

Understanding your
HUBSPOT
DASHBOARD

REPORT DEFINITIONS
& BEST PRACTICES



AVG DEAL SIZE YOY

2026 TOTAL SALES

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2025 TOTAL SALES

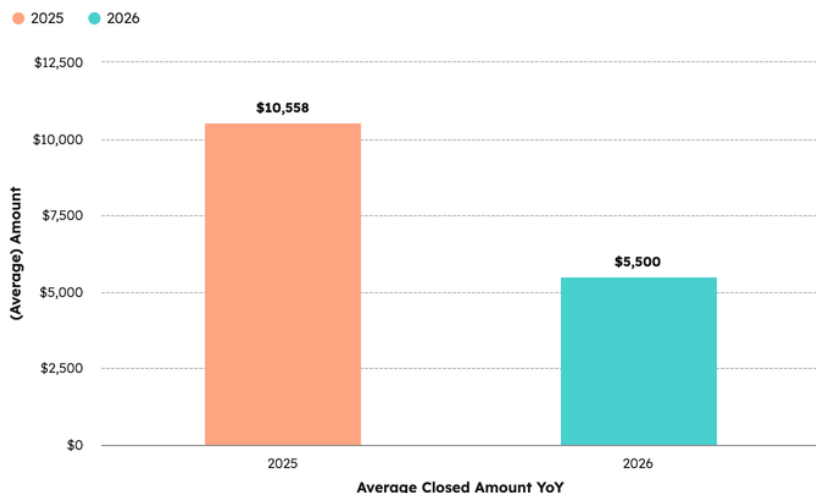
2025 CALENDAR YEAR REVENUE

OWED, REQUESTED, PAID FOR 2025 EVENTS

2025 SPEAKING ACTIVITY (EVENTS DELIVERED)

AVG DEAL SIZE YOY

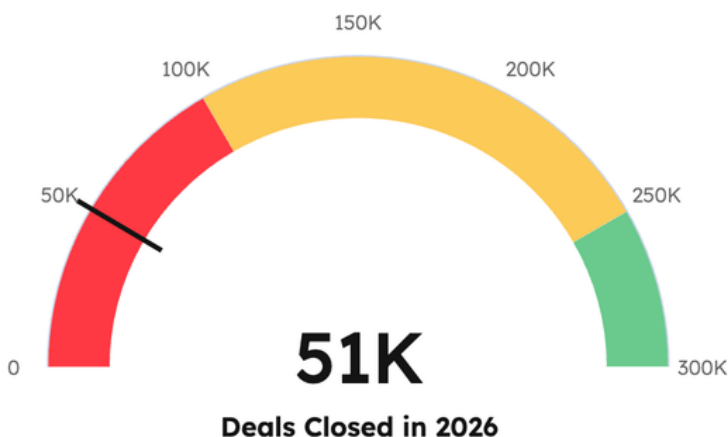
This report compares the average value of deals we closed in 2025 versus 2026. It's a quick pulse check on whether your engagements are trending toward higher fees over time.



Goal: By December 31, 2026, your average deal size should be equal to or greater than your 2025 average. Watch this number across the year to spot if deal sizes are dipping.

2026 TOTAL SALES

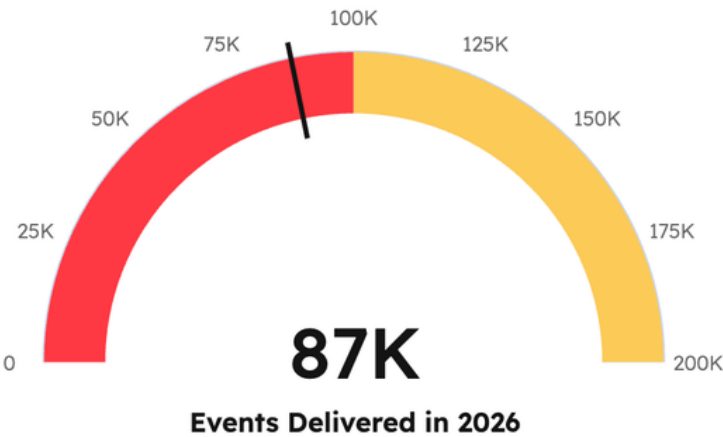
This is the combined dollar value of every contract executed in 2026, including events scheduled for 2027 or beyond. Think of it as your running sales total for the year. Each speaker has a personalized goal. The gauge visualization on the report shows you whether you are in the red (below target), yellow (approaching target), or green (at or above target).



Goal: Hit your green zone by year-end. Use this report to regularly track your pace and identify if you need to push for additional bookings.

2026 CALENDAR YEAR REVENUE

This report shows the gross revenue for all events taking place in 2026, both completed and upcoming. It gives you a full picture of how much revenue your 2026 events represent in total.

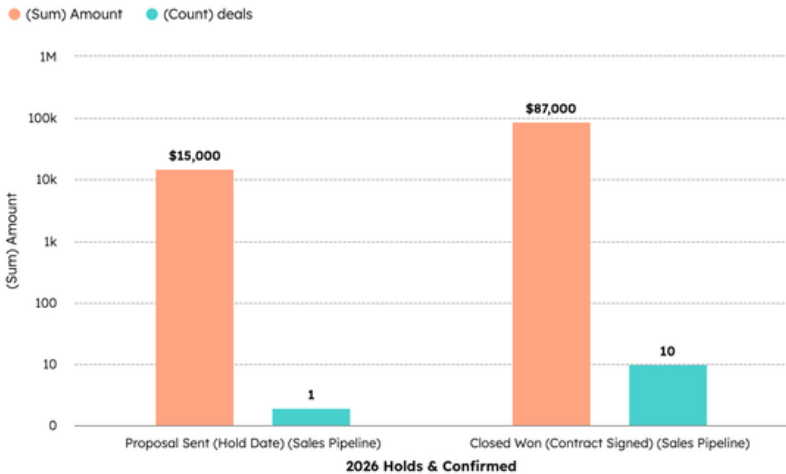


Goal: Use this to gauge your overall 2026 event revenue at a glance. Compare it against your personal goal to see where you stand and how much runway you have left in the year.

2026 PIPELINE ANALYSIS

This report gives you a high-level snapshot of your 2026 pipeline in two categories:

- Proposal Sent (Hold Date): Deals where a date is being held but a final decision has not been made.
- Closed Won: Deals that are fully confirmed (contracts executed). These are locked in.

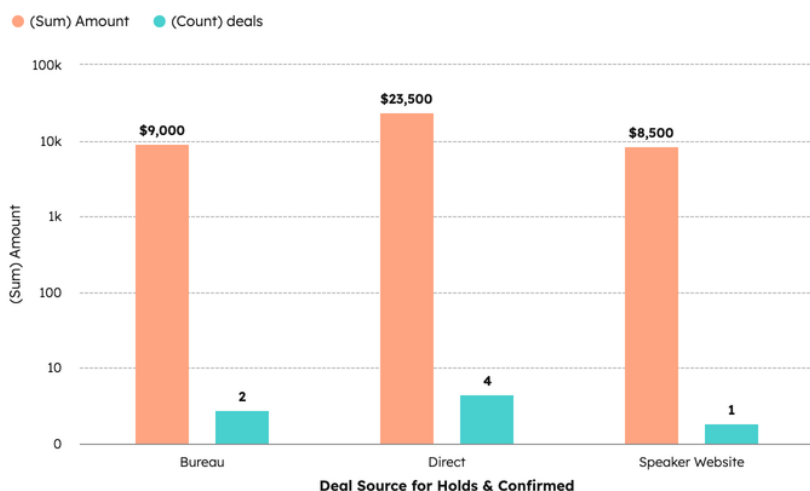


Note: This graph shows deal counts and dollar totals. It does not display individual event dates. Stevie will send you a detailed report during your monthly calls that you can use to cross-reference with your calendar and confirm all dates are properly held or blocked off.

2026 DEAL SOURCE

This report shows where your current Holds and Confirmed deals are originating from. There are three categories:

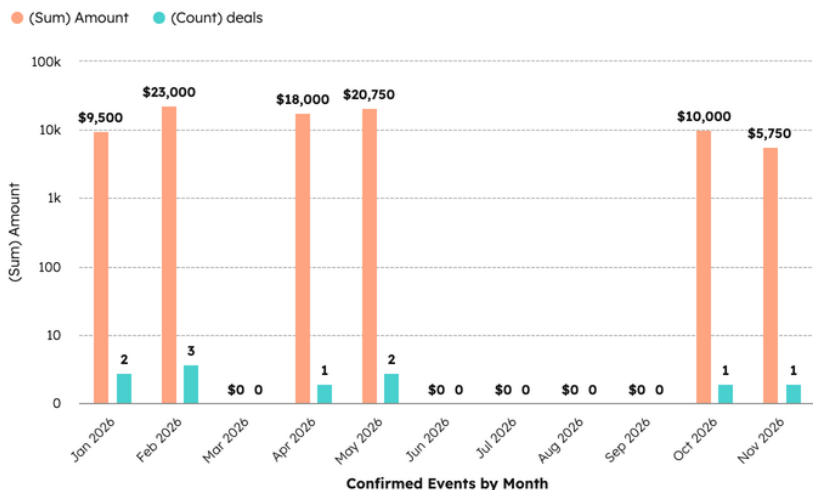
- Bureau: deal was sourced through a speakers bureau.
- Direct: deal was sourced through Inkwell outreach on your behalf.
- Speaker Website: deal came in through your own website or inquiry.



How to use it: This tells you which channel is working best. If Bureau deals dominate, that relationship is strong. If Direct is low, it may be a signal to invest more in targeted outreach. Use it to guide where to focus your business development energy.

2026 SPEAKING FORECAST (EVENTS)

This report breaks down your Closed Won deals month by month for 2026, showing how many events you have confirmed each month and their combined value.



How to use it: Identify slow months and use that insight to focus outreach efforts. If March and August are light, those are prime times to pitch new engagements and build pipelines.

OWED, REQUESTED, PAID FOR 2026 EVENTS

This report applies only to your Closed Won deals and shows where payment stands across three categories. All three columns are gross figures and do not include travel. Your actual take-home will be lower once commission is applied. If you want a net revenue estimate, please reach out to Stevie.

OWED

\$17,500

DEPOSIT RECEIVED

\$9,000

FULLY PAID

\$14,500

Status	What it means	Keep in mind
Owed	No payment has been received yet. The full amount is still outstanding from the client.	Typically due 7 days after contract execution, unless it's a bureau deal or the contract states otherwise.
Deposit Received	A partial payment (typically 50% of the speaker fee plus 50% of travel buyout) has been received by Inkwell MGMT.	A 9k deal in "Deposit Recieved" does not mean \$9K has been received. It likely means ~\$4.5K came in. Commission is then deducted from the deposit.
Fully Paid	All payment from the client has been received by Inkwell MGMT.	A \$14K "fully paid" deal may represent ~\$10.5K in actual speaker revenue after commission is deducted.

TOP DIRECT CLIENTS (SOLD = PAST 12 MONTHS)

This lists the direct clients associated with your Closed Won deals over the last 12 months. "Direct" means the deal came through Inkwell outreach not through a bureau. For each client you can see the number of deals and the combined dollar value of those deals. One client may appear multiple times across separate events.

Company name ↑	(Count) deals ↑↓	(Sum) Amount ↑↓	Close date - Monthly ↑↓
duke university	<u>1</u>	<u>\$8,500</u>	Feb 2026
etherio	<u>1</u>	<u>\$5,000</u>	Mar 2026
mishrm	<u>1</u>	<u>\$10,000</u>	Mar 2026
national council for mental wellbeing	<u>1</u>	<u>\$9,000</u>	Jan 2026
school nutrition association	<u>1</u>	<u>\$6,000</u>	Jan 2026
the arc of the ozarks	<u>1</u>	<u>\$11,500</u>	Dec 2025
treeline associates	<u>1</u>	<u>\$10,000</u>	Mar 2026
utah's credit unions	<u>1</u>	<u>\$9,000</u>	Feb 2026
Report Total	7	\$59,000	

How to use it: Identify your most loyal direct clients. A client with 3+ events is a strong relationship worth nurturing. This list also shows which organizations keep coming back, which can inform your outreach and referral strategy.

TOP BUREAU CLIENTS (SOLD = PAST 12 MONTHS)

This lists the bureaus that have sourced your Closed Won deals over the last 12 months. You can see the number of deals booked through each bureau and their combined value.

Company name [↑]	(Count) deals [⌵] [⌴]	(Sum) Amount [⌵] [⌴]
apb speakers	<u>1</u>	<u>\$45,000</u>
bigspeak	<u>2</u>	<u>\$60,000</u>
chartwell speakers	<u>1</u>	<u>\$15,000</u>
lst speakers	<u>1</u>	<u>\$19,500</u>
the speaker exchange agency	<u>1</u>	<u>\$35,000</u>
wsb	<u>1</u>	<u>\$30,000</u>
(No value)	<u>1</u>	<u>\$20,000</u>
Report Total	8	\$224,500

How to use it: Understand which bureau relationships are generating the most revenue. A bureau with a high deal count and strong dollar value is a key partner to maintain and grow.

TOP BUREAU AGENTS (SOLD = PAST 12 MONTHS)

Rather than showing the bureau as a whole, this report breaks it down to the individual agent level; the specific person at each bureau who is bringing you deals. For each agent you can see their name, which bureau they represent, how many deals they have closed with you, and the combined value of those deals.

First name ↑↓	Last name ↑↓	Company name ↑	(Count) deals ① ↑↓	(Sum) Amount ① ↑↓
laura	obermann	apb speakers	<u>1</u>	<u>\$45,000</u>
amy	eddy	bigspeak	<u>1</u>	<u>\$30,000</u>
michelle	gustafsson	bigspeak	<u>1</u>	<u>\$30,000</u>
jeana	webster	chartwell speakers	<u>1</u>	<u>\$15,000</u>
sondra	ulin	1st speakers	<u>1</u>	<u>\$19,500</u>
deia	starr rank	the speaker exchange agency	<u>1</u>	<u>\$35,000</u>
meg	ryan	wsb	<u>1</u>	<u>\$30,000</u>
dan	risner	(No value)	<u>1</u>	<u>\$20,000</u>
Report Total			8	\$224,500

How to use it: Agent relationships matter. If one agent at a bureau is responsible for the majority of your bookings, that is someone worth staying close to. Use this list to prioritize relationship-building with your highest-producing bureau contacts.

MOST ACTIVE BUREAU AGENTS

(HOLDS+LOSTS+WON) = PAST 12 MONTHS

This report measures overall bureau agent activity across all deal stages, not just wins. It combines Holds, Losses, and Won to show you who is bringing the most volume of activity to your pipeline.

First name ↑↓	Last name ↑↓	Company name ↑	(Count) deals ① ↑↓	(Sum) Amount ① ↑↓
laura	obermann	apb speakers	<u>1</u>	<u>\$45,000</u>
michelle	gustafsson	bigspeak	<u>1</u>	<u>\$30,000</u>
amy	eddy	bigspeak	<u>1</u>	<u>\$30,000</u>
jeana	webster	chartwell speakers	<u>1</u>	<u>\$15,000</u>
sondra	ulin	lst speakers	<u>1</u>	<u>\$19,500</u>
deia	starr rank	the speaker exchange agency	<u>2</u>	<u>\$50,000</u>
meg	ryan	wsb	<u>1</u>	<u>\$30,000</u>
dan	risner	(No value)	<u>1</u>	<u>\$20,000</u>
Report Total			9	\$239,500

How to use it: High activity doesn't always mean high revenue, but it does mean engagement. An agent submitting a lot of holds is actively thinking of you for events. Even if not all convert, that pipeline activity is valuable and worth acknowledging.

COUNT OF SALES ACTIVITIES LAST 90 DAYS

This report shows all activity that Inkwell has logged against your deals in HubSpot over the past 90 days. It is a snapshot of the work happening behind the scenes on your behalf.

CALL	EMAIL REPLY FROM CONTACT	EMAIL SENT TO CONTACT	NOTE	TASK
<u>7</u>	<u>175</u>	<u>386</u>	<u>8</u>	<u>1</u>

Activity is broken into five categories:

- **Call:** logged calls including pre-event prep, discovery, and logistics.
- **Email Reply from Contact:** any contact (client, bureau, agent) who has replied to an email related to one of your deals.
- **Email Sent to Contact:** emails Inkwell has sent out on your behalf, from standard logistics to outreach and pitching.
- **Note:** internal notes Inkwell has logged to your deals. These cover a wide range of deal updates and conversations.
- **Task:** all tasks tied to your deals, such as proposal submissions, follow-ups, and action items.

Important: *These numbers reflect only what has been logged in HubSpot. The real volume of activity on your behalf is almost certainly higher. Use this report as a floor, not a ceiling.*

2026 SPEAKING HOLDS + CONFIRMED

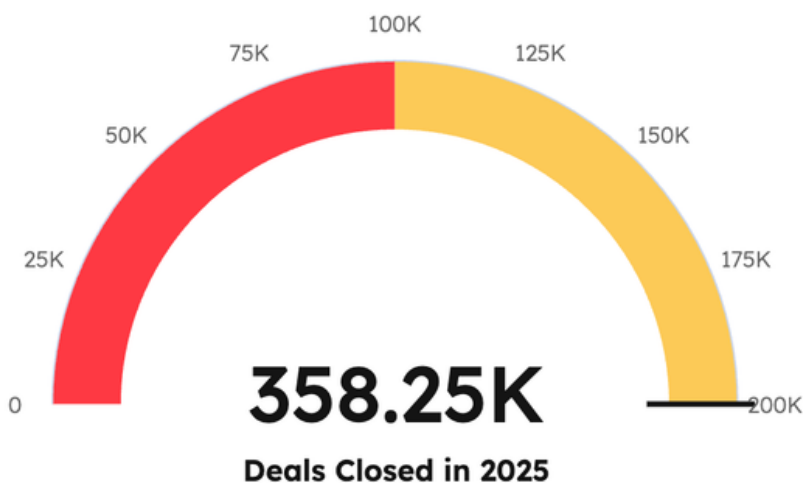
This report displays all 2026 speaking engagements currently in the “Closed Won” and “Proposal Sent” stages. It includes both confirmed events and tentative holds that are actively in progress.

Deal stage ↑↓	Event Name ↑↓	Event Start Date - Daily ↑	Event End Date - Daily ↑↓
Closed Won (Contract Signed) (Sales Pipeline)	2026 Ohio Safety Congress & Expo	3/12/2026	3/12/2026
Closed Won (Contract Signed) (Sales Pipeline)	Employee Inclusive Excellence	3/30/2026	3/30/2026
Closed Won (Contract Signed) (Sales Pipeline)	Annual Human Resources Conference	4/20/2026	4/20/2026
Closed Won (Contract Signed) (Sales Pipeline)	Talent 2026	4/21/2026	4/21/2026
Closed Won (Contract Signed) (Sales Pipeline)	California HR Conference	5/13/2026	5/13/2026
Proposal Sent (Hold Date) (Sales Pipeline)	ICMI Contact Center Expo 2026	10/26/2026	10/29/2026

Note: Use this report to cross-reference with your calendar and ensure all applicable dates are properly blocked off and reserved.

2025 TOTAL SALES

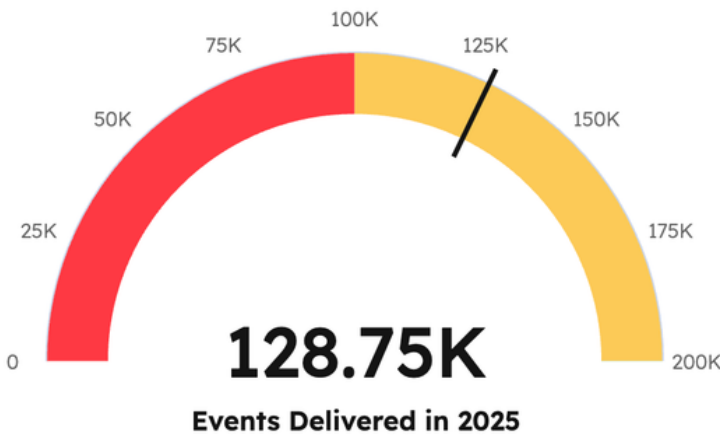
This is the gross revenue for all contracts executed during 2025 regardless of when the actual event took place. An event contracted in 2025 with a 2026 date still counts here.



Note: Use this as a historical benchmark to compare against your 2026 pace and set realistic expectations for growth.

2025 CALENDAR YEAR REVENUE

The gross revenue from events actually delivered in 2025. This is your historical baseline; useful for year-over-year comparisons and understanding your earnings from completed engagements last year.



Note: Use this number as a reference point when evaluating your 2026 progress. If your 2026 Calendar Year Revenue is tracking ahead of this figure, you're growing. If it's behind, it may be worth discussing pacing and strategy.

OWED, REQUESTED, PAID FOR 2025 EVENTS

This section mirrors the 2026 report but covers your 2025 events. At this stage, it functions primarily as a historical record reflecting the same gross revenue as the 2025 Calendar Year Revenue report.

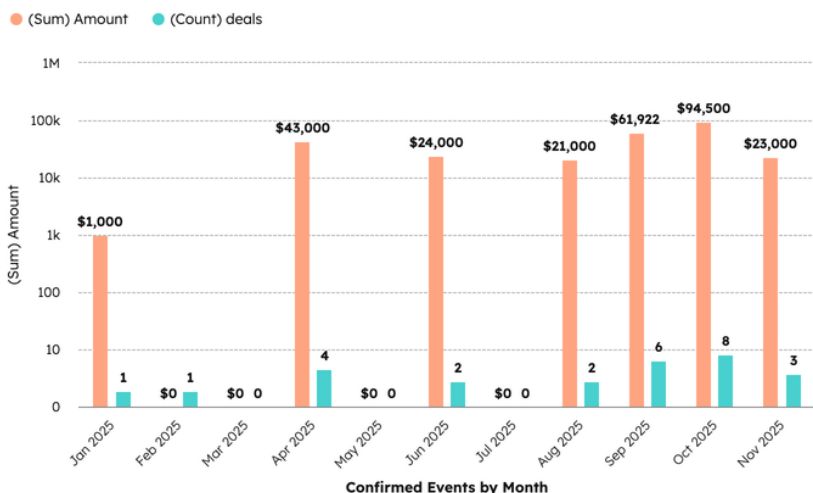
FULLY PAID

\$128,750

Note: *While this section is largely retrospective, it serves as an important foundation. We're leaning into the evolving/scaling speaker, and because of that we feel like it's important to document where your speaking career began.*

2025 SPEAKING ACTIVITY (EVENTS DELIVERED)

This report shows a month-by-month breakdown of events that were delivered (completed) in 2025. For each month you can see the number of Closed Won deals and their combined dollar value.



How to use it: Use this to understand your seasonality. Which months had the most events? Which months were quiet? Knowing your 2025 patterns helps you plan smarter outreach in 2026 and set realistic expectations for revenue flow throughout the year.

QUESTIONS ABOUT YOUR DASHBOARD?

PLEASE REACH OUT TO

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AND

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WE'RE HAPPY TO WALK THROUGH ANY
REPORT WITH YOU.

