METRICS MODEL

STEP 1: CREATE A MAP FOR YOUR METRICS

Translate your money model into a map for your metrics. To do this, draw a dot at the center of each of your gears and then connect the dots with lines.

STEP 2: DECIDE WHAT TO MEASURE

Determine what you are going to measure for each of the lines on your map. On the Sales Funnel, or Potential Money, side of the map, the lines will measure the quality of the sub-processes that move customers (and money) from one gear to the next. On the Income Statement, or Actual Money side, the lines will measure the quality of the things you are spending money on. **Complete the first column by filling in your expenses. In the second column, list what you are measuring for each line.**

LINE	METRICS
Traffic to Calls	
Calls to Leads	
Leads to Jobs	
Jobs to Customers	
Customers to Staff	
Expense:	
Expense:	
Expense:	
Expense:	
Expense:	
Expense:	

STEP 3: DETERMINE STANDARDS OF QUALITY

Determine quality standards for each of your metrics. Make a place for these on your grid by adding three more columns. Working from left to right, label these "Good," "Acceptable," "Bad" respectively. Set a target for each metric and enter it on the grid. Then establish a good range and a bad range.

LINE	METRICS	Good	Acceptable	Bad
Traffic to Calls				
Calls to Leads				
Leads to Jobs				
Jobs to Customers				
Customers to Staff				
Expense:				
Expense:				
Expense:				
Expense:				
Expense:				
Expense:				

STEP 4: ASSESS YOUR METRICS

With data in hand, go through your grid and identify where each metric falls in terms of quality standards. Circle or highlight the corresponding range.

STEP 5: CONVERT YOUR METRICS TO CODED LINES

Recreate your grid replacing the circled or highlighted range with a color-coded line. Good lines are short and green. Acceptable lines are yellow. Bad lines are long and red.

LINE	METRICS	Good	Acceptable	Bad
Traffic to Calls				
Calls to Leads				
Leads to Jobs				
Jobs to Customers				
Customers to Staff				
Expense:				
Expense:				
Expense:				
Expense:				
Expense:				
Expense:				

STEP 6: PUT YOUR METRICS ON THE MAP

Return to your map from Step 1. Replace each of the lines with the respective, coded line from the grid. [You can find colored lines for this purpose below]

(Optional) STEP 7: REFINING THE PICTURE

Using the same process outlined above, determine and visualize metrics on the department, job function, and/or employee level.

(Optional) STEP 8: PUT IT IN MOTION

Make your model dynamic by collecting a series of "snapshots" and putting them together—either with editing software to make a kind of animated movie, or on paper to form a flip-book. The more snapshots you collected the smoother the animation.