Business Intelligence metrics list

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№	Direction within the company	Index	Priority	How to calculate	Description	What does it say / how to analyze / conclusions	Как часто нужно контролировать
1	Finances	Sales	High	cost price (or purchase price) + value added	Determination of the company's activities effectiveness and analysis of activities for the future.	Shows the degree of the company success, since it includes the amount of money received in the company's account during the reporting period from the sale of products.	План/факт каждый день, неделю, месяц
2	Finances	CoGS = Cost of Goods Sold	High	CoGS = cost of goods purchased from supplier + direct costs // Cost of retailer net purchases, including any shipping + reduction in inventory OR minus increase in inventory	Simply put, this is the cost of doing business, that is, the cost of selling each product in your store.	It is important to keep track of these expenses in order to know the gross and net profit of the company.	Plan/fact every day, week, month
3	Finances	Gross profit	High	Gross profit = Sales profit – cost of goods sold (works, services)	Gross profit reflects the profitability of sales (both all and broken down by type of activity) and allows you to determine how rationally each of the company's resources is used. The calculation of gross profit is especially relevant with a relatively small share of management and commercial expenses.	A company's gross profit is the simplest measure of its profitability.	The indicator can be used when drawing up budgets and cash flows for the next period.
4	Finances	Marginal profit	High	Revenue - Variable Costs	This is the difference between sales revenue and variable costs. You can also say that this is the income that remains with the business from the sale, minus variable costs.	This is the main indicator for calculating the break-even point, operating leverage, as well as the reasonable formation of the product line.	Plan/fact every day, week, month
5	Finances	Margin	High	Gross profit to sales ratio	This financial indicator shows the percentage of a company's gross profit in the price of a product or service.	Margin means the share of the company's profits in the check they presented to the customer.	Plan/fact every day, week, month
6	Finances	Net margin	High	Net profit = Revenue - Cost of goods - Management and selling expenses - other expenses - taxes	Net profit cleared of all costs and expenses shows the integral result of the enterprise functioning.	The net profit of an enterprise serves as an indicator of its sustainable development. The greater the net profit for the reporting period, the higher the ability to pay suppliers and contractors for raw materials on time. In theory, there is no normal value of the rate of net profit, since it strongly depends on the industry, the stage of development at which a particular enterprise is located. However, in order for the enterprise to bring dividends to the owners, the net profit rate must be at least positive.	Once a month
7	Finances	EBITDA	High	EBITDA = Profit (loss) before tax + (Interest payable + Depreciation of fixed assets and intangible assets)	In fact, with the help of EBITDA costs are hidden. EBITDA can be used to determine whether a company can afford to reinvest funds, grow its business and service its debt obligations in the future.	Negative EBITDA indicates that organization's activities are unprofitable already at the operating stage, even before paying for the use of borrowed capital, taxes, and depreciation.	Once a year, once a quarter, once a month

8	Finances	EBIT	Medium	EBIT = profit from core activities - (tax amount + interest rate + depreciation deductions + costs excluding depreciation)	This indicator is increasingly used among analysts and the reason for this is its versatility. It can be used to determine the value of the firm in the marketplace, obtain information about the long-term profitability of the company, determine the performance of the firm based on the operating result of the business, and conduct an overall assessment of the business.	EBIT reflects the transition from the gross profit of the enterprise to net profit. This indicator is used to assess the company's debt load by the ratio of profit and profitability. That is, for a correct assessment of the company's ability to pay off obligations, it is required to calculate the amount of net debt to the Ebit indicator.	Once a year, once a quarter, once a month
9	Finances	Depreciation and amortisation	medium	K(a)= Depreciation / Cost of fixed assets	It is expedient to consider the depreciation ratio with the ratio of usefulness of fixed assets. Indicators are often used to characterize the state of fixed assets. Although conventional, they have analytical value. The value of the indicator Depreciation rate of more than 50% and the ratio of usefulness of less than 50% is undesirable.	The depreciation ratio shows how much fixed assets are worn out, i.e. to what extent their possible future replacement as depreciation is financed.	Once a month
10	Finances	Dividends	High	D = DPS x S, where D – dividends you will get; S – the number of shares you own	Dividends represent the cash income of shareholders and, to a certain extent, show how successful a commercial organization is operating, in whose shares they have invested their funds. Most enterprises consider reinvested profits to be the main source of financing their activities.	Dividends are a part of the company's income returned to shareholders, the decision on which is made by the board of directors. Their payment can be in cash, shares or other assets.	Once a month
11	Finances	% gross profit	High	Gross Profit Ratio = (Net Sales - Cost of Goods Sold) ÷ Net Sales.	Managers use the percentage of gross profit to evaluate the performance of the company as a whole and, in some cases, the performance of individual business units or products. Since only two variables affect this indicator, there are only two ways to influence it. A price increase or cost reduction increases gross profit while a price decrease or cost increase decreases it.	GPP shows the income from operations after deducting all variable costs. It can be used to measure the performance of a company, as it shows the economic efficiency of production in relation to prices and sales volumes..	Daily

12	Finances	Profitability of sales	High	Sales Profit = Gross Profit - Selling Expenses - Management Expenses	Profit from sales is the resulting indicator of the economic activity of a trading company.	Profitability of sales shows which aspects of the company's core business are problematic in terms of their impact on the sale of products (works, services). The higher the value of the sales profitability indicator, the better the efficiency of the organization's core activities. But more indicative for the analysis is not an absolute assessment of the value of the sales profitability indicator, but the stability of the dynamics of this coefficient.	Daily
13	Finances	Operating flow	High	Operating Cash Flow = Net income - Non-cash expenses (Amortization, Impairment) - Interest (paid) on loans - Income tax	Money received or spent in the course of internal (operational) business processes. Calculated as the sum of working capital and cash inflows. This indicator is one of the most important signs of a company's success, since many obligations are usually repaid at its expense..	If the company is solvent, the result will be positive.	Once a month
14	Finances	Financial flow	High	Net cash flow +/- investment +/- operating	Money received from the provision of a credit / loan, or paid in the form of dividends, loan repayments or share repurchases.	It characterizes the activities of an organization or enterprise, as a result of which an outflow or inflow of means of payment is generated, and is an important criterion for the financial balance of a company.	Once a month
15	Finances	Investment flow	High	Net cash flowк +/- financial +/- operating	Money received from the sale of long-term assets, or spent on investment needs (construction, investments).	Cash outflow directed to investments. Investment is the acquisition of long-term assets	Once a month
16	Finances	Receivables turnover	Medium	Accounts receivable turnover (ratio) = Revenue / Average balance of receivables	The indicator measures the effectiveness of work with customers in terms of collection of receivables, and also reflects the organization's policy regarding sales on credit.	For the turnover of receivables, as well as for other indicators of turnover, there are no clear standards, since they are highly dependent on the industry characteristics and technology of the enterprise. But in any case, the higher the coefficient, i.e. the faster buyers repay their debt, the better for the organization. At the same time, effective activity is not necessarily accompanied by high turnover. For example, when selling on credit, the balance of receivables will be high, and the turnover ratio will be correspondingly low.	Daily, weekly monthly
17	Finances	Accounts payable turnover	Medium	Accounts payable turnover (ratio) = Purchases / Average accounts payable	As well as the turnover of receivables, the turnover of accounts payable is used in assessing the organization's cash flows, the effectiveness of calculations.	The turnover of accounts payable is highly dependent on the industry, the scale of the organization. For creditors, a higher turnover ratio is preferable, while the organization itself is more profitable with a low ratio, which allows it to have the balance of outstanding accounts payable as a free source of financing for its current activities.	Daily, weekly monthly

18	Finances	inventory turnover	Medium	Inventory turnover (ratio) = Revenue / Average annual inventory balance	This indicator characterizes the quality of stocks and the effectiveness of their management, allows you to identify the remains of unused, obsolete or substandard stocks. The importance of the indicator is connected with the fact that profit occurs with each "turnover" of stocks (ie, use in production, operating cycle).	A decrease in the inventory turnover ratio may reflect the accumulation of excess inventory, poor warehouse management, and the accumulation of unusable materials. But high turnover is not always a positive indicator, since it can indicate the depletion of stocks, which can lead to interruptions in the production process.	Daily, weekly monthly
19	Finances	Dynamics of indicators	High	(Indicator of the current period - indicator of the previous period) / indicator of the previous period	Ratio of the current period indicator to previous. By the previous day, week, month, year	The dynamics shows the change in indicators over the period, which can indicate that the company is growing in development or vice versa is falling. For comparison between indicators. For example, if expenses have a positive trend, and sales have a negative one, then the company is not working efficiently.	Daily
20	Finances	Plan/fact of indexes	High	Ratio of Fact to Plan	Displays the % of the plan completion. Shows % of the company's budget execution	When analyzing the deviation of profit from the plan, the analysis of the plan / fact is evaluated item by item, which shows who influenced and how	Daily
21	Finances	Structure of indicators for sales	Medium	Ratio of current index to sales	Shows the ratio of each individual indicator to sales	We analyze the share of each indicator in sales	Daily
22	Finances	ROI point of sales	High	ROI = (Income - Cost) / Amount of investment * 100%	This is a ratio that shows the return on investment. In other words, it is an indicator of the success of investments..	Each business determines its ideal index of the return on investment. But one rule for all: ROI should be positive (higher 100%). By monitoring the dynamics of ROI changes in reports, you can reallocate your advertising budget to more effective advertising channels.	Once a month
23	Finances	% Administrative expenses to sales	B	Administrative expenses / sales	Share of administrative expenses in company sales	Used to control administrative costs in relation to company sales	Monthly
24	Finances	Average stocks	C	(Stocks for start + stocks for the end) / 2	Average balances of goods for the period	Used to control the permanent balance of goods, other stocks in warehouses	Monthly
25	Finances	Break even	B	BEP=FC/(P-AVC), FC– fixed cost, P– price. AVC– average variable cost	Break even — is the volume of production and sales of products at which expenses will be offset by income, and in the production and sale of each subsequent unit of production, the enterprise begins to make a profit.	The value of the break-even point of the enterprise is important for determining the financial stability of the company. This indicator of the break-even point allows you to determine how many products need to be sold, how much work to perform, or services to provide, so that the company's profit would be equal to zero.	Monthly, once a year
26	Finances	Operating cycle	C	Operating cycle = production cycle + receivables turnover period	This indicator is one of the key indicators of the working capital management effectiveness.	An increase in the duration of the operating cycle leads to an increase in the need for working capital, while a decrease in it, on the contrary, reduces this need.	Monthly

27	Finances	Financial cycle	C	The indicator is calculated as the difference between the operating cycle and the average period of repayment of accounts payable.	A decrease in this value in dynamics indicates effective management decisions regarding the use of the company's working capital and makes it attractive in the eyes of partners.	The financial cycle should be as short as possible, so you will have to raise fewer additional funds. An increase in the Financial Cycle indicates that the company is having problems with the turnover of goods, or with the return of receivables.	Monthly
28	Finances	Current liquidity ratio	C	Current liquidity ratio = Current Assets / Current Liabilities	One of the main calculation characteristics that assess the solvency of a legal entity, which is of interest not only to him, but also to the tax authorities. Allows you to determine whether the company has enough working capital to cover current liabilities in a timely manner, so its other name is the coverage ratio.	The current liquidity ratio shows the company's ability to repay current (short-term) liabilities at the expense of current assets only. The estimated indicator of the current liquidity of a normally operating solvent legal entity must be at least 1, i.e. it is necessary that the total value of current assets will be more than the amount of short-term liabilities. A factor less than this may be the relative norm for organizations with high turnover rates, where the values involved in the calculation change frequently.	Monthly
29	Finances	Markup	B	To calculate the final cost of a product, you need to multiply the cost price by the markup percentage, and then add the resulting number to the purchase price.	correctly calculated markup gives the entrepreneur the opportunity not only to cover the costs of organizing a business, but also to receive the expected income.	The markup is determined by the rationing of profits generated by a trading enterprise	Daily
30	Finances	Net profit	B	Net profit = Revenue - Cost of goods - Management and selling expenses - other expenses - taxes	Net profit is the most important indicator of financial analysis and represents the final rate of return, which remains after deducting all costs, including taxes.	The size of net profit and the dynamics of its change serves as a guideline for developing strategies and plans to increase it at the operational level.	Daily
31	Finances	Return on invested capital	B	Return on Invested Capital = Net Income / (Equity + Long-Term Liabilities)	Return on invested capital shows how effectively the company's management invests in the core business of the company.	It characterizes the return on the amount of money invested in the business. The higher the rate of return on invested capital, the better.	Monthly
32	Finances	Sales per square meter of trading space	C	Divide the amount of revenue for the reporting period by the area of the trading space in square meters.	The amount of revenue per square meter of the trading space	They need to be tracked in order to understand how effectively the retail space is being used.	Monthly
33	Finances	Payroll	B	Payroll =Compensation for work + compensation payments + incentive payments	Payroll	With the help of this indicator, the cost of salaries of employees of different structural divisions and categories is analyzed, adjustment and optimization of costs, adjustment of rates, salaries, prices are carried out..	Payroll calculation periods: **Annual.** This period is most often used to determine the amount of the wage fund. Data for the last calendar year is used. **Monthly.** For reporting, the monthly payroll is no less important than the annual one. Day. This period is used much less often, as a
34	Finances	% Payroll to sales	C	Payroll / sales	Payroll share to sales	Helps keep payroll costs at a certain level in relation to sales	Monthly
35	Sales department work	Number of manager's calls	B	All the manager's calls	Number of all calls made, duration from 10-15 sec	Calculating the required number of calls and attracted customers will help you correctly determine KPIs for sales managers.	Daily
36	Sales department work	Number of successful manager's calls	B	Number of manager calls that led to a positive result	Number of manager calls that led to a positive result	The real norm for today can be considered 20 productive calls daily (taking into account the fact that the sales manager is also involved in the execution of contracts, meetings, service work, etc.). For a manager who only calls, this rate can be 35-45 calls per day.	Daily
37	Sales department work	Number of successful deals	C	Number of successful deals	Number of deals, which led to positive result	Speaks about sales department work effectiveness	Daily
38	Sales department work	Sales volume by managers	B	Each manager amount of sales	Amount of sales in money and quantity	Helps to astemate the effectiveness of each manager work	Daily

39	Sales department work	Gross profit by managers	B	Sales - cost price	Shows gross margin for each manager	Share of participation of each manager in the company's gross profit	Daily
40	Sales department work	The amount of discounts provided by managers in money	C	Amount of discounts in money	Shows the amount of the discount granted for each manager	Gives an understanding of what size of discount managers provide on average and how this affects the change in gross profit for goods sold	Daily
41	Sales department work	Accounts receivable by managers	B	Number of sales - payment for orders	Client debts assigned to managers	Shows which clients have the most debt and managers these debts are assigned to	Daily
42	Sales department work	% execution of the call plan by managers	B	Real number of calls / planned number of calls	Ratio of real calls to plan	Effectiveness of manager's calling clients work	Daily
43	Sales department work	% sales plan performing	B	Real sales/planned sales	Ratio of sales fact to plan	Comparing sales of the current month by retail outlets with closed months, we can draw conclusions on the scale of the backlog, both in absolute terms and in percentage of the plan. Based on this analysis, you can realistically assess the criticality of the situation and adequately perceive the pessimism of managers regarding the implementation of the plan.	Monthly
44	Marketing	Gross margin by brand, category, product	Medium	Sales - cost price (by brand, category, product)	Gross margin by top product line hierarchy	Shows which products are more significant by gross margin index	Daily
45	Marketing	Conversion	High	Conversion = Positevly closed deals / (positevly closed deals + negatuively closed deals) * 100%	Conversion (CTR) directly affects the business margin: more this index, more effective advertising channels.	Conversion shows how your ad and your site aligned with the original business objectives. Calculating conversion, you can clearly see whether your costs for the sale of goods / services are justified.	Daily
46	Marketing	ROMI	High	ROMI = company profit – expenses / investments * 100%	ROMI helps to estimate fastly effectiveness of events carried, without taking into account various errors – accounting expenses, seasonality of demand and others. This is the main universality of the formula.	Index ROMI more than 100% shows campaign profitability. Negative index и – all less 100% - shows non-payback of the project, that is, investments are not returned.	Daily
47	Marketing	Return on sales by customer	High	Return on sales = (pure margin / the amount of profit received from the sale of manufactured products, expressed in monetary terms) x 100%	Return on sales – is the persantage of expression of profit share from each earned ruble.	The profitability ratio of sales allows you to characterize the most important thing for a company or enterprise – realisation of main product. Knowing the profitability of sales, the company can control pricing and costs.	Daily
48	Marketing	Cost of lead attraction	High	Cost for attraction / number of contacts with clients or Cost of all leads/total numberof leads obtained	User, who made the necessary action — is lead (lead), but money, spent on leading him to action, — is cost per lead or CPL (cost per lead).	Knowing leads cost from different channels, you may calculate cost of attraction the client for each channel, devide the ad budgetbetween the most profitable channels and even correct the product price.	Daily
49	Marketing	Cost of client attraction	High	Cost of client attraction = marketing expenses (for the period) / number of clients attracted (for the period)	This factor largely determines whether your company has a viable business model that allows you to keep a low level of CAC while scaling your business.	Marketers use CAC to evaluate the return on advertising investment. In other words, if the cost of "extracting" money from customers is reduced, then profitability improves, which increases profits.	Daily

50	Marketing	Profit from client	High	Profit from client = (time, which user interacts with you) x (profit from one client for the period)	This characteristic contains information about the income and profit that you can receive from your ideal client for the entire period of your cooperation.	Knowing this index, you get the invaluable advantage: it influences all your marketing decisions, allows you to spend your advertising budget with the greatest efficiency and accuracy. You know in advance how much money you can spend on attracting customers, and what will be the financial return from each client.	Daily
51	Marketing	Number of client purchases	High	Number of client purchases for the whole time of cooperation with him	Number of client purchases for the whole time of cooperation with him	Allows to estimate, how interesting your products and services, if necessary to correct the strategy of users retaining.	Daily
52	Marketing	customer value	Medium	Ratio between advantages and costs	Customer value of product — is the ratio between the benefits that the consumer receives as a result of the acquisition and use of the product, and the costs of its acquisition and use.	Customer value represents an important indicator in the marketing activities of each company.	Daily
53	Marketing	Customer recommendation rating	Medium	Rate = (client affiliate / all recommendations) x 100%	Shows level of clients satisfaction and readiness to recommend brand	An increase in the coefficient of referral marketing indicates an increase in loyalty, recognition and credibility to the brand	Daily
54	Marketing	Sales to customers by segments (genre, age, income level, etc)	High	Accrual of points to leads according to predetermined criteria, showing how close, how ready a potential client is to purchase.	b2b-marketing tool, which is a method of segmenting potential customers in the sales funnel	The higher the points accrued to the lead, the more ready the lead is for the buying process, the higher the probability that he will accept the offer made to him	Daily
55	Marketing	Conversion CPM	B	How to count: (how much money was spent on advertising) divided by (how many ad impressions were) and the result is multiplied by 1000.	CPM - is an ad model,where the price is set for the one thousand impressions of advertiser banner, in other words show of ad block to one thousand visitors	Index CPM — is an important characteristic for media planning and calculation of the effectiveness of the "delivery" of an advertisement to the end consumer. The value of CPM depends on the number of visitors to the advertising platform, or rather, on the number of expected direct contacts with the ad, and the cost of advertising for a specific unit of time. Using these parameters, you can calculate and compare how effective the selected advertising sites are.	Daily
56	Marketing	Conversion CPC	B	(how much money were spent on advertisment) divided to (how many people clicked the ad).	This is the cost of a click, the amount that the advertiser pays to the contextual system for a click on an ad made by a user.	The CPC calculation will help us determine the cost per click, one of the important indicators that affects the effectiveness of an advertising source as a whole. The lower the CPC, the better, especially if those clicks are converting.	Daily
57	Marketing	Conversion CTR	B	(how many people clicked the ad) divided to (how many people saw the ad) the result multiply by 100.	This is the primary metric that shows the ratio of ad impressions to ad clicks.	CTR helps you understand where your ads are getting more clicks from users.	Daily
58	Marketing	Conversion CPA	B	CPA = sum of expences for advertisment / number of targeted actions	The advertiser decides himself what is meant by the target action (for example, calls or watching a video) and what is the acceptable size of the indicator CPA.	The profit may turn out to be negative if the income from the target action turned out to be lower than the planned indicator.	Daily
59	Marketing	Average check	B	average check – final revenue divided on amount of checks (purchases)	The average check is the turnover in monetary terms, reduced to the number of checks for a certain period, the sum of all purchases made by customers for a certain period of time, divided by the number of checks for the same period.	The stability of the average check for a long time indicates the stability of your business. Fluctuations up or down - an occasion to think about whether the target audience for advertising is chosen correctly.	Daily
60	Marketing	Lead quality	B	(target leads / total leads amount) x 100%	Level of getting to your Targeter Audience	More targeted leads, more real clients	Daily

61	Marketing	NPS	B	It is calculated based on the answers of the clients themselves — those who used services not potential buyers. The process is: 1) company asks question: «How likely will you recommend us?»; 2) clients answer on a scale from 0 to 10, where 0 — would not recommend at all, and 10 — will tell everybody how great you are; 3) according to the answers, segments are distributed: those who answered from 0 to 6 (critics), 7–8 (nutral), 9–10 (supporters or promoters); 4) calculate percentage of each segment; 5) from support persantage deduct persantage of critics — it is NPS.	NPS — mirrow od clients loyaltyand index of future company growth. Verbatim from English Net Promoter Score can be translated as «general index of supporters», and popular Russian translation — index of consumers' loyalty.	If your NPS: more than 50 — everything if perfect,but you can't relax; from 30 to 50 — not bad but you can better; less 30 — not good sign; less 0 — it is time to take action urgently.	Weekly
62	Marketing	Market share	B	Market share of company equals to the ratio of sales figures to the total sales of goods of the same category in the market.	Shows what share of sales the company has from the total sales amount in this market segment	With an increase in market share, your company's income increases proportionally	Once a month
63	Marketing	Lost clients	B	Churn Rate = (Amount of gone by the end of month) / amount of paid for the next month) * 100%	It is subscribers persentage (for example, for push-notifications from site), which unsibscribed from communication channel, refused from service turn during certain time period.	Churn Rate is determined to solve the following tasks: Following calculation of LifeTime and correspondingly LifeTimeValue, for the next calculation of client's attraction cost (CAC). Calculation of the dynamics of each month and build on this one of the possible company's KPI.	Daily
64	Marketing	RPR	B	RPR is calculated as the ratio of the number of users who purchased goods or ordered services more than once during the reporting period to the total number of buyers.	RPR — repeat purchase rate — repeat purchase frequency	This index is like CRR, but reflects not only total service satisfaction and support, but theservice/good themself. Loyalty programs are usually developed on the basis of RPR.	Daily
65	Marketing	ROAS	B	ROAS is calculated as the ratio of income from advertising campaign, to expenses for this advertising campaign (measured as a percentage).	ROAS — return on advertising spent — return of expenses for advertising from certain advertising channel.	Knowing ROAS,you can understand, how much your expenses on advertisment pay off.	Daily
66	Marketing	ROMI	B	(gross profit - marketing expenses) / marketing expenses) x 100%	ROMI — idex of return of investments of marketing channels	It is easy to understand, the higher the score, the better. ROMI clearly demonstrates how successful and effective certain marketing strategies, promotions or solutions were.	Daily
67	Marketing	LTV	B	LTV = income from client - expenses for attraction and client's retaining.	LTV (Lifetime Value) —This is the total profit of the company received from one client for the entire time of cooperation with him.	By help of this index you may determine the effectiveness of funds spent on marketing. LTV lets to estimate, how interesting your goods and services, if necessary correct the strategy of users retaining	Weekly