




Business Metrics Checklist

Track & Improve Your Business with Data-Driven Insights

 **Business Name:** _____

 **Date:** _____

 **Reviewed by:** _____

Customer Acquisition Cost (CAC)


 **Why it Matters:**

Are you spending too much to acquire customers?

- Do you track **how much it costs to acquire a customer** from each marketing channel?
- Are you **measuring CAC vs. revenue per customer** to ensure profitability?
- Have you optimized your **ad spend to reduce unnecessary costs**?
- Are you investing in **organic customer acquisition methods (SEO, referrals, social proof)**?

 **Action Plan:**

Customer Lifetime Value (LTV)

 **Why it Matters:** Are customers worth more than they cost?

- Have you calculated **how much revenue each customer generates over time**?
- Are you tracking **repeat purchases and upsells**?
- Have you implemented a **loyalty or retention strategy**?
- Are you offering **subscriptions, memberships, or recurring services** to increase LTV?

 **Ways to Increase LTV:**

Profit Margins & Pricing Strategy


 **Why it Matters:** Are you pricing for profit or just to compete?

- Are you tracking **Gross Profit Margin** (Revenue - Cost of Goods Sold)?
- Are you tracking **Net Profit Margin** (Profit after ALL expenses)?
- Have you adjusted pricing **based on value, not just competition**?

Are you optimizing your pricing to **maximize revenue per sale**?

 **Pricing Adjustments Needed:**

Cash Flow & Financial Planning

 **Why it Matters:** Growth without cash flow is unsustainable.

Do you have a **cash flow forecast** for the next **3-6 months**?


Are your **invoice payment terms optimized** to ensure timely payments?

Do you have **3-6 months of cash reserves** for emergencies?

Are you **tracking and reducing unnecessary expenses** regularly?

 **Steps to Improve Cash Flow:**

Marketing & Sales Effectiveness

 **Why it Matters:** More leads don't always mean more profit.

Are you tracking **Cost Per Lead (CPL) and Conversion Rate (CR)**?

Have you identified your **most profitable marketing channels**?

Are you focusing on **high-ROI sales tactics instead of just chasing leads**?

Are you optimizing your **sales funnel to improve conversions**?

 **Marketing & Sales Improvements Needed:**

 **Final Action: Use This Checklist Monthly to Stay on Track!**