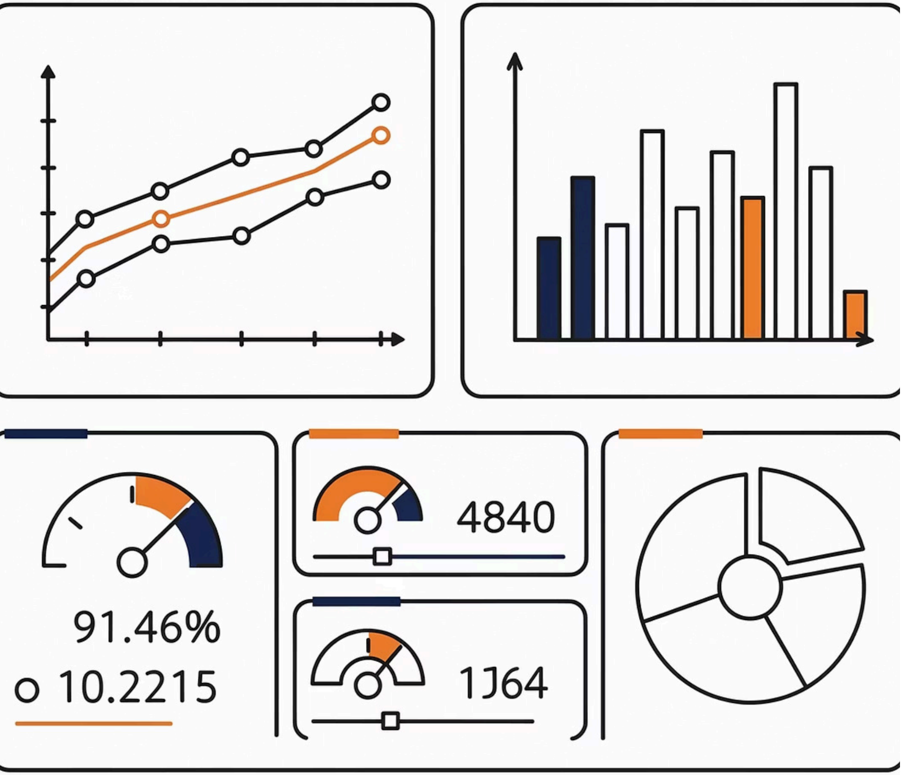



# Simple GTM Metrics Dashboard

A clarity tool for revenue decisions, not a reporting exercise. Stop debating opinions and start aligning around financial signals that actually explain growth.

INTRODUCTION

# Why This Template Exists

Most teams collect numbers but don't use them to make decisions. They build elaborate dashboards filled with metrics that generate reports but rarely drive action. This template exists to focus on a small set of GTM metrics that actually explain growth, not just activity.

Created to help leadership teams stop debating opinions and start aligning around financial signals tied to go-to-market performance. When everyone looks at the same handful of metrics and interprets them the same way, decisions become faster and more confident.

# Who This Template Is For

### B2B Service Businesses

Companies selling services to other businesses who need to understand unit economics and customer profitability patterns.

### SaaS & Recurring Revenue Models

Organizations with subscription-based or recurring revenue streams where retention and lifetime value are critical.

### Founders & Operators

Leaders who want clarity without complexity—decision-makers tired of drowning in data while starving for insights.

Used by Fractional CFOs to help clients see whether growth is healthy, risky, or unclear—monthly in leadership reviews, not daily operations.

## How to Use This Dashboard

### Track Only What Informs Decisions

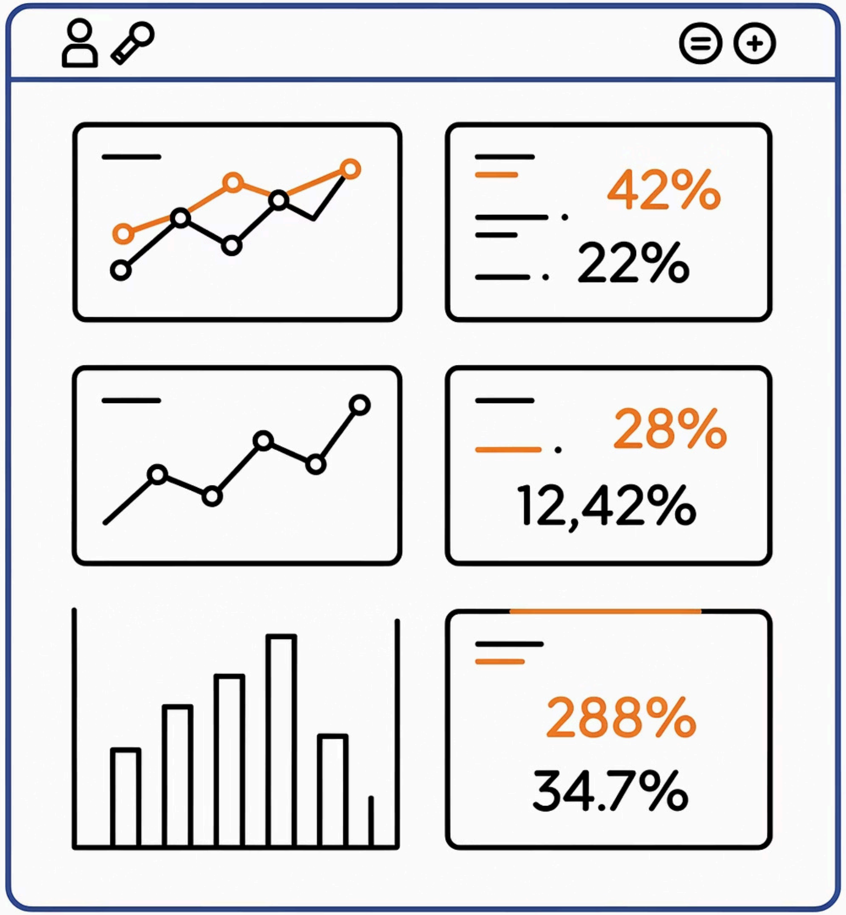
If a metric doesn't change behavior or inform a specific decision, remove it. Every number on this dashboard should have a clear "so what" attached to it.

### Keep It to One Page

Complexity kills clarity. A single-page dashboard forces prioritization and ensures the entire leadership team can internalize the story at a glance.

### Review Monthly, Not Daily

These are strategic indicators, not operational metrics. Use them in monthly leadership reviews to assess trajectory and make course corrections.




CORE METRICS

# The Five Non-Negotiables

These metrics form the foundation for understanding revenue health. Each one reveals a different dimension of your go-to-market performance, and together they tell a complete story about whether your growth is sustainable.

- Customer Acquisition Cost (CAC)
- Customer Lifetime Value (LTV)
- LTV:CAC Ratio
- Monthly Revenue Growth Rate
- Retention & Churn

# Customer Acquisition Cost (CAC)

## What It Is

The total cost to acquire a new customer, calculated by dividing your sales and marketing spend by the number of new customers acquired in that period.

## Why It Matters

CAC reveals whether growth is efficient or artificially inflated. Rising CAC without corresponding increases in value delivered suggests messaging, targeting, or channel efficiency problems. It's your early warning system for unsustainable growth patterns.

## Fractional CFO Example

Total sales and marketing spend this month divided by new clients acquired. If you spent $45,000 on sales and marketing and acquired 3 clients, your CAC is $15,000.

**$15K**

**Example CAC**

Cost to acquire one new customer

# Customer Lifetime Value (LTV)

### What It Is

Total revenue expected from a customer over their entire relationship with your company.

### Why It Matters

LTV shows how much you can responsibly spend to grow. It sets the ceiling for your acquisition costs and reveals whether customers stay long enough to justify investment.

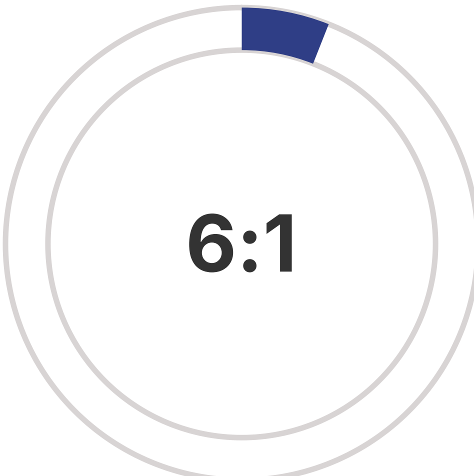
### How to Calculate

Average monthly retainer multiplied by average client lifespan in months. A $5,000/month client who stays 18 months = $90,000 LTV.

# LTV:CAC Ratio & Monthly Revenue Growth

## LTV:CAC Ratio

The relationship between value created and cost to acquire. This ratio is your quickest signal of sustainability.




### Healthy Ratio

$90K LTV ÷ $15K CAC

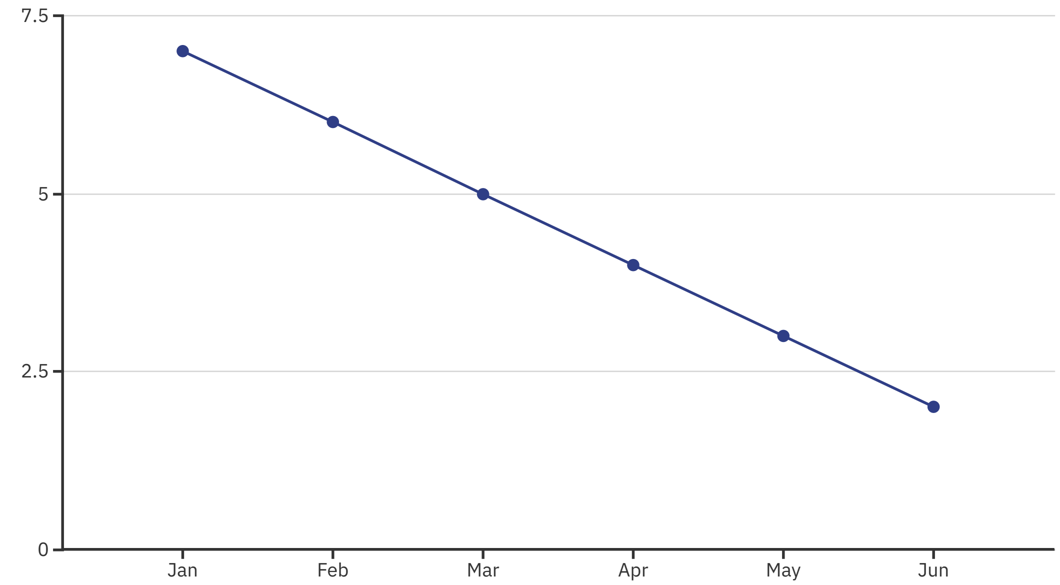

### Warning Threshold

Below this signals fragile growth

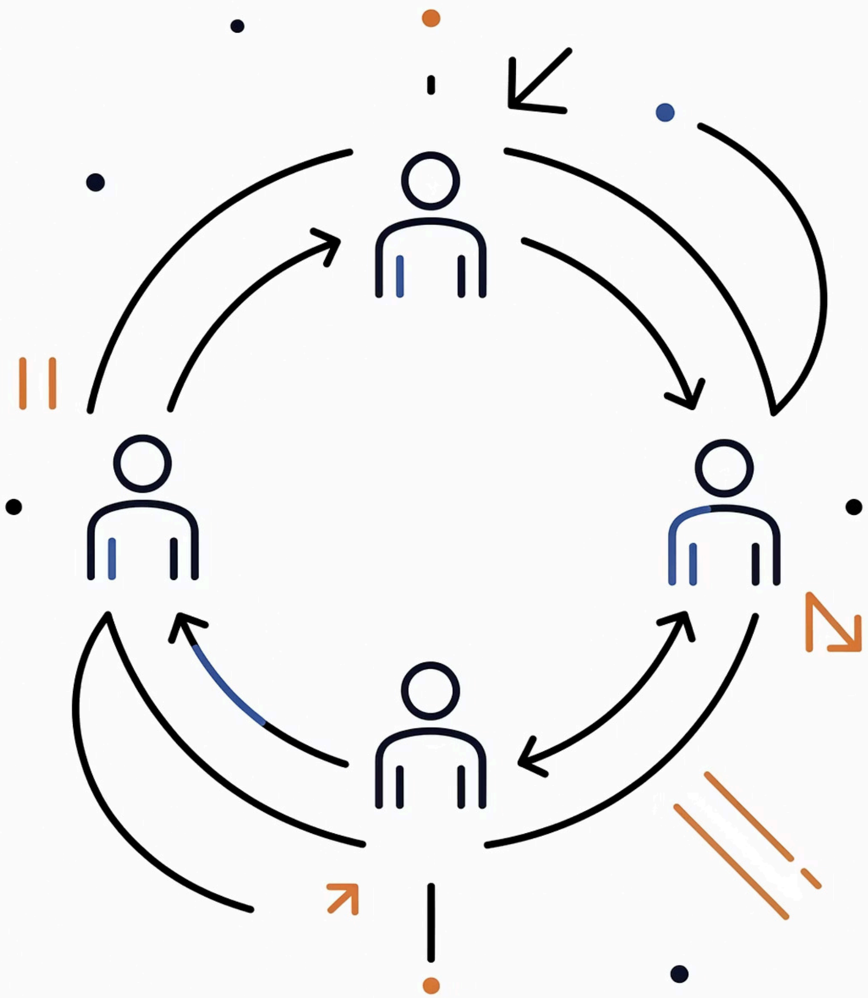
A ratio below 3:1 means growth is fragile—you're spending too much to acquire customers relative to the value they deliver.

## Monthly Revenue Growth Rate

Percentage increase or decrease in revenue month over month. This metric shows momentum or serves as an early warning sign.




**Formula:** (This month revenue – Last month revenue) ÷ Last month revenue



# Retention & Churn Signal

## The Question

Are customers staying long enough to realize value? Growth without retention is leakage—you're pouring water into a bucket with holes.

### What to Track

Number of clients lost in a period divided by total active clients at the start of that period.

### Why It Matters

High churn indicates delivery issues, value perception problems, or misaligned customer expectations.

### Example

Lost 2 clients this quarter out of 20 active = 10% quarterly churn rate.



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CRITICAL

# Decision Signals: The Most Important Part

Metrics without interpretation are just numbers. The real value comes from understanding what these signals mean and what decisions they suggest. This is where data becomes actionable intelligence.

| Signal | What It Usually Means |
|---|---|
| CAC Rising | Messaging, targeting, or channel efficiency issue. Your acquisition engine is working harder to achieve the same results. |
| LTV Flat | Delivery or value perception issue. Customers aren't staying longer or spending more, suggesting stagnant value delivery. |
| LTV:CAC < 3:1 | Growth is fragile. You're spending too much relative to customer value, making expansion risky. |
| Growth Slowing | Funnel, retention, or pricing pressure. Something in your go-to-market motion has changed or broken. |

> **Fractional CFO Example:** Rising CAC combined with flat LTV means growth effort is increasing without better outcomes—a clear signal to pause expansion and focus on efficiency.

## The Required Question

# What decision does this data suggest?

This is the only question that matters. If you look at your metrics and can't answer this clearly, the metrics are noise—data collected for comfort, not clarity.

Every metric on your dashboard should point toward a specific decision or action. If it doesn't, remove it. The goal isn't to have impressive analytics; the goal is to make better decisions faster.

VALIDATION

# Confidence Check: Built-In Quality Control

Before trusting any insights from this dashboard, your leadership team needs to pass this confidence check. If any answer is "No," treat your insights as directional only—useful for discussion but not ready for major decisions.

1

### Calculation Agreement

We agree on how each metric is calculated, including which costs roll into CAC and how we measure customer lifespan for LTV.

2

### Interpretation Consistency

Two leaders looking at the same number would interpret it the same way and reach similar conclusions about what action to take.

3

### Decision Integration

We reviewed these metrics before making our most recent GTM changes, and they informed (not just validated) our decisions.

# Practical Application: Real Example

## Fictional Fractional CFO Client Story

A mid-sized professional services firm came to their Fractional CFO with a common complaint: they were growing, but something felt wrong. Revenue was up, but stress was higher. Using this simple dashboard revealed the problem.

### Findings

- Customer Acquisition Cost (CAC): Increased 30% over six months (from $11,500 to $15,000)
- Customer Lifetime Value (LTV): Remained unchanged at $90,000
- LTV:CAC Ratio: Declined from 7.8:1 to 6:1, approaching warning threshold
- Monthly Revenue Growth Rate: Slowed from 7% to 2% month-over-month
- Retention & Churn: Client churn crept from 5% to 12% quarterly

**Company Profile:** 20-person B2B services firm experiencing "growth without confidence"

### Insight

Growth issues were not a sales problem, but unclear positioning and inconsistent onboarding

### Action Taken

Leadership paused channel expansion and focused on retention and messaging clarity

### Outcome

Within two quarters, churn dropped to 6% and CAC stabilized, enabling confident growth

# Before You Move On

If you've worked through this template—actually calculated your numbers, not just read about them—you've done something most leadership teams avoid: you've looked directly at the relationship between what you spend to grow and what you get back.

## What This Tool Was Meant to Do

This dashboard exists to create clarity, not certainty. It's designed to help you see patterns in your go-to-market performance and identify which decisions matter most right now. It won't tell you exactly what to do, but it will show you where to look.

## A Note on Unclear or Incomplete Results

If your numbers revealed more questions than answers, that's normal. Most teams discover their CAC calculation is inconsistent, their LTV assumptions are guesses, or their leadership team interprets the same metric differently. Discomfort means you're seeing reality more clearly than before.

### Learn

Review the Decision Signals section monthly. Track one or two metrics consistently before adding more.

### Validate

Run the Confidence Check with your leadership team. Identify where definitions or interpretations diverge.

### Align

Use this dashboard in your next strategic review. Make one decision based solely on what the data suggests.

## About Tingom Group

Tingom Group helps founders and operators build systems that support how people actually work—not how software vendors think they should work. We focus on clarity, alignment, and decisions that stick because they're grounded in reality, not aspiration.

> **One Last Thought:** Metrics should reduce debate, not create it. If your numbers don't point to decisions, they're being tracked for comfort—not clarity.

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Learn more at [TingomGroup.com](https://tingomgroup.com)

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