

Monthly KPI Template

A founder-friendly scorecard for tracking the operational and financial metrics that actually move the needle.

Financial KPIs

Metric	Target	Actual	Variance
Revenue			
Gross Profit			
Gross Margin %			
Net Profit			
Cash on Hand			
Accounts Receivable			

Sales KPIs

Metric	Target	Actual	Variance
Leads Generated			
Appointments Scheduled			
Estimates Sent			
Close Rate %			
Jobs Sold			
Sales Revenue			

Operations KPIs

Metric	Target	Actual	Variance
Projects Completed			
Projects On Schedule %			
Change Orders Approved			
Average Project Duration			
Customer Satisfaction Score			

Marketing KPIs

Metric	Target	Actual	Variance
Website Leads			
Facebook Leads			
Google Leads			

Referral Leads			
Cost Per Lead			

Leadership Review

Biggest Win This Month: _____

Biggest Challenge This Month: _____

Top 3 Priorities Next Month:

1. _____

2. _____

3. _____

Back Office Solutions™

Building businesses through visibility, accountability, and execution.