

REVUP WORKSHOP

Growth through numbers

The handful of metrics that drive revenue for service businesses,
and what to do when they move.

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THE BEST MONTH THAT WASN'T

A record revenue month.

And yet

Cash is tight.

And yet

The team is burned out.

THREE MONTHS LATER

Revenue drops, and he can't say why.

Leads

Up

Close rate

Slipped

Average job size

Shrank

More work for less money. He found out a quarter too late.

**Revenue tells you what
happened.**

**Other numbers tell you why,
and what's coming next.**

YOU'LL LEAVE KNOWING

Three things, in three parts.

1

The handful of
numbers that drive
your revenue

2

A 15-minute weekly
way to track them

3

What to do when
one moves

GUT FEEL VS. NUMBERS

Gut feel built most small businesses.

It stops scaling once you can't personally see every lead and every job.

Vanity metrics and revenue metrics

FEELS GOOD

Likes

Impressions

Website visits

Follower count

PAYS THE BILLS

Booked appointments

Close rate

Average sale

Repeat customers

THE TEST FOR ANY NUMBER

**If it doubled tomorrow,
would you know what to do
differently?**

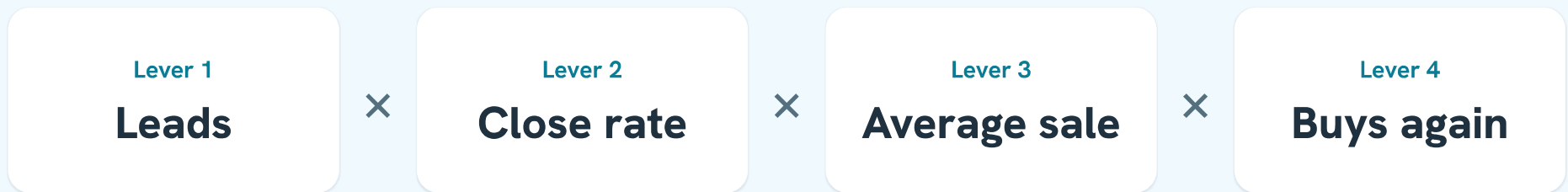
If not, stop watching it.

01

**The metrics that
move the needle**

THE REVENUE EQUATION

Revenue is four levers, multiplied.



Revenue = leads × close rate × average sale × how often customers buy again

IMPROVE EACH LEVER BY 10%

Leads	1.1
× Close rate	1.1
× Average sale	1.1
× Buys again	1.1
= Revenue	1.46

46%

more revenue. No single heroic fix needed.

Most owners only work the first lever.

Leads

Usually the most
expensive

Close rate

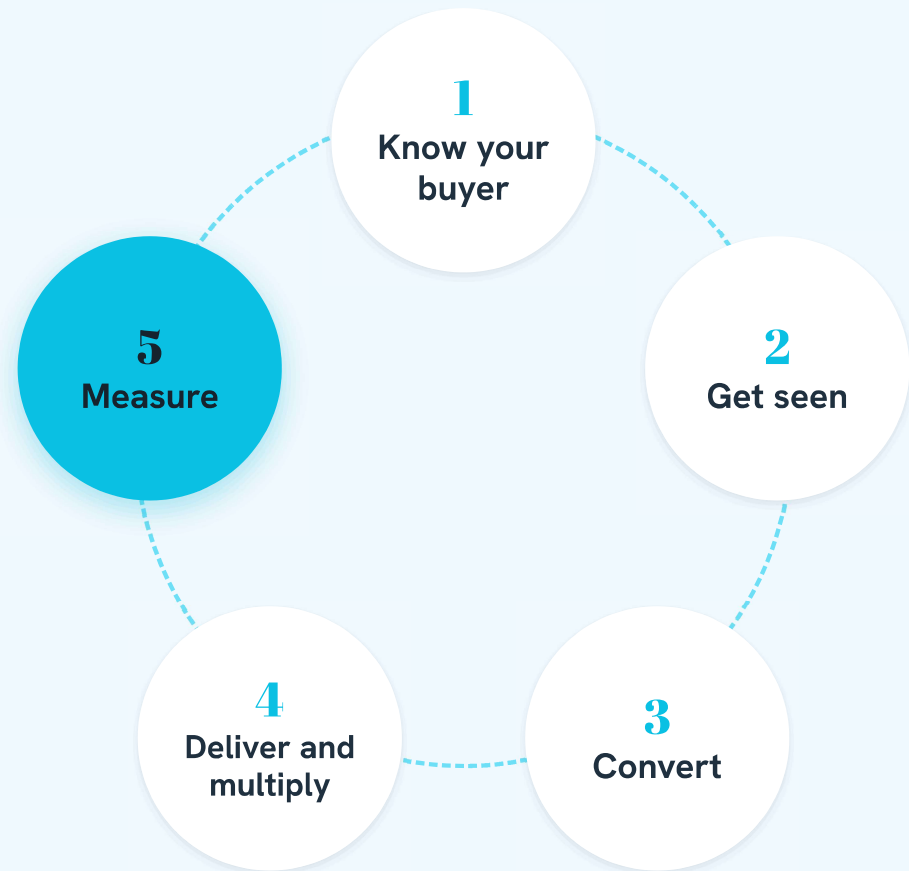
Average sale

Buys again

THE NUMBERS ALONG THE CUSTOMER
JOURNEY

The revenue loop

Five stages. Each one gets one or two numbers.



One or two numbers per stage

1 · Know your buyer

Which customer types and sources produce your highest lifetime value

2 · Get seen

Leads by channel
Cost per lead

3 · Convert

Speed to lead
(minutes to first response)
Booking rate
Close rate

4 · Deliver and multiply

Average sale
Repeat rate
Referral rate
Reviews per job

5 · Measure

Is every lead tied to its source?

This one makes all the others trustworthy.

IS YOUR GROWTH HEALTHY?

Two numbers decide it.

CAC Customer acquisition cost

Total marketing and sales spend
÷ new customers

LTV Lifetime value

Average sale × purchases per year
× years they stay

A COMMON RULE OF THUMB

$$LTV \geq 3 \times CAC$$

Below that, growth costs more than it earns.

Example: a coach

\$400

to win a client

\$3,600

client value over a year

9:1

She can afford to spend more on marketing than she thinks.

Leading vs. lagging

LAGGING

Report the past

Revenue, profit

LEADING

Predict the future

Response time, appointments booked,
quotes sent this week

Manage the leading ones weekly and the lagging ones take care of themselves.

DO THIS WEEK

Write down your four revenue-equation numbers from last month.

Even rough guesses. Use the [Growth Math Worksheet](#).

02

The tracking system

THE WEEKLY SCORECARD

5-7 numbers. One page. A target and one owner each.

METRIC	TARGET	OWNER	LAST 13 WEEKS
Leads	25 / wk	Owner	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Speed to lead	< 5 min	Office	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Appointments booked	12 / wk	Office	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Close rate	40%	Sales	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Average sale	\$2,500	Sales	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Reviews received	4 / wk	Ops	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Cash collected	\$12,500	Owner	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>

Example scorecard. Targets are illustrative.

The traffic-light rule



Green

On target



Yellow

Close



Red

Needs a conversation this week

The trend over 13 weeks matters more than any single week.

GETTING CLEAN DATA

Every lead needs a source.

**Tracked phone numbers
per channel**

Tagged links (UTMs)

**A required "how did you
hear about us" field in
your CRM**

Record every lost deal and the reason.

Losses teach more than wins.

Start with what you have.

A spreadsheet updated every Monday beats a perfect dashboard nobody opens.

WORK BACKWARDS FROM YOUR GOAL

\$50,000 a month in new revenue

Average job \$2,500

20

jobs needed

Close rate 40%

50

quotes or
appointments

Booking rate 50%

100

leads needed

Cost per lead \$60

~\$6,000

a month in marketing

Now the goal is a plan, and every number has a lever you can pull.

The rhythm

Weekly

15-minute scorecard review

Monthly

Channel review: cost per lead and close rate by source

Quarterly

Reset targets. Check you're still marketing to your best customers.

03

Turning numbers
into growth

FIND YOUR BOTTLENECK

The weakest lever is usually the cheapest to fix.

IF YOU SEE

IT'S PROBABLY

Leads steady, close rate falling

A sales process or follow-up problem, not a marketing one

Cost per lead rising, close rate steady

A channel or message problem

Revenue up, profit flat

An average sale or pricing problem

Lots of one-time customers

A retention and referral problem

Three quick examples

HOME SERVICES

Close rate

Before

First call at 30 minutes

The change

Response time cut to under 5 minutes. Same ad budget.

After

21× more likely to qualify the lead

Source: Lead Response Management Study, MIT / InsideSales (Oldroyd), 15,000+ leads

COACHING

Buys again

Before

Renewals not tracked

The change

Renewal rate tracked for the first time, then a mid-program check-in added.

After

+5% retention = 25-95% more profit

Source: Bain & Company (Reichheld)

CONSULTING

Average sale

Before

Hourly / custom quotes: 39% reach \$10K+ projects

The change

A standard packaged, value-priced offer instead of custom quotes.

After

Value-based: 51% reach \$10K+ projects

Source: Consulting Success fee study, ~1,000 consultants

CLOSE THE LOOP

Let the numbers change who you market to.

Find more of the customer types with the best LTV.

Stop chasing the ones who churn.

Every quarter, the numbers get sharper and growth gets cheaper.

DO THIS WEEK

**Pick your weakest
lever and one
action to move it
10%.**

YOUR 30-DAY PLAN

Know your four levers.
Track them weekly.
Fix the weakest one first.

HANDOUT

Revenue Scorecard Template

HANDOUT

Growth Math Worksheet

Thank you.

If you want help setting up your scorecard, you can find me at wundertre.com.

Ryker Taylor · Thanks for watching!

