



KPIs no advisor should be without

Meagan Wood, Intuit (Moderator)

A photograph of two young women with long blonde hair, one in profile and one from behind, talking at night. They are wearing dark jackets with fur-lined hoods. The background is dark with some green and blue bokeh lights.

**Take a few moments
to **CONNECT** with
your neighbour**

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KPIs no advisor should be without



Moderator: Meagan Wood

Head of Advisor Marketing, Intuit

@MeaganWoodAU

KPIs no advisor should be without



“If you can’t measure it, you can’t manage it” Peter Drucker

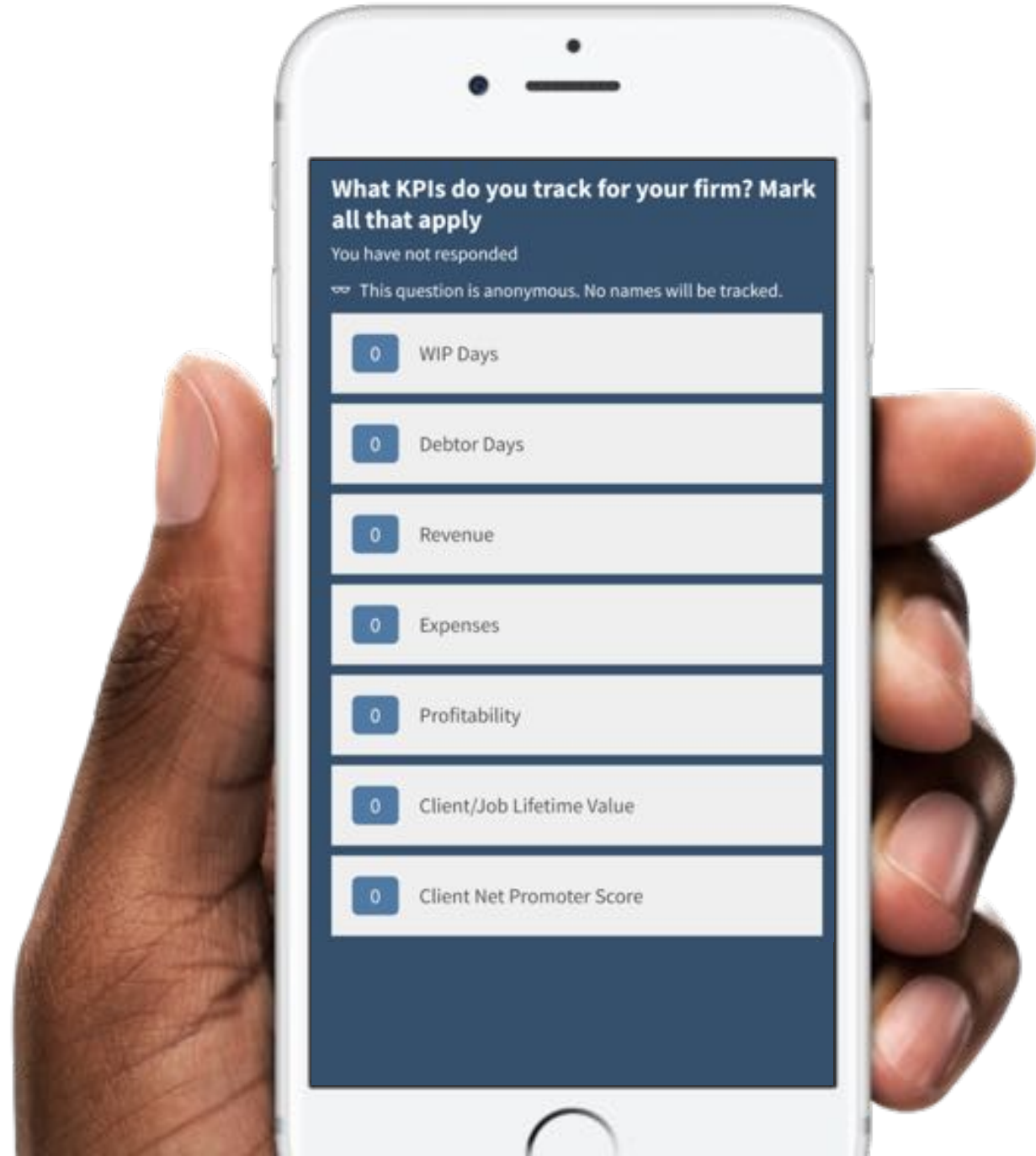
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Head to pollev.com/qbckpi

Tell us:

What KPIs do you track for your firm?

What KPIs do you track for your clients?



What KPIs do you track for your firm? Mark all that apply

WIP Days

Debtor Days

Revenue

Expenses

Profitability

Client/Job Lifetime Value

Client Net Promoter Score

Team Net Promoter Score

Client Growth - # YOY

Other

None :(

What KPIs do you track for your clients today? Mark all that apply

Accounts Receivable

Accounts Payable

Cash Flow

Cost of Goods Sold (COGS)

Operating Expenses (OE)

Gross Profit Margin (GPM)

Net Profit Margin & Net Income (NI)

Cash Burn Rate

Other...

None :(

Our expert panel

Moderator: Meagan Wood
Head of Advisor Marketing, Intuit
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Setting the scene

- KPIs vs metrics
- Leading vs lagging indicators



1.

Business
Health

- How is the business performing and how does the future look?



2.

Sales & Marketing

- How strong is sales performance?
- Which products are your star performers?
- How effective are your marketing campaigns?



3. Cashflow

- Can you cover your debts?
- Are you in a position to invest?



4.

Financing

- Demonstrating sustainable sales growth
- Leveraging data from external systems (e.g. CRM)



Next steps

Take down this link to stay up to date with new technologies and industry trends here - <https://www.intuitblog.com/>

Chat with today's panellists to learn more

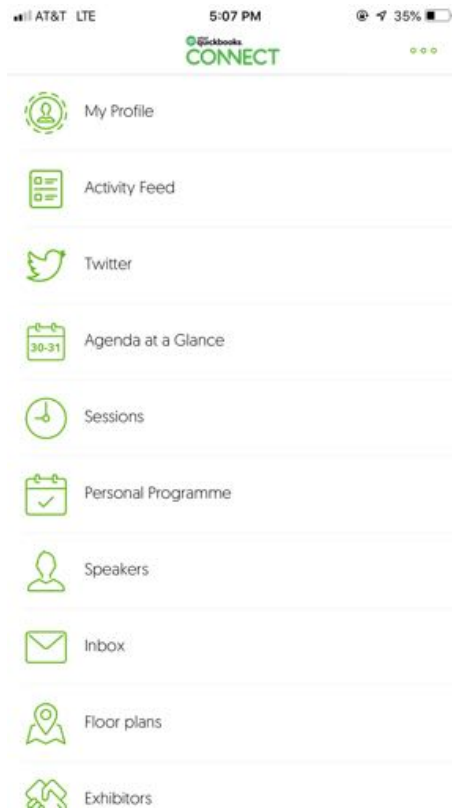
Questions?

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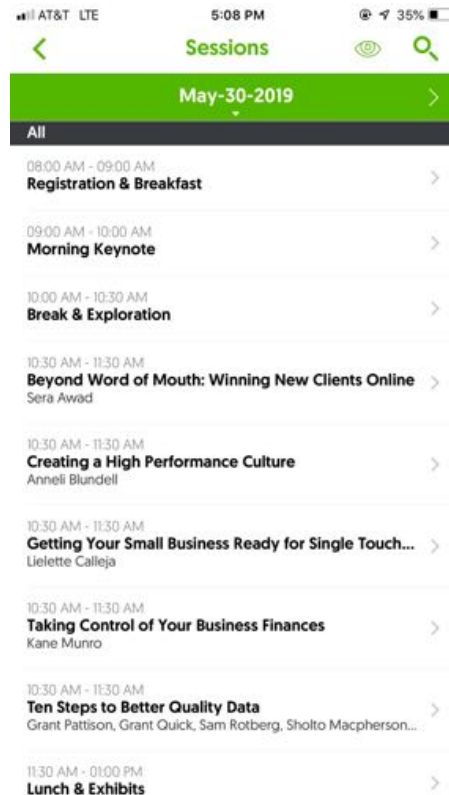
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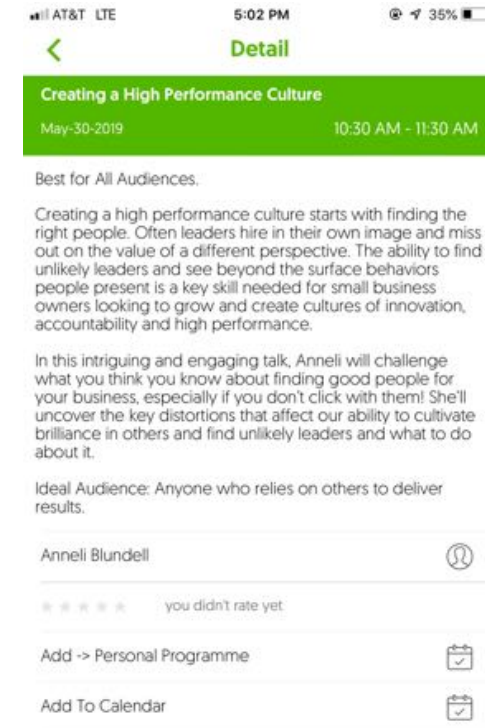
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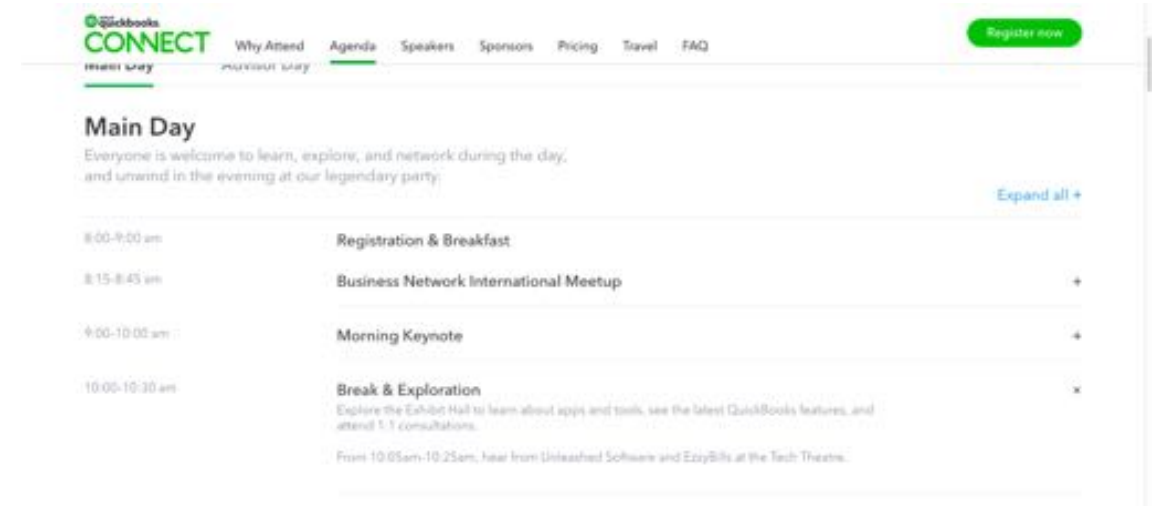
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