

**Weekly:**

- Timesheets completed (all time, billable and non-billable): Your goal should be 95% or better
- The entire agency (billable and non-billable combined, including owners) should be at least 75% billable time and 60% utilized (actually billed to the client)

**Monthly:**

- Gross billings: No specific metric but measure it against your annual goals.
- AGI: No specific metric but measure it against your annual goals.
- AGI ratios: Your AGI should be spent in this approximate ratio
  - 55-60% People (all expenses tied to your staff. Salaries, benefits, payroll taxes etc.)
  - 20-25% Overhead (Day to day operating expenses like rent, travel, professional fees, etc.)
  - 20% Profit (EBITA)
- Profitability by client (It's reasonable to shoot for a 10% minimum)
- AGI/FTE (your goal is \$150K in AGI for every FTE) and whatever your AGI/FTE is, then your Salary/FTE should be about 50-60% of what your AGI/FTE is.
- Write up/offers (are you adding profit to jobs or writing off time. Track both)
- Billable % (Overall staff billability should be 75% or higher)
- Utilization – what you actually billed (Overall staff utilization should be 60% or higher)

**Quarterly:**

- Employee Satisfaction (On a scale of 1-10, how likely are you to recommend working at the agency to a friend?)
- New revenue ratios (70% of new revenue should come from current clients)
- New clients/sales: No specific metric but measure it against your annual goals.
- Average spend per client (you should set a minimum acceptable quarterly spend)
- Client Satisfaction (Net promoter score -- on a scale of 1-10, how likely are you to recommend hiring our agency to a peer?)

**Annually:**

- Client retention (Goal should be 80% or higher)
- Employee retention (Goal should be 75% or higher)
- AE work load – a mid-level AE should be able to successfully manage and grow about \$400K-\$500K in AGI. The variance is going to be tied to things like – how much media is involved, are they doing part of the production work (writing social posts, etc.) or just being the AE, etc.