

Managing *Performance*

SETTING UP YOUR KPIS

Reference the **KPI Worksheet** as you complete this section.

List the top 3 Key Performance Indicators (KPIs) most impactful to your goals in each area.

Personal KPI	Financial KPI	Client KPI	Growth KPI	Team KPI	Other KPI

IDENTIFY YOUR 'INDEPENDENCE INDICATORS'

Next, identify the top 5 Key Performance Indicators (KPIs) that will tell you that the practice is running at the desired standards, independent of your involvement - thus giving you total confidence you don't NEED to be involved.

Independence KPIs	Where to Track	KPI: Current	KPI: Target
1.			
2.			
3.			
4.			
5.			



The Biggest *Levers*

Now, list the top 3 “biggest levers” you can pull to improve your Independence KPIs.

BIG LEVER #1

Name Description:		
ACTION 1:	ACTION 2:	ACTION 3:

BIG LEVER #2

Name Description:		
ACTION 1:	ACTION 2:	ACTION 3:

BIG LEVER #3

Name Description:		
ACTION 1:	ACTION 2:	ACTION 3:



Performance Reporting *Checklist*

PERSONAL	REPORTING: <ul style="list-style-type: none">• Personal Goals• Success Shifter (or similar)• Friday Check-Ins (Masterminds)	Next Steps: _____ _____ _____
Notes:		

FINANCIAL	REPORTING: <ul style="list-style-type: none">• Profit & Loss (budget vs. actual)• Client Profitability Analysis• KPI Worksheet or Practice Benchmark	Next Steps: _____ _____ _____
Notes:		

CLIENT BASE	REPORTING: <ul style="list-style-type: none">• Client Profitability Analysis• Practice Benchmark• Client Surveys• NPS Scores	Next Steps: _____ _____ _____
Notes:		

GROWTH	REPORTING: <ul style="list-style-type: none">• Marketing Activity Report• New Business report (pipeline / conversions / source)• Referrals Report	Next Steps: _____ _____ _____
Notes:		

TEAM	REPORTING: <ul style="list-style-type: none">• 360 Feedback• Engagement Surveys	Next Steps: _____ _____ _____
Notes:		

