

Scorecard Audit Report

Acme Manufacturing

12

Started with

12

Ending with

67%

Leading indicators

3

Ownership gaps fixed

This scorecard has solid bones but suffers from three core problems: ownership gaps on the most important numbers (revenue, gross margin, NPS), duplicate metrics cluttering the view, and a heavy tilt toward outcomes without enough weekly activity drivers feeding them. Given your stated challenges — losing deals in the pipeline and unpredictable cash flow — the fix is to add forward-looking activity metrics in sales and finance, assign clear owners to the lagging outcomes, and remove the duplicates. The result will be a tighter scorecard where every red number has an owner who can act on it.

KEEP — No changes needed (3)

Sales calls made

The team trusts and discusses this metric and it drives pipeline.

Invoices sent within 48hrs

Strong leading indicator for cash flow with clear owner and goal.

New proposals sent out

Direct leading indicator for revenue with single owner and clear weekly target.

STRENGTHEN — Keep, raise the goal (1)

On-time delivery (Mike)

New goal: 95% of orders shipped on or before promised date

Consolidates two duplicate versions of this metric under one owner at the higher bar.

ADD — New measurables recommended (8)

Revenue collected this week

Owner: **Finance Manager**

Goal: **Your team sets this baseline in week one.**

Revenue had no owner and no weekly visibility. Finance Manager carries the 25% growth goal on the scorecard. Set your real weekly target after two weeks of actuals.

Gross margin %

Owner: **Operations Lead**

Goal: **Your team sets this baseline in week one.**

With a 10% production cost reduction goal, gross margin must be visible weekly and owned by the person closest to production.

Discovery meetings held with qualified prospects

Owner: **Sales Manager**

Goal: **8 meetings/week (estimated baseline - set your real target after week one of tracking)**

Pipeline loss was flagged as a top challenge. Tracking discovery meetings shows whether deals are dying at top of funnel or at proposal.

NPS responses collected

Owner: **Customer Success**

Goal: **15 responses/week (estimated baseline - set your real target after week one of tracking)**

Replaces the lagging unowned NPS score with the controllable weekly activity that makes it meaningful.

Marketing qualified leads delivered to sales

Owner: **Marketing**

Goal: **20 MQLs/week (estimated baseline - set your real target after week one of tracking)**

Connects Marketing's work directly to sales pipeline rather than vanity traffic numbers.

CEO weekly pipeline review with Sales Manager

Owner: **CEO**

Goal: **1 documented pipeline review/week covering deals over \$25K**

CEO had no seat on the scorecard and pipeline loss is a top challenge. Weekly review surfaces where deals die.

New hires made (monthly cadence)

Owner: **HR Manager**

Goal: **Track progress toward 2 hires/quarter - monitor weekly**

Properly labels the quarterly outcome and pairs it with a weekly driver.

Candidates advanced to final interview

Owner: **HR Manager**

Goal: **3 candidates/week (estimated baseline - set your real target after week one of tracking)**

Weekly leading activity that drives the quarterly hiring outcome.

REMOVE — Cut these from your scorecard (7)

Revenue this month

No owner, no goal. Replaced with weekly revenue collected under Finance Manager.

On-time delivery (Ops)

Duplicate of Mike's on-time delivery metric. Two owners on one number means no real owner.

Employee turnover rate

Lagging trailing-twelve-months metric that doesn't move week to week.

Website visitors

Vanity traffic metric. Replaced with MQLs delivered to sales which ties to revenue.

Net Promoter Score

No owner, no goal, lagging score. Replaced with weekly NPS responses collected.

Proposals sent (Sarah)

Duplicate of New proposals sent out.

New hires this quarter

Replaced with properly labeled monthly version plus weekly candidate pipeline driver.

WHAT TO DO NEXT

- › 1. Run a pipeline autopsy this week. Since deals are dying somewhere unknown, have the Sales Manager pull the last 10 lost deals and tag which stage they died at. That tells you whether to focus on discovery, proposal, or close — and informs which leading metric matters most.
- › 2. Set real baselines in week one for the placeholder goals. Revenue collected and gross margin need two weeks of actual tracking before setting targets. Don't guess — measure first, then commit.
- › 3. Kill the "always red" pattern by week three. If a metric is red three weeks running, either the goal is wrong or the owner can't actually influence it. Audit each red metric at the four-week mark and adjust the goal or the owner.