

ADVISORY SERVICE

KPI Dashboards

See What's Driving Your Results

\$725

one-time setup, starting at
No monthly fee. Changes \$150/hour.

Your key numbers, in one place, updated every month.

Most owners don't know which measures matter most. We help you choose them, build the dashboard from your QuickBooks data and walk you through what to watch.

Who It's For

- Owners who want a quick read on how the business is doing, without digging through reports.
- Growing businesses tracking progress toward specific goals.
- Teams that want everyone working from the same numbers.

Questions This Helps You Answer

- “ Which numbers should I watch every month?
- “ Are we getting more efficient, or less?
- “ Is that new hire or equipment paying off?

What's Included

- ✓ **KPI Selection** – We help you choose the metrics that matter most for your business and industry.
- ✓ **Custom Dashboard** – Built from your QuickBooks data, with your key numbers and trends in one place.
- ✓ **Monthly Updates** – Your dashboard stays current as your books are updated.
- ✓ **Walk-Through** – We review what the numbers mean and what to keep an eye on.

How It Works

- 1 **Choose** – We pick 5 to 8 key measures together.
- 2 **Build** – We set up the dashboard from your books.
- 3 **Review** – We walk through it with you.
- 4 **Adjust** – We refine it as your business changes.

Why It Matters

When your key numbers are in front of you, you can act sooner, whether that means following up on slow-paying customers, adjusting your pricing or planning for a big purchase.

Good to Know

Bookkeeping Plus includes 1 custom KPI dashboard. Additional dashboards are available as an advisory service.

Pricing – Starting at \$725 for a one-time setup. Your dashboard updates monthly with no monthly fee. Changes after setup are \$150 per hour.