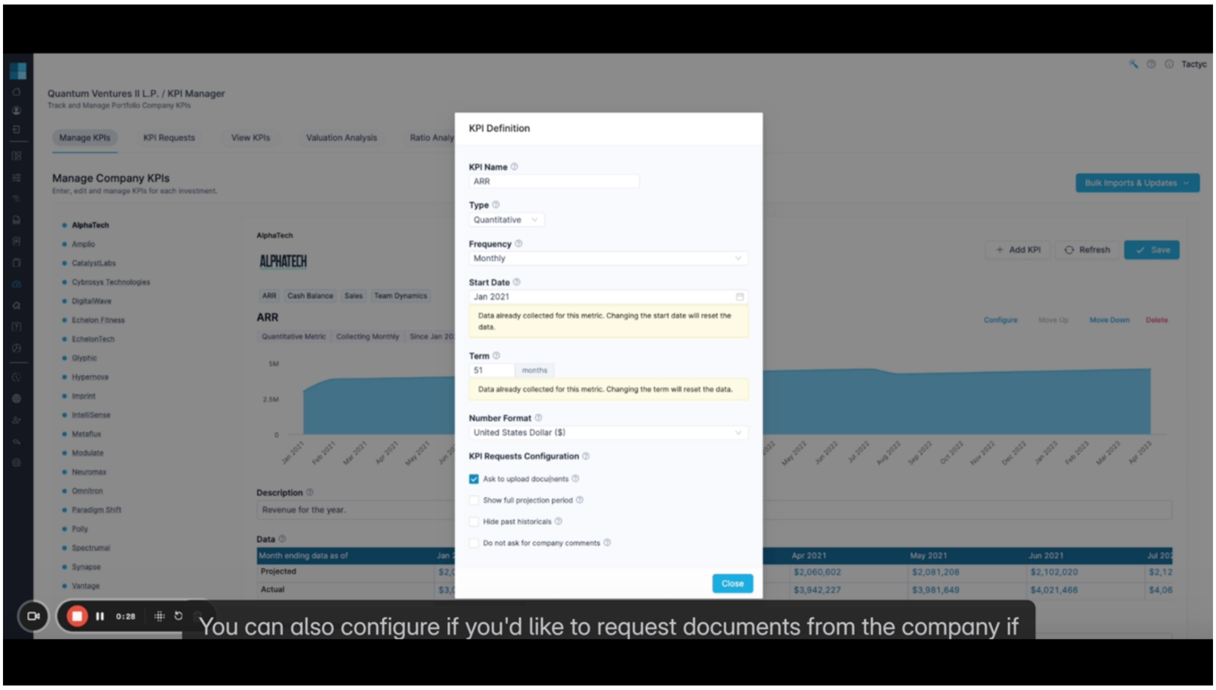
KPI Manager Walkthrough (Sanitized for Notion)

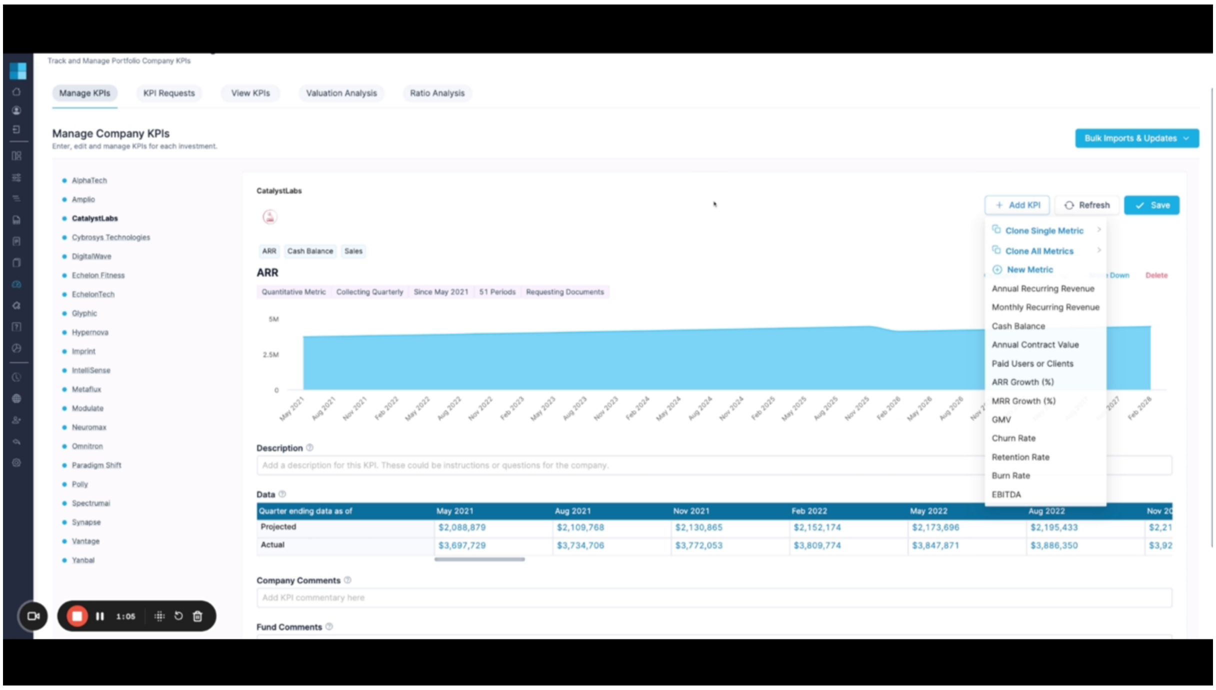
KPI Overview

KPIs are operating metrics typically tracked to monitor a portfolio company's performance. These could include Revenue, Cash Balances, or Customers.



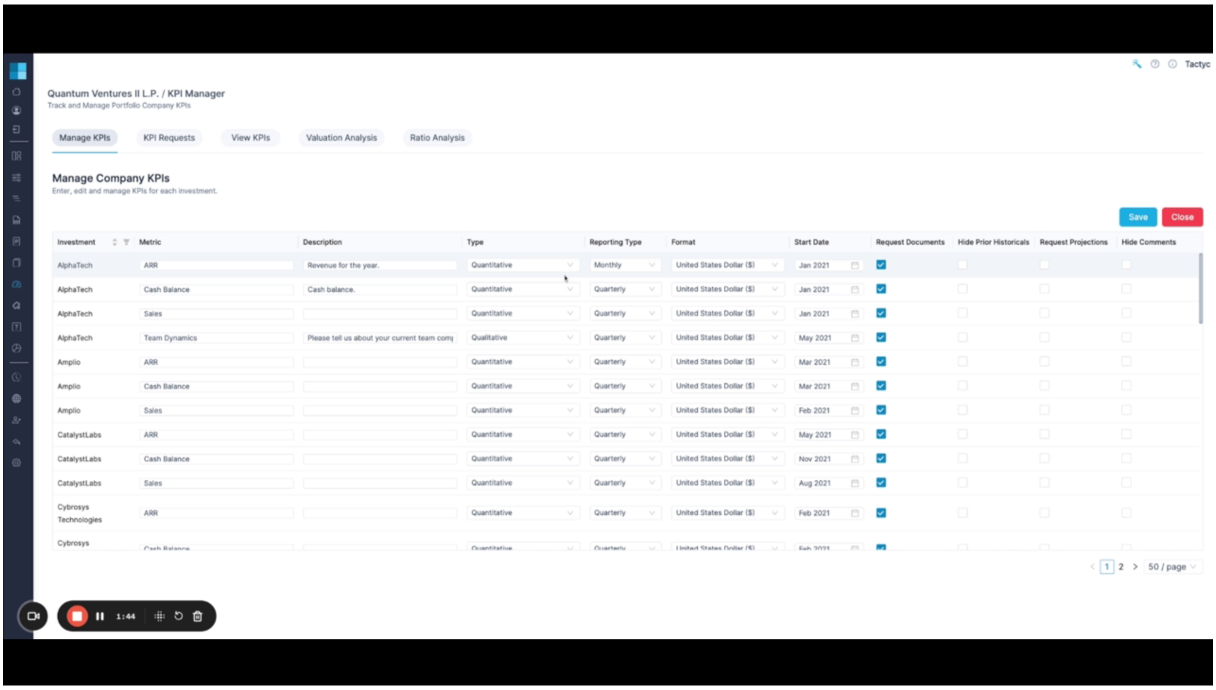
How to Add a KPI

From the Notion sidebar, navigate to the KPI Manager. Select a portfolio company, click 'Add KPI', and either select a predefined metric or create a new one. You can customize the frequency, data type, range, and even upload supporting documentation.



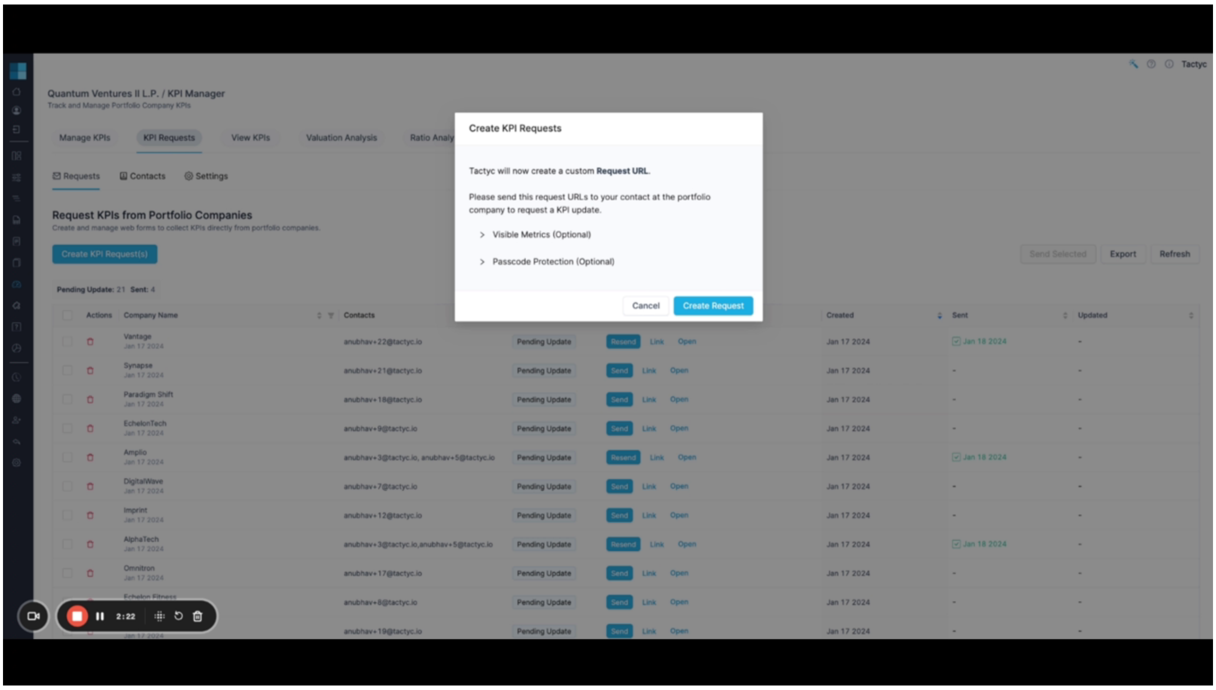
Adding KPI Data and Assigning Contacts

You can manually input KPI data via Notion Pages, or assign portfolio companies to enter the data themselves by assigning a contact email. Contact details can also be imported from Notion.



Creating and Sending KPI Request Forms

Request forms are created in the KPI Manager. Select reporting periods, choose whether the form applies to all or specific companies, and optionally secure the form with a passcode. You can send these forms automatically or manually by copying the link.



Reviewing Submitted KPIs

Once a portfolio company submits their data, you'll receive a notification. Log in to review, compare against previous values, and choose to approve or reject the updates. You can also enable auto-approval in settings.