HUBSPOT REPORTING DASHBOARD IMPLEMENTATION

Dietitian Live (Healthcare & Nutrition Services)

CHALLENGE

Dietitian Live's sales and support teams were struggling with:

- No central visibility into rep performance.
- Tracking calls, connects, and meetings required manual reports in spreadsheets.
- Managers lacked real-time insights to identify bottlenecks in the sales process.
- Performance reviews were reactive, not proactive.

The leadership team wanted a single dashboard that showed all key metrics across reps and workflows.

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SOLUTION IMPLEMENTED

Using HubSpot Reporting & Dashboards, we designed and deployed a Calling Performance Dashboard with real-time KPIs, including:

- Rep Totals (Dials) – Total calls made by each rep.

- Connects – Number of successful connections with prospects.

- Completion Rate – % of calls completed successfully.

- Activated Leads – Prospects that engaged positively.

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- Meetings Scheduled – Calls converted into meetings.

- Conversion Ratios – Connect % and Meeting % tracked over time.

We also integrated graphical trend reports to highlight activity growth and conversion trends by day.
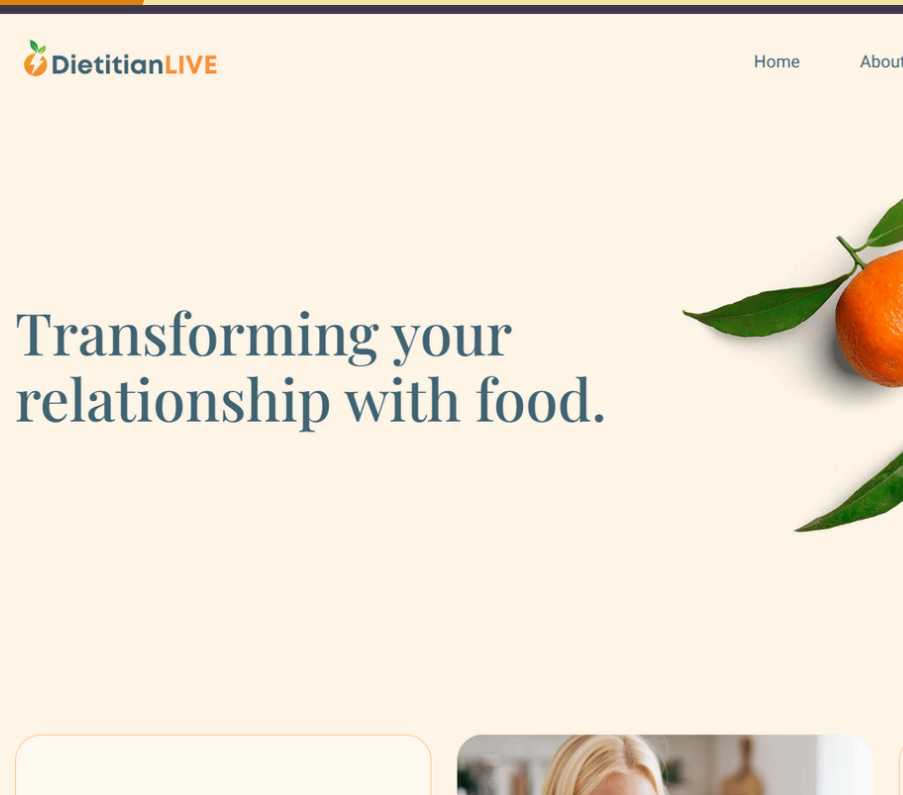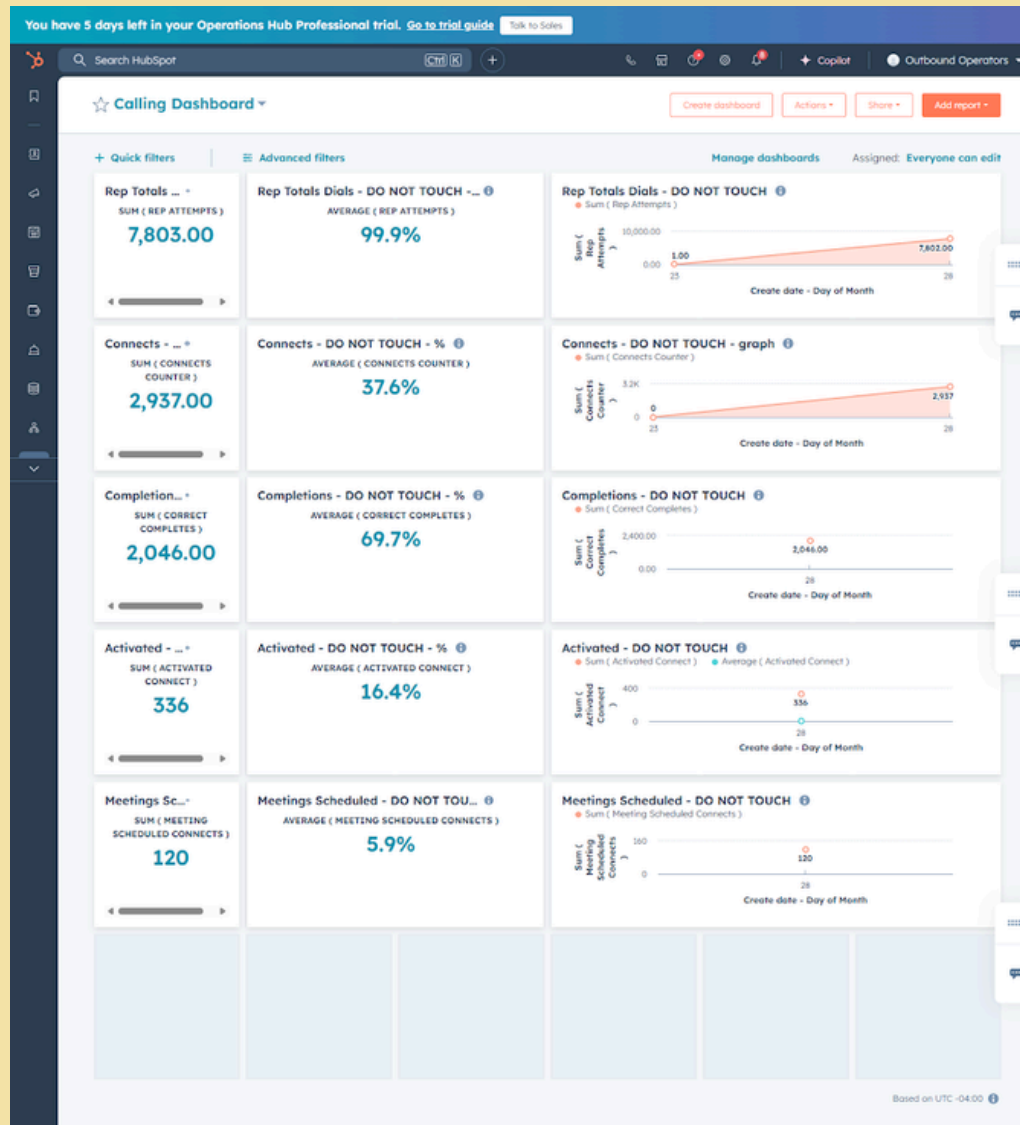
Results

After implementation:

- Managers gained real-time visibility into team performance.

- Call-to-meeting conversion rates improved by 25% in the first 6 weeks.

- Reps were able to track their own progress and self-correct without waiting for weekly reports.
  - Leadership could forecast pipeline with higher accuracy based on meetings scheduled.

The dashboard became a centralized control center for sales operations, replacing manual spreadsheets entirely.

DietitianLIVE

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Transforming your relationship with food.

HubSpot Reporting Dashboard

KEY TAKEAWAY

HubSpot's Reporting Dashboard gave Dietitian Live the ability to:

- Track performance in real-time
- Eliminate manual reporting
- Align reps and managers with clear KPIs
- Drive measurable improvements in call efficiency and meeting conversions