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METRICS
MASTER LIST

Ads
(Metrics 1-5)

Ad spend by Outlet
Ad spend vs Profit
Facebook ad summary per ad
Note: Ad spend, Click through rate, Cost per click, link clicks
Amazon ads spend and sales per month
Google Ads summary - past 30 days vs prior 30 days
Note: Organic searches, impressions, ad cost, CPM, CPC, CTR%, Cost per Transaction, Cost per Conversion

Email Marketing
(Metrics 6-8)

Active email subscribers per month
Note: Can also monitor unsubscribes and new subs
Email metrics per newsletter sent
Note: Recipients, open rate, conversion rate, links clicked
Email open rate and click rate over time

Financials
(Metrics 9-25)

Ad expense % of Revenue
Affiliate earnings per month
Affiliate earnings summary table
Note: Clicks, Items Sold, Conversion Rate, Avg Items/Order, Avg \$ per Order
Average Invoice \$ per month
Average monthly Revenue

Closed payments vs Pending payments per month
COGS as % of Revenue
COGS per month
Collaborations earnings per month
Gross profit margin per month
Net Income per month
Operating Expenses over time
Opex as % of Revenue
Opex per month
Note: Can highlight key expenses e.g. Advertising, Supplies, etc.
Profitability by client
Note: Revenue per client, Gross profit per client, Opex per client, Net income per client
Revenue by Month vs Plan vs a year ago
Note: Can also have separate chart to see for just this month
Revenue by Services
Note: Or per platform

Financials Cont'd
(Metrics 26-40)

Revenue by Type/Source
Note: YTD or per month
Revenue by Type/Source vs prior period
Revenue percentage per source per month
Note: How much of your revenue comes from each particular source
Stripe payouts by month
YTD total Revenue vs plan vs a year ago
Revenue detail by client
Note: Revenue, count of transactions, avg Revenue per transaction
Income vs Cash received per month
Cash flow per month
Supplier payables
Note: Cash spent, cash received, closing bank balance
Aged receivables summary
Aged payables summary
Cumulative Revenue per month
Cumulative net income per month
Net income as % of Revenue
Project cost and Revenue per month
Note: Can be segmented per project type

Lead Generation
(Metrics 41-48)

Deal pipeline forecast
Deals won by referrer
Funnel conversion rates per month
Funnel/pipeline conversion
New client count per month
Number of leads and cost per lead
Calls booked and client conversion rate per month
Proposals sent and client conversion rate per month



*Most commonly
used metrics for
scaling small
businesses...*



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METRICS MASTER LIST

Membership

(Metrics 49-50)

Member churn per month
Note: New members and inactive members in one chart
Membership count per month

Operations

(Metrics 51-55)

Appointment count by month
Note: Option to break down appointment type
Average visits per client over time
Client count and average invoice \$ per client per month
Time tracking by staff
Note: Can segment or filter billable vs non billable
Project time tracker
Note: Hours budgeted, hours spent, hours remaining

Product

(Metrics 56-65)

Average selling price per category
Current Inventory
Inbound value per category
Note: For product sellers
Inventory value over time
Note: For product sellers
Net shipment value per month
Note: Can be segmented according to sales channels
Net shipments per account/customer
Note: Units or \$

Net shipments per product
Note: Units or \$
Product return percentage over time
Top Products sold
Note: Past 30 Days/YTD/specific time period
Units Sold per month
Note: Can be segmented according to sales channels

Social Media

(Metrics 66-68)

Facebook video impressions per week/per month
FB page summary per month
Note: FB Fans, Engaged Users, Fan Adds, Removes, Page Impressions
FB post impression, reach, likes per month

Social Media Cont'd

(Metrics 69-76)

IG impressions and reach over time
IG website clicks and profile views per month
Pinterest impressions per month
Podcast downloads/listeners per month
Top 10 Podcast episodes last month
Facebook Reactions per type
Instagram Top Posts by Likes
Content creation tracking per month
Note: Blog posts published, Instagram posts, Linked in posts, emails sent

Website

(Metrics 77-81)

Google Analytics goal completions per month
Note: Can be segmented to traffic referrer
Google Analytics sessions per month
Google Analytics sessions top social media referrers
Note: Past 30 days and/or YTD
Google Analytics sessions top traffic referrers
Note: Past 30 days and/or YTD
Google Business Profile summary per month
Note: Interactions, views, website clicks

Website Cont'd

(Metrics 82-84)

Website Top 10 pages from last 30 days
Note: According to number of page views
Google Analytics summary - past 30 days vs prior 30 days
Note: Users, % New sessions, Bounce rate, avg session duration, Page views, total page views/session
Google Analytics users by country

YouTube

(Metrics 85-86)

Youtube summary per month
Note: Subscribers gained, views, watch time
Youtube Top 10 videos last month
Note: According to number of views and/or watch time



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