

**What do leading KPIs
look like?**



IRX – What do good LEADING KPIs look like?

The **SECRET SAUCE** in IRX IDMs is constant learning and pursuit of better **LEADING KPIs**

Lagging KPIs: A Window into the Past

Lagging KPIs measure what has already happened, such as sales numbers and costs. These indicators provide valuable insight into your progress towards your goals and objectives. But what about the future?



Leading KPIs: A Glimpse into the Future

Leading KPIs, such as the number of inquiries, help predict future sales and give you the ability to plan and make strategic decisions. They are used to predict changes or trends and are forward looking and help to manage the performance of a system or process.



The key difference between Leading and Lagging KPIs is that Leading KPIs indicate where you're likely to go, while Lagging KPIs only measure what you have already achieved.

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KPI Stair Step Framework

Area of Focus	Unacceptable	Basic	Intermediate	Advanced
Sales Team	Leading KPIs			
Revenue Bookings	<ul style="list-style-type: none"> * \$ Bookings * Shipments/revenue * Funnel size (unweighted \$s) * # of active projects 	<ul style="list-style-type: none"> * # of Sales calls * # of Funnel adds (\$s) * Total Funnel size w/ weighted \$s * # of SQLs (MQLS converted) = Sales qualified leads 	<ul style="list-style-type: none"> * Sales calls * Appointments/ Appointment attempts * Quotes/demos (Stage #3 in funnel) * MQLs = Marketing qualified leads converting to SQLs and leading to quotes above xx\$s 	<ul style="list-style-type: none"> * Sales calls with SQLs * 3 week appointments scheduled for SQLs * 3 week appointments scheduled for stage 3 funnel opportunities * Stage 4 Funnel Size (w/2 week conversion target) * MQL – SQL Cycle time and conversion rate to orders above xx\$s
Value added	Not too much	Interesting	Informative	Predictive

The goal overtime is to move up the value add KPI ladder

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	<div><div></div><div></div><div></div><div></div></div> <ul style="list-style-type: none">– Where are you in your KPI journey?– At the end of each IDM cycle do you discuss (besides results & outcomes versus your 100 day objectives) – What did we learn & how can we push the “leading” KPIs as we move forward in the next 100 day cycle?– This can be an absolute games changer			
Value added	Not too much	Interesting	Informative	Predictive

The goal overtime is to move up the value add KPI ladder

CARE – Q1

	Area of Measurement	OWNER	Start Point	Target	Leading or Lagging		9-Jan WK 1	16-Jan 2	23-Jan 3	30-Jan 4	6-Feb 5	13-Feb 6	20-Feb 7	27-Feb 8	6-Mar 9	13-Mar 10	20-Mar 11	27-Mar 12	3-Apr 13
1	CARE On Time Renewal Win Rate	ASL	65%	68%	Leading	TARGET	65%	65%	65%	65%	66%	66%	66%	66%	66%	67%	67%	67%	68%
						ACT	65%	80%	50%	70%	60%	71%	60%	68%	68%	71%	72%	68%	69%
2	Unconnected 0 to 36 month assets with Care quoted	ASL/AM	32%	38%	Leading	TARGET	32%	32%	33%	33%	34%	34%	35%	35%	36%	36%	37%	37%	38%
						ACT	32%	30%	30%	34%	38%	36%	38%	39%	39%	40%	41%	43%	44%
3	New CARE Opportunities Created - Weekly pacing (\$)	ASL/AM	\$0	\$22,500,000	Leading	TARGET	\$1,730,769	\$3,461,538	\$5,192,308	\$6,923,077	\$8,653,846	\$10,384,615	\$12,115,385	\$13,846,154	\$15,576,923	\$17,307,692	\$19,038,462	\$20,769,231	\$22,500,000
						ACT	\$1,407,021	\$3,006,813	\$4,338,176	\$5,913,906	\$7,559,189	\$10,837,775	\$13,080,303	\$14,097,303	\$15,297,303	\$15,897,303	\$18,429,735	\$19,947,856	\$21,656,996
4	CARE Bookings QTD (\$)	ASL/AM	\$0	\$11,261,000	Lagging	TARGET	\$866,231	\$1,732,462	\$2,598,692	\$3,464,923	\$4,331,154	\$5,197,385	\$6,063,615	\$6,929,846	\$7,796,077	\$8,662,308	\$9,528,538	\$10,394,769	\$11,261,000
						ACT	\$223,988	\$632,210	\$1,018,015	\$1,778,291	\$1,778,291	\$4,620,636	\$5,484,921	\$6,188,943	\$7,414,901	\$8,123,899	\$10,064,613	\$10,739,246.00	\$12,872,013.93
5	CARE Bookings Weekly (\$)	ASL/AM	\$673,769.00	\$866,230.77	Lagging	TARGET	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77	\$866,230.77
						ACT	\$223,988	\$408,023	\$386,005	\$687,682	\$0	\$2,842,345	\$867,000	\$704,022	\$1,225,958	\$708,998	\$1,940,713	\$674,633.00	\$2,132,767.00
6	20 Year Attachment Rate on All Accounts	ASL/AM	39%	41%	Lagging	TARGET	39%	39%	39%	39%	39%	39%	39%	39%	39%	40%	40%	40%	41%
						ACT	39%	39%	39%	39%	39%	39%	39%	39%	39%	39%	39%	39%	39%

Value added

Not too much



Interesting



Informative



Predictive

CARE – Q2

	Area of Measurement	OWNER	Start Point	Target	Leading or Lagging		10-Apr WK 1	17-Apr 2	24-Apr 3	1-May 4	8-May 5	15-May 6	22-May 7	29-May 8	5-Jun 9	12-Jun 10	19-Jun 11	26-Jun 12	3-Jul 13
1	CARE On Time Renewal Win Rate	ASL	68%	70%	Leading	TARGET	68%	68%	68%	68%	68%	68%	68%	68%	68%	69%	69%	69%	70%
						ACT	68%												
2	Unconnected 0 to 36 month assets with Care quoted	ASL/AM	43%	50%	Leading	TARGET	43%	44%	44%	45%	45%	46%	46%	47%	47%	48%	48%	49%	50%
						ACT	43%												
3	New CARE Opportunities Created - Weekly pacing (\$)	ASL/AM	\$21,656,000	\$43,156,000	Leading	TARGET	\$1,653,846	\$3,307,692	\$4,961,538	\$6,615,385	\$8,269,231	\$9,923,077	\$11,576,923	\$13,230,769	\$14,884,615	\$16,538,462	\$18,192,308	\$19,846,154	\$21,500,000
						ACT	\$364,000												
4	New 'Target Account' CARE Opportunities Created - Weekly pacing (count)	ASL/AM	40	86	Leading	TARGET	3	6	9	12	15	18	22	26	30	34	38	42	46
						ACT	2												
5	CARE Bookings QTD (\$)	ASL/AM	\$12,873,014.00	\$25,060,514.00	Lagging	TARGET	\$937,500.00	\$1,875,000.00	\$2,812,500.00	\$3,750,000.00	\$4,687,500.00	\$5,625,000.00	\$6,562,500.00	\$7,500,000.00	\$8,437,500.00	\$9,375,000.00	\$10,312,500.00	\$11,250,000.00	\$12,187,500.00
						ACT	\$129,074												
6	Average 4 Assets Attached by AM Per Month	ASL/AM	136	364	Lagging	TARGET	18	35	53	70	88	105	123	140	158	175	193	210	228
						ACT	6												

