Company Scorecard or Dashboard:	
Step 1	Set vision and values (define company why)
Step 2	Set 1 year and 3 year plan
Step 3	Set organizational structure without names
Step 4	Target and define top 3-5 responsibilities for each position
Consider	No decisions without going through the 1 year and the why. **Will this decision help us get to our 1 year plan?**
Consider	Set the most important priority metrics for the company to attain 1 year goal.
Consider	Ensure that each metric is assigned appropriately to each seat.

Individual Leadership Scorecards:	
Step 1	Set vision and values
Step 2	Set 1 year and 3 year plan
Step 3	Set organizational structure without names
Step 4	Target and define top 3-5 responsibilities for each position
Consider	Ensure that the most important metrics of each seat are reflected for continued fluid systems and processes. (This position exists to have these metrics met.)
Consider	Assess job descriptions to view capacity of what all has been assigned for each position. Adjust and reassign time suckers that are not conducive to this position. Need to allow for each position to meet metrics with capacity, experience, and focus.
Consider	Get buy in and understanding of the 1 year plan and vision and find out what is needed from that seat owner. Ask the current seat owner what needs to be measured to get to the one year goals. Gather info on the why of the seat holder and how it is aligned with company why.
Consider	Set 5 most important metrics that will help that position contribute to the 1 year plan and continued progress of the company.
Consider	Review for the first 30 days to see how it is helping with metric information. **Are we seeing improvements with the focus on set metrics? If not, discuss and adjust.**
Consider	Metrics and spreadsheets should not be a time sucker. It is a story of the work and progress or reflection on what needs to be improved. A work in progress.

	WEEKLY	
	Leadership Scorecard Template	
Period	**Owner**	**Title**
Weekly	Accounting and Finance	Cash Receipts
Weekly	Accounting and Finance	AR Over 30 Days
Weekly	Accounting and Finance	AP Over 30 Days
Weekly	Operations	Number of Items Made (Manufacturing)
Weekly	Operations	Utilization - Billable Hours vs. Total Hours (Services)
Weekly	Operations	Velocity of Delivery - Items or Projects by Time
Weekly	Operations	Number of Defects or Unsatisfied Customers.
Weekly	Sales and Marketing	Number of Proposals and Contracts Sent
Weekly	Sales and Marketing	Sales of New Clients
Weekly	Sales and Marketing	Sales of Existing Clients
Weekly	People Team	New Hires
Weekly	People Team	Terminations or departures
Weekly	Technology	Downtime that Impacts Business
Weekly	Technology	Number of Tickets Completed
Weekly	Legal and Risk	Safety incident or score. If in manufacturing.

MONTHLY Leadership Scorecard Template					
Period	**Owner**	**Title**	**Jan**	**Feb**	**March**
Monthly	Accounting and Finance	Revenue			
Monthly	Accounting and Finance	Gross Profit			
Monthly	Accounting and Finance	Sales and General Administration (SG&A)			
Monthly	Accounting and Finance	EBITDA			
Monthly	Operations	Number of Items Made (Manufacturing)			
Monthly	Operations	Utilization - Billable Hours vs. Total Hours (Services)			
Monthly	Operations	Velocity of Delivery - Items or Projects by Time			
Monthly	Operations	Number of Defects or Unsatisfied Customers.			
Monthly	Sales and Marketing	Number of New Clients. Defined by new paying customers this year.			
Monthly	Sales and Marketing	Sales of New Clients			
Monthly	Sales and Marketing	Sales of Existing Clients			
Monthly	People Team	Total Number of Employees			
Monthly	People Team	New Hires			
Monthly	People Team	Turnover. Defined as Total Number of Departed / Total Number of Employees			
Monthly	Technology	IT Costs vs. Revenue (%)			
Monthly	Technology	Downtime that Impacts Business			
Monthly	Technology	Number of Tickets Completed			
Monthly	Legal and Risk	Number of Claims, Filing or Suits against the Company or its Officers.			
Monthly	Legal and Risk	Safety incident or score. If in manufacturing.			

		QUARTERLY				
		Leadership Scorecard Template				
Period	**Owner**	**Title**	**Q1**	**Q2**	**Q3**	**Q4**
Quarter	Accounting and Finance	Revenue				
Quarter	Accounting and Finance	Gross Profit				
Quarter	Accounting and Finance	Sales and General Administration (SG&A)				
Quarter	Accounting and Finance	EBITDA				
Quarter	Accounting and Finance	Total Debt. Including Notes, LoC, PPP				
Quarter	Operations	Number of Items Made (Manufacturing)				
Quarter	Operations	Utilization - Billable Hours vs. Total Hours (Services)				
Quarter	Operations	Velocity of Delivery - Items or Projects by Time				
Quarter	Operations	Number of Defects or Unsatisfied Customers.				
Quarter	Sales and Marketing	Number of New Clients. Defined by new paying customers this year.				
Quarter	Sales and Marketing	Sales of New Clients				
Quarter	Sales and Marketing	Sales of Existing Clients				
Quarter	People Team	Total Number of Employees				
Quarter	People Team	New Hires				
Quarter	People Team	Turnover. Defined as Total Number of Departed / Total Number of Employees				
Quarter	Technology	IT Costs vs. Revenue (%)				
Quarter	Technology	Downtime that Impacts Business				
Quarter	Technology	Employee Satisfaction Score/Survey				
Quarter	Legal and Risk	Number of Claims, Filing or Suits against the Company or its Officers.				
Quarter	Legal and Risk	Safety incident or score. If in manufacturing.				

ANNUAL					
Leadership Scorecard Template					
Period	**Owner**	**Title**	**2022**	**2023**	**2024**
Annual	COO	Tie in with 10 Year Target/Purpose			
Annual	Accounting and Finance	Revenue			
Annual	Accounting and Finance	Gross Profit			
Annual	Accounting and Finance	Sales and General Administration (SG&A)			
Annual	Accounting and Finance	EBITDA			
Annual	Accounting and Finance	Total Debt. Including Notes, LoC, PPP			
Annual	Operations	Number of Items Made (Manufacturing)			
Annual	Operations	Utilization - Billable Hours vs. Total Hours (Services)			
Annual	Operations	Velocity of Delivery - Items or Projects by Time			
Annual	Operations	Number of Defects or Unsatisfied Customers. Can also use Net Promotor score.			
Annual	Sales and Marketing	Number of New Clients. Defined by new paying customers this year.			
Annual	Sales and Marketing	Number of Recurring Clients. Defined by paying customers from previous year.			
Annual	Sales and Marketing	Sales of New Clients			
Annual	Sales and Marketing	Sales of Existing Clients			
Annual	People Team	Total Number of Employees			
Annual	People Team	New Hires			
Annual	People Team	Turnover. Defined as Total Number of Departed / Total Number of Employees			
Annual	People Team	Employee Engagement Score or Organizational Check-up Score			
Annual	Technology	IT Costs vs. Revenue (%)			
Annual	Technology	Downtime that Impacts Business			
Annual	Technology	Employee Satisfaction Score/Survey			
Annual	Legal and Risk	Number of Claims, Filing or Suits against the Company or its Officers.			
Annual	Legal and Risk	Safety incident or score. If in manufacturing.			
Annual	Legal and Risk	Insurance Cost vs. Revenue (%)			