

[Company name] weekly dashboard

Week of	MM/DD/YYYY
Updated by	[name]
Reviewed in	[meeting, day and time]

1 KPIS

KPI	Area	Owner	Target	Better if	This week	Last week	Trend	Status	Note
Revenue this month	Sales			Higher					
New customers	Sales			Higher					
Pipeline	Sales			Higher					
Close rate	Sales			Higher					
On-time delivery	Operations			Higher					
Open issues	Operations			Lower					
Cash on hand	Cash			Higher					
Overdue receivables	Cash			Lower					

2 WHAT'S STUCK

Anything that isn't a KPI yet but needs a decision. Keep it on the list until it's fixed.

Item	Owner	Stuck since	Decision needed

Fill in the shaded cells. Trend and Status fill themselves in.

Eight numbers. Every Monday.

A KPI dashboard is a one-screen view of the numbers that tell you how the business is running. This template keeps it to one page: a short list of KPIs, an owner and a target for each, and a list of what's stuck.

- 1 Pick eight to ten KPIs, sales first.** Sales is king. Start with the sales numbers, then delivery and cash. Cut anything you wouldn't act on. The KPI menu tab has starter sets and a formula for each KPI.
- 2 Name an owner for each.** One person per number, responsible for updating it and explaining it when it moves.
- 3 Find the data source.** For each KPI, write down where the number lives: the accounting system, the CRM, the store, the project tool. If it doesn't live anywhere yet, that's the first fix.
- 4 Set a target.** Take the average of the last three months and set the target a little better. Choose Higher or Lower to say which way is good. Review targets every quarter.
- 5 Update it every week.** Same day, same time, before the weekly meeting. Trend and Status fill themselves in.
- 6 Go through it in the meeting.** Each owner says on track or off track. On-track numbers get no discussion. For anything missed, the owner explains why and what changes.
- 7 Prune it quarterly.** Every quarter, drop a number nobody acted on and add one you wished you'd had.

If a number doesn't change a decision, it doesn't belong on the dashboard.

The full guide: lockhold.com/guides/kpi-dashboard-for-small-business

KPI dashboard template by Lockhold · lockhold.com · Free to use and adapt for your business.

Example Co. weekly dashboard

Sample numbers for illustration only. Your own numbers go on the Dashboard tab.

Week of	01/12/2027
Updated by	Operations lead
Reviewed in	Monday team meeting, 9:00 AM

1 KPIS

KPI	Area	Owner	Target	Better if	This week	Last week	Trend	Status	Note
Revenue this month	Sales	Sales lead	\$120,000	Higher	\$96,000	\$81,000	↑	Missed	Week 3 of 4. Two big orders due Friday.
New customers	Sales	Sales lead	12	Higher	14	9	↑	On track	
Pipeline	Sales	Sales lead	\$300,000	Higher	\$240,000	\$260,000	↓	Missed	One large deal pushed to next quarter.
Close rate	Sales	Sales lead	30%	Higher	33%	28%	↑	On track	
On-time delivery	Operations	Operations lead	95%	Higher	91%	96%	↓	Missed	Supplier delay on one product line.
Open issues	Operations	Operations lead	10	Lower	14	11	↑	Missed	Backlog up after the new launch.
Cash on hand	Cash	Owner	\$50,000	Higher	\$62,000	\$58,000	↑	On track	Two invoices paid early.
Overdue receivables	Cash	Bookkeeper	\$15,000	Lower	\$9,000	\$12,000	↓	On track	

2 WHAT'S STUCK

Anything that isn't a KPI yet but needs a decision. Keep it on the list until it's fixed.

Item	Owner	Stuck since	Decision needed
Hire for the second delivery crew	Owner	3 weeks	Approve the job post?
Supplier for packaging	Operations lead	10 days	Switch suppliers or wait one more week?

Pick from these. Don't take all of them.

Sales is king: start with the sales numbers, then delivery and cash.

KPI	What it tells you	How to calculate it	How often
Revenue this month	Whether you're on pace for the month.	Sales so far this month. Pick invoiced or collected, and stick with it.	Weekly
New customers	Whether the base is growing, not just sales to the same people.	First-time buyers in the period.	Weekly
Pipeline	What's likely to close in the coming weeks.	Total value of open deals you expect to close soon.	Weekly
Close rate	How well leads turn into customers.	Deals won ÷ deals decided (won + lost).	Monthly
Conversion rate	How many visitors buy.	Orders ÷ visits.	Daily
New accounts	Whether more stores are carrying your product.	Stores that placed a first order in the period.	Weekly
Average value per account	What each store is worth to you in a year.	Last 12 months of sales to stores ÷ stores that ordered in that time.	Quarterly
Sales by SKU	Which products sell and which don't.	Sales (or units) for each product in the period.	Weekly
Reorder rate	Whether the product sells through once it's on the shelf.	Stores that ordered again ÷ stores that ordered at all.	Monthly
Qualified leads	Whether marketing is producing conversations worth having.	New leads that meet your definition of a fit.	Weekly
Cost per new customer	Whether you pay a sensible amount to win a customer.	Marketing spend ÷ new customers.	Monthly
Average attendance	How full the room is, and where revenue is heading.	Total visits ÷ number of classes.	Weekly
On-time delivery	Whether you keep your promises.	Delivered on or before the promised date ÷ all delivered.	Weekly
Open issues	What's stuck, and whether the pile is growing.	Problems still open at update time.	Weekly
Retention rate	Whether customers stay.	Customers at the start of the period who are still customers at the end ÷ customers at the start.	Monthly
Cash on hand	What you actually have.	Bank balance today.	Weekly
Overdue receivables	Money earned but not collected.	Unpaid invoices past their due date.	Weekly
Capacity	Whether you have the people to deliver what you've sold.	Hours committed ÷ hours available.	Monthly

No industry benchmarks here on purpose. Compare each number with your own target and with last month.

STARTER SETS BY TYPE OF BUSINESS

Online store *These move fast enough to check every day. Still review them together once a week.*

Site traffic	How many people visit the store.
Conversion rate	Orders divided by visits. The share of visitors who buy.
Running 30-day sales	Total sales over the last 30 days, updated daily. It smooths out good and bad days.
Average order value	Sales divided by orders.
Repeat purchase rate	The share of orders from customers who bought before.
Orders shipped on time	Whether you're keeping the delivery promise.

Membership or studio *Leads and close rate fill the room. Attendance tells you where revenue is heading.*

New leads	People who asked, booked a trial, or signed up for a guest pass.
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Close rate	New members divided by leads.
Average attendance	Visits divided by classes. The number to grow month over month.
New members	First-time sign-ups this month.
Cancellations	Members who left this month.
Cash on hand	What's in the bank today.

Product brand *Selling a product through stores. Every new store that carries it adds about the same value each year, so new accounts are the number to grow.*

New accounts	New stores carrying the product this month.
Average value per account	What a store is worth to you in a year, on average. Multiply it by new accounts to see what each month of selling-in adds.
Sales by SKU	Sales for each product. It shows what to push, reorder and drop.
Reorder rate	Stores that ordered again. A first order gets you in; reorders mean it's selling.
Active accounts	Stores that ordered in the last 90 days.
Inventory on hand	Weeks of stock left at the current sales pace, by SKU.

Service business *Sales first, then whether you're delivering and getting paid.*

Pipeline	The value of open deals likely to close soon.
Close rate	Deals won divided by deals decided.
Revenue this month	Sales so far this month, against the month's target.
On-time delivery	Jobs delivered by the date you promised.
Overdue receivables	Money you've earned but haven't collected.
Cash on hand	What's in the bank today.