

**DON'T take the implementation suggestions literally! ChatGPT is wrong a lot (most?) of the time on these. But it might be a place to start looking.**

## Weekly Executive KPI Scorecard

### 1. Metric Catalogue

#	KPI	How defined	Exact Field(s) & Transformation	Data Source & Tab	Notes
1	<b>Net Revenue (last 7 days)</b>	Total sales (not including shipping or taxes) minus discounts and refunds, last 7 days	SUM of Column "Net" in Metorik orders export	Orders_Raw (Metorik Orders export)	Filter <b>created_at</b> >= WeekStart < WeekStart+7
2	<b>Gross Revenue</b>	Total sales, not including shipping or taxes, last 7 days	SUM <b>Column "total"</b>	Orders_Raw	Same date filter
3	<b>Discounts Given</b>	Total discounts given last 7 days	SUM column "Total discount"	Orders_Raw	Context for promos/CAC
4	<b>Refunds</b>	Refunds last 7 days	SUM <b>column "total refunds"</b>	Orders_Raw	...
	<b>Trials started</b>	How many people started free trial subscriptions in the past week			

5	<b>New Members</b>	Number of new PAID subscribers - i.e. not including free trial people	COUNT subscription_id	Subs_New_Raw (New Subs export)	Start date filter → last 7 days
6	<b>Cancellations</b>	How many people canceled their subscriptions (as opposed to having their subscriptions end - people who canceled are allowed to finish out their terms)	COUNT subscription_id	Subs_Cancelled_Raw	Cancelled date filter
7	<b>Net paid subscriber Growth</b>	New paid subscriber minus cancellations	[New – Cancels]	derived in KPI_Summary	
8	<b>Average CAC (rolling 4 wk)</b>	Ignore this for now	$(\Sigma \text{Ad\_Spend} \div \Sigma \text{New Members})$	Ad_Spend tab & Subs_New_Raw	Use 4-week window
9	<b>Rolling LTV</b>	Estimated lifetime value of a subscriber = average tenure of subscriber in months * subscription price per month.  Note that this does not include non-subscription purchases, e.g. a la carte classes	ARPU12 × Average Tenure	Orders_Raw + Subs All Time	Refresh quarterly

1	<b>Member email</b>	This is the open rate for	AVG open_rate For	Drip_Raw	Average of last 28
0	<b>Open Rate (avg last 28 days)</b>	our member newsletter, sent from Handweaving Academy's Drip account. All these newsletters are in the Drip group "Weekly member newsletter"	our member newsletter emails in Drip		days
1	<b>Member Email</b>	This is the click-through	AVG click_rate for	Drip_Raw	
1	<b>Click Rate</b>	rate for member newsletter	member newsletters		
1	<b>Nonmember newsletter</b>	This is the open rate for	AVG open_rate for	Drip_Raw	Average of last 28
0	<b>Email Open Rate - Handweaving Academy list (avg last 28 days)</b>	nonmember newsletter emails in the Handweaving Academy's Drip account (we have two accounts, one for Warp & Weave and one for Handweaving Academy). All these newsletters are in the Drip group "Weekly nonmember newsletter".	nonmember newsletters - these are in the group "Weekly nonmember newsletters"		days
1	<b>Nonmember newsletter</b>	Click-through rate for the	AVG click_rate	Drip_Raw	Average last 28
1	<b>Email Click Rate - Handweaving Academy list</b>	nonmember newsletter emails in the HA drip account.			days

1 0	<b>Nonmember newsletter Email Open Rate - Warp &amp; Weave list (avg last 28 days)</b>	Nonmember newsletters in the Warp & Weave account. In the Drip group "Weekly nonmember newsletters". (last 28 days)	AVG <code>open_rate</code> for <code>nonmember newsletters</code> - these are in the group "Weekly nonmember newsletters"	Drip_Raw	Average of last 28 days
1 1	<b>Nonmember newsletter Email Click Rate - Warp &amp; Weave list</b>	Click rate for the nonmember newsletters in the Warp & Weave account (last 28 days)	AVG <code>click_rate</code>	Drip_Raw	Average last 28 days
1 2	<b>Lead-Magnet Sessions</b>	Ignore for now	GA4 event count <code>page_view</code> filtered by page path	GA4 export to Sheet	Optional until GA4 is live
1 3	<b>Cash in Bank</b>	We will pull this from the bank manually but need to know where in the spreadsheet to put it	Manual entry	Cash_Balance tab	Pull Monday balances from bank feed if available

---

IGNORE BELOW THIS LINE

Suggested route is to use Metorik/Drip → emailed report → Zapier → Google Sheets → Looker Studio. I don't know if that works.

## 2. Sheet Structure

HWA\_KPI\_Workbook

— Orders_Raw	(incremental)
— Subs_New_Raw	(incremental)
— Subs_Cancelled_Raw	(incremental)
— Drip_Raw	(incremental)
— Ad_Spend	(manual weekly)
— Cash_Balance	(manual weekly)
— KPI_Summary	(formulas)

## 3. KPI\_Summary Columns & Formulas

C	Label	Formula	Form at
A	Week_Start	typed Mondays	date
B	Net Revenue	<code>=SUMIFS(Orders_Raw!\$D:\$D, Orders_Raw!\$A:\$A, "&gt;="&amp;A2, Orders_Raw!\$A:\$A, "&lt;"&amp;A2+7)</code>	curre ncy
C	Gross Revenue	<code>... gross_total ...</code>	curre ncy
D	Discounts	<code>... discount_total ...</code>	curre ncy
E	Refunds	<code>... refund_total ...</code>	curre ncy
F	New_Membe rs	<code>=COUNTIFS(Subs_New_Raw!\$B:\$B, "&gt;="&amp;A2, Subs_New_R aw!\$B:\$B, "&lt;"&amp;A2+7)</code>	numb er

G	Cancels	similar on Subs_Cancelled_Raw	number
H	Net_Growth	=F2-G2	number
I	CAC	=IF(F2>0,SUMIFS(Ad_Spend!\$C:\$C,Ad_Spend!\$A:\$A,">="&A2,Ad_Spend!\$A:\$A,"<"&A2+28)/SUMIFS(Subs_New_Raw!\$B:\$B,Subs_New_Raw!\$B:\$B,">="&A2-21,Subs_New_Raw!\$B:\$B,"<"&A2+7),"	currency
J	LTV	quarterly calc reference	currency
K	Open%	AVGIFS on Drip_Raw	%
L	Click%	AVGIFS	%
M	LeadMag Sessions	GA4 figure	number
N	Cash_Balance	VLOOKUP Monday	currency

#### 4. Looker Studio Layout

1. **Header:** "Handweaving Academy – Weekly Executive KPI" (auto-date stamp).
2. **Row 1 Scorecards**
  - Net Revenue • Gross Revenue • Discounts • Refunds
3. **Row 2 Scorecards**
  - New Members • Cancels • Net Growth • CAC • LTV
4. **Row 3 Scorecards**

- Open% • Click% • Lead-Magnet Sessions • Cash Balance
  - 5. **Trends (sparklines)** under each major metric (Revenue, Members, CAC) – 12-week line chart.
  - 6. **Colour Rules:**
    - Net Growth red if  $<0$ , green  $\geq 0$
    - CAC red if  $> \$80$  (example threshold)
  - 7. **Data Source:** single connection to KPI\_Summary.
  - 8. **Delivery:** email PDF Mondays 9 am PT; optional Slack digest plug-in.
- 

## 5. Owner Checklist

- **Tien:** Maintain Ad\_Spend sheet & KPI formulas.
- **Janet:** Verify GA4 lead-magnet event is firing.
- **VA:** Enter Cash\_Balance each Monday, sanity-check numbers after Looker email.

Once GA4 & LearnDash events are live, add "Class Completions" and "Toolbox Usage" as optional scorecards in Row 3.