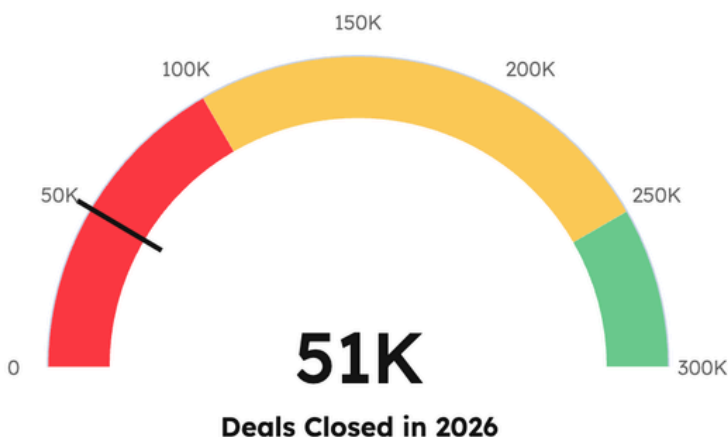


Understanding your
HUBSPOT
DASHBOARD

REPORT DEFINITIONS
& BEST PRACTICES

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).

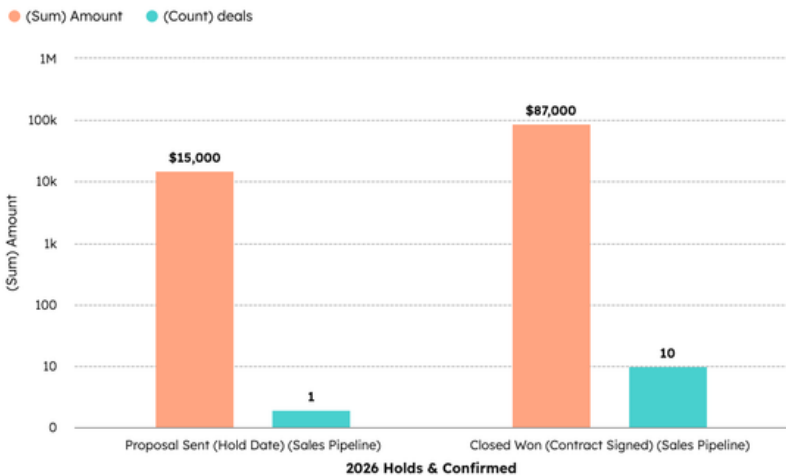


Goal: Hit your green zone by year-end. Use this report to regularly track your pace and identify if you need to push for additional bookings.

2026 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.

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	DEPOSIT RECEIVED	FULLY PAID
<u>\$17,500</u>	<u>\$9,000</u>	<u>\$14,500</u>

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.

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.

QUESTIONS ABOUT YOUR DASHBOARD?

PLEASE REACH OUT TO

STEVIE@INKWELL-MGMT.COM

AND

OPERATIONS@INKWELL-MGMT.COM

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

