



# Tracking your performance

QUICKSNAPS - How to best track your performance.



**Review your  
business regularly**



**Past performance,  
future success**



**Track Canvas activity**

# Tracking your performance

## QUICKSNAPS - How to best track your performance.

### THINGS YOU NEED TO KNOW / DO    CONSIDERATIONS

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**Review your business regularly**

- Do you set aside time at the end of each week, month, quarter and year to review your financial performance?
- Are there issues which have arisen in the past which you have not been prepared for?
- Could you have avoided cash flow problems in the past if you had a better understanding of how your business was truly performing?

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**Past performance, future success**

- What is working well?
- What is not working well?
- Did you meet your budget?
- Do you have enough cash for the upcoming months?
- Which product or customer do you make the most money on?
- Which debtors are the slowest payers? Can you address this?
- Have you performed better than this time last year?
- Are expenses in line with your expectations?

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**Track Canvas activity**

- How is your business tracking against your business plan?
- How is your business tracking against your budget and forecast?
- Do you know the busy and quiet periods in your business?
- What can you change? (Use the Change lever cards)

#### More information

- Review the performance of your business against your budget and forecasts, and consider the change levers that might help you improve the cash flow of your business
- Update budget and forecasts once you have considered which change levers you will focus on in your business
- Setup regular reminders via calendar to prompt you to review how you are tracking. For example, cash at bank balance and reconciliation, money owed to you by your customers and suppliers you have not yet paid.