



KPI-Metrics Report Schedule — Decisions with Data™

Your Roadmap to Data-Driven Decision Making

Data without decisions is just noise. This roadmap shows you exactly which reports to run, when to run them, and in what order to implement them. Start with Phase ① metrics—these are your foundation. Master those, then move to Phase ② and ③.

Most closet businesses run blind because they don't track the right numbers at the right time. Don't be one of them.

— Tim Coleman, Founder, Coleman Collaborations Consulting Group

REPORTS BY DEPARTMENT & FREQUENCY

What to run — and when

<u>MARKETING</u>			<u>SALES</u>		
Weekly	Monthly	Quarterly	Weekly	Monthly	Quarterly
Lead Source ①	Marketing Spend/Channel ② Lead to Appt % ②	Marketing ROI ③	Sales this Week ①	Average Sale ③ Close Ratio ② Sales Pipeline \$ ③	Designer Ratios ③
<u>PRODUCTION (SHOP)</u>			<u>OPERATIONS (INSTALL)</u>		
Weekly	Monthly	Quarterly	Weekly	Monthly	Quarterly
—	Material Cost % ② Mfg vs Outsourced ③	Production Efficiency ③ Waste Report ③	Jobs Completed ① Go Back Report ② Job Cost Report ②	Install Labor % ②	Customer Satisfaction ③
<u>ADMINISTRATION</u>			<u>FINANCE</u>		
Weekly	Monthly	Quarterly	Weekly	Monthly	Quarterly
—	Revenue per Employee ③	Employee Productivity ③	Accounts Rec ① Cash Flow ③ Cash Position ①	Gross Profit % ② Net Profit % ③ Overhead % ② P&L Review ③	Bakers Dozen Rpt ③

ANNUAL REVIEWS & PLANNING

Forecast & Budget

Begin in October. Set your course for the year ahead. Review last year's performance against projections, analyze market trends, and establish realistic revenue targets and expense budgets. This is your roadmap—without it, you're driving blind.

Customer Reviews

Time to be honest—which customers should you fire? Identify clients who are consistently rude, slow to pay, never ready when promised, or simply not a good fit for your business. Not every customer is worth keeping. Protecting your team's time and sanity is more valuable than difficult revenue.

Employee Reviews

Can also be conducted quarterly. Use a simple format and complete these without regard to compensation discussions. However, every review should include a Full Compensation Package explanation showing the complete value of employment (salary, benefits, PTO, training, etc.). Recognition and growth opportunities matter as much as pay.

Supplier/Vendor Review

Evaluate your key suppliers and vendors annually. Compare pricing, quality, and service levels. Are you getting the best value? Are there reliability issues? Ask about rebate offers or special payment terms you might be missing. Strong vendor relationships impact your margins and your reputation—make sure you're partnering with the right companies and maximizing every advantage.

NEED HELP IMPLEMENTING THESE SYSTEMS?

Coleman Coaching can guide you.

One-on-one coaching to prioritize the right reports, build your dashboard, and turn numbers into decisions — week by week.



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