Client Management KPIs

KPI	Formula	Definition
Client Retention	((Current month # of clients - Prior month # of clients) / Current month # of clients)	Shows the month over month change in number of clients engaged to do business with the company.
Total Sales Pipeline	Total projected lifetime revenue of prospective clients not yet engaged (does not factor in projected Win Rate)	Shows the projected value of all open deals without weighting.
Weighted Sales Pipeline	(Projected Revenue of Pipeline group 1 x Win rate group 1) + (Projected Revenue of pipeline group 2 x Win Rate group 2) + …	Calculates projected value of open deals while factoring in likelihood of success of engaging client (Win Rate).
Average Deal Size	(Total Pipeline / Number of deals in pipeline)	Shows how the average size of pursued clients and deals overtime.
Revenue per Client	(Total amount of revenue earned from clients/ Total number of clients)	The average amount of revenue that is accrued from each client. This can give you an estimate of how much more revenue you can gain by adding a new client or how much revenue that can be lost by losing a client.
Client Acquisition Costs	(Total costs spent to acquire a new client (i.e. marketing expenses)/total number of clients acquired)	The average amount it costs to acquire a new client. This helps determine the resources that are needed for a company to attract new customers and continue its growth.
Client Acquisition Rate	(number of clients acquired over a period of time/the length of the same period)	Allows you to compare client acquisition rates for various timeframes so you can determine if your results are improving over previous periods.
Repeat Purchase Rate (RPR)	(Number of Clients who bought service more than once(365 days)/ Total number of clients (365 days))	A calculation that shows you the percentage of your current customer base that has purchased at least a second time. This metric is influenced by your customer retention efforts and is a good indicator of the value you are providing your customers.
Average Number of Training Hours Per Employee	(Total number of Training hours undertaken by employees/number of employees trained)	Tells you the average amount of time it will take you to train one employee. This KPI gives a clear figure of how much effort the company is putting into developing its workforce. On average, the companies that score higher in this KPI tend to have a higher performance rate.
Earnings Before Interest, Taxes, Depreciation, and Amortization (EBITDA)	(Net Income + Interest + Taxes + Depreciation + Amortization)	Is a measure of a company's overall financial performance and is used as an alternative to net income in some circumstances. EBITDA, however, can be misleading because it strips out the cost of capital investments like property, plant, and equipment.
Average Revenue per user (ARPU)	(Total Revenue/Total Clients)	The average amount of monthly revenue that you receive per client.

Year-over-year growth	Year-over-Year growth=((This year's value-Last year's value)/Last year's value)*100)	Year-over-Year compares a value for one period to value for the same period of the subsequent year. This period may be a month, a quarter or any other time span.
Revenue per Employee	(Total Revenue/Number of Employees)	A measure of how efficiently a particular company is utilizing its employees. In general, relatively high revenue per employee is a positive sign that suggests the company is finding ways to squeeze more sales (revenue) out of each of its workers.

For a review of your KPIs, contact us for a free consultation!