


Catersource
+ The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.


RECIPE FOR SUCCESS:
MASTERING KPIs & METRICS

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WHAT IS A KPI?

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KEY
PERFORMANCE
INDICATORS

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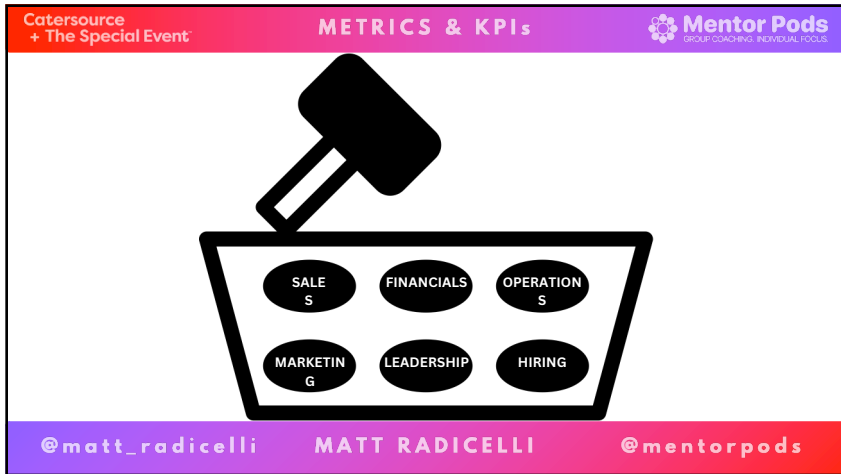
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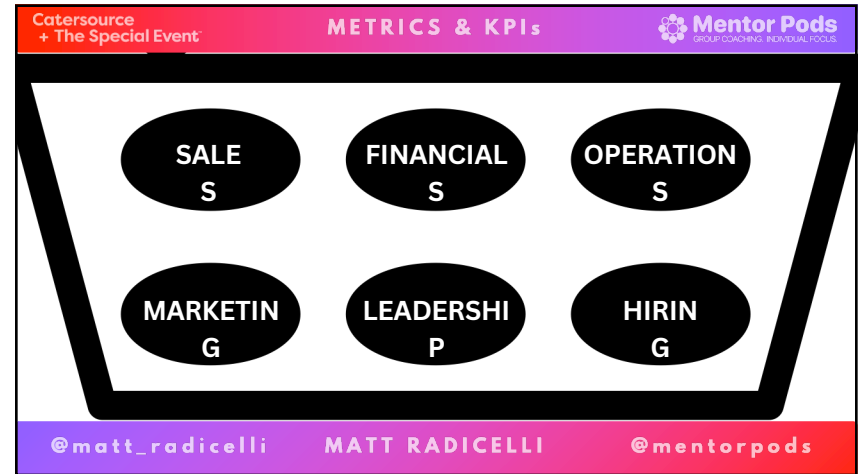
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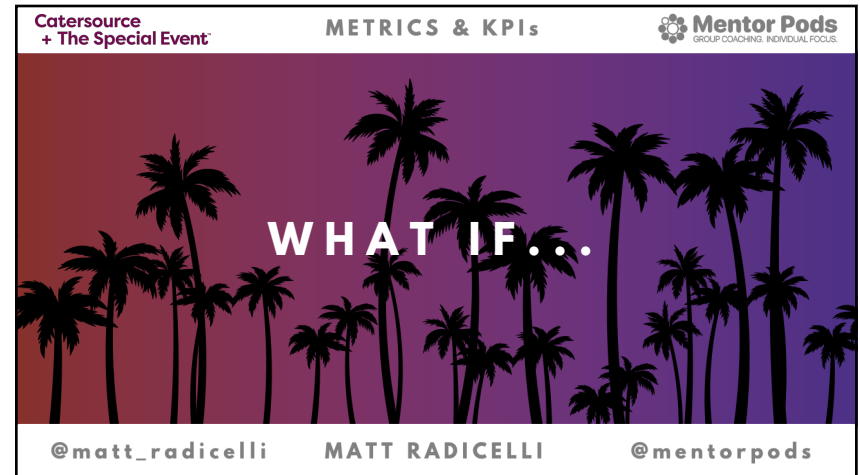
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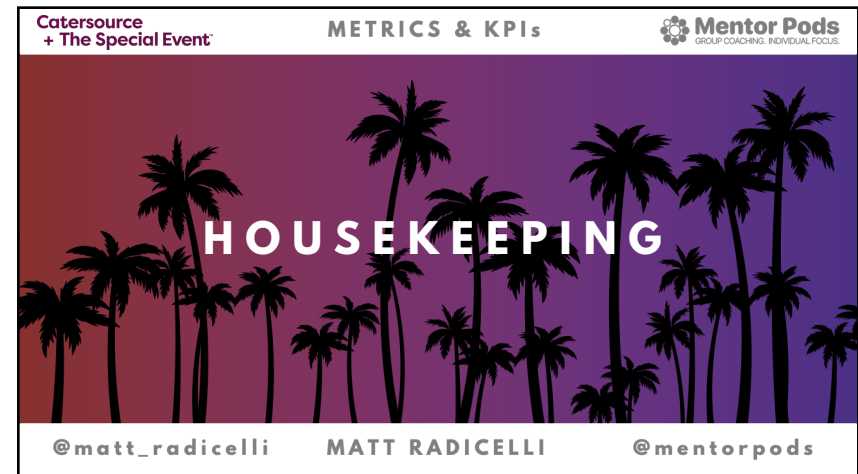
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✓ PRESENTATION SLIDES

AND...

✓ 10X MARKETING MATRIX

✓ SCORECARD OF YOUR CHOICE

AND...

✓ 50 FINANCIAL KPIs

✓ 50 SALES KPIs

✓ 50 MARKETING KPIs

✓ 50 OPERATIONS KPIs

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GROUP COACHING. INDIVIDUAL FOCUS.

EXPLAINING EVERYTHING.
NO GATEKEEPING.
(BUT WE HAVE LIMITED TIME)

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MEETING YOU WHERE YOU ARE

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**"WHAT YOU TRACK
IMPROVES BY 10%
ALL BY ITSELF"**

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**"WHAT GETS
MEASURED,
GETS MANAGED"**

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**"NOT EVERYTHING THAT CAN BE
COUNTED COUNTS, AND NOT
EVERYTHING THAT COUNTS CAN BE
COUNTED."**

W. EDWARDS DEMING

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FOCUS ON WHAT MATTERS

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MATCH YOUR METRICS WITH YOUR GOALS

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
IMPORTANT TERMS

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IMPORTANT TERMS








-  **DASHBOARD** – A REAL-TIME VIEW OF KEY BUSINESS METRICS.
-  **SCORECARD** – A REPORT TRACKING PROGRESS OVER TIME.
-  **KPI (BUSINESS)** – MEASURES COMPANY SUCCESS.
-  **KPI (INDIVIDUAL)** – TRACKS EMPLOYEE PERFORMANCE.
-  **LEADING INDICATOR** – PREDICTS FUTURE RESULTS.
-  **LAGGING INDICATOR** – SHOWS PAST PERFORMANCE.
-  **BENCHMARKING** – COMPARES TO INDUSTRY STANDARDS.

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FINANCIAL KPIs (PROFITABILITY & CASH FLOW) REVENUE GROWTH GROSS MARGIN % NET PROFIT % CASH FLOW 'TIL EMPTY'	SALES KPIs (BOOKING & CONVERSIONS) LEAD VOLUME CONVERSION RATE AVERAGE DOLLAR SALE INCUBATION PERIOD
MARKETING KPIs (DEMAND & AWARENESS) LEAD SOURCE VOLUME WEBSITE TRAFFIC SOCIAL ENGAGEMENT CAMPAIGN ROI	OPERATIONS KPIs (PRODUCTION & DELIVERY) ON-TIME DELIVERY CAPACITY REPORTING CUSTOMER SATISFACTION EFFICIENCY RATINGS

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FINANCIAL

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REVENUE


(GROWTH RATE)
(VS. BUDGET)

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COGS


(COST OF GOODS SOLD)
(VARIABLE COSTS)

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GROSS MARGIN


(GROSS PROFIT \$)
(GROSS MARGIN %)

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NET PROFIT

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CASH FLOW

(CASH FLOW FORECAST)

(DTE, WTE, MTE)

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REVENUE PER EMPLOYEE

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A	B	C	D
READ AND FOLLOW INSTRUCTIONS + INPUTS TAB!	WEEK 1	WEEK 2	WEEK 3
ANY COMPANY USA	WEEK START	WEEK START	WEEK START
ACCOUNTING SCORECARD (WEEKLY)	12/29/2024	1/5/2025	1/12/2025
MENTOR PODS INFO@MENTORPODS.COM	WEEK ENDING	WEEK ENDING	WEEK ENDING
VIA PROFIT AND LOSS (DATE RANGE)	1/4/2025	1/11/2025	1/18/2025
REVENUES	\$ 11,082.00	\$ 15,652.00	\$ 30,929.00
VARIABLE EXPENSES (COGS)	\$ 4,142.00	\$ 6,286.00	\$ 11,021.00
GROSS PROFIT \$	\$ 6,940.00	\$ 9,366.00	\$ 19,908.00
GROSS MARGIN %	62.62%	59.84%	64.37%
FIXED EXPENSES	\$ 13,726.00	\$ 10,770.00	\$ 12,825.00
OTHER INCOME	\$ -	\$ -	\$ -
NET PROFIT \$	\$ (6,786.00)	\$ (1,404.00)	\$ 7,083.00
NET PROFIT MARGIN %	-61.23%	-8.97%	22.90%

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VIA PROFIT AND LOSS - AREAS OF INTEREST			
OVERTIME	\$ 457.00	\$ -	\$ -
TRAVEL & ENTERTAINMENT	\$ -	\$ -	\$ -
FUEL	\$ 1,473.00	\$ 309.00	\$ 513.00
REFUNDS	\$ -	\$ -	\$ 2,000.00
CAPITAL EXPENDITURES	\$ -	\$ -	\$ -

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VIA BALANCE SHEET (WEEK ENDING)			
CHECKING ACCOUNT - OPERATING	\$ 64,234.00	\$ 60,688.00	\$ 26,052.00
SAVINGS ACCOUNT - MAIN	\$ 45,569.00	\$ 46,195.08	\$ 47,432.24
SAVINGS ACCOUNT - TAXES	\$ 1,108.20	\$ 2,673.40	\$ 5,766.30
SAVINGS ACCOUNT - PIGGY BANK FOR IRA	\$ 400.00	\$ 510.00	\$ 620.00
CREDIT CARD BALANCE 01 (EDIT / NAME / DELETE)	\$ 2,345.00	\$ 2,812.00	\$ 3,279.00
CREDIT CARD BALANCE 02 (EDIT / NAME / DELETE)	\$ -	\$ -	\$ -
CREDIT CARD BALANCE 03 (EDIT / NAME / DELETE)	\$ -	\$ -	\$ -
CREDIT CARD BALANCE 04 (EDIT / NAME / DELETE)	\$ -	\$ -	\$ -
LONG TERM LIABILITY BALANCE	\$ 251,678.00	\$ 252,433.03	\$ 253,190.33
A/P - ACCOUNTS PAYABLE	\$ 15,187.80	\$ 14,497.60	\$ 20,269.10
A/R - ACCOUNTS RECEIVABLE	\$ 11,082.00	\$ 15,652.00	\$ 30,929.00
VIA STATEMENT OF CASH FLOWS (DATE RANGE)			
NET CASH INCREASE	\$ 2,149.00	\$ (4,209.00)	\$ 12,020.00

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SALES

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1

LEAD VOLUME

2

CONVERSION RATE

3

AVERAGE DOLLAR SALE

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HOT TIP

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HOT TIP

ASK FOR THE SALE **SOONER**

ASK FOR THE SALE **BEFORE** SETTING THE APPOINTMENT

ASK FOR THE SALE **BEFORE** GIVING YOUR PRESENTATION

10%+
INCREASE IN SALES SUCCESS

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THE PERFECT CLIENT JOURNEY

AWARENESS

INTEREST

INQUIRY

CONSULTATION

PROPOSAL/ QUOTE

BOOKING/ CONTRACT

PRE-EVENT PLANNING

EVENT EXECUTION

POST-EVENT FOLLOW UP

REPEAT BUSINESS & REFERRALS

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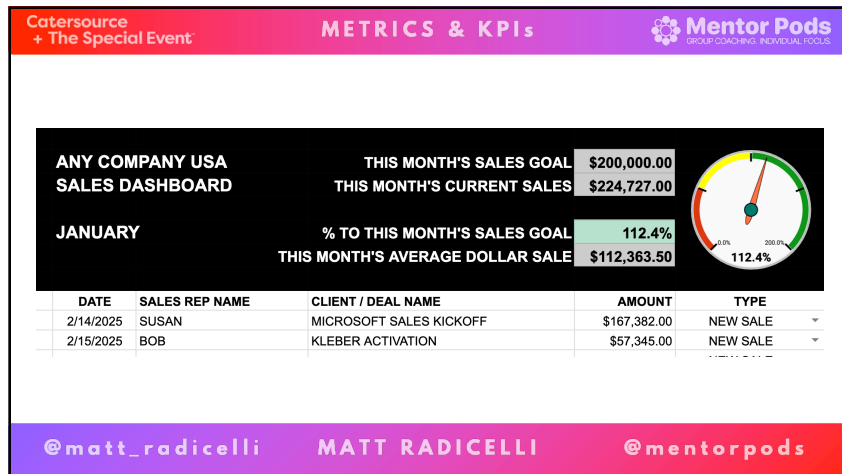
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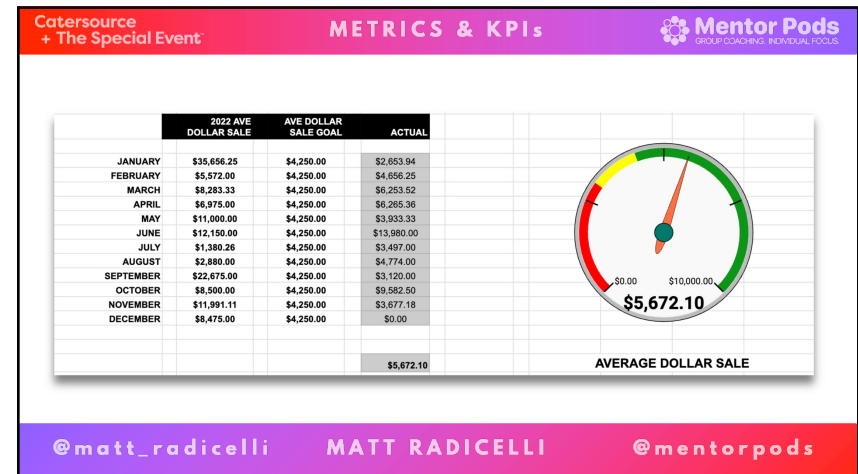
READ AND FOLLOW INSTRUCTIONS TAB!	WEEK 6	WEEK 7	WEEK 8	WEEK 9	WEEK 10
ANY COMPANY USA					
WEEKLY SALES SCORECARD (SIMPLIFIED)	WEEK START	WEEK START	WEEK START	WEEK START	WEEK START
MENTOR PODS INFO@MENTORPODS.COM	2/5/2023	2/12/2023	2/19/2023	2/26/2023	3/5/2023
	WEEK ENDING	WEEK ENDING	WEEK ENDING	WEEK ENDING	WEEK ENDING
	2/11/2023	2/18/2023	2/25/2023	3/4/2023	3/11/2023
TRACKED ITEMS (SIMPLIFIED)					
LEADS	6	7	3	1	0
MEETINGS	2	1	1	0	0
DEALS (WON)	2	1	1	0	0
TOTAL SALES DOLLAR VALUE	\$0.000.00	\$2,250.00	\$2,500.00	\$0.00	\$0.00
AVERAGE DOLLAR SALE	\$3,000.00	\$2,250.00	\$2,500.00	\$0.00	\$0.00
CLOSING PERCENTAGE (AVG, 6-WEEK, ROLLING)	25.9%	22.6%	24.1%	20.8%	23.8%

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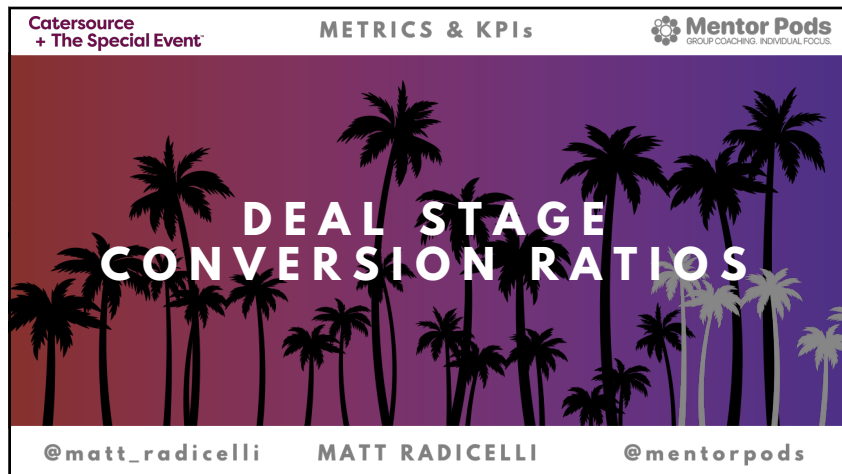
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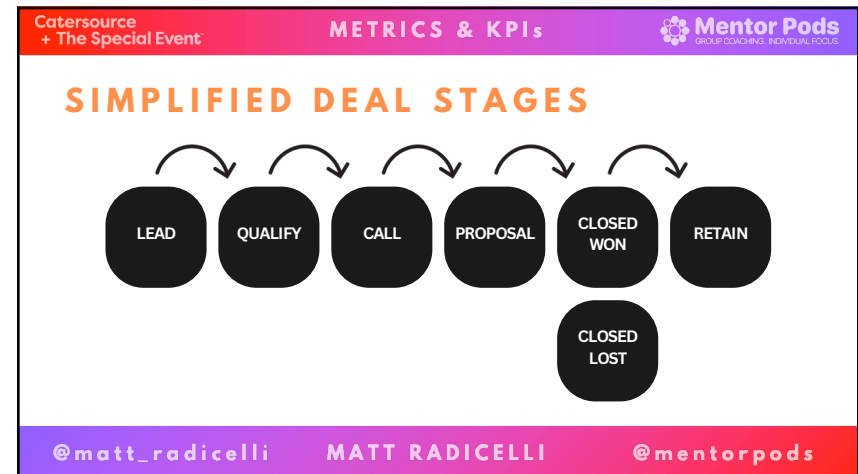
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HOT TIP

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HOT TIP

EVERY STEP IN YOUR PIPELINE HAS ITS OWN
CONVERSION RATE. EMBRACE IT. RESPECT IT.

10%+
INCREASE IN SALES SUCCESS



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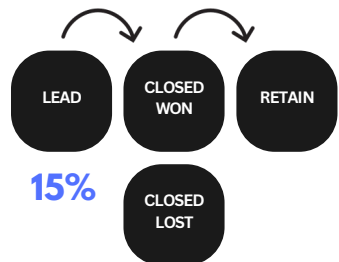
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DEAL STAGES



```
graph LR; LEAD --> CLOSED_WON[CLOSED WON]; CLOSED_WON --> RETAIN; LEAD --> CLOSED_LOST[CLOSED LOST];
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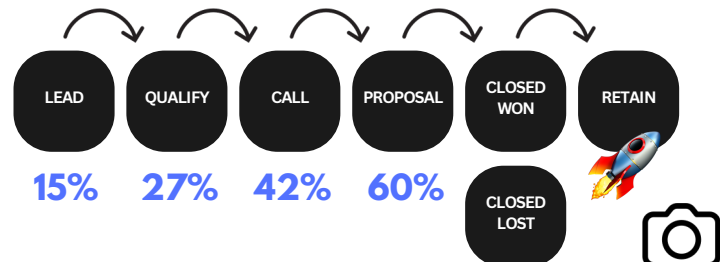
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DEAL STAGES



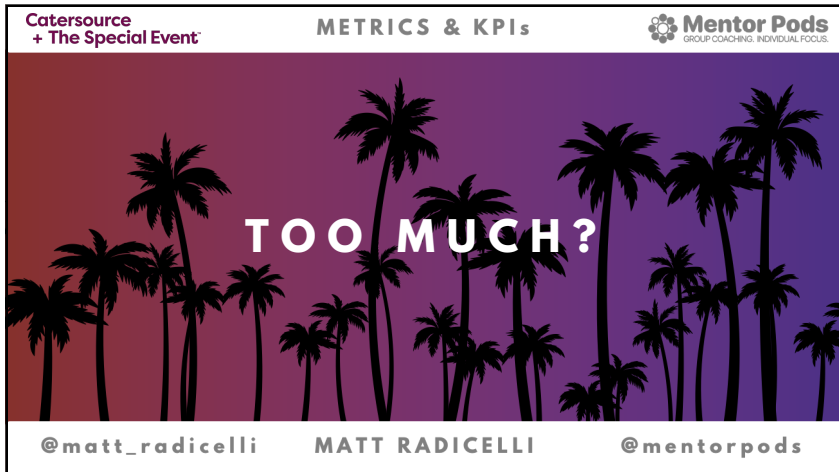
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graph LR; LEAD --> QUALIFY; QUALIFY --> CALL; CALL --> PROPOSAL; PROPOSAL --> CLOSED_WON; CLOSED_WON --> RETAIN; LEAD --> CLOSED_LOST[CLOSED LOST]; PROPOSAL --> CLOSED_LOST;
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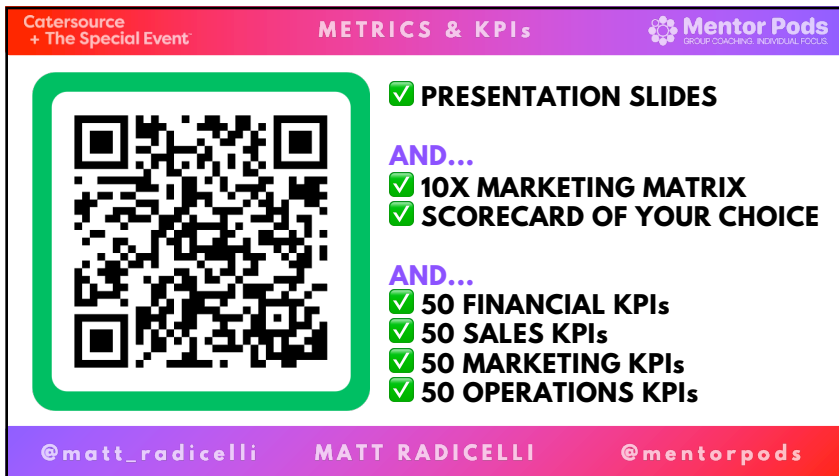
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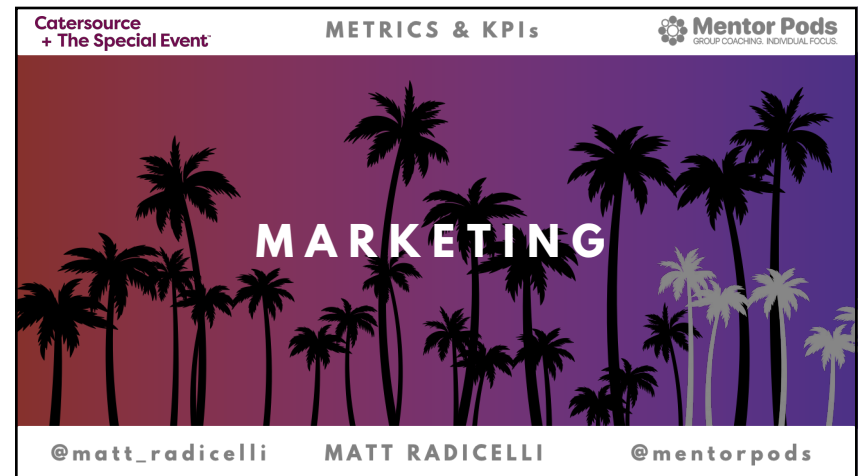
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READ AND FOLLOW INSTRUCTIONS + INPUTS TAB!

ANY MARKETING COMPANY USA
MARKETING SCORECARD (WEEKLY)
MENTOR PODS | INFO@MENTORPODS.COM

LEADS (CUSTOMIZE TO FIT YOUR BUSINESS)

LEADS - REPEAT CLIENT
LEADS - INTERNET SEARCH
LEADS - REFERRAL - CLIENT
LEADS - REFERRAL - VENUE
LEADS - REFERRAL - PLANNER
LEADS - REFERRAL - OTHER / FRIEND
LEADS - EMAIL MARKETING
LEADS - SOCIAL MEDIA
LEADS - TRADE SHOW / SHOWCASE
LEADS - UNKNOWN / OTHER

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WEB INFO (HOVER FOR NOTE)

TOTAL VISITS
TOTAL VISITORS
DIRECT VISITS
ORGANIC (SEARCH) VISITS
PAID (SEARCH) VISITS
REFERRALS - SOCIAL
REFERRALS - GENERAL
OTHER
OPTIONAL EXAMPLES (WEB):
CONTACT FORM VISITS
CONTACT FORM COMPLETIONS
CONTACT FORM CONVERSION %

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SOCIAL REACH + INFO

SOCIAL REACH - FB
SOCIAL REACH - IG
SOCIAL REACH - OTHER (LINKEDIN)
SOCIAL REACH - OTHER (TWITTER/TIKTOK)

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10x MARKETING MATRIX

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MENTOR PODS 10x MARKETING MATRIX

CAMPAIGN / INITIATIVE DESCRIPTION	LEADS	DEALS WON	TOTAL REVENUE	TOTAL SPEND	CONVERSION %	AVERAGE DOLLAR SALE	\$ SPENT / LEAD	\$ SPENT / DEAL WON	ROI
1 BRIDAL SHOW	320	72	\$192,243	\$22,000.00	23%	\$2,670	\$68.75	\$305.56	8.7
2 VENUE REFERRAL GIFTS	60	12	\$38,750	\$720.00	20%	\$3,229	\$12.00	\$60.00	53.8
3 HOLIDAY CAMPAIGN	28	5	\$6,873	\$2,100.00	18%	\$1,375	\$75.00	\$420.00	3.3
4 KNOT	480	42	\$89,495	\$9,600.00	9%	\$2,131	\$20.00	\$228.57	9.3
5 WEDDING WIRE	259	65	\$67,074	\$3,200.00	25%	\$1,032	\$12.36	\$49.23	21.0
6 SCHOOL MAILER	95	31	\$71,974	\$2,100.00	33%	\$2,322	\$22.11	\$67.74	34.3
7 ILEA SPONSORSHIP	14	1	\$3,159	\$2,200.00	7%	\$3,159	\$157.14	\$2,200.00	1.4
8 META ADS (FB + IG)	114	12	\$21,793	\$1,460.00	11%	\$1,816	\$12.81	\$121.67	14.9
9 CLIENT REFERRAL PROGRAM	220	140	\$380,742	\$1,950.00	64%	\$2,720	\$8.86	\$13.93	195.3
10 GOOGLE ADS	140	18	\$3,975	\$3,400.00	13%	\$221	\$24.29	\$188.89	1.2
SHEET TOTALS / AVERAGES	1730	398	\$876,078	\$48,730.00	23%	\$2,201	\$28.17	\$122.44	18.0

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Catersource + The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.

MENTOR PODS 10x MARKETING MATRIX

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Catersource + The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.

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Catersource + The Special Event		METRICS & KPIs					Mentor Pods GROUP COACHING. INDIVIDUAL FOCUS.	
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Catersource + The Special Event		METRICS & KPIs					Mentor Pods GROUP COACHING. INDIVIDUAL FOCUS.	
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Catersource
+ The Special Event

METRICS & KPIs



Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.



MENTOR PODS 10x MARKETING MATRIX

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Catersource
+ The Special Event

METRICS & KPIs






OPERATIONS & QUALITY CONTROL

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<p>Catersource + The Special Event</p>	<p>METRICS & KPIs</p>	<p> Mentor Pods GROUP COACHING. INDIVIDUAL PODS.</p>							
	<table border="1"> <thead> <tr> <th data-bbox="438 393 722 417">GENERAL</th></tr> </thead> <tbody> <tr> <td data-bbox="438 417 722 441"></td></tr> <tr> <td data-bbox="438 441 722 464">TOTAL EVENTS THIS WEEK</td></tr> <tr> <td data-bbox="438 464 722 488">TOTAL EVENT REVENUES</td></tr> <tr> <td data-bbox="438 488 722 511"></td></tr> <tr> <td data-bbox="438 511 722 535">AVERAGE DOLLARS PER EVENT</td></tr> <tr> <td data-bbox="438 535 722 552"></td></tr> </tbody> </table>	GENERAL		TOTAL EVENTS THIS WEEK	TOTAL EVENT REVENUES		AVERAGE DOLLARS PER EVENT		
GENERAL									
TOTAL EVENTS THIS WEEK									
TOTAL EVENT REVENUES									
AVERAGE DOLLARS PER EVENT									
<p>@matt_radicelli</p>	<p>MATT RADICELLI</p>	<p>@mentorPods</p>							

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Catersource + The Special Event	METRICS & KPIS	 Mentor Pods <small>GROUP COACHING. INDIVIDUAL FOCUS.</small>

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Catersource + The Special Event	METRICS & KPIs	Mentor Pods <small>(GROUP COACHING, INDIVIDUAL PODS)</small>
STAFFING		
LAST MINUTE STAFFING CHANGES		
LATE STAFF ARRIVAL		
ATTIRE MISS		


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EQUIPMENT / INVENTORY	
	TRANSLATION MISS
	MISSING EQUIPMENT / RENTALS
	WRONG EQUIPMENT / INVENTORY SENT
	BROKEN EQUIPMENT / INVENTORY SENT

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Catersource
+ The Special Event

METRICS & KPIs



VEHICLES
TOTAL VEHICLES USED
TOTAL VEHICLES RENTED
POST EVENT
MISSING END OF SHOW REPORTS
MISSING DELIVERY SLIPS
PHOTOS SUBMITTED

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Catersource
+ The Special Event

METRICS & KPIs





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METRICS & KPIs





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METRICS & KPIs



TRACK / SAMPLE
DATA WEEKLY.
ADJUST AS NEEDED.

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Catersource
+ The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.



WHO'S READY TO GET EXTRA NERDY?

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Catersource
+ The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.



INCUBATION PERIOD

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Catersource
+ The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.



```
graph LR; A[INQUIRY DATE] <-->|X| B[BOOKED DATE]
```

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Catersource
+ The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.



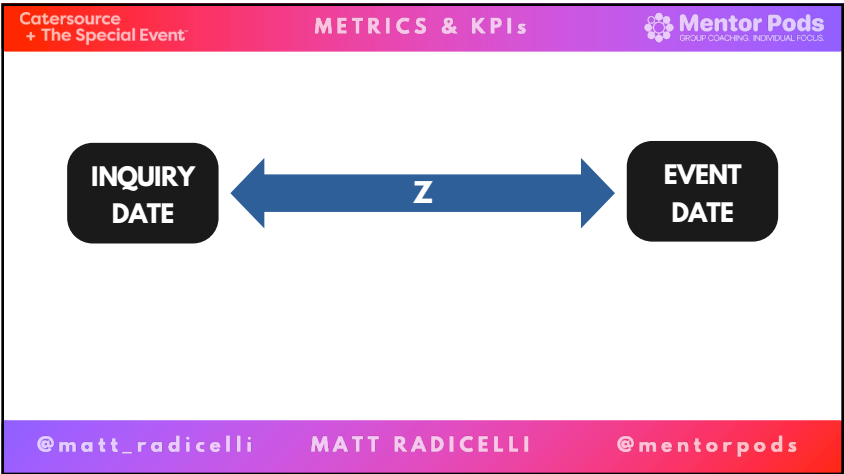
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@matt_radicelli

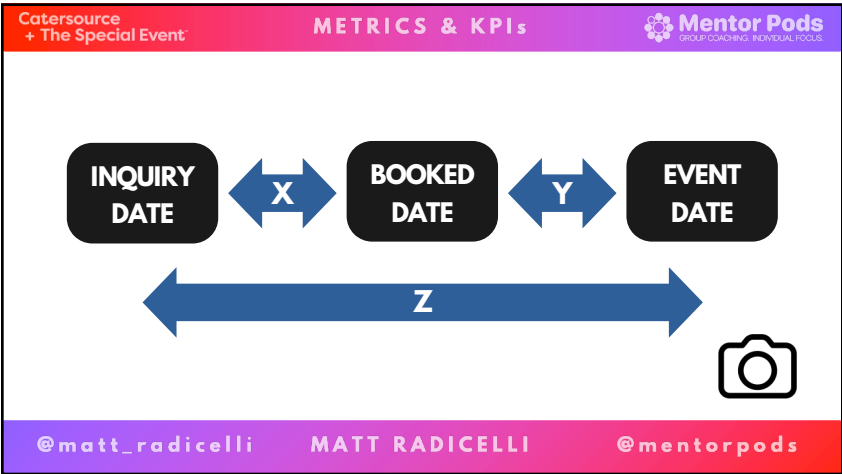
MATT RADICELLI

@mentorpods

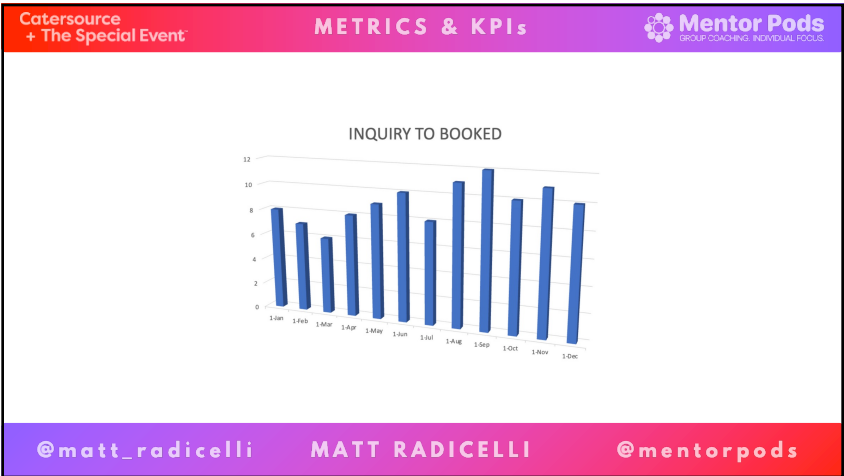
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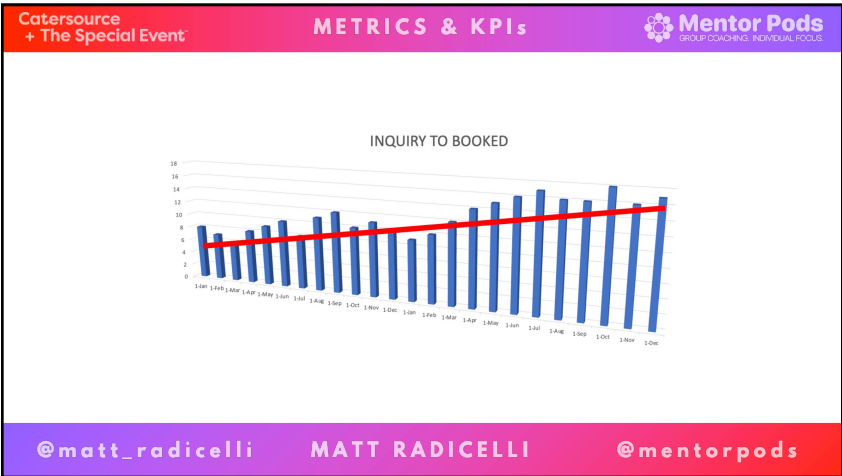
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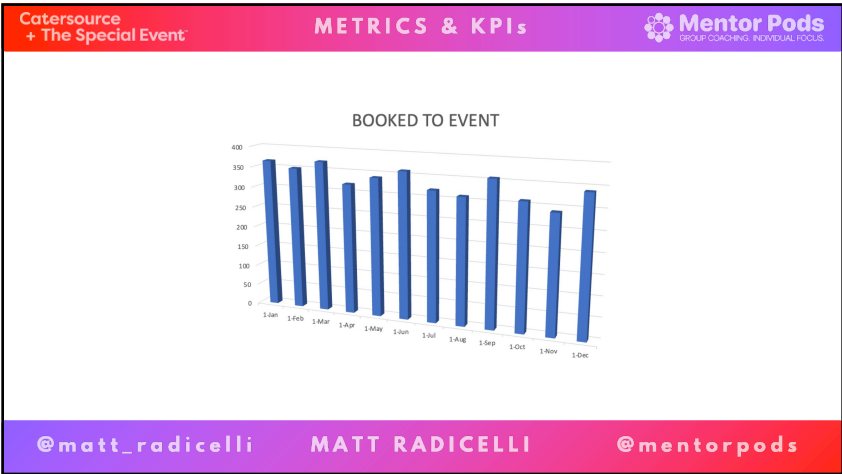
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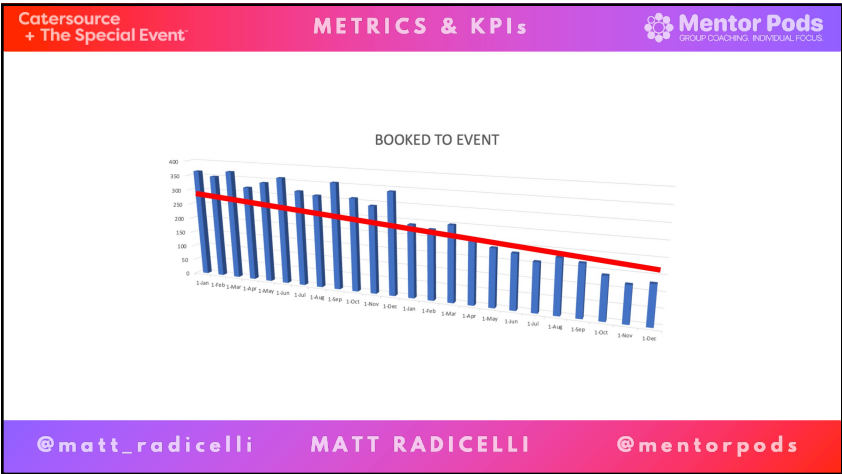
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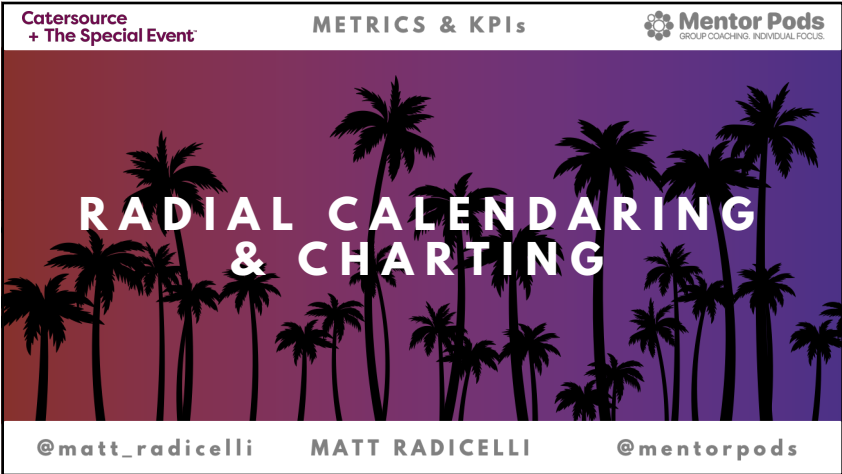
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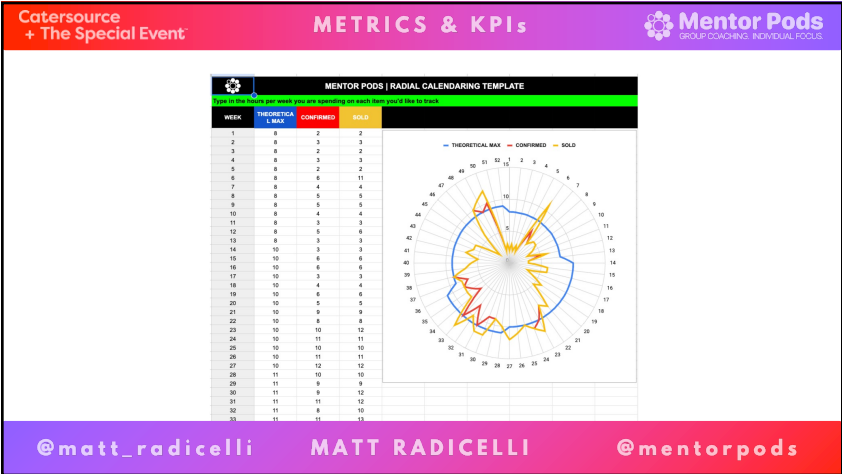
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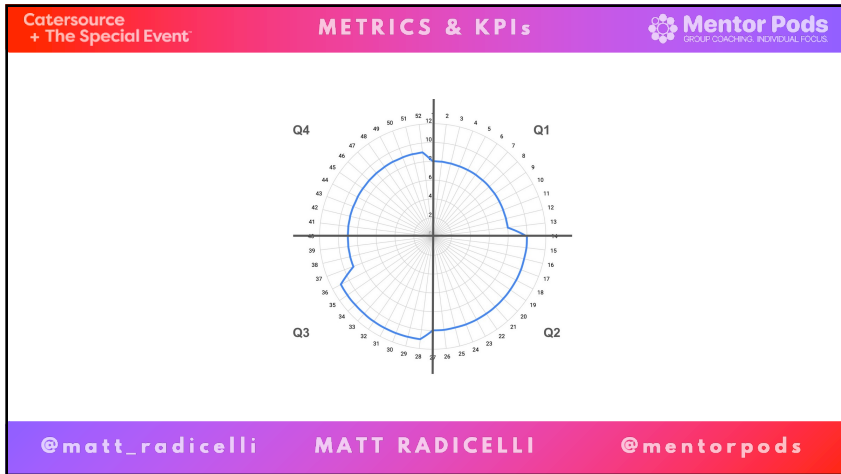
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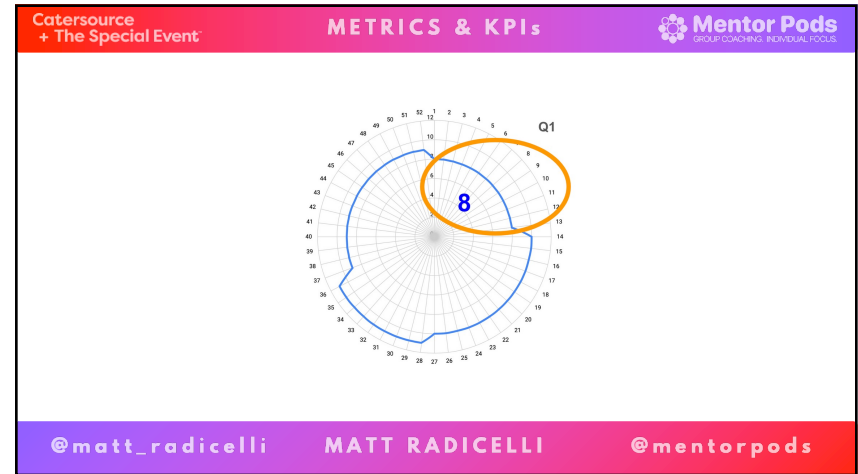
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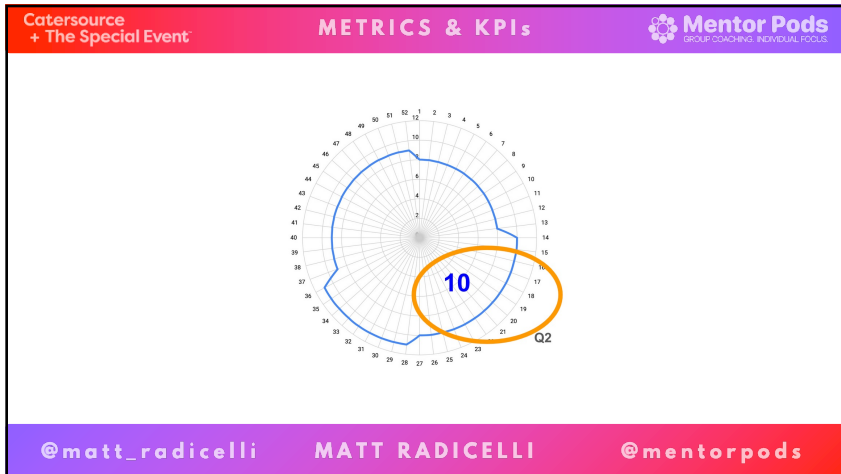
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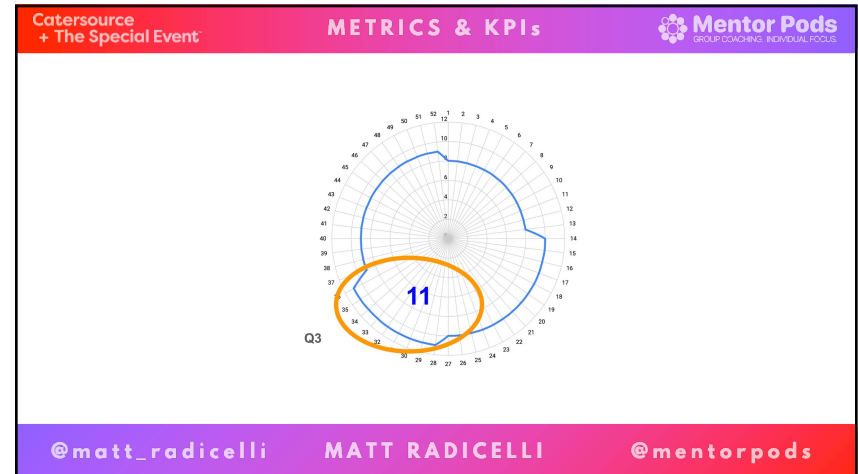
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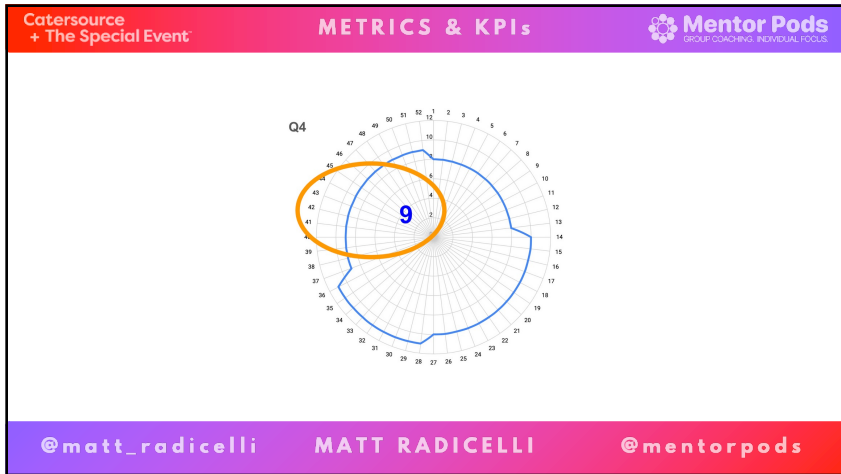
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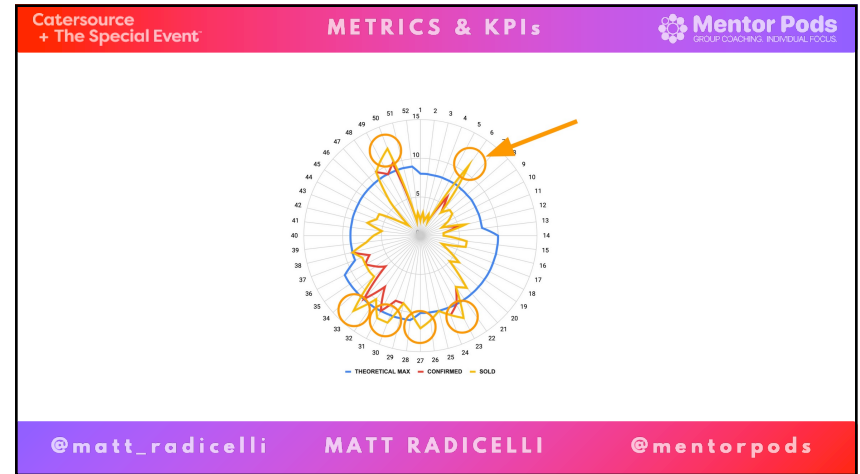
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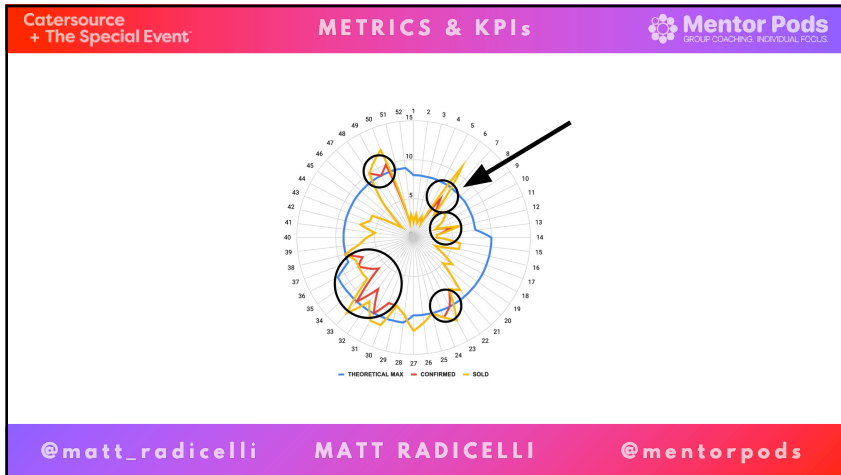
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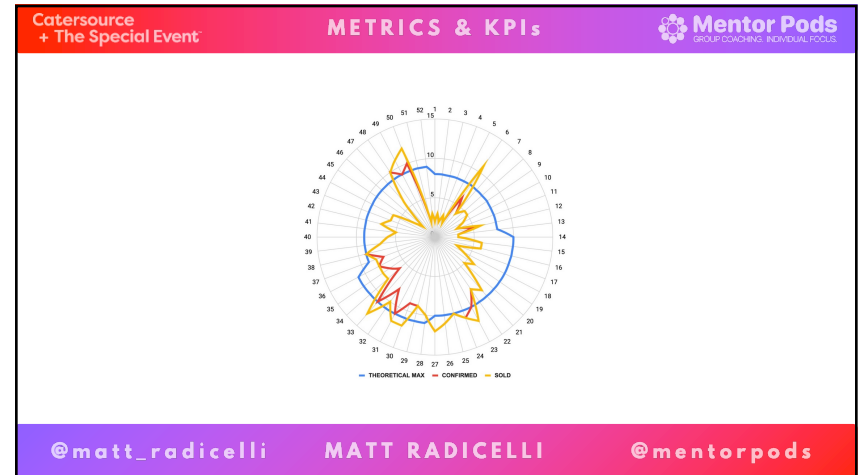
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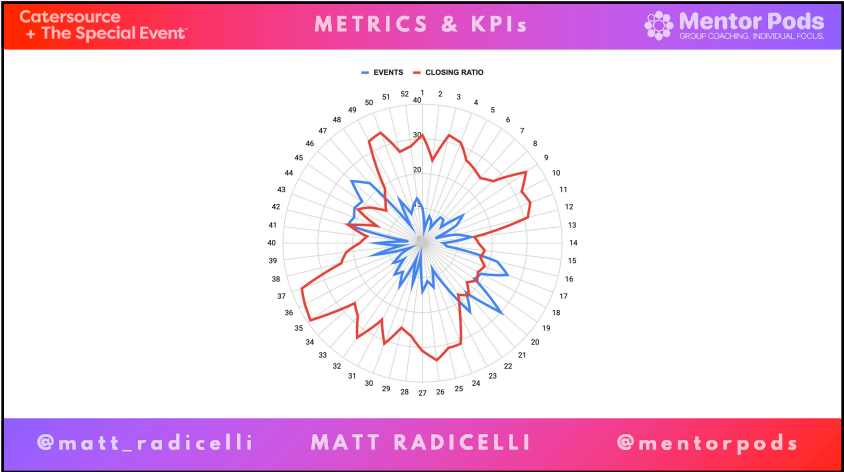
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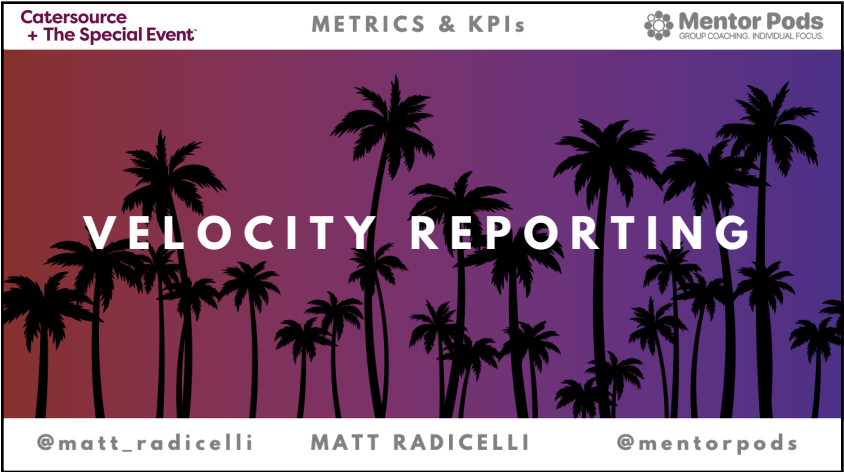
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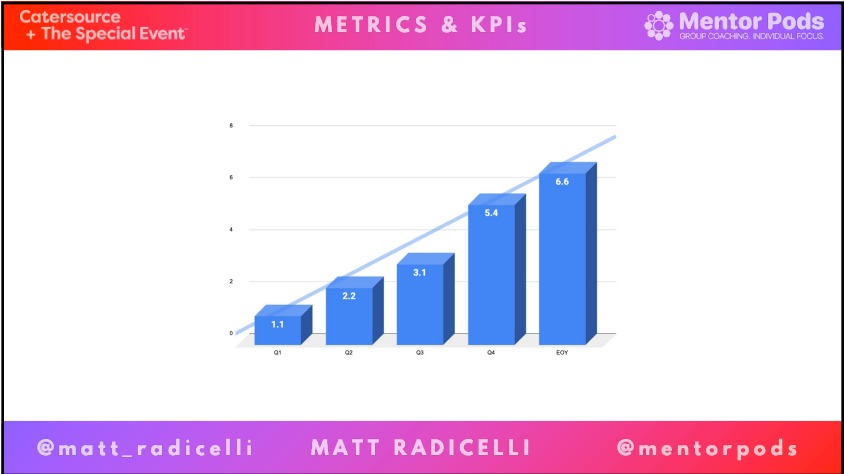
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Catersource + The Special Event

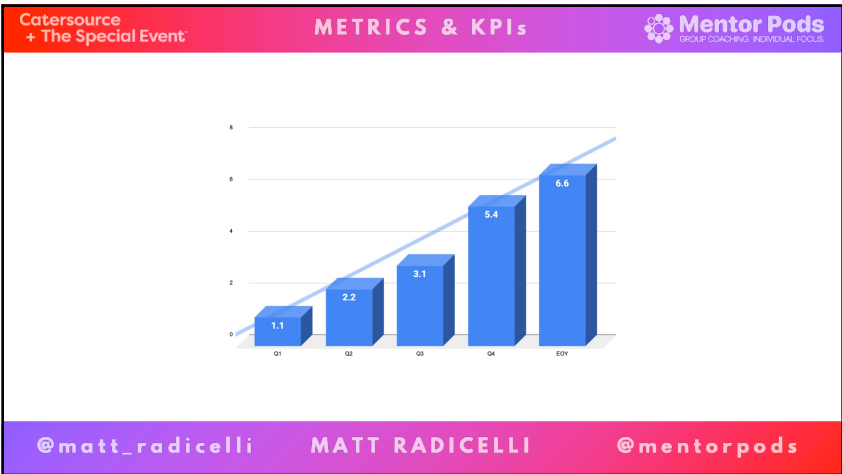
METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.

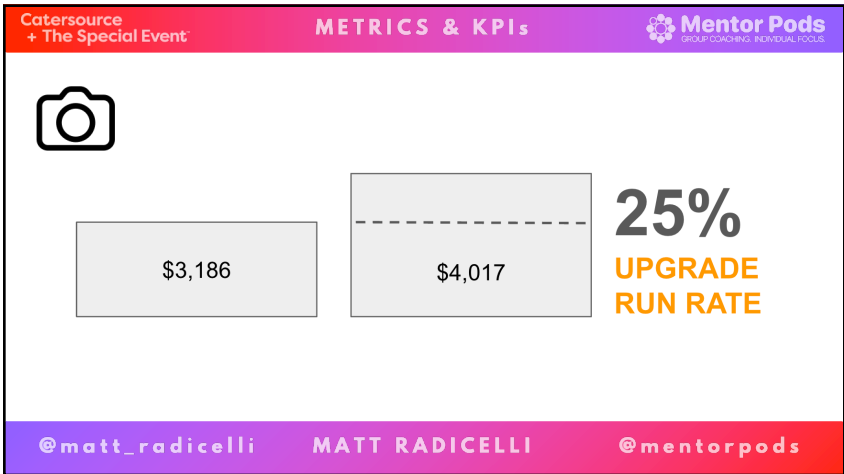
	JAN 1		DEC 31
WEEK 1	1.2 MM	5.5X	6.6 MM
WEEK 13	2.2 MM	3X	6.6 MM
WEEK 26	3.1 MM	2.1X	6.6 MM
WEEK 39	5.4 MM	1.2X	6.6 MM

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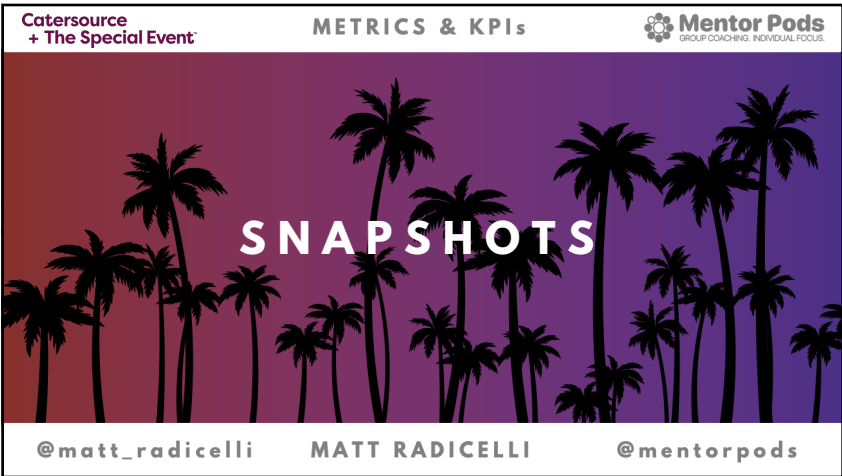
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Catersource + The Special Event

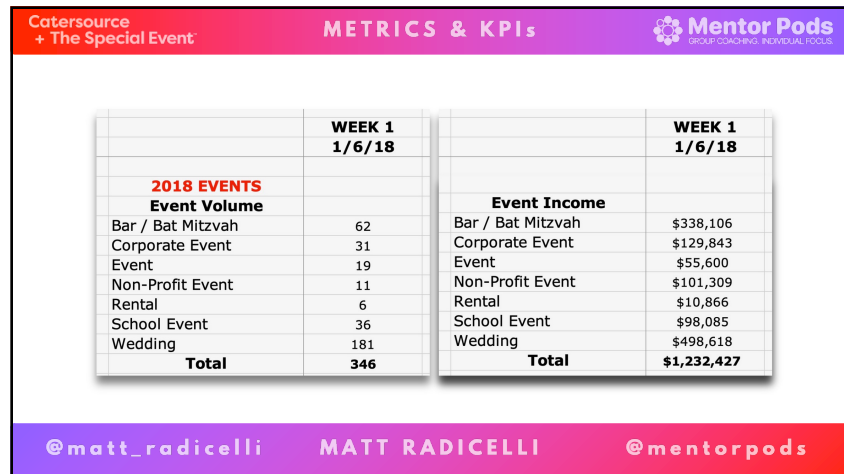
METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.

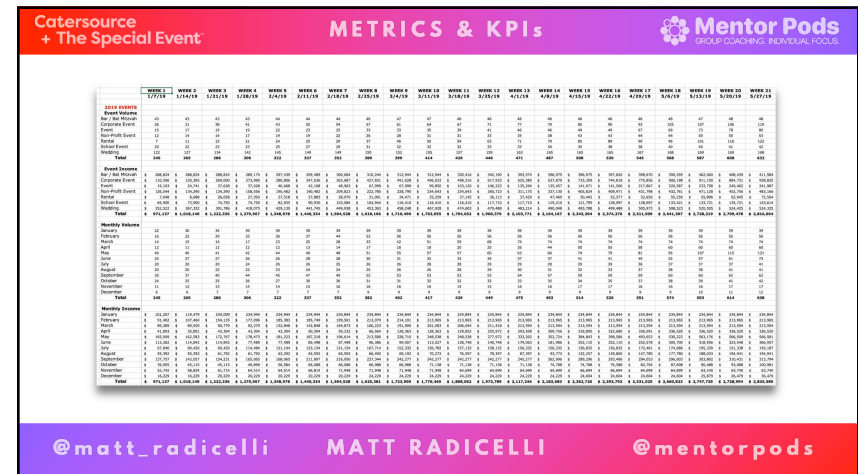
	WEEK 1 1/6/18		WEEK 1 1/6/18
Monthly Volume		Monthly Income	
January	31	January	\$139,129
February	21	February	\$93,553
March	13	March	\$59,855
April	20	April	\$79,924
May	52	May	\$204,651
June	53	June	\$207,030
July	24	July	\$66,810
August	37	August	\$113,218
September	40	September	\$112,237
October	42	October	\$111,905
November	9	November	\$33,537
December	4	December	\$10,580
Total	346	Total	\$1,232,427

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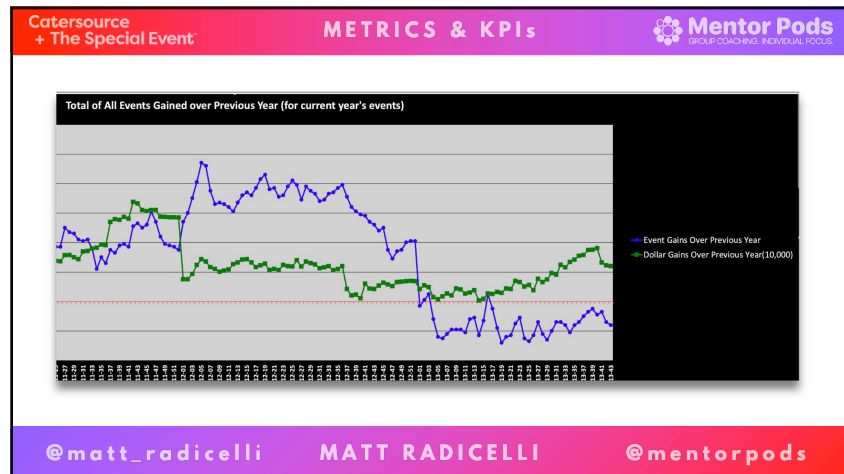
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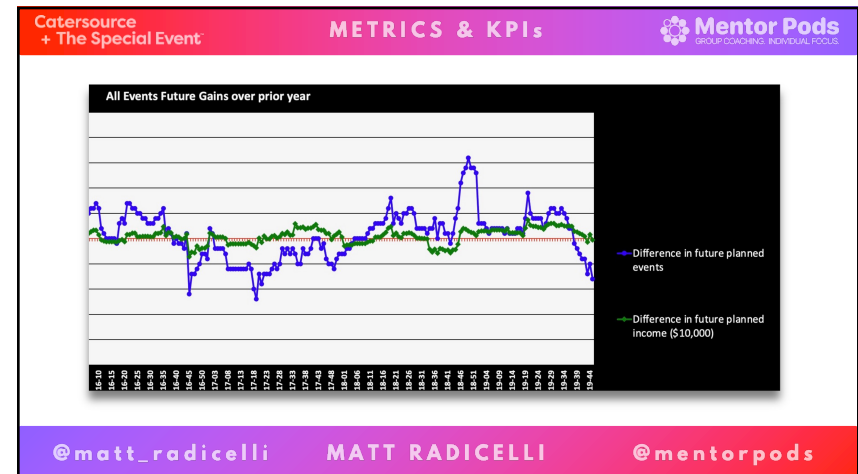
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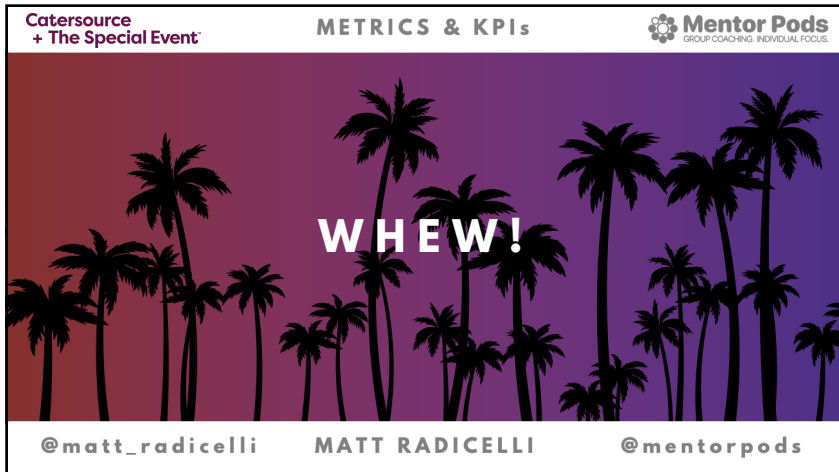
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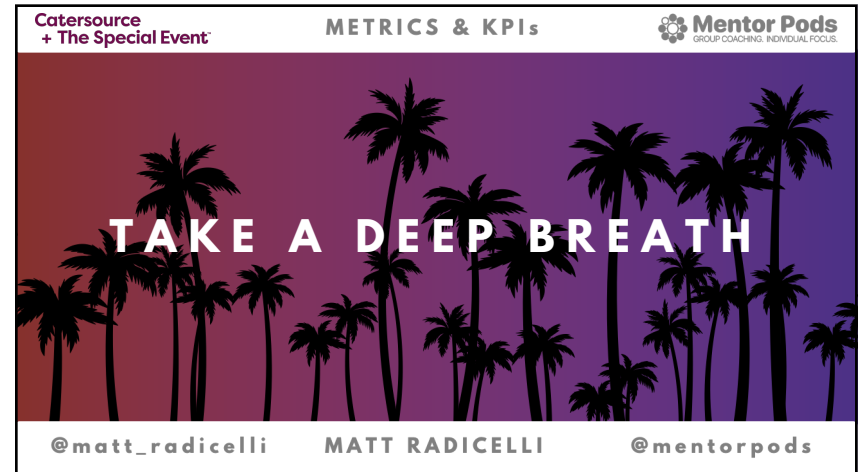
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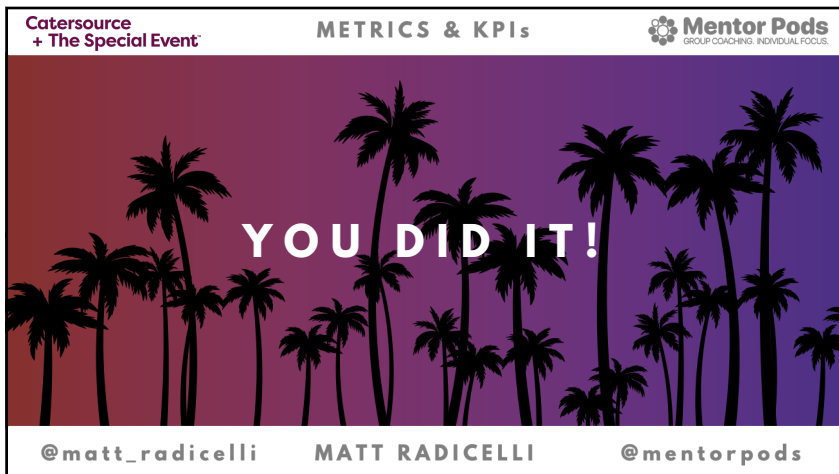
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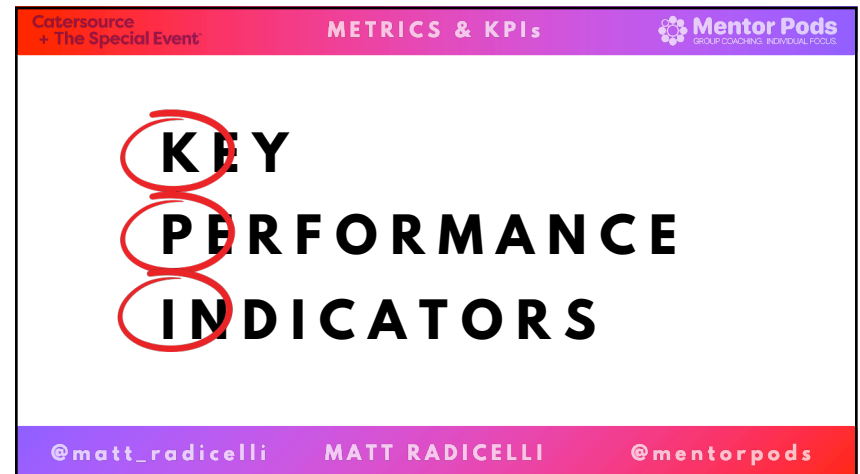
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Catersource + The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.



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METRICS & KPIs

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FINANCIAL KPIs (PROFITABILITY & CASH FLOW) REVENUE GROWTH GROSS MARGIN % NET PROFIT % CASH FLOW 'TIL EMPTY'	SALES KPIs (BOOKING & CONVERSIONS) LEAD VOLUME CONVERSION RATE AVERAGE DOLLAR SALE INCUBATION PERIOD
MARKETING KPIs (DEMAND & AWARENESS) LEAD SOURCE VOLUME WEBSITE TRAFFIC SOCIAL ENGAGEMENT CAMPAIGN ROI	OPERATIONS KPIs (PRODUCTION & DELIVERY) ON-TIME DELIVERY CAPACITY REPORTING CUSTOMER SATISFACTION EFFICIENCY RATINGS

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METRICS & KPIs

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**IT'S YOUR TURN.
IT'S YOUR TIME.**

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METRICS & KPIs

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GROUP COACHING. INDIVIDUAL FOCUS.

**WHERE ARE YOU
GOING TO START?**

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Catersource + The Special Event METRICS & KPIs Mentor Pods
GROUP COACHING, INDIVIDUAL FOCUS

**KEEP IT SIMPLE.
START WITH 3-5 KPIs
(MAX) TO AVOID
OVERWHELM**

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Catersource + The Special Event METRICS & KPIs Mentor Pods
GROUP COACHING, INDIVIDUAL FOCUS

**MATCH YOUR METRICS
WITH YOUR GOALS**

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Catersource + The Special Event METRICS & KPIs Mentor Pods
GROUP COACHING, INDIVIDUAL FOCUS

**“WHAT GETS
MEASURED,
GETS MANAGED”**

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Catersource + The Special Event METRICS & KPIs Mentor Pods
GROUP COACHING, INDIVIDUAL FOCUS

**“WHAT YOU TRACK
IMPROVES BY 10%
ALL BY ITSELF”**


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Catersource
+ The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.



✓ PRESENTATION SLIDES

AND...

✓ 10X MARKETING MATRIX

✓ SCORECARD OF YOUR CHOICE

AND...

✓ 50 FINANCIAL KPIs

✓ 50 SALES KPIs

✓ 50 MARKETING KPIs

✓ 50 OPERATIONS KPIs

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Catersource
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METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.

THANK YOU!

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Catersource
+ The Special Event

METRICS & KPIs

Mentor Pods
GROUP COACHING. INDIVIDUAL FOCUS.

RECIPE FOR SUCCESS:
MASTERING KPIs &
METRICS

@matt_radicelli

MATT RADICELLI

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