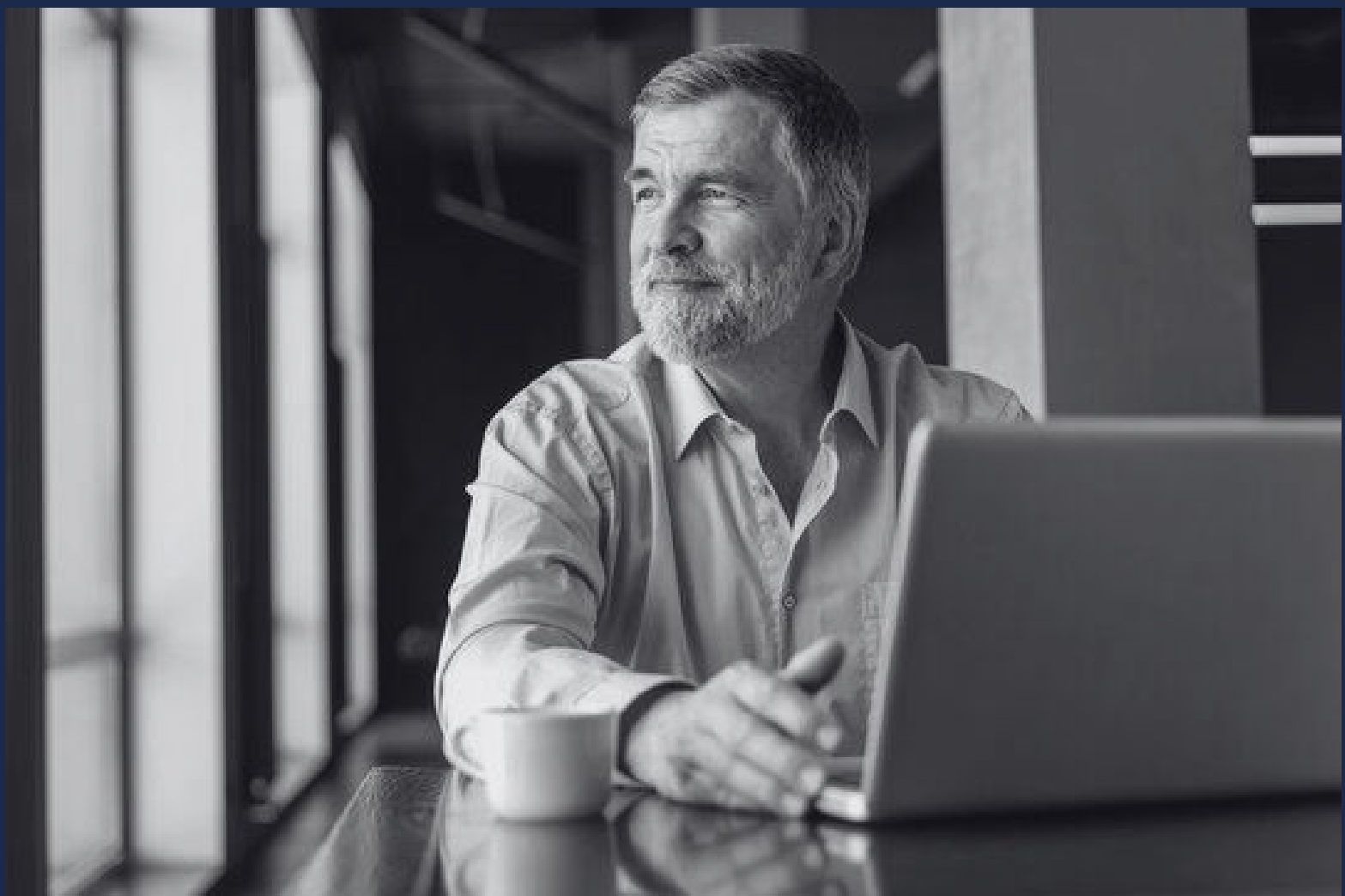
Prometis PARTNERS

Driving Success. Strengthening Value.

KEY PERFORMANCE INDICATORS:

A BUSINESS OWNER'S GUIDE TO MEASURING WHAT MATTERS MOST





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Goals Are a Great Start... But Results Are What Matter.

Let's be honest — you didn't start your business to spin your wheels, setting the same goals year after year without seeing real progress. You're here to build, grow, and leave a lasting impact.
Goal-setting is absolutely vital, both personally and professionally. But if you're like most business owners, you've probably noticed that achieving those goals can often feel harder than it should be.

Why?
Because many goals are too vague. Without clear metrics or defined milestones, it becomes almost impossible to measure progress, make adjustments, or spot issues early. When that happens, daily demands quickly take over, and even your best intentions get pushed aside.

If you want to create the impact — and the future — you've envisioned, it's time to move beyond broad intentions and start treating your goals like the serious business initiatives they are.

The most effective way to do that?
Replace vague aspirations with clear, measurable Key Performance Indicators (KPIs) — metrics that show whether you're truly moving the needle toward your vision.

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KPIs: The Numbers That Drive Your Business Forward

You've probably heard the term before — but this isn't just more business jargon to ignore.

Key Performance Indicators (KPIs) are measurable values that show how well your business is hitting specific targets. They're the tools you use to track, assess, and adjust your strategies to ensure you're building real, measurable momentum.

The reality is simple: **what gets measured, gets managed — and what gets managed, gets results.**

When you actively track KPIs, you create accountability — both for yourself and for your team.

Clear KPIs empower you to make smarter decisions about where to invest your time, energy, and resources. They align your daily work with your bigger goals, so you're not just busy — you're actually making progress.

Whether you're running solo or managing a lean, driven team, KPIs are how you keep the business machine moving forward in the right direction.



KPIS ARE STRATEGIC METRICS THAT SEPARATE THE IMPACT- MAKING CEOS FROM THE HOBBYIST WANTREPRENEURS.

KPI Success Formula

If you want to create KPIs that truly move your business forward — not just check another box — you need more than generic metrics. You need KPIs that are meaningful, actionable, and tied directly to your bigger vision.

Effective KPIs are built with intention. They should:

- **Measure exactly what matters.**
  - A KPI should track a specific, critical aspect of your business — not vanity numbers. It must deliver real insights that help you make confident, strategic decisions.
- **Prove progress toward defined goals.**
  - Strong KPIs show evidence of movement toward a clearly stated target — or reveal when you're falling behind, so you can pivot early rather than react late.
- **Capture trends over time.**
  - It's not about isolated data points. Effective KPIs let you compare past and present performance, helping you understand patterns, predict outcomes, and course-correct with precision.
- **Zero in on key business drivers.**
  - Every KPI you track should be linked to a critical part of your operations — whether it's efficiency, quality, compliance, behavior, personnel performance, or resource management. If it doesn't impact your goals, it's not worth tracking.

When you craft KPIs that meet these standards, they become powerful tools — not just numbers. They help you stay focused, agile, and accountable as you build a business that's ready to scale, transition, or sell when the time is right.

Remember: It's not about tracking everything. It's about tracking what matters most.

KPIs in Bringing Action: Goals to Life

The real power of a KPI lies in clarity and accountability.
It's not enough to simply list a goal — you must define exactly what success looks like and how you're going to measure it.

When developing effective KPIs, make sure you:

- **Specify the tasks and actions required** to drive progress.
- **Define a clear, measurable outcome** tied to a specific timeline.
- **Identify exactly how you will track and evaluate success.**

Let's look at an example:
Maybe you've had a goal to "grow your email list" — a goal that keeps getting pushed to the back burner quarter after quarter.

The problem? The goal is too vague to act on. There's no target, no timeline, no accountability.

Instead, a strong KPI would sound like this:
"Grow my email list by 250 subscribers by the end of Q2."

Now, you have a quantifiable target and a deadline — two essential ingredients for serious progress.

But defining the KPI is only the beginning.
You also need a plan to influence the outcome. In this case, you might decide to:

- Promote your top-performing lead magnet once a week across your social media channels.
- Partner with a complementary business to run a giveaway or co-host a free workshop to tap into new audiences.

Finally, commit to reviewing your progress weekly.

Block time on your calendar to check the numbers. If you're falling behind pace, the data will tell you — and you'll have the opportunity to pivot your strategy before it's too late.

Bottom line:
KPIs are not "set it and forget it." They're living, working tools that keep you focused, accountable, and moving forward toward tangible results.

Tracking KPI Progress

Setting KPIs is important — but without actively tracking them, they quickly lose their power.

If you want KPIs to truly drive your business forward, you must monitor your progress consistently and deliberately.
Tracking can be as simple or sophisticated as your business needs.

Some businesses prefer starting with a straightforward spreadsheet to record and review their numbers. Others opt for more advanced systems like KPI dashboards or operations management platforms that provide a broader, more dynamic view of performance over time.

Going back to our email list example:
A basic spreadsheet might log the total number of subscribers gained, along with details like where each subscriber came from — such as which lead magnet they downloaded or which form they completed.

At Prometis Partners, we recommend using whatever method makes tracking part of your normal business rhythm.

One great option is to use an operations management tool that integrates KPI tracking alongside your everyday tasks. Tools like ClickUp, for example, allow you to create goals tied to specific metrics — whether that's a dollar amount, a number of completed actions, or the achievement of major milestones.

You can assign ownership for each goal or task, making it easier for your team to stay accountable and focused on what matters most. Having everything — tasks, projects, and KPIs — in one system helps ensure that decisions are backed by real-time data, not guesswork.

Bottom Line:
Whether you're managing KPIs in a simple spreadsheet or a full-scale dashboard, the key is consistency. Track them, review them, and adjust based on what the numbers are telling you.



Examples of KPIs to Track in Your Business

Now that you have a strong foundation for understanding KPIs and their role in your business, it's time to take action.

To help you get started, we've compiled a list of KPI examples — but before you dive in, a word of advice: **The best KPIs are customized to your unique business and goals.**

Your KPIs should directly support your long-term vision and strategic objectives. Targets that make sense for your competitors or peers may not align with your mission — and that's okay. The most powerful KPIs are the ones that drive your business forward, not someone else's.

As you review potential KPIs, take time to reflect on:

- Your 1-, 3-, and 10-year business plans
- Your company's core mission and values
- The outcomes that will create real, lasting value

In general, most business KPIs will fall into one of four key categories:

- **Operations Management**
- **Marketing**
- **Sales**
- **Financials**

On the next page, you'll find examples within each of these categories to spark ideas. After reviewing them, continue to the **KPI Planner Workbook** section where you'll begin crafting KPIs that are truly aligned with your business's future.

Sample KPIs **by Business Category**

KPIs must reflect your unique business and goals. Your KPIs should always drive you toward achieving the bigger objectives that align with your overall mission. Don't just adopt metrics because your competitors track them — make sure every KPI you set is meaningful to your business's success story.



Marketing

- New leads generated (weekly/monthly), broken down by source
- Cost per conversion (by channel)
- Customer retention rate
- Monthly website traffic
- Organic search traffic volume
- Returning visitors vs. new visitors
- Call-to-action (CTA) conversion rates
- SEO target keyword rank improvements
- Page authority score
- Website traffic volume by content type (e.g., IGTV vs. Instagram Stories vs. Instagram Live vs. Instagram Feed Posts vs. Instagram Carousels)
- Followers, audience growth, or subscribers by channel
- Engagement rate (shares, saves, comments)
- Blog visits
- Articles, videos, social posts, pins, and other content published per month



Operations Management

- Planned Value (PV) vs. Actual Cost (AC) vs. Earned Value (EV) — and Cost Variance (CV)
- (Also known as Planned vs. Actual Cost Performance Index - CPI)
- Schedule Variance (SV) and Schedule Performance Index (SPI)
- Planned hours vs. actual hours worked
- Number of overdue tasks
- Missed milestones
- Percentage of projects/tasks completed on time and within budget
- Project Return on Investment (ROI)
- Cost of managing operational processes



Financial

- Profit margin percentage
- Cash flow (monthly/quarterly trends)
- Current Accounts Receivable (AR)
- Current Accounts Payable (AP)
- Budget variance (planned vs. actual spending)
- Vendor and subcontractor expenses
- Total cost of managing and running the business



Sales

- Total sales revenue and number of new customers
- Number of new leads generated
- Customer Lifetime Value (CLV) — overall profitability per customer
- Lead-to-sale conversion rate
- Sales tracked hourly, daily, weekly, monthly, quarterly, and annually
- Customer turnover (churn) rate and retention rate
- Abandoned cart rate (for ecommerce businesses)
- Number of quotes or proposals issued vs. contracts awarded
- Average purchase value/order size
- Sales volume by lead source
- Average monthly and annual sales per customer
- Refund and return rates

KPI Planner Workbook

Now that you have clarity on what KPIs can do for your business, use this workbook to begin mapping out the KPIs that will guide your growth over the next quarter and beyond. Use this section to map out your quarterly and annual KPIs. (If you prefer, feel free to use a spreadsheet or project management tool to track your work.)

1 What is the purpose of this project or objective? How does it align with your overall business mission and long-term goals?
(Tip: If an initiative doesn't clearly support your mission or growth plans, reconsider the time and resources you're investing.)

2 What specific, quantifiable metrics will best measure success for this project or objective?
(These will become your KPIs. Focus on the few metrics that truly move the needle.)

3 How do these KPIs directly support your short- and long-term business goals? Are the KPIs clear, actionable, and attainable?
(Each KPI should give you insight into performance and provide a path to action if adjustments are needed.)

4 For each KPI you've selected: What is the specific, measurable target you want to achieve?
(Example: Grow email list by 250 subscribers by the end of Q2.)

5 How and when will you collect the data for this KPI? Where will the data come from (CRM, spreadsheets, dashboards, etc.)? How often will you review your progress (weekly, monthly, quarterly)?

6 What specific actions can you take to positively influence this KPI? (Example: Promote a lead magnet weekly on social media to drive email subscriptions.)

7 How will you review and evaluate progress toward each KPI? Who needs to receive updates or reports on KPI performance? How will you present the results — via spreadsheet, dashboard, written report? When will you schedule regular reviews (monthly, quarterly, and/or annually)?

THE BEST EXITS DON'T HAPPEN BY ACCIDENT,

THEY HAPPEN BY DESIGN



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