

# SaaS Company Scorecard Template

Company: \_\_\_\_\_ Week of: \_\_\_\_\_ Completed by: \_\_\_\_\_

## HOW TO USE THIS SCORECARD

- 1. **Choose 5-15 metrics** that best reflect your business health
- 2. **Set targets** for each metric (green = on/above target)
- 3. **Assign owners** - one person responsible for each metric
- 4. **Review weekly** in your Weekly Leadership Meeting (5 minutes max)
- 5. **Track trends** - 3 weeks of red/yellow = add to the open issues list

### Status Indicators:

-  **GREEN** = At or above target
-  **YELLOW** = Slightly off track (within 10-15% of target)
-  **RED** = Significantly off track (needs attention)

## REVENUE METRICS

| Metric                          | Owner | Goal    | Week 1  | Week 2  | Week 3  | Week 4  | Status                                                                                                                                                                                                                                                                                |
|---------------------------------|-------|---------|---------|---------|---------|---------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Monthly Recurring Revenue (MRR) |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ | <div><div></div></div> |

| Metric                         | Owner | Goal    | Week 1  | Week 2  | Week 3  | Week 4  | Status                                                                                                                                                                                                                                                         |
|--------------------------------|-------|---------|---------|---------|---------|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New MRR                        |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ |  <br> |
| Expansion MRR                  |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ |  <br> |
| Churned MRR                    |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ |  <br> |
| Net New MRR                    |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ |  <br> |
| Annual Recurring Revenue (ARR) |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ |  <br> |

## CUSTOMER METRICS

| Metric                 | Owner | Goal  | Week 1 | Week 2 | Week 3 | Week 4 | Status                                                                                                                                                                                                                                                               |
|------------------------|-------|-------|--------|--------|--------|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Total Active Customers |       | _____ | _____  | _____  | _____  | _____  |  <br> |
| New Customers          |       | _____ | _____  | _____  | _____  | _____  |  <br> |
| Churned Customers      |       | _____ | _____  | _____  | _____  | _____  |  <br> |

| Metric                  | Owner | Goal  | Week 1 | Week 2 | Week 3 | Week 4 | Status                                       |
|-------------------------|-------|-------|--------|--------|--------|--------|----------------------------------------------|
| Net New Customers       |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |
| Customer Churn Rate %   |       | ____% | ____%  | ____%  | ____%  | ____%  | <div><div></div><div></div><div></div></div> |
| Net Revenue Retention % |       | ____% | ____%  | ____%  | ____%  | ____%  | <div><div></div><div></div><div></div></div> |

SALES & GROWTH METRICS

| Metric                 | Owner | Goal  | Week 1 | Week 2 | Week 3 | Week 4 | Status                                       |
|------------------------|-------|-------|--------|--------|--------|--------|----------------------------------------------|
| New Leads              |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |
| Qualified Leads (SQLs) |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |
| Demos Booked           |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |
| Demos Completed        |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |
| Trials Started         |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |

| Metric                           | Owner | Goal    | Week 1  | Week 2  | Week 3  | Week 4  | Status                                           |
|----------------------------------|-------|---------|---------|---------|---------|---------|--------------------------------------------------|
| <b>Trial → Paid Conversion %</b> |       | ____%   | ____%   | ____%   | ____%   | ____%   | <div> <div></div> <div></div> <div></div> </div> |
| <b>Sales Pipeline Value</b>      |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ | <div> <div></div> <div></div> <div></div> </div> |
| <b>Avg Deal Size</b>             |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ | <div> <div></div> <div></div> <div></div> </div> |
| <b>Sales Cycle Length (days)</b> |       | _____   | _____   | _____   | _____   | _____   | <div> <div></div> <div></div> <div></div> </div> |



## FINANCIAL METRICS

| Metric                                 | Owner | Goal    | Week 1  | Week 2  | Week 3  | Week 4  | Status                                           |
|----------------------------------------|-------|---------|---------|---------|---------|---------|--------------------------------------------------|
| <b>Cash Balance</b>                    |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ | <div> <div></div> <div></div> <div></div> </div> |
| <b>Burn Rate</b>                       |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ | <div> <div></div> <div></div> <div></div> </div> |
| <b>Runway (months)</b>                 |       | _____   | _____   | _____   | _____   | _____   | <div> <div></div> <div></div> <div></div> </div> |
| <b>Customer Acquisition Cost (CAC)</b> |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ | <div> <div></div> <div></div> <div></div> </div> |

| Metric               | Owner | Goal    | Week 1  | Week 2  | Week 3  | Week 4  | Status                                       |
|----------------------|-------|---------|---------|---------|---------|---------|----------------------------------------------|
| Lifetime Value (LTV) |       | \$_____ | \$_____ | \$_____ | \$_____ | \$_____ | <div><div></div><div></div><div></div></div> |
| LTV:CAC Ratio        |       | ____:1  | ____:1  | ____:1  | ____:1  | ____:1  | <div><div></div><div></div><div></div></div> |
| Gross Margin %       |       | ____%   | ____%   | ____%   | ____%   | ____%   | <div><div></div><div></div><div></div></div> |

 **PRODUCT & ENGAGEMENT METRICS**

| Metric                     | Owner | Goal  | Week 1 | Week 2 | Week 3 | Week 4 | Status                                       |
|----------------------------|-------|-------|--------|--------|--------|--------|----------------------------------------------|
| Daily Active Users (DAU)   |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |
| Weekly Active Users (WAU)  |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |
| Monthly Active Users (MAU) |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |
| Feature Adoption Rate %    |       | ____% | ____%  | ____%  | ____%  | ____%  | <div><div></div><div></div><div></div></div> |
| User Engagement            |       | _____ | _____  | _____  | _____  | _____  | <div><div></div><div></div><div></div></div> |

| Metric                   | Owner | Goal  | Week 1 | Week 2 | Week 3 | Week 4 | Status                                              |
|--------------------------|-------|-------|--------|--------|--------|--------|-----------------------------------------------------|
| Score                    |       |       |        |        |        |        |                                                     |
| Net Promoter Score (NPS) |       | _____ | _____  | _____  | _____  | _____  | <div> <div>🟢</div> <div>🟡</div> <div>🔴</div> </div> |



## CUSTOMER SUCCESS METRICS

| Metric                         | Owner | Goal   | Week 1 | Week 2 | Week 3 | Week 4 | Status                                              |
|--------------------------------|-------|--------|--------|--------|--------|--------|-----------------------------------------------------|
| Support Tickets Created        |       | _____  | _____  | _____  | _____  | _____  | <div> <div>🟢</div> <div>🟡</div> <div>🔴</div> </div> |
| Support Tickets Resolved       |       | _____  | _____  | _____  | _____  | _____  | <div> <div>🟢</div> <div>🟡</div> <div>🔴</div> </div> |
| Avg Response Time (hrs)        |       | _____  | _____  | _____  | _____  | _____  | <div> <div>🟢</div> <div>🟡</div> <div>🔴</div> </div> |
| Avg Resolution Time (hrs)      |       | _____  | _____  | _____  | _____  | _____  | <div> <div>🟢</div> <div>🟡</div> <div>🔴</div> </div> |
| Customer Satisfaction (CSAT) % |       | _____% | _____% | _____% | _____% | _____% | <div> <div>🟢</div> <div>🟡</div> <div>🔴</div> </div> |

| Metric                       | Owner | Goal  | Week 1 | Week 2 | Week 3 | Week 4 | Status                                           |
|------------------------------|-------|-------|--------|--------|--------|--------|--------------------------------------------------|
| Onboarding Completion Rate % |       | ____% | ____%  | ____%  | ____%  | ____%  | <div> <div></div> <div></div> <div></div> </div> |



## TEAM & CULTURE METRICS

| Metric               | Owner | Goal  | Week 1 | Week 2 | Week 3 | Week 4 | Status                                           |
|----------------------|-------|-------|--------|--------|--------|--------|--------------------------------------------------|
| Team Size            |       | _____ | _____  | _____  | _____  | _____  | <div> <div></div> <div></div> <div></div> </div> |
| Open Positions       |       | _____ | _____  | _____  | _____  | _____  | <div> <div></div> <div></div> <div></div> </div> |
| Time to Hire (days)  |       | _____ | _____  | _____  | _____  | _____  | <div> <div></div> <div></div> <div></div> </div> |
| Employee NPS (eNPS)  |       | _____ | _____  | _____  | _____  | _____  | <div> <div></div> <div></div> <div></div> </div> |
| Voluntary Turnover % |       | ____% | ____%  | ____%  | ____%  | ____%  | <div> <div></div> <div></div> <div></div> </div> |



## YOUR WEEKLY SCORECARD (Choose 5-15 Most Important)

**Instructions:** Select the metrics that best reflect your business health right now. Focus on leading indicators (things you can control) not just lagging indicators (results).

| #  | Metric | Owner | Goal | This Week | Status                                       | Trend                                        |
|----|--------|-------|------|-----------|----------------------------------------------|----------------------------------------------|
| 1  |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 2  |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 3  |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 4  |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 5  |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 6  |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 7  |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 8  |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 9  |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 10 |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 11 |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 12 |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 13 |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 14 |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |
| 15 |        |       |      |           | <div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div></div> |



## RECOMMENDED SAAS SCORECARD (Copy to above)

Our recommended starting scorecard for SaaS companies:

1. **MRR** - Monthly Recurring Revenue
2. **New MRR** - From new customers
3. **Churn Rate %** - Monthly customer churn
4. **New Customers** - This month
5. **NPS** - Net Promoter Score
6. **New Leads** - Marketing qualified
7. **Trial → Paid %** - Conversion rate
8. **CAC** - Customer Acquisition Cost
9. **Support Tickets** - Number created
10. **Cash Balance** - Current runway



## ISSUES IDENTIFIED FROM SCORECARD

Metrics that have been red/yellow for 3+ weeks:

| Metric | Weeks Off Track | Root Cause Analysis | Action Plan |
|--------|-----------------|---------------------|-------------|
|        |                 |                     |             |
|        |                 |                     |             |
|        |                 |                     |             |



## SCORECARD BEST PRACTICES

**DO:**

- ✅ Review weekly in Weekly Leadership Meetings (5 minutes max)
- ✅ Choose leading indicators you can control
- ✅ Keep it to 5-15 metrics (not 50)
- ✅ Update metrics before the

meeting (automated if possible) ✅ Make red/yellow metrics into Issues ✅ Celebrate when metrics go green

## DON'T:

❌ Spend more than 5 minutes on review ❌ Deep dive into problems (that's for Issue Resolution time) ❌ Skip weeks or forget to update ❌ Choose metrics you can't impact ❌ Track too many metrics ❌ Ignore trends (3 weeks red = problem)

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## INTEGRATE WITH GOALCADENCE

Connect your data sources to GoalCadenace for automatic updates:

- **Revenue:** Stripe, QuickBooks, Salesforce
- **Customers:** CRM (HubSpot, Salesforce)
- **Product:** Analytics (Mixpanel, Amplitude, Segment)
- **Support:** Zendesk, Intercom, Help Scout
- **Finance:** QuickBooks, Xero

→ **No more manual updates. Live data in every Weekly Leadership Meeting.**

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