

- **HubSpot** is the primary tool used to collect, store, and report on all sales and marketing data.

- It acts as the “system of record,” meaning it’s the official repository for all critical data.

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2. What Data Does HubSpot Track?

HubSpot tracks information about:

- **Contacts** (people who interact with your company)
- **Companies** (businesses you’re working with)
- **Deals** (potential or actual sales)
- **Activities** (emails, calls, meetings, etc.)
- **Marketing Engagement** (ad clicks, form submissions, event attendance, etc.)

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3. How Are Metrics Calculated?

A. Standardized Fields and Properties

- Every contact, company, and deal in HubSpot has specific fields (like “Create Date,” “Owner,” “Deal Amount,” etc.).
- These fields are used to calculate metrics (for example, counting how many new leads were created in a month).

B. Stages and Statuses

- HubSpot utilizes **lifecycle stages** (such as Lead, MQL, SQL, Opportunity, and Customer) to track an individual's progress through the sales process.
- When a contact moves from one stage to another, HubSpot records the date and details.

C. Activities and Engagement

- HubSpot automatically logs activities, such as emails sent, meetings booked, calls made, and forms submitted.
- These activities are linked to contacts and deals, allowing you to view the complete history.

D. Attribution

- HubSpot tracks **the origin of leads** (ads, events, social media, etc.) using tools such as UTM codes and interaction types.
- This helps measure which marketing channels are working best.

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4. Examples of Metrics Tracked in HubSpot

- **Leads Created:** Number of new contacts added in a period.
- **MQLs (Marketing Qualified Leads):** Contacts who meet specific criteria and are ready for sales.
- **SQLs (Sales Qualified Leads):** Contacts who have engaged with sales (like having a meeting).
- **Opportunities:** Companies with a new deal created.

- **Customers:** Contacts or companies that have made a purchase.
- **Conversion Rates:** How many leads move from one stage to the next.
- **Deal Amounts and Revenue:** The value of deals created and closed.
- **Engagement Metrics:** Number of emails sent, meetings booked, forms submitted, etc.

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5. Data Quality and Rules

- The document sets rules for **how data should be entered and maintained** in HubSpot (for example, every deal must have an amount and a close date).
- There are checks for missing or duplicate data, and rules to prevent manual overrides of important fields.

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6. Reporting and Dashboards

- HubSpot's data is used to create dashboards and reports that show performance over time.
- Reports are standardized so everyone sees the same numbers, using the same definitions.

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7. Special Tracking Methods

- **Attribution:** HubSpot utilizes specialized "interaction types" (such as "Form Submitted," "Ad Clicked," and "Sales Call Attended") to track how leads are generated and which activities lead to sales.
- **Custom Events:** For activities such as Instagram Direct Messages (DMs) or Account-Based Marketing (ABM), custom events are set up in HubSpot to track these specific actions.

In Summary

HubSpot tracks metrics by recording every meaningful action and detail about contacts, companies, and deals. It utilizes standardized fields, stages, and activity logs to calculate metrics such as leads, conversion rates, revenue, and engagement. Special rules and checks ensure the data is accurate and reliable for reporting.

Formulas

- The appendix includes formulas for calculating various aspects, such as the time from first contact to first meeting or from first contact to a closed deal.

How Is Data Quality Maintained?

- The document sets rules for what data must be filled in (like making sure every deal has an amount and a close date).

- It checks for duplicates and missing information.
- It makes sure that the way things are tracked doesn't change without approval.

Who Uses This?

- **GTM Leadership:** Go-to-market leaders who need to see the big picture.
- **RevOps, Analytics, Finance:** Teams that analyze and report on performance.

Action Items

- [ ] Define the Net New GTM funnel, pipeline, sales motion, and retention metrics with consistent naming, grain, time basis, and ownership.
- [ ] Ensure Ads & Others exclusion matches CRM ownership rules for Leads (Contacts).
- [ ] Ensure the Net New flag is controlled, and no manual overrides are allowed for Net New Deals Created.
- [ ] Ensure discount/credit timing aligns with Finance for Net New Revenue Won ($).
- [ ] Document eligibility rules for Renewal Eligibility.
- [ ] Standardize the loss reason picklist for Opp Loss Rate.
- [ ] Lock cohorts once assigned for Cohort Retention.
- [ ] Document LTV model assumptions for LTV: CAC.
- [ ] Ensure the exclusion list relies on the HubSpot user teams' assignment for Discovery Meetings Booked and Completed.
- [ ] Avoid double-counting overlapped activity types for Sales Activities Logged and Times Contacted.

📝 Page Metadata

- **Owner (Doc):**?
- **Contributors:** Marketing Ops, Sales Ops, CX Ops, Finance
- **System of Record:** HubSpot (primary), Billing/FP&A (for retention + unit economics)
- **Primary Audience:** GTM leadership, RevOps, Analytics, Finance
- **Last Updated:** 2025-12-05

📝 Document Standards (Governance)

- **Reporting Grain:** Metrics computed at the contact, company, deal, or leader/customer grain exactly as specified below.
- **Time Basis Standards:**
  - **Flow metrics** use *Create Date / Close Date* within the selected period.
  - **Snapshot metrics** use *Period End / Snapshot Date*.
- **Attribution Standard:** Utilize **system attribution** for ROI & channel performance. **Sales Perceived Source is context** only.
- **Change Control:** Any KPI definition update must be approved and versioned in this document.

📝 Report UI consistency rules

- **Counts:** use plural nouns (*Contacts, Deals, Customers, Meetings*).
- **$ metrics:** always use a dollar sign **($)**.
- **Rates:** always include **Rate** or **%**.
- **Flow vs snapshot:**
  - Flow = **Created / Won / Booked / Completed**

- Snapshot = **Open / Active / As-of**
- **Units:** show in label only when not obvious (**(Days)**).

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1) Lifecycle Report

📌 1.1 Top-of-Funnel Volume (Contacts / Companies / Leaders)

How much demand is entering and progressing, measured in people.

1. **Leads (Contacts):** Count of marketing contacts created during the period, excluding Ads and Others, where the company's first deal date is after the contact creation date or unknown.
   a. Ensure Ads & Others exclusion matches CRM ownership rules.
   b. Depends on meeting outcomes and the integrity of the "first deal creation date".
2. **MQLs (Contacts):** Count of marketing contacts first converted during the period, excluding Ads & Others.
3. **SQL (Contacts):** Count of marketing contacts first engaged during the period, with at least one completed meeting, not owned by the Ads & Others team, with the first engagement before the first deal creation date.
   a. Depends on meeting outcomes and the integrity of the "first deal creation date".
4. **Opportunities (Companies):** Count of companies with the first deal creation date during the period, not owned by the Ads & Others team.
   a. Dedupe multiple deals per company while preserving Net New logic.
5. **Customers (leaders):** Count of leaders created during the period (date became a leader)
   a. Depends on the leader having the correct first closed-won deal labeled and associated with them, as this relies on the "Became a Leader Date" property.

📌 1.2 Funnel Conversion Rates

Efficiency of movement between stages

- **Lead → SQL Conversion Rate**
  - The denominator must align with the Lead Contacts for the same period.
- **MQL → SQL Conversion Rate**
- **SQL → Opportunity Conversion Rate**
  - Grain shift requires controlled contact→company mapping.
- **Opportunity → Customer Conversion Rate**
  - Ensure stable company→leader association rules.
- **Lead → Customer Conversion Rate *(full-funnel)***
- **Lead → SQL Conversion Rate**
- **SQL → Opportunity Conversion Rate**
- **Opportunity → Customer Conversion Rate**
- **Lead → Customer Conversion Rate*(full-funnel)***
  - Full-funnel grain blending must be explicit in the BI layer.

📌 1.3 Top-of-Funnel Inflow & Quality

- **Lead Source Mix (Tracked)**: % leads by channel (using our system attribution).

- Do not use Sales Perceived Source.
- **Valid Leads**: Count marketing contacts linked to companies with valid domains and valid emails, excluding Ads and Others, where the company's first deal date is after the contact creation date or unknown.
  - Depends on Clay Enrichments
- **Valid Leads Rate:** ICP Leads ÷ Leads
- **ICP Leads (Contacts):** Count of marketing contacts created during the period that are set as "Core" for Profile Fit, excluding Ads and Others, where the company's first deal date is after the contact creation date or unknown.
  - Depends on Clay Enrichments
- **ICP Leads Rate:** ICP Leads ÷ Leads
- **Time to First Touch (hrs/days)** — speed-to-lead; huge conversion driver.
  - Sensitive to late logging; use the first sales activity timestamp.

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2) Net New Pipeline & Revenue Report

Standards

- **Counts = Deals**
- **Values = Pipeline/Revenue ($)**
- **Net New includes only deals classified as net new (excludes renewals/expansions).**

📌 2.1 Net New Pipeline Creation (Flow)

What new pipeline are we *adding* in this period, and is growth driven by volume, size, or better qualification?

1. **Net New Deals Created** — *Count of net new deals with a create date within the selected period.*
   a. The Net New flag must be controlled; no manual overrides are allowed.
2. **Net New Pipeline Created ($)** — *Sum of amounts for net new deals created within the selected period.*
3. **Avg Deal Size (Net New, $)** — Pipeline Created ÷ Deals Created.
4. **Pipeline per SQL ($/SQL)** — creation efficiency.
   a. Requires reliable SQL→deal mapping.
5. **Deals per Rep / Pipeline per Rep** — productivity and capacity planning.
   a. Choose owner-at-create vs current owner consistently.
6. **% Pipeline from Marketing-Driven vs Sales-Drive**n motion mix.
   a. Relies on stable channel taxonomy. Marketing-driven initiatives are: **Events**, **Inbound**, **IG Outreach**, and **ABM**.

📌 2.2 Net New Wins (Flow)

What net new revenue are we closing in the period?

1. **Net New Deals Won** — *Count of net new deals closed-won with a close date within the selected period.*
   a. The close date must be standardized across all teams.
2. **Net New Revenue Won ($)** — *Sum of closed-won amounts for net new deals with a close date within the selected period.*
   a. Ensure discount/credit timing aligns with Finance.

📌 2.3 Open Net New Pipeline (Snapshot)

Current backlog, as of period end

- **Open Net New Deals** — *Count of net new deals not closed (won or lost) as of the period end/snapshot date.*
  - Snapshot date must be visible (e.g., "As of YYYY-MM-DD").
- **Open Net New Pipeline ($)** — *Sum of amounts for net new deals still open as of the period end/snapshot date.*
  - Avoid post-snapshot amount edits that distort the historical record.

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3) Marketing Engagement

📌 3.1. Paid Inbound Acquisition

1. **Paid acquisition performance:** date dimension is the date the money was spent
   a. $ Paid Ads Spend: The sum of the amount spent on paid ads during the period. (Filter: campaign name contains any of "b2b" or "fullfunnel.")
   b. # Ad Clicks:
   c. # Paid Conversions (Form submissions):
   d. $ Paid Cost/Conversion:
   e. # Paid MQLs (Contacts):
   f. $ Paid Cost/MQL:
   g. # Paid ICP Leads (Contacts):
   h. # Paid SQLs (Contacts):
   i. # Paid Opportunities (Companies):
   j. $ Paid Cost/Opportunity:
   k. # Paid Customers (Leaders):
   l. $ Paid Cost/Customer:
2. **Paid acquisition performance by platform**
3. **Paid acquisition performance by campaign**
4. **Paid acquisition funnel:** The date dimension represents the date of contact and the first conversion.
   a. # Paid MQLs (Contacts):
   b. % Paid Conversion→MQL Rate:
   c. # Paid ICP Leads (Contacts):
   d. % Paid ICP Rate:
   e. Avg Marketing Emails/Contact:
   f. Avg Marketing SMS/Contact:
   g. Avg Sales emails/Contact:
   h. Avg Calls/Contact:
   i. Avg Meetings/Contact:
   j. Avg Outreach Touches: Average sum of *calls, emails, or meetings completed* and *logged for the contact after the conversion date (tracked in HubSpot).* Avoid double-counting overlapped activity types.
   k. # Paid Discovery Meetings Booked:
   l. % Paid Contact→Meeting

m. # Paid Discovery Meetings Complete:
n. % Paid Meeting→Complete Rate:
o. Time to meeting: time between the contact's first conversion and the first meeting booked
p. # Paid SQLs (Contacts):
q. % Paid MQL→SQL Rate:
r. # Paid Opportunities (Companies):
s. % Paid MQL→Opportunity Rate:
t. # Paid Customers (Leaders):
u. % Paid MQL→Customer:

5. **Paid acquisition funnel by date**
6. **Paid acquisition funnel by AE**

📌 3.2 Organic Inbound Acquisition

1. **Organic acquisition performance:** The date dimension represents the date of contact and the first conversion.
   a. # Organic Form Views
   b. # Organic Form Submissions
   c. % Organic Form View→Submission Rate:
   d. # Organic MQLs (Contacts):
   e. % Organic Conversion→MQL Rate:
   f. # Organic ICP Leads (Contacts):
   g. % Organic ICP Rate:
2. **Organic acquisition performance by date**
3. **Organic acquisition funnel:** The date dimension represents the date of contact and the first conversion.
   a. # Organic MQLs (Contacts):
   b. % Organic Conversion→MQL Rate:
   c. # Organic ICP Leads (Contacts):
   d. % Organic ICP Rate:
   e. Avg Marketing Emails/Contact:
   f. Avg Marketing SMS/Contact:
   g. Avg Sales emails/Contact:
   h. Avg Calls/Contact:
   i. Avg Meetings/Contact:
   j. Avg Outreach Touches: Average sum of *calls, emails, or meetings completed* and *logged for the contact after the conversion date (tracked in HubSpot).* Avoid double-counting overlapped activity types.
   k. # Organic Discovery Meetings Booked:
   l. % Organic Contact→Meeting
   m. # Organic Discovery Meetings Complete:
   n. % Organic Meeting→Complete Rate:
   o. Time to meeting: time between the contact's first conversion and the first meeting booked
   p. # Organic SQLs (Contacts):

q. % Organic MQL→SQL Rate:
r. # Organic Opportunities (Companies):
s. % Organic MQL→Opportunity Rate:
t. # Organic Customers (Leaders):
u. % Organic MQL→Customer:

4. **Organic acquisition funnel by AE**

📌 3.3 ABM Acquisition

1. **ABM email performance:** The date dimension represents the date of the first email sent to the contact.
    a. # ABM emails sent
    b. # ABM emails delivered
    c. % ABM delivery rate
    d. # ABM emails opened
    e. % ABM open rate
    f. # ABM emails clicked
    g. % ABM click rate
    h. # ABM emails replied
    i. % ABM reply rate
    j. # ABM emails moved to spam
    k. % ABM spam rate
2. **ABM email performance by ABM Flight**
3. **ABM funnel:** The date dimension represents the date of the first email sent to the contact.
    a. # ABM Leads
    b. # ABM Discovery Meetings Booked:
    c. % ABM Contact→Meeting
    d. # ABM Discovery Meetings Complete:
    e. % Organic Meeting→Complete Rate:
    f. Time to meeting: time between the contact's first conversion and the first meeting booked
    g. # ABM SQLs (Contacts):
    h. % ABM Lead→SQL Rate:
    i. # ABM Opportunities (Companies):
    j. % ABM MQL→Opportunities Rate:
    k. # ABM Customers (Leaders):
    l. % ABM MQL→ Customers:
4. **Organic acquisition funnel by AE**

📌 3.4 IG Outreach Acquisition

1. **IG Outreach funnel:** The date dimension represents the date of the first DM sent to the company
    a. # IG Outreach DMs sent
    b. # IG Outreach Leads

c. % IG DM→Lead Rate
d. # IG Outreach SQLs
e. Time to meeting: time between the first DM sent and the first meeting booked
f. # Organic SQLs (Contacts):
g. # IG Outreach Opportunities (Companies):
h. % IG Lead→Opportunity Rate:
i. # IG Outreach Customers (Leaders):
j. % IG Opportunity→Customer Rate:
k. % IG Lead→Customer Rate:

2. **IG Outreach funnel by date**
3. **IG Outreach funnel by AE**

📌 3.5 In-Person Events Acquisition

1. **In-Person Events performance:** date dimension is the date the event occurred.
    a. $ Spent in events: The sum of the amount spent on the event (marketing event field)
    b. # Event Prospects (Companies):
    c. # Event Attendees (Contacts):
    d. # Event Attributed Connections: Count of marketing contacts who attended the event and had their first engagement during or after the event date, and are not owned by the Ads & Others team.
    e. $ Event Cost/Connection:
    f. # Event Conversions (Form submissions):
    g. # Event ICP Leads (Contacts):
    h. # Event SQLs (Contacts):
    i. # Event Opportunities (Companies):
    j. $ Event Cost/Opportunity:
    k. # Event Customers (Leaders):
    l. $ Event Cost/Customer:
2. **In-person events performance by event**
3. **In-Person Events performance by date**
4. **In-Person Events Funnel:** date dimension is the date the event occurred.
    a. # Event Prospects (Companies):
    b. # Event Attendees (Contacts):
    c. # Event Attributed Connections: Count of marketing contacts who attended the event and had their first engagement during or after the event date, and are not owned by the Ads & Others team.
    d. Avg Marketing Emails/Contact: delivered after the event date
    e. Avg Marketing SMS/Contact: delivered after the event date
    f. Avg Sales emails/Contact: delivered after the event date
    g. Avg Calls/Contact: made after the event date
    h. Avg Meetings/Contact: booked after the event date
    i. # Event SQLs (Contacts):

j. % Event Connection→SQL Rate:
k. # Event Opportunities (Companies):
l. % Event Connection→Opportunity Rate:
m. # Event Customers (Leaders):
n. % Event Connection→Customer Rate:

5. **In-Person Events Funnel by date**
6. **In-Person Events Funnel by AE**
7. **In-Person Events Funnel by Event**

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4) Sales Motion Report

📌 4.1 Sales Activity & Outreach

Effort + intensity on contacts.

1. **Sales Activities Logged:** *Total sales activities recorded for the contact (HubSpot-tracked from user actions).*
   a. Define whether sequences/automations count as activities.
2. **Times Contacted (Outreach Touches):** *Total calls, emails, or meetings completed* and *logged for the contact (tracked in HubSpot).*
   a. Avoid double-counting overlapped activity types.

📌 4.2 Discovery Meetings (Net New Team View)

Early-stage execution quality for net new.

1. **Discovery Meetings Booked:** *Number of sales-discovery meetings scheduled in the selected period, excluding meetings assigned to the Ads&Others team*
   a. The exclusion list relies on the HubSpot user teams assignment.
2. **Discovery Meetings Completed:** *Number of sales-discovery meetings completed in the selected period (completed outcome), excluding meetings assigned to the Ads&Others team.*
   a. Sensitive to late outcome updates.
3. **Discovery Show Rate**: Completed ÷ Booked.
4. **Avg Time from Lead to Discovery (Days)** — funnel friction.
   a. Requires a reliable first-engaged timestamp.

📌 4.3 Deal Velocity & Stage Conversion

Speed to close (down-funnel efficiency) reveals average duration and bottlenecks.

- **Avg Deal Duration (days):** *Average* time between deal creation and close dates.
- **Median Deal Duration (Days):** *Median of* time between deal creation and close dates. *(less sensitive to outliers)*
- **Stage Velocity (Days)**: Time spent per deal stage.
- **Stage Velocity (Days by stag**e): time in SQL, time in Opp, etc.
- **Stalled Deal Rate**: deals with no activity in 20 days.
- **Close Rate by Segment:** win rate broken out by owner, product, size, vertical, or channel.
  - Depends on the segment field hygiene.

📌 4.4 SQL & Opportunity Health

Understand if the middle funnel is healthy or just accumulating.

- **SQL→Opp Time (Days):** Average of time between the first meeting occurrence and first deal created
- **Opp Win Rate:** Deals Won ÷ Deals Created
- **Opp Loss Rate + Loss Reasons** — What's Killing Net New.
    - Loss reason picklist must be standardized.
- **Pipeline Coverage (x)** — Open Pipeline ÷ Next-period target.
    - Planning target source must be versioned.
- **Pipeline Aging** — % of open opps older than 180 days.
    - Define "age" (since create vs since stage entry).

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5) Retention & Growth Report

📌 5.1 Post-Sale Customer Motions (Counts)

1. **Renewing Customers (Leaders):** The number of leaders associated with a Renewal deal that were closed as "won" during the period.
    a. Association must be deterministic.
2. **Expanding Customers (Leaders):** Count of leaders associated with an Expansion deal that were closed as "won" during the period.
    a. Association must be deterministic.
3. **Churned Customers (Leaders):** Count of leaders associated with a Churn/Cancelation deal that were closed as "lost" during the period.
    a. Requires consistent churn logging via deals.
    b. Association must be deterministic.
4. **Active Customers (Leaders)**: The active base at the start/end of the period.
    a. Stable "active" rules required.
5. **Renewal Eligibility:**
    a. Eligibility rules must be documented elsewhere.
6. **Logo Retention Rate** — customer-count retention vs revenue retention.
7. **Cohort Retention** (by signup month/quarter)
    a. Lock cohorts once assigned.

📌 5.2 Post-Sale Rates

1. **Renewal Rate:** Renewing Customers ÷ eligible base.
    a. Denominator must be explicit on dashboards.
2. **Expansion Rate:** Expanding Customers ÷ active base.
3. **Churn Rate:** Churned Customers ÷ active base (or start base).
    a. Must codify denominator choice.

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6) Retention & Net New Unit Economics Report

📌 6.1 Retention Economics

1. **Starting ARR:** revenue from customers you already had at period start
2. **Churned ARR:** revenue lost from customers who left
3. **Contraction ARR:** revenue lost from downgrades
4. **Expansion ARR:** revenue gained from upgrades/add-ons from those same customers
5. **GRR (Gross Revenue Retention):** measures how much recurring revenue you kept from existing customers after churn and downgrades, but *before* expansions. Formula: (Starting ARR− Churned ARR− Contraction ARR) ÷ Starting ARR
   a. Cannot exceed 100%; ARR vs MRR basis must be fixed.
6. **NRR (Net Revenue Retention):** measures how much recurring revenue you keep after churn, downgrades, *and* expansions. Formula: (Starting ARR− Churned ARR− Contraction ARR +Expansion ARR) ÷ Starting ARR
   a. Can exceed 100%; reconciled to billing.

📌 6.2 Net New Unit Economics

1. **$ CAC (Net New):** Spend ÷ Customers (leaders)
2. **Payback Period (months):** CAC payback timeline.
   a. Sensitive to margin assumptions.
3. **LTV: CAC:** Lifetime value efficiency.
   a. LTV model assumptions must be documented.
4. **Gross Margin by segment*:*** Margin by segment.
   a. Segment mapping must match the GTM taxonomy.

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7) Attribution Report

☑️ Channel segmentation

🧲 Marketing-driven touchpoints

Events → Marketing Event Attendance

Tracking method: marketing event attendance *OR* Asset Title contains: NRB
HubSpot interaction types to enable:

- Marketing event attended

IG Outreach → Custom Event

Tracking method: custom behavioral events for IG DMs
HubSpot interaction types to enable:

- **Custom event** *(must be turned on under Attribution → Interaction Types)*

According to attribution rules, Instagram DM outreach is credited only when the interaction type is set to '**Instagram DM Outreach' (custom event)**.

Inbound → Form Submission

Tracking method: HubSpot Email click, Ad Click, Social Post Click, Studio PLG, *AND* Asset Title does not contain: NRB. Or form submission *AND* Asset Type is: External Pages, Landing Pages, Ads, Social Post, *AND* Asset Title does not contain: NRB.

HubSpot interaction types to enable:

- **Form submitted** (all subtypes: landing page, website page, external page, blog post, etc.)
- **CTA clicked** *(optional but recommended for influence attribution)*

Inbound SQL and Deal attribution depend directly on **the** form submitted and asset type filtering.

ABM → UTM-based Form Submission

Tracking method: form submission with ABM-specific UTMs
HubSpot interaction types to enable:

- **Form submitted** (same as inbound)
- **Ad clicked** *(for paid ABM plays when applicable)*
- **Marketing email clicked** *(if ABM email sequences are used)*

ABM relies on UTM Campaign filters, not a unique attribution interaction type — therefore, **form submissions must be enabled** for attribution to function.

🧲 Outbound (Sales-Driven)

Tracking method: sales activity and sales email engagement
HubSpot interaction types to enable:

- **Sales call attended**
- **Sales meeting attended**
- **Sales email reply**
- **Live chat**
- **Sequence events**
  - Contact enrolled in sequence
  - Contact replied to the email from the sequence
  - Contact booked a meeting through a sequence
  - Contact unenrolled manually from the sequence

Outbound is attributed when the interaction type is '*Sales Interaction*' or when form submissions occur on *Misc HubSpot pages*.

📌 7.1 Financial Metrics

Date dimension: the initiative occurrence date

1. **% ROI:** (Attributed Revenue – Spend) ÷ Spend
2. **$ CAC (Net New):** Spend ÷ Customers (leaders)
3. **Cost/SQL:** Spend ÷ SQLs (contacts)
4. **Cost/Deal:** Spend ÷ Attributed Deals

5. **Cost/Closed-Won:** Spend ÷ Attributed Won Deals

📌 7.2 Revenue Metrics

6. **$ Attributed Revenue:** The income generated by the investment.
    a. Revenue model: Full-path(first, lead create, deal create, close)
    b. Date dimension: Close Date
    c. Metric: *Attributed revenue* only
7. **# Attributed Won Deals:** count of attributed deals won by the investment.
    a. Revenue model: Full-path(first, lead create, deal create, close)
    b. Date dimension: Close Date
    c. Metric: *Attributed revenue* only
8. **# Attributed Deals:** count of deals generated by the investment.
    a. Deal model: W-Shaped (weights first touch, lead design, and deal creation)
    b. Date dimension: Create Date
    c. Metric: *Attributed deals* only
9. **# Attributed Pipeline:** sum of amounts in deals generated by the investment.
    a. Deal model: W-Shaped (weights first touch, lead design, and deal creation)
    b. Date dimension: Create Date
    c. Metric: *Attributed deals* only

> ℹ️ A positive ROI is generally considered good, with a normal ROI of 5-7% often seen as a reasonable expectation. However, a strong general ROI is something greater than 10%.
>
> The 10-5-3 rule is a rule of thumb that classifies investment returns as follows:
>
> - 10% → Equity Mutual Funds (High Risk, High Return)
> - 5% → Debt Mutual Funds (Moderate Risk, Moderate Return)
> - 3% → Savings Accounts / Fixed Deposits (Low Risk, Low Return)

---

8) Data Quality & CRM Hygiene Report

- **% contacts missing:**
    - Company association
    - Owner
    - Email/domain
    - Lifecycle stage
- **Deals missing:**
    - Amount
    - Close Date
    - Contact association.
    - Line item association
- Duplicate contacts & companies
- Invalid UTMs or missing campaigns

- Incomplete meeting outcomes (no-shows not flagged)
- Stuck Lifecycle or Journey Stages
- Enrichment completeness (via Clay mapping)

---

9) ICP, Segment & Persona Insights Report

- SQLs by ICP Tier
- Deals Won by ICP Tier
- Revenue by ICP Tier
- Persona Engagement (email, IG, inbound)
- Profile Fit distribution (Whale → Mouse)
- Top converting customer profiles
- Growth-stage vs Mega-church vs Media Ministry trends
  Aligned to qualification & segmentation rules.

---

10) Quarterly Sales Acceleration Narrative

- What channels drove the most SQLs
- What channels drove the most deals
- What channels drove the most revenue
- ROI comparison by initiative
- Cost efficiency (SQL, Deal, Revenue) trends
- Recommendation for budget reallocation

Appendix

Formulas Library

Time from First Conversion → First Marketing Email Sent

```
DATE_DIFF(
  OLDEST(IF(TRUE, [MARKETING_EMAIL_EVENT.Send date], NULL)),
  OLDEST(IF(TRUE, [CONTACT.First conversion date], NULL)),
  "day"
)
```

Time from First Conversion → First Meeting Booked

```
DATE_DIFF(
  OLDEST(IF(TRUE, [MEETING_EVENT.Meeting Create date], NULL)),
  OLDEST(IF(TRUE, [CONTACT.First conversion date], NULL)),
  "day"
)
```

Time from First Conversion → First Meeting Starts

```
DATE_DIFF(
  OLDEST(IF(TRUE, [MEETING_EVENT.Meeting Start time], NULL)),
  OLDEST(IF(TRUE, [CONTACT.First conversion date], NULL)),
  "day"
)
```

Time from First Conversion → First Deal Created

```
DATE_DIFF(
  OLDEST(IF(TRUE, [DEAL.createdate], NULL)),
  OLDEST(IF(TRUE, [CONTACT.First conversion date], NULL)),
  "day"
)
```

Time from First Conversion → First Deal Closed-Won

```
DATE_DIFF(
  OLDEST(IF([DEAL.hs_is_closed_won] = true, [Deal Close date], NULL)),
  OLDEST(IF(TRUE, [CONTACT.First conversion date], NULL)),
  "day"
)
```