

The Ultimate Metrics Checklist



Below are the most common metrics we track in client dashboards (most of which you should be tracking too). Our dashboards automatically pull these metrics via API from whatever systems our clients use; at the least, you should pull these metrics manually.

To get the most value from these metrics, you should track them in different time intervals (e.g., day, week, month, etc.). Metrics should also be compared versus previous time periods. Finally, current month, quarter and/or annual results should be projected so you can assess your real-time performance.

Financial Performance Metrics

- Gross Profit
- Cash Balance
- Accounts Receivable vs Payable
- Quick Ratio
- Current Ratio

Sales Metrics

- Total Sales (\$)
- Number of Sales (#)
- Sales by Product
- Sales by Partners, Resellers, etc.
- Sales by Source (e.g. Online vs Offline, etc.)
- Membership Program Retention (# of months and churn)
- Lifetime Customer Value

Website Metrics

- Revenue (or Leads) Generated from Paid vs Unpaid Traffic
- Number of Visitors
- Visits per Visitor
- Website Bounce Rates
- Time on Website
- Revenue (or Leads) per Visitor
- Top Search Traffic Sources
- Top Website Pages (views/\$/leads)
- Top Organic Keywords (visits/\$/leads)
- New vs. Returning Visitors
- Visitors by Country
- Mobile & Tablet Traffic
- Top Referring Websites (views/\$/leads)

Lead & Conversion Metrics

- Leads by Day, Week, Month
- Leads by Source
- Revenue per Lead
- Cost per Lead
- Lead Conversion Rate by Day, Week, Month

Sales Team Metrics

- Sales by Team Member (\$ and #)
- New Leads per Team Member
- Team Member Proposal and Close Ratios
- Number of Proposals Given by Team Member
- Revenue per Lead (Overall and by Team Member)
- Revenue per Lead Source

Email Metrics

- Email Subscriber List Size
- Emails Sent
- Email Opens (and Open Rate)
- Email Clicks (and Click Through Rate)
- Email Revenue or Leads
- Email Unsubscribes (and Unsubscribe Rate)
- Revenue/Leads per Email
- Average Revenue/Leads per Click

Social Media Metrics

- Traffic to Your Website from Social Media
- Leads and/or Sales Generated from Social Media
- Facebook Page Post Impressions
- Facebook Fan Engagement
- Facebook Likes vs Unlikes
- Number of Twitter Followers
- Number of Retweets
- Top Retweets
- Number of YouTube Video Views
- Number of YouTube Channel Subscribers
- Number of LinkedIn Followers
- Number of Pinterest Pins
- Number of Instagram Followers & Comments

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Advertising Metrics

- Leads and/or Revenue from Advertising
- Advertising Costs (Total and by Source)
- Revenue vs Cost per Advertising Sale
- Online Advertising Clicks
- Online Advertising Impressions
- Online Advertising Cost per Click
- Number of Leads Generated by Advertising
- Cost per Lead (by Advertising Source and Campaign)
- Advertising Expenses as % of Sales

Customer Service Metrics

- Total Refunds
- Refunds by Product
- Unpaid Invoices (# and \$ amounts)
- Total Calls and Emails
- Customer Satisfaction
- Average Call Handle Time
- Average Speed of Answer
- Average Call Length
- Number of New Tickets
- Number of Open Tickets
- Average Ticket Handle Time