

A man and a woman in business attire are looking at a computer screen in an office setting. The man is pointing at the screen. The background is a blurred office environment with a window and some office equipment.

A Beginner's Guide to KPIs

Klipfolio  TM

Key Performance Indicators

A key performance indicator (KPI) is a measurable value, typically expressed as a figure or percentage, that demonstrates your organization's effectiveness at achieving its key objectives.

Business Metrics

A Business Metric is a quantifiable measure that organizations use to track and assess the performance of a specific business process. Every business function has specific metrics their leaders should monitor. For example: marketers track campaign and program responses, sales teams monitor new opportunities and leads, while executives look at financial metrics.

Monitoring Metrics and KPIs

Business metrics are important drivers of performance, and business leaders must monitor their KPIs and report on them regularly.

This guide provides a sampling of the most important and commonly used KPIs for businesses today. To see more examples, visit our gallery of KPI Examples and Templates at [Klipfolio.com](https://klipfolio.com).

Sales KPIs: Your competitive edge is a data-driven culture

Only the data-driven survive in today's ultra-competitive market. Build a data-driven sales team with these Sales KPIs and metrics.

Sales Growth

Shows the pace at which your sales revenue is increasing or decreasing - an essential part of your growth projections. Monitor this metric over multiple time periods to assess trends and normalize values.



Sales Opportunities

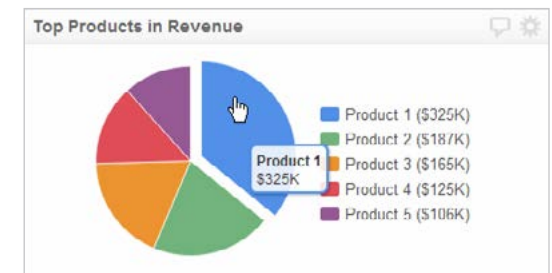
Organizes your prospects based on the value of each opportunity and the likelihood of closing the sale. Attaching a value to each opportunity helps your reps prioritize their efforts.

A table titled "Opportunities" with a dropdown menu for "Stage". The dropdown menu is open, showing options: "Proposal or higher", "Qualified or higher", and "Proposal or higher". The table has columns: Name, Value, and Weighted. The data is as follows:

Name	Value	Weighted
✓ Weldon Won	\$9,877	\$9,877
✓ Kord II Lost	\$9,702	\$9,702
✓ Welltown Inc.	\$9,416	\$9,416
✓ Testa Inc.	\$9,332	\$9,332
✓ M Corp.	\$9,150	\$9,150
✓ Welltown Inc.	\$9,120	\$9,120
Weldon	\$9,641	\$8,677
Fujikawa Ltd.	\$9,516	\$8,564
	\$624,939	\$540,702

Product Performance

Ranks product sales based on revenue performance. See which are selling well and which are failing to resonate with your customers. Use this metric in conjunction with revenue and marketing metrics.



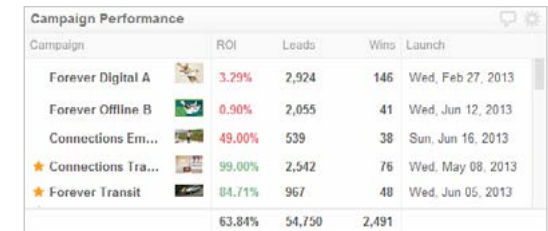
Show me more Sales KPIs in Klipfolio

Marketing KPIs: Your brand powered by data-driven marketing

Marketing occupies the intersection of art and science. These Marketing KPIs and metrics will help your team maximize both for optimal results.

Marketing Return on Investment (ROI)

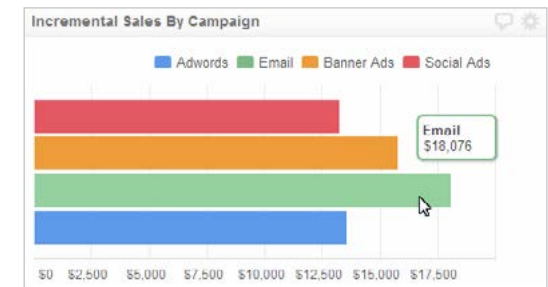
Measures the results that a marketing campaign is generating compared to the cost of running it. Results can include new prospects, increased web traffic, or more brand mentions online. Costs typically include time and money.



Campaign	ROI	Leads	Wins	Launch
Forever Digital A	3.29%	2,924	146	Wed, Feb 27, 2013
Forever Offline B	0.90%	2,055	41	Wed, Jun 12, 2013
Connections Em...	49.00%	539	38	Sun, Jun 16, 2013
★ Connections Tra...	99.00%	2,542	76	Wed, May 08, 2013
★ Forever Transit	84.71%	967	48	Wed, Jun 05, 2013
	63.84%	54,750	2,491	

Incremental Sales

Measures your marketing contribution to sales revenue. This KPI emphasizes the important relationship between sales and marketing and the need for alignment between these two functions.



Web Traffic Sources

Measure and ranks the sources driving visitors to your website. Three common traffic sources are direct, referral, and search, though your campaigns may also include banner ads, paid search, or content syndication.



Show me more Marketing KPIs in Klipfolio 

SaaS KPIs: Meticulous measurement of the SaaS metrics core to business growth

SaaS-based companies live or die on happy customers and monthly revenue. These SaaS KPIs help them monitor their growth in both.

Customer Lifetime Value to Customer Acquisition Ratio (CLV:CAC)

Measures the relationship between lifetime value of a customer and the cost of acquiring the customer. This is a crucial metric for subscription-based companies.



Customer Lifetime Value (CLV or LTV)

Measures the amount of money a customer brings to your business over the entire time they do business with you. This KPI is based on the interaction among your churn rate, your gross margin, and the average length of time a customer stays with you.



Monthly Recurring Revenue (MRR) Expansion Rate

SaaS-based companies (for ex: telcos, banks), put this KPI at the core of their business. Increasing MRR among current accounts is a sign of customer satisfaction and loyalty.



Show me more SaaS KPIs in Klipfolio 

Social Media KPIs: Interact, measure, analyze, profit

Twitter Engagement

On Twitter, engagement takes into account the number of user actions (favorites, retweets, and mentions) your tweets are generating. This KPI is an important component of your social media strategy.

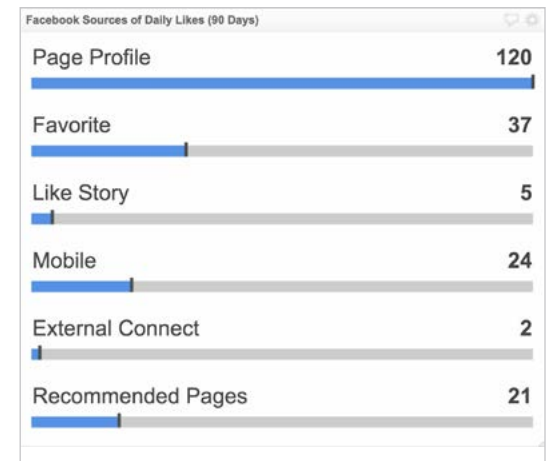
Twitter Followers

The Followers KPI measures the popularity of your company. The more followers you have, the bigger the audience and, as a result, the greater the possibility to convert them into customers.

Facebook Page Likes

The Page Likes KPI measures the popularity of your company on Facebook. Like your Twitter Engagement, this KPI should also be at the core of your social media strategy.

Show me more Social Media KPIs in Klipfolio 



Finance KPIs: Grow your business and monitor your fiscal health

Revenue and responsibility are the watchwords of Finance. Use these Finance KPIs to prove your profitability to employees, investors, and stockholders.

Current Ratio

A measure of your ability to pay your debts over a given time period. This ratio includes your current assets and liabilities to help you understand the solvency of your business.



Working Capital

Measures your financial health by analyzing assets you have on-hand to meet any short-term liabilities. Includes cash-on-hand, short-term investments, and accounts receivable.



Return on Equity

Measures your ability to generate revenue for each unit of shareholder equity. A good measure not only of your profitability, but also your efficiency.



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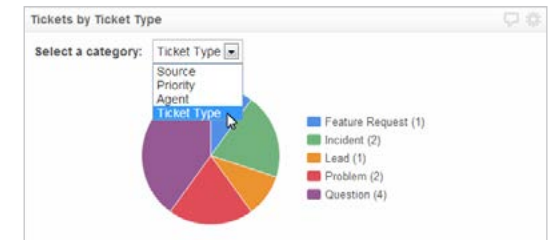


Help Desk KPIs: Track your performance in real time to respond to tickets before they become crises

People are still the most important part of the business equation. These Help Desk KPIs help your teams elevate your service ratings from “average” to “game-changing.”

Ticket Analysis

A breakdown of the types of tickets being submitted to your help desk. Ticket types can include priority level, assigned agency, category, and source.



Ticket Queue

Analyzes outstanding tickets to help you prioritize urgent issues and coordinate responses for quick resolution. This KPI includes information on ticket age, owner, type, and current status.

A table titled "Tickets by Priority" showing a list of tickets. The columns are: Agent, Ticket Type, Status, and Time to Resolve. The table contains five rows of data.

Agent	Ticket Type	Status	Time to Resolve
John Doe	Incident	Open	2.30 hrs
John Doe	Incident	Open	2.30 hrs
John Doe	Incident	Open	2.30 hrs
John Doe	Incident	Open	2.30 hrs
John Doe	Incident	Open	2.30 hrs

Agent Performance

Measures the performance of your help desk team against key metrics such as total calls handled, first-call resolution, and customer sentiment. Use this KPI to identify the stars on your team and those who need help.

A table titled "Agent Performance" showing metrics for five agents. The columns are: Agent, Avg Calls / HR, First-Call Resolution, Points MTD, and Customer Sentiment. The table contains five rows of data.

Agent	Avg Calls / HR	First-Call Resolution	Points MTD	Customer Sentiment
Angelina Wilkins	2.8	61	325	
Danielle Roy	2.8	68	209	
James Walsh	3.2	73	376	
Robin Lyons	2.1	71	267	
Vicki Glover	3.6	78	351	

Show me more Help Desk KPIs in Klipfolio

Call Center KPIs: Keep your call center on track with the right data

A successful call center balances call volume and customer satisfaction. Use these Call Center KPIs to avoid having to choose between the two.

Service Level

Measures your ability to deliver the service agreed upon in a Service Level Agreement (SLA) provided to your customers. This KPI provides a real-time barometer of your call center's performance.



Agent Schedule Adherence

Measures how effectively your call center agents manage their time. A high adherence rate indicates cost-effective agents; a low rate could mean failure to meet SLAs with your customers.



Active and Waiting Calls

Compares the current call volume to the number of callers waiting to speak with an agent. This KPI provides agents with real-time visibility into their performance.



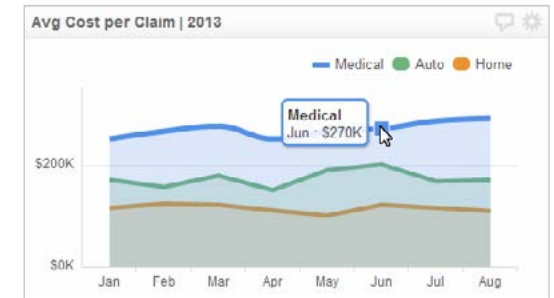
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Insurance KPIs: Managing risk and reward with a data-driven culture

Successful Insurance companies strike a balance between short-term risks and long-term rewards. Use these Insurance KPIs to succeed in both time frames.

Average Cost Per Claim

Measures the amount in dollars paid out for each customer claim. Use this KPI to better assess the risk associated with each policy so you can adjust prices accordingly.



Customer Satisfaction

Measures your customers' varying levels of satisfaction with your products and services. Use this KPI to identify customers at risk of changing providers or to reward satisfied customers with additional offers.



Claims Ratio

Measures the number of claims in a period, divided by the earned premium for that same period. A higher-than-usual ratio could indicate fraudulent claim activity; a lower-than-usual ratio could indicate irrelevant products.



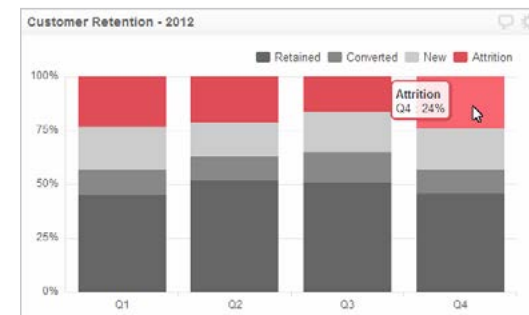
[Show me more Insurance KPIs in Klipfolio](#) ➔

Retail KPIs: Sharpen your competitive edge with the right data

The best retailers keep more customers coming back and buying more. These KPIs help you find the ones most likely to reward you with repeat business and higher profits.

Customer Retention

Measures your ability to keep and generate revenue from recurring customers over the long term. A modest 5% increase in customer retention can increase profits anywhere from 25% to 95%.



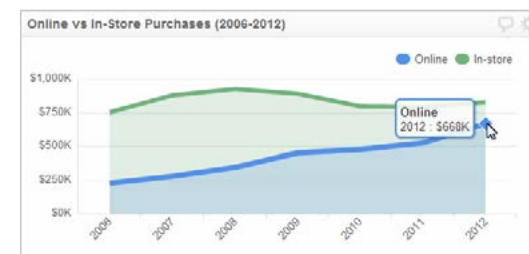
Customer Satisfaction

Measures the public perception of your business and the degree to which they're satisfied with your products or services. Data inputs for this KPI can include point-of-sale forms or call center surveys.



Point of Purchase

Measures where you're completing sales and compares each "point" (for ex: URL or checkout lane) over a given time period. This KPI shows you where customers make the most purchases so you can allocate resources more effectively.



Show me more Retail KPIs in Klipfolio



Don't stop reading!

This is only one of our four-part series of eBooks on Dashboards and KPIs. Visit www.klipfolio.com for the others in this series:

➔ A Beginner's Guide to Business Dashboards

➔ The Marketer's Guide to KPIs

➔ The Sales Leader's Guide to KPIs

About Klipfolio

Klipfolio's mission is to make it fast, easy and affordable (\$20/user/month) for business users to build and share real-time dashboards - enabling them to move from quarterly reflective management to continual performance optimization.

Klipfolio has more than 3,500 customers including marketing agencies, financial services, retailers, educational institutions, SaaS software companies and not-for-profits organizations. Find out more at klipfolio.com and follow us on twitter.com/klipfolio.



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