# LoftyBiz One-Page Dashboard

Map the customer path, track one ratio per step with a target and an owner, and put revenue and retention at the top.

*From LoftyBiz 137 — A Simple Dashboard: Track the Few Numbers That Matter. Systex is our own product; you can find Systex at loftybiz.net, or click the link in the description.*

## This Monday

On one sheet, draw your customer path in four to six steps. Write one number for each step, as a ratio where you can. Add a target and one owner per number. Put revenue and retention at the top. Then block twenty minutes every Monday to go through it. Put that page into Systex, so the routine is waiting for the team.

## The numbers at the top

| Number (put revenue and retention first) | This week | Target | Owner |
|---|---|---|---|
| Revenue this month | | | |
| Retention (still here after 3 months, or your own window) | | | |
| | | | |

## Customer path — one ratio per step

The amber row is an example from the video, not a promise. Replace it with your own path.

| Step | Ratio we track | This week | Target | Owner |
|---|---|---|---|---|
| Example only: day pass → intro course | Day-pass visitors who book a course | 1 in 10 | 15% within a quarter | Front desk lead |
| 1. First contact → next step | | | | |
| 2. | | | | |
| 3. | | | | |
| 4. | | | | |
| 5. A customer who stays | | | | |

*In Ottilie's example, a bouldering gym in Bozeman with nine staff, about 420 members and roughly $68,000 a month, tracked five steps. About 40% of course climbers joined, which was healthy, but only one in ten day-pass visitors booked a course. The target was 15% within a quarter, with a coach check-in in week three for January joiners. In this example, within four months the day-pass-to-course rate reached about 14%, and monthly revenue rose to around $74,000. These are examples, not promises.*

## What each number means (keep this in Systex)

| Number | What it means, in one sentence | Where the figure comes from | Owner |
|---|---|---|---|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

## Marketing by outcomes, not clicks

| Channel | Enquiries this month | Became paying customers | Days to enrol | Still enrolled | Notes |
|---|---|---|---|---|---|
| Example only: paid social | Most enquiries | Few became families | — | Many left within two months | Paused in a four-week test |
| Search ads | | | | | |
| Referrals | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| Other | | | | | |

*In Ngozi's example, a home-tutoring agency in Sacramento with forty tutors, about 200 families and roughly $52,000 a month, was spending around $6,000 a month on marketing. Reports looked strong (traffic up 40%) but new enrolments had barely moved in half a year. She put new-family revenue, still-enrolled, and enquiry-to-family by channel at the top, and moved clicks to a second page. A four-week test (ads paused in half the neighbourhoods) showed almost no difference in enrolments. She cut paid social to a small amount, moved most of that budget into search and a bigger referral reward, and kept the same monthly spend. In this example, after five months new enrolments were up by about a quarter, and monthly revenue reached roughly $59,000. These are examples, not promises.*

## Monday review (20 minutes)

| Date | Which numbers missed the target? | Why, in one sentence | One change we will try | Who owns the c |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |

*Example figures. General education, not financial, legal, HR or tax advice. Results vary. These are examples, not promises.*