



**STRUCTURE.
MEASUREMENT. ACCOUNTABILITY.**

THE SALES KPI TEMPLATE

What to measure daily, weekly and monthly – how to work out your real daily number from your revenue target – and the Job Scorecard that measures the output, not just the effort.

WHAT'S INSIDE

- The KPI ladder: daily, weekly, monthly
- Backwards maths: target to daily number
- KPI menus for Founder, Head of Sales, BDM, BDE
- The Job Scorecard + blank template
- Printable daily, weekly and monthly trackers
- The one-line daily reporting format

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BEFORE YOU FILL ANYTHING IN

READ THIS FIRST

Most businesses already have KPIs somewhere. Very few have KPIs that change what anyone does on a Tuesday afternoon. The difference is almost always these three rules.

THREE RULES OF A REAL KPI

- 1 It is a number you control.** “Close two deals this week” is not a KPI — the customer decides that one. “Start twelve new conversations” is. Outcomes are targets. KPIs are the inputs that produce them. If a bad month can happen while you did everything right, you are measuring the wrong thing.
- 2 It has a frequency attached.** Daily, weekly or monthly — decided in advance. A number without a frequency is a wish. The test: you should be able to score yourself on it before you go to bed tonight.
- 3 It has a name against it, not a department.** Team KPIs get missed quietly. Named KPIs get missed publicly — which is exactly why they get hit.

If nobody would notice you skipping it for a week, it is not a KPI. It is a preference.

SET THIS UP IN 30 MINUTES

Do it in this order. Each step feeds the next one.

01	Write your revenue target for the next 90 days.	Page 04
02	Work backwards to your real daily activity number.	Page 04
03	Pick a maximum of three daily KPIs per person.	Pages 05–06
04	Build the Job Scorecard so output gets measured too.	Pages 07–08
05	Print the trackers and start reporting one line a day.	Pages 09–11

Do not delegate the first two steps. The person who does the arithmetic is the person who believes the number.

THE STRUCTURE

THE KPI LADDER

Three levels. Each answers a different question. Most businesses only measure the top one – which is why they find out too late to do anything about it.

DAILY ACTIVITY

You control this almost entirely.

Did I do the work today?

EXAMPLES

New conversations started · Follow-ups completed · Proposals sent · Meetings booked · Referral touchpoints · Dormant clients contacted

REVIEW Reviewed every evening, by the person themselves, in under two minutes.

WEEKLY PIPELINE

Mostly yours. Partly the market's.

Is the work turning into opportunity?

EXAMPLES

Meetings held · Pipeline value added · Proposals outstanding · Stalled deals re-engaged · Conversion rate this week · Average deal value

REVIEW One fixed 30-minute slot. Same day, same time, every week. It does not move.

MONTHLY OUTCOME

Partial. This is the scoreboard, not the steering wheel.

Did it actually land?

EXAMPLES

Revenue closed · Deals won · Close rate · New clients · Repeat and referral revenue · Cost per acquisition

REVIEW Reviewed with the team, against target, in writing. Not a conversation – a document.

If the monthly number is off, the fix is never in the monthly number. It is always in the daily one.

THE ARITHMETIC

WORK BACKWARDS TO YOUR DAILY NUMBER

You do not choose your daily KPI. Your revenue target chooses it for you. Do this once and the number stops being an opinion and starts being a fact.

#	THE LINE	WORKED EXAMPLE	YOUR NUMBER
A	Monthly revenue target	AED 300,000	
B	Average deal value	AED 25,000	
C	Deals needed ($A \div B$)	12	
D	Proposal win rate	25%	
E	Proposals needed ($C \div D$)	48	
F	Meeting proposal rate	50%	
G	Meetings needed ($E \div F$)	96	
H	Conversation meeting rate	25%	
I	Conversations needed ($G \div H$)	384	
J	Working days in the month	22	
K	YOUR DAILY NUMBER ($I \div J$)	18 conversations a day	

If your daily number comes out impossible, you have exactly three choices: raise your average deal value, raise a conversion rate, or add people. Quietly lowering the target is not one of them – that is how a year disappears.

TWO THINGS PEOPLE GET WRONG HERE

- **Using the conversion rates you wish you had.** Pull the last 90 days from your actual records, not from memory. Memory rounds everything up.
- **Forgetting the lag.** Conversations started today do not close today. If your sales cycle is 45 days, the daily number you hit this month pays out next quarter – which is precisely why the daily number cannot wait for the monthly review.

PICK FROM THESE — DO NOT USE ALL OF THEM

KPI MENU BY ROLE

Pick a **maximum of three daily KPIs** per person. More than three and none of them get done properly. Everything below is a suggestion, not a standard — the right KPI is the one your own backwards maths on page 04 pointed at.

FOUNDER / BUSINESS OWNER

You sell whether you like it or not

DAILY	1 dormant client contacted · 1 referral-partner touchpoint · 1 personal voice or video message to someone you have been avoiding
WEEKLY	Pipeline reviewed · 2 in-person meetings · 1 piece of content published · Team KPI sheet actually read
MONTHLY	Revenue vs target · Close rate · Revenue from referrals · % of the team hitting their daily KPI

HEAD OF SALES

You are measured on the team, not on your own deals

DAILY	Huddle or 1:1 held · Deals moved a stage · Overdue follow-ups cleared to zero
WEEKLY	Every rep's numbers reviewed individually · Forecast updated · 2 live deals coached · Lost deals reviewed for reason
MONTHLY	Team revenue vs target · Forecast accuracy · Team close rate · Ramp time of new joiners · % of reps at target

A Head of Sales whose own deals are the biggest line in the pipeline does not have a sales team. They have a sales person with an expensive title.

IF YOU ARE THE FOUNDER AND THE SALES TEAM

- Take the founder daily KPIs, not the BDM ones. Your advantage is relationships and dormant clients, not volume outreach — measure the thing you are actually better at than anyone you could hire.
- Keep the number small enough to survive a bad week. Three touches a day that happen every day beat twenty that happen when you remember.

PICK FROM THESE — DO NOT USE ALL OF THEM

KPI MENU BY ROLE

Continued. Same rule — three daily KPIs maximum, and every one of them a number the person can move on their own without waiting for anyone else.

BUSINESS DEVELOPMENT MANAGER

Owns the deal from first conversation to signature

DAILY	New conversations started · Follow-ups completed · Proposals sent · Meetings booked
WEEKLY	Meetings held · Pipeline value added · Proposals outstanding · Stalled deals re-engaged
MONTHLY	Revenue closed · Close rate · Average deal value · Sales cycle length

BUSINESS DEVELOPMENT EXECUTIVE

Owns the top of the funnel and the response clock

DAILY	Dials and messages sent · Connects made · Qualified leads passed on · Records updated same day
WEEKLY	Meetings booked for the team · Show-up rate · Leads qualified · Average response time to a new enquiry
MONTHLY	Qualified leads delivered · Lead meeting rate · Contribution to closed revenue

Response time deserves a line of its own. In most UAE markets the first credible responder wins the deal — not the best proposal. If nobody owns that number, nobody owns those leads.

BEFORE YOU MOVE ON

- Write the three daily KPIs for each person **in their own words**, not yours. If they cannot say the number out loud from memory, it will not survive a busy week.
- Check every KPI against rule one on page 02: can this person move the number today, alone, without anyone's permission? If not, rewrite it.
- Set the target for each KPI now. A KPI without a target is just a counter.

THE OTHER HALF

THE JOB SCORECARD

KPIs measure the activity. The scorecard measures whether the job is actually being done. You need both – activity without output is just expensive busyness, and output without activity is luck you cannot repeat.

A SCORECARD HAS THREE PARTS

- 1 Outcomes – three to five, no more.** What must be true for this role to be a success? Each one written as a number and a date. Not “grow the pipeline” but “AED 1.2m of qualified pipeline by 31 March.” If you cannot put a number and a date on it, it is a hope, not an outcome.
- 2 Responsibilities.** The recurring work that produces those outcomes. This is what you coach against week to week. Outcomes tell you if someone is winning; responsibilities tell you why.
- 3 The score.** Every line rated 1 to 5 each month – by the person first, then by their manager, independently. The gap between those two scores is the most useful conversation you will have all month. Where they score themselves higher, you have a standards problem. Where they score themselves lower, you have a confidence problem. Those need opposite responses.

THE SCALE

- | | |
|----------|--|
| 5 | Consistently exceeds the standard. Needs no supervision. |
| 4 | Meets the standard fully. Occasional support needed. |
| 3 | Meets most of it. Needs regular direction. |
| 2 | Below standard. Improvement plan required, in writing. |
| 1 | Not performing. The role is at risk. |

Every role in the business gets a scorecard, starting with yours. If you cannot write your own, nobody reporting to you will be able to write theirs.

HOW TO RUN THE REVIEW

- **Both parties score before the meeting, separately.** If you score together, you are not reviewing – you are negotiating.
- **Spend the time on the gaps, not the agreements.** Anywhere the two scores match, move on in ten seconds. The disagreements are the whole meeting.
- **Finish with one thing, not five.** Write it in the box at the bottom of the scorecard and open next month's review with it.

Job Scorecard

Print one per person, per month. Score independently, then compare.

ROLE

NAME

PERIOD

REVIEWED BY

OUTCOMES

Three to five. Each one a number and a date.

#	OUTCOME – NUMBER + DATE	SELF 1-5	MANAGER 1-5
1			
2			
3			
4			
5			

RESPONSIBILITIES

The recurring work that produces the outcomes above.

#	RESPONSIBILITY	SELF 1-5	MANAGER 1-5
1			
2			
3			
4			
5			
6			

OVERALL SCORE THIS PERIOD

THE ONE THING TO FIX NEXT PERIOD

DAILY KPI TRACKER

One sheet per person, per week. Fill the target column first – before the week starts, not while it is happening.

NAME

ROLE

WEEK COMMENCING

MY DAILY KPI	TARGET /DAY	MON	TUE	WED	THU	FRI	SAT	SUN	WEEK TOTAL
KPI 1									
KPI 2									
KPI 3									
HIT ALL THREE TODAY? Y / N									

WHAT BLOCKED ME THIS WEEK

Be specific. "Busy" is not a blocker.

ONE CHANGE FOR NEXT WEEK

WEEKLY & MONTHLY TRACKER

The daily sheet tells you if you did the work. This one tells you whether the work is worth doing in the way you are doing it.

WEEKLY – PIPELINE

WEEK	MEETINGS HELD	PROPOSALS SENT	PIPELINE VALUE ADDED	DEALS WON	WHAT MOVED / WHAT STALLED
W1					
W2					
W3					
W4					
W5					

MONTHLY – OUTCOME

MONTH	REVENUE TARGET	REVENUE CLOSED	DEALS WON	CLOSE RATE %	AVG DEAL VALUE	VARIANCE + / -

Fill the variance column in every month, even when it hurts. A tracker that only records good months is a scrapbook.

RECALCULATE EVERY QUARTER

- Take the real conversion rates from these three months and put them back into the maths on page 04.
- Your daily number will move. That is the point – it should be a live number, not a decision you made once in January.

THE PART EVERYONE SKIPS

THE REPORTING LINE

This is what makes the rest of the document work. A tracker nobody else sees is a diary. One line, same format, every day, in a group where somebody would notice it missing.

THE FORMAT

NAME | COMMITMENT | NUMBER TODAY | RUNNING TOTAL | TARGET

IN PRACTICE

Ravi | New conversations | 14 | 162 | 380

FOUR RULES THAT KEEP IT HONEST

- 1 **A number, not a narrative.** “Had a really productive day” is not a report. It is a feeling. Post the digit.
- 2 **Report in the same unit you committed to.** This is the one that quietly ruins most groups. If you committed to 160 referral touchpoints, report touchpoints — not partners signed. When everyone reports in their own units, the group looks busy while nothing is actually being measured, and nobody notices until the last week.
- 3 **Running total, always.** The daily number is noise. The running total is the signal — it is what tells you on day 12 whether you are going to land on day 30.
- 4 **A miss gets posted, not hidden.** Post the zero. The zero is data, and it is the most useful data in the group. A silent day reads as a zero anyway — it just arrives without the conversation that would have fixed it.

Done properly, you will know by day 12 who is going to hit the 30-day number — not on day 30, when it is too late to do anything about it. That is the entire value of this document.

WHERE TO POST IT

- **Somewhere with people in it.** A WhatsApp group, a team channel, a peer group of three. A private note in your phone will not work, and you already know that.
- **Same time every day.** End of day is better than start of day — you are reporting what happened, not what you intend.
- **Pair people up and rotate the pairs.** One person checking one other person beats a group where everyone is technically responsible and nobody actually is.

STRUCTURE. MEASUREMENT. ACCOUNTABILITY.

This template is the measurement piece. On its own it will help — most people who print it get a better month simply because the number is finally written down. It works properly once the other two are in place: a structure that decides what gets measured, and somebody who notices when you stop.

IF YOU WANT A SECOND PAIR OF EYES ON YOUR NUMBERS

BOOK A SALES ASSESSMENT

Twenty-five minutes. We take your revenue target, work out your real daily number together, and find the one place in your process that is leaking. You leave with the number whether or not we ever work together.

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Send the word ASSESSMENT and I will send you two times.

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You commented KPI on the reel — thank you. Tell me which page you actually used.