

Module 11: Benchmarking & Performance

Summary

Use data and metrics to improve performance, not just track activity.

Sections & Action Items

Metrics That Matter

- Review year-over-year trends
- Track job size & close rate
- Analyze performance quality

Dashboards

- Track key metrics
- Review weekly
- Focus on trends

Coach with Data

- Use metrics for coaching
- Reward improvement
- Share wins

Reflection Question

Which metric best reflects your business health?

Next Steps

1. Review performance trends
2. Simplify dashboard
3. Coach using data

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Module 11: Benchmarking & Performance Worksheet

How to Use: Identify ONE improvement to act on.

Metrics Visibility

Do you track key metrics? ☐ Yes ☐ No

What matters most? _____

Score (1-5): _____

Dashboard

Do you review regularly? ☐ Yes ☐ No

What is missing? _____

Score: _____

Coaching

Is feedback data-based? ☐ Yes ☐ No

Where is inconsistency? _____

Score: _____

30-Day Action

1 improvement: _____

Owner: _____ Deadline: _____

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