Stage 3
KPI Tracker

hubbix

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Our walkthrough videos and step-by-step articles show you how to easily navigate each stage of the **hubbix** process and demonstrate how to get the best out of the platform. Watch the video

Before we get started with adding and updating a Key Performance Indicator, we need to touch upon the 2 different types of KPI: lead and lag measures.

Lag measure - something the client has already achieved

This refers to recording something that has already happened in the past, you cannot influence it, and you cannot change it.

For example: last month's income.

Lead measure - something the client wants to achieve

This refers to setting the KPI goal.

For example: next month's income goal.

Now let's move on to adding and updating those crucial KPIs

Start by clicking on the ***KPI Tracker*** in the left bar of the ***Client's Profile***.

1. Adding a new KPI - Lag measure (something the client has already achieved)

Setting up a new Lag Measure KPI

a. Click on the ***Add KPI*** button in the top right of the screen.

b. Add a title to specify the category of KPI by clicking on the ***Title*** dropdown box.
There are numerous KPI categories you can track
For example, click on the ***Income*** option.

c. Choose the appropriate ***Unit*** that will be measured.
For example - Pound (Sterling), click on the ***Unit*** dropdown box and select £ (pound).

d. You then need to determine the ***Starting Value***.

In this example we are looking at a Lag Measure - something that has already happened - so you enter the amount of income the client earned in the previous calendar month, for example - £12,000 so enter 12,000 into the ***Starting Value*** box.

e. Select the date by marking the end of the previous month:
   - Click on the ***Date*** box and select the last day of the previous month (for example - October 31st). Click on the ***OK*** button.

f. The ***Time Period*** box refers to how often you want to be updating this particular KPI. We have found that monthly sessions with a client are most effective.

   *If you select **Monthly**, that means you'd be seeing the client on a monthly basis and getting an update on the necessary information to track the KPI. If you are seeing the client and obtaining the KPI data on a quarterly basis, select **Quarterly**.*

   Click on the ***Time Period*** box and select ***Monthly***.

g. To finalise the process, click on ***Save***.

2. Updating a KPI - Lag measure

We have created a Lag Measure KPI, now we're going to update it. Imagine you are in the following month's session with the same client: you have already recorded October's income, so now we need to update the KPI with November's income.

a. Click on ***Updates*** for the relevant KPI.

b. Click on ***Add Update*** in the top right corner of the screen.

c. Enter the income for November (for example - £13,000) so enter 13,000 in the Value box.

d. We need to enter the information in the same way as before, for example - the last day of the previous month:
e. Click on the ***Date*** box and select November 30th.
   Click on the ***OK*** button.

f. To finalise the update, click on ***Save.***

3. Adding a new KPI - Lead measure (something the client wants to achieve)

Setting up a new Lead Measure KPI

a. Start by heading back to the ***KPI Tracker*** page:
Click on ***Back To Kpi Tracker*** button in the top left corner of the screen.

b. Click ***Add Kpi*** button in the top right corner of the screen.

c. In this new example, we're going to input the number of ***Leads*** we want the client to achieve so click on the Title dropdown box and select the ***Leads*** option.

d. Choose the appropriate Unit that will be measured. For example - ***Number*** (because we want to measure the number of leads the client generates) so click on the Unit dropdown box and select ***Number.***

e. Input the number of leads we want the client to achieve, for example – 10, so enter 10 into the ***Starting Value*** box.

f. We need to enter a future date, as this is something the client hasn't achieved yet. For example - if you are in a November session, you need to enter the end of December:
Click on the ***Date*** box and select December 31st,
Click on ***OK.***

g. If you are seeing this particular client on a monthly basis, click on the **Time Period** box and select the **Monthly** option.

h. To finalise the process, click on **Save.**

4. Updating a KPI - Lead measure

We have created a Lag Measure KPI, now we're going to update it.
Imagine you are in the following month's session with the same client: we have already set the number of leads you want the client to achieve by the end of December.
Now we need to update the KPI with the number of leads you want them to achieve in the following month of January.

a. Click on ***Updates*** on the new ***Leads Kpi*** we just created and click on ***Add Update***.

Let's say that the client has hit their target of 10 leads within the month and you want to increase the number of leads to 12:

b. Click on the ***Value*** box and enter 12.

c. Add in the future date:
d. Click on the ***Date*** box and select January 31st,
e. Click on OK.

f. To finalise the update, click on ***Save***.

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