PipelineSync

FREE TEMPLATE · REPORTING

HubSpot Report and Dashboard Plan Template

Plan your HubSpot reporting before you build it: the KPIs your team agrees on, a spec for every report, each dashboard's audience, filters, access and scheduled emails, the goals you track and the data behind them. Reference pages, a worked example and fillable worksheets.

KPI list | Report specs | Dashboard plan | Goals and data checks

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Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

Most reporting problems start before the first chart: KPIs nobody defined, reports that join the wrong objects and dashboards built for no one in particular. Write those decisions down here and keep this as the record of what each report is for.

1 Check your plan and permissions
What your plan allows for reports, dashboards and goals (pages 3 to 5).

2 Agree the KPIs
One row per number your team acts on, defined in words, with an owner (pages 6 and 7).

3 Spec each report
The question, data sources, join, fields, filters and chart (pages 9 and 10).

4 Plan each dashboard
Audience, reports, filters, access and scheduled emails (page 11).

5 Add goals and data checks
Goals to track and the properties your reports depend on (pages 12 and 13).

6 Review monthly
Spot-check reports, check the data and log every change (page 14).

What is inside

Page	Section	Use it to
03	**Reference: reports**	Plans, report types, data sources, joins, fields and limits
04	**Reference: dashboards**	Plans, filters, access and scheduled emails
05	**Reference: goals**	Plans, goal templates, contributors and durations
06	**Standards: KPIs and questions**	Agree how to define a KPI and phrase a report's question
07	**KPI list**	Record every KPI, its definition, owner and decision
08	**Worked example**	See a complete, illustrative sales leadership plan
09	**Report spec**	Plan one report before you build it
10	**Report inventory**	List every report with its sources, chart and audience
11	**Dashboard plan**	Plan one dashboard: audience, reports, filters, access, emails
12	**Goals to track**	Record each goal's template, period and assignees
13	**Data quality checks**	List the properties reports depend on and keep them filled
14	**Monthly review and change log**	Spot-check reports, track fixes and log changes

Tip: Every worksheet is fillable in Acrobat Reader, Preview or your browser, or print it. Copy the report spec and dashboard plan pages for each report and dashboard. A spreadsheet version is on the template page at pipelinesync.net.

REFERENCE · CHECKED OCTOBER 2026

Reports and the custom report builder

A single object report answers a question about one object and queries the live CRM. The custom report builder joins a primary data source with related objects, activities and events. When we checked, it needed a Professional or Enterprise subscription, and users needed Create/own and Edit report permissions.

Plans and permissions

Feature	Requirement (October 2026)
Custom report builder	Professional or Enterprise of Marketing, Sales, Service, Data, Content or Revenue Hub
Building reports	Create/own and Edit report permissions
Datasets	Data Hub Enterprise
Number of custom reports	Set by subscription; in HubSpot's Product and Services Catalog. Two same-tier subscriptions don't combine

Data sources and joins

- **Primary source decides the count.** The first source you tick sets the focus; every other source is secondary. Swapping them can change totals.
- **Up to five sources.** Connective sources HubSpot adds to join two objects (grey check mark) count toward the five. View data join info shows how they join.
- **Double counting.** A filter or field on a secondary object can count a record once per association. Filter on the primary object, or use Distinct count.
- **Empty values** are not counted in aggregations, so missing data lowers a total without warning.

Fields and filters

- Dimensions group the data; measures have an aggregation: Distinct count, Sum, Average, Median, Min or Max
- Up to 12 measures and one event field per report
- Filter by date or dimension, not by an aggregated measure

Limits to plan around

- Non-table reports: 1,000 unique rows; tables paginate
- Builder reports refresh about every two hours; manual refresh once every 15 minutes
- Keep Break down by well under 100 values, or the report won't load on a dashboard

Chart types: vertical and horizontal bar, line, area, combination, donut, pie, KPI, gauge, scatter plot, pivot table and table. Bar, line, area, KPI and gauge charts can Compare by a date range. Formula field access is described differently on two HubSpot pages: check your account.

REFERENCE · CHECKED OCTOBER 2026

Dashboards: filters, access and emails

A dashboard collects reports for one purpose or person. When we checked, dashboards were on all plans. The number of dashboards follows the highest subscription tier in the account, and reports per dashboard follow your subscription; both are in HubSpot's Product and Services Catalog. Notes and embedded content count toward the per-dashboard limit.

Access

Setting	What it means (October 2026)
Private to owner	The owner and Super Admins
Everyone can view / view and edit	Every user in the account at that level
Specific users and teams ENTERPRISE	No access, View only or View and edit per user or team
Reporting permissions	View, Edit, Create/own and Admin levels per user

Reports on a dashboard follow the dashboard's access settings. Dashboard access doesn't override record, data source or field permissions: a user without them may see partial data, a blank report or an error.

Dashboard filters

- A filter only changes reports that use the data source its property belongs to, and is added with AND logic.
- Pin up to five quick filters. Only the owner and users with edit access can change them.
- Filters a viewer applies only change their own view, for their browser session. Copy the URL to share a filtered view.
- Pipeline and funnel reports keep their own date property; the dynamic Date range filter doesn't affect Date entered [stage] properties.

Scheduled emails

Send once, or daily, weekly or monthly. Recurring emails go to HubSpot users only and show data based on the permissions of the user who set them up. Data is captured two hours before the send.

Outside recipients PRO / ENT

One-time sends only, with admin-level Reporting permissions and the recipient's domain connected as an email sending domain. Emails leave out dashboard filters unless you choose to send with them.

REFERENCE · CHECKED OCTOBER 2026

Goals

HubSpot goals are targets for users and teams over a week, month, quarter, year or custom period, tracked automatically. When we checked, goals needed Marketing Hub, Sales Hub or Service Hub Professional or Enterprise; Sales Hub Starter had the Revenue measure only. Custom goals built from scratch needed Sales Hub or Service Hub Enterprise.

Goal templates

Category	What it measures
Sales	Revenue, Deals created, Calls made, Meetings booked
Customer service	Average ticket response time, Average ticket resolution time, Tickets closed
Marketing	Network conversions, cost per contact in a lifecycle stage, contacts in a lifecycle stage, contacts from first form submission
Custom ENTERPRISE	A property and aggregation (Sum, Average, Min, Max or Count) on a supported object; up to 1,000 per account

Decide before you save

- **Contributors:** individual users, team goals only, or teams with individual user targets. A user's target applies to one team only, their primary team if they have one.
- **Duration:** Weekly, Monthly, Quarterly, Yearly or Custom, optionally aligned with your fiscal year. Duration can't be changed later; clone the goal instead.
- **Names** must be unique across the account. Custom goals can't take new users or teams after they are created.
- **Forecast:** only revenue goals set up for forecasting appear in the forecast, and their duration must match the forecast period.

Goal statuses



Statuses are set against 100% of the target for each milestone. Goal reports come from a goal's Summary tab, the Goals data source in the single object report builder, or a goal added to a deal-based report. Assigned users need a seat.

STANDARDS

Defining KPIs and report questions

A KPI definition names the object, the date that decides the period and what is left out, in words a manager can check against records. A report's question is one a person will act on. Agree both with the people who use the numbers.

Vague definitions and checkable definitions

Hard to check	A manager can check it against records
"Pipeline"	Amount of open deals in the new business pipeline, by close date this quarter
"New leads"	Contacts whose lifecycle stage became Lead in the month; existing customers excluded
"Revenue"	Amount of deals moved to Closed won, by close date; renewals reported separately
"Response time"	Average time to first reply on tickets created in the month, all channels
"How is marketing doing?"	Which original sources created the deals we closed this quarter?

These are illustrative examples, not HubSpot rules or recommended KPIs. Your team writes its own.

RECOMMENDED REPORT NAME PATTERN

Measure, by breakdown, for scope

Example: **Closed won revenue by source, new business** · **Deals created by owner, this quarter**

Your standards

Report name pattern	
Dashboard name pattern	
A KPI definition must say	e.g. object, date property, included and excluded records, calculation
Who may add a report to a shared dashboard	
Agreed by / date	

- [ ] Every KPI has one owner
  Who answers when the number looks wrong
- [ ] Every dashboard has one audience
  And an owner who keeps it current
- [ ] Every report answers a question
  Written before it is built
- [ ] Changes go in the change log
  Page 14

WORKSHEET

KPI list

One row per number your team acts on. If a KPI has no owner and no decision attached, leave it off the dashboard until it does. Targets are left out on purpose: your team sets them.

ID	KPI name	Definition agreed in words	Calculation	Object and date property	Excluded records	Owner	Decision it supports	Cadence	Report IDs
K-01	*New deals created*	*Deals created in the new business pipeline in the period*	*Count of deals*	*Deals, Create date*	*Other pipelines, test deals*	*Sales manager*	*Is there enough pipeline for next quarter?*	*Monthly*	*R-01*

Calculation: Count, Distinct count, Sum, Average, Median, Min or Max of a property, or a ratio of two KPIs written out in words. Cadence: how often the owner reviews it (daily, weekly, monthly, quarterly). Report IDs: the report specs that show this KPI.

WORKED EXAMPLE · ILLUSTRATIVE

Sales leadership dashboard

An illustrative plan for a sales team on Sales Hub Professional. Your KPIs, reports and dashboards will differ; the point is how much is agreed before anyone builds a chart.

KPIs	K-01 New deals created (Deals, Create date) · K-02 Closed won revenue (Sum of Amount, Close date). New business pipeline only; renewals reported separately.
Dashboard	D-01 Sales leadership: new business · owner RevOps lead · audience head of sales and sales managers · Everyone can view
Filters and email	Quick filters Deal owner and Pipeline · weekly email to the head of sales and managers, set up by the head of sales
Goal	Revenue template, quarterly, teams with individual user targets, used in the forecast · targets set by the head of sales (left blank here)

ID	Question it answers	Type	Sources	Measure and filters	Date and breakdown	Chart
R-01	Are we creating enough new business deals each month?	Single object	Deals	Count of deals; Pipeline is New business	Create date, 12 months; Deal owner	Vertical bar, compare to previous year
R-02	Which original sources bring the revenue we close?	Custom report builder	Deals (primary), Contacts	Sum of Amount; Closed won; New business	Close date, this quarter; Original source	Horizontal bar
R-03	Who is on track for this quarter's revenue goal?	Goal report	Goals	Target amount and KPI value	This quarter; by user	Table

Why the spec mattered

The first draft of R-02 filtered on Create date (Contact). Deals with two contacts were counted twice, so the total was higher than closed won revenue. The spec moved the filter to Close date on Deals and noted the join.

First monthly review

Six open deals had no Amount, so K-02 and the forecast ran low. Action: the sales manager makes Amount required when deals enter Proposal sent, and the data quality tab tracks fill rate.

All values on this page are made up for illustration. Deal stage names and the Original source breakdown are examples; use the properties in your account.

WORKSHEET · COPY FOR EACH REPORT

Report spec

Report name and ID	
Question it answers	
KPI ID and who needs it	
Report type	☐ Single object ☐ Custom report builder (Pro / Ent) ☐ Report library ☐ Goal report
Primary data source	
Secondary sources (up to five in all)	
Join checked	☐ View data join info reviewed ☐ Filters on the primary object ☐ Distinct count where needed
Dimensions	
Measures and aggregation	
Filters	
Date property and range	
Break down by (well under 100 values)	
Chart type and Compare by	
Dashboards and access	
Spot-checked against records / by	

DONE FOR YOU

Rather hand your reporting to a HubSpot Gold Partner?

We agree KPI definitions with your team, build the custom reports, dashboards and goals, set access and scheduled emails, and fill in this template for you.

Book a free consultation

WORKSHEET

Report inventory

One row per report, including the ones already in your account. A report that supports no KPI and no decision is a candidate to retire.

ID	Report name	KPI	Question it answers	Type	Data sources (primary first)	Filters and date range	Chart	Who needs it	Status	Spot-checked
R-02	*Closed won revenue by source*	*K-02*	*Which sources bring the revenue we close?*	*Custom*	*Deals, Contacts*	*Closed won; Close date, this quarter*	*Horizontal bar*	*Head of sales*	*Live*	*2026-10-28*

Type: Single object, Custom (custom report builder, Professional or Enterprise), Library, Goal. Status: Planned, Building, Live, Retire. Spot-checked: the date someone last compared a few rows with the records.

WORKSHEET · COPY FOR EACH DASHBOARD

Dashboard plan

Dashboard name and ID	
Audience	
Decision it supports	
Owner	

Reports on it, in order

#	Report ID	Report name	Size and position, or note above it
1			
2			
3			
4			
5			
6			

Quick filters (up to five)	
Date range and frequency	Range: _____ Frequency: _____ ☐ Fiscal year
Access	☐ Private to owner ☐ Everyone can view ☐ Everyone can view and edit ☐ Specific users and teams (Ent)
Users or teams with access	
Scheduled email	☐ None ☐ Daily ☐ Weekly ☐ Monthly ☐ With dashboard filters
Email recipients (HubSpot users)	
Set up by (their permissions decide the data)	
Tested as a user from each team	
Approved by / date	

WORKSHEET

Goals to track

One row per HubSpot goal. Decide contributors and duration before you save: duration can't be changed later, and custom goals can't take new users or teams. Targets are yours to set; none are suggested here.

Goal name	Goal template	KPI	Contributors	Assignees	Duration	Pipelines	Forecast	Target per period	Notifications	Shown on
New business revenue 2027	*Revenue*	*K-02*	*Teams with user targets*	*Sales team*	*Quarterly*	*New business*	*Yes*	*(your team sets it)*	*Kick-off, missed*	*D-01*

Contributors: individual users, team goals only, or teams with individual user targets. Duration: Weekly, Monthly, Quarterly, Yearly or Custom. Forecast: a revenue goal set up for forecasting, with a duration that matches the forecast period. Goal names must be unique in the account.

WORKSHEET

Data quality checks

One row per property a report or goal depends on. Empty values aren't counted in aggregations, so a missing value lowers a total without warning. Record how you will keep each one filled, then check it monthly.

Property	Object	Report IDs	Why it matters	Filled in by	How you keep it filled	Check (list, view, report)	In scope	Missing	Owner
Amount	*Deals*	*R-02*	*Missing amounts lower closed won revenue*	*Deal owner*	*Required when a deal enters Proposal sent*	*View: open deals, no Amount*	*120*	*6*	*Sales manager*

The example numbers are made up. The spreadsheet version calculates fill rate (one minus missing divided by in scope). Goals need owners too: a meeting counts toward a user's goal only with a value in Activity assigned to, and goal progress stops updating for deactivated users.

- [ ] Owner fields checked
  Reports and goals by owner depend on them
- [ ] Associations checked
  Cross-object reports need them

WORKSHEET · ONCE A MONTH

Monthly review and change log

Check	How	Done	Notes
Key reports spot-checked	Compare two or three rows of each key report with the records		
Data behind reports	Update the data quality checks; follow up on missing values		
KPI definitions	New pipelines, stages or sources? Update definitions and filters		
Access and emails	New users and teams; recipients and the sender's permissions		
Unused reports	Ask each dashboard owner; retire reports that support no decision		
Goals for next period	Clone goals for the next period (duration is locked) and set targets		

This month's numbers

Month	Dashboards reviewed	Reports spot-checked	Wrong or unclear totals	Reports retired	Properties low on data	Biggest cause
2026-10	*3*	*12*	*2*	*4*	*1*	*Join on contacts*

The example row is made up. The spreadsheet version calculates reports passing the spot-check (checked minus wrong or unclear).

Change log

Date	KPI, report or dashboard	What changed	Why, and what it affects	By
2026-10-28	*R-02*	*Date filter moved from Create date (Contact) to Close date (Deal)*	*Deals with two contacts counted twice; D-01 and K-02*	*RevOps lead*

PipelineSync

HUBSPOT GOLD SOLUTIONS PARTNER

Want reporting your team trusts, designed and built for you?

We agree KPI definitions with your team, build the custom reports, dashboards and goals, set access, filters and scheduled emails, then hand over this template filled in.

RevOps infrastructure, lead to close

Lifecycle stage definitions, lead scoring and routing with SLAs and fallback owners, sales and marketing automation, attribution reporting and executive dashboards.

Ongoing HubSpot administration and optimization

Monthly support for workflow changes, reporting updates, data hygiene and user support.

HubSpot implementation and onboarding

Design and build of the full HubSpot structure: properties, pipelines, teams and permissions, workflows and dashboards, with SOPs and training.

HubSpot audit

A structured review of your portal, data, automation and reporting, with prioritized recommendations.

Book a free 30-minute consultation

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