



Building your business dashboard



The critical metrics you need to stay in the air and reach your destination

Set-up: How's your business going?

pretty good! I love the work I do and who I work with. I've met my revenue goal for the year, I feel like my working hours have mostly stayed inside my schedule. I'd like a stronger pipeline.

I'm using a mix of how I emotionally feel about my business and some concrete metrics that I've set for myself. I could do a better job aligning my metrics to the ultimate outcomes I want.

Step 1: Plan. Set your destination

What "success" or outcome(s) would make you stay in business? Why did you start your business?

- I need to make enough money to cover both my family's expenses and "enough" of the fun stuff
- I want to enjoy the work I do "most" of the time
- I need to be able to cover all of the kids' schedules/activities/sick days...
- I want to feel like I make a difference and improve our communities.

How are you going to measure that outcome?

- annual revenue goal (set each year based on family budget)
- Working schedule (based on kids' schedule and "balance")
- Review of client alignment with my values
- 80% positive emotions

Data Source:

Bank account/finances, Outlook calendar/auto tracker for "activity outside work hours", weekly emotional assessment

Step 2: Liftoff. Get (and stay) off the ground

Data Sources for Lift (income)

Bank and invoicing apps

Data Source(s) Gravity (expenses)

Invoicing/time tracking app and bank statements, bills for software

Fuel (inputs)

- My hours
- Consultant hours
- Analytic software

Thrust (outputs)

- Podcast
- Consulting projects
- Training sessions
- Analytic management contracts

Data Source(s):

Time tracking apps

Data Source(s):

Podcast app, time tracking app, calendar/schedule

Get to the heart of your data.



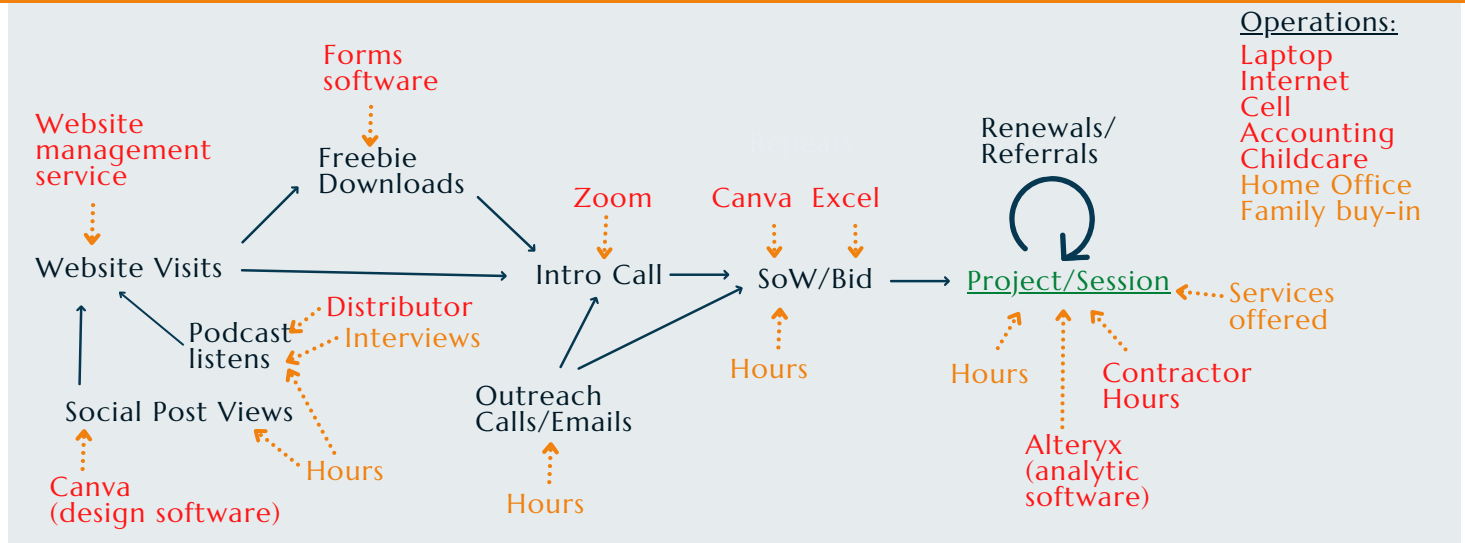


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Step 3: Aviate. Fly your plane



Data Source(s) for levers:

bank, invoicing, website analytics, podcast app, expense tracking

Data Source(s) for engines:

Podcast app, time tracking app, calendar/schedule, CRM/pipeline management app

Step 4: Navigate. Stay on course

How frequently do you need to be checking your compass and instrument panel?
How often will those values change, and how often can and will you actually make changes?

- podcast=weekly
- finances=monthly
- client success rate=quarterly
- website=quarterly

Step 5: Evolve. Reach new heights!

How what do you commit to doing within the next two weeks to ensure you aren't flying with blinders on?

setting aside a reserved time on my calendar as recurring events for the next 12 months to review my key metrics and adjust course

What is at least one "stretch goal" for how you would like to use data in your business?

setting up auto-alerts (emails) when certain thresholds for key metrics are reached, e.g. if monthly or total expenses reach X dollars.