Transparent Performance Tracking System

28/08/2025

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Welcome & Agenda

Today we'll explore how our Google Sheets tracking system ensures:

- ✅ Why we track performance metrics

- ✅ Agent Quality Tracker - Ensuring call excellence

- ✅ City Performance Tracker - Optimizing market efficiency

- ✅ Data File Efficiency Tracker - Validating data quality

- ✅ Client Support Ticket Tracker - Ensuring accountability

- ✅ Lead Sharing Tracker - Transparent lead quality

- ✅ Key benefits and next steps

Why We Track

👁 Transparency

Provides complete visibility into daily operations, ensuring you always know exactly what's happening with your campaigns and resources.

⚡ Efficiency

Identifies optimization opportunities to maximize resource utilization and ensure the highest quality standards across all operations.

📈 Data-Driven Decisions

Empowers your team with actionable insights, building confidence in results and enabling strategic decision-making based on real performance data.
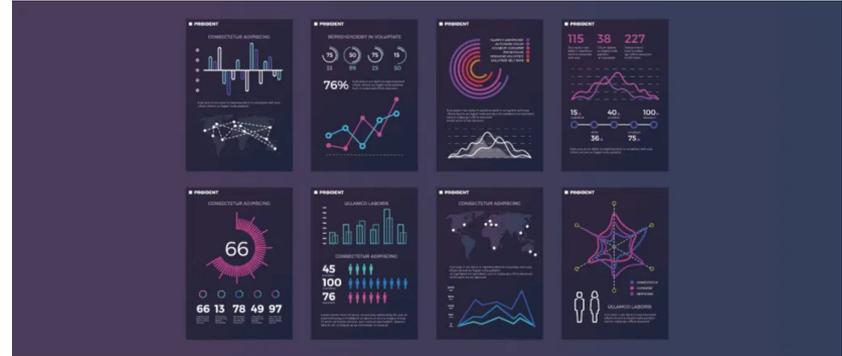
Sheet 1: Agent Quality Tracker

◎ Purpose

Monitor cold call quality of appointment setters to ensure consistent performance and high conversion rates.
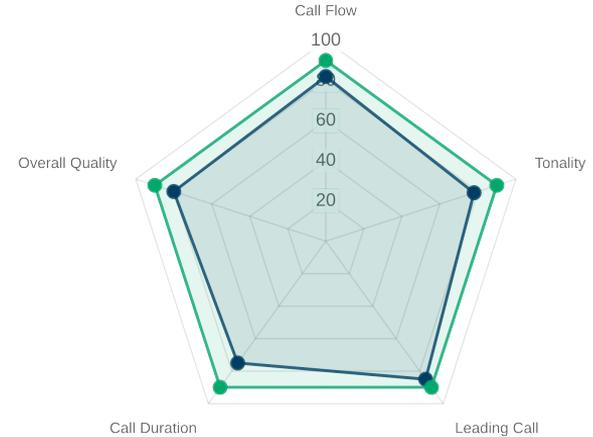
★ Client Benefits

✓ Ensures calls are professional and consistent

✓ Focuses on high conversion quality

✓ Provides transparency into agent performance

✓ Enables data-driven quality improvements

☰ Key Metrics Tracked

📞 Call Flow % - Structure and conversation flow

💬 Tonality % - Voice quality and approach

👤 Leading Call % - Conversation control

🏅 Overall Q rate % - Comprehensive quality score

Agent Quality Metrics

Legend: Target | Average Performance

5 Steps on Measuring Quality Metrics in Your Organization

1. Collect data.
2. Conduct data validation checks.
3. Perform data analysis and comparison.
4. Interpret and visualize results.
5. Monitor and track progress.

Sheet 2: City Performance Tracker

📍 Purpose

Measure market efficiency in each city to optimize resource allocation and guide strategic expansion decisions.

🥧 Client Benefits

Identify best areas for marketing spend

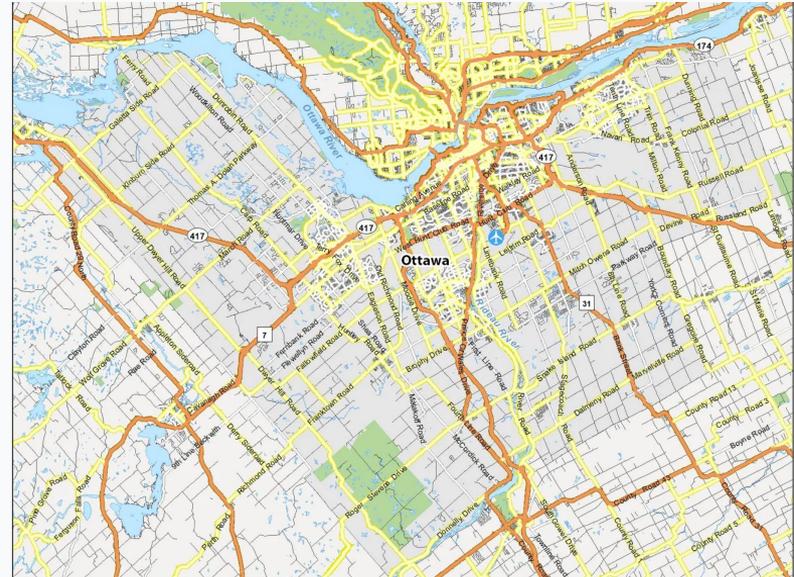Make data-driven expansion decisions

Optimize resource allocation by city

Track performance trends over time

📶 City Status Categories

🟢 **Efficient** - High ROI, optimal performance

🟡 **Partially Efficient** - Moderate ROI, needs optimization

🔴 **Inefficient** - Low ROI, requires intervention

City Performance Map

Geographic distribution of market efficiency - Ottawa focus

Sheet 3: Data File Efficiency Tracker

🗄 Purpose

Track efficiency of city data files for appointments and operational feedback, ensuring optimal resource allocation.

✅ Client Benefits

🛡 Guarantees only high-quality data is used for campaigns

🪙 Saves time and budget through data validation

◔ Ensures efficient resource allocation

👁 Provides transparency in data processing

📄 Data Source → ⚙ Processing

⚙ Processing → 📅 Appointments

📅 Appointments → 👤✓ Manager Validation
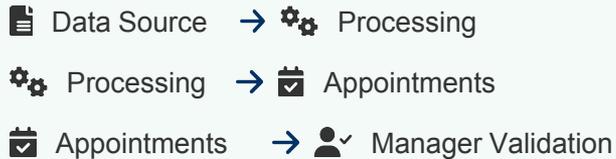
Sheet 4: Client Support Ticket Tracker

Purpose

Capture and track all client complaints and inquiries from submission to resolution, ensuring nothing falls through the cracks.

Client Benefits

- ✓ Ensures quick resolution of all client issues with clear accountability

- ✓ Provides transparency into support process and resolution timelines

- ✓ Builds stronger client relationships through responsive service

- ✓ Identifies recurring issues for proactive problem-solving

- ✓ Creates historical record of all client interactions and resolutions
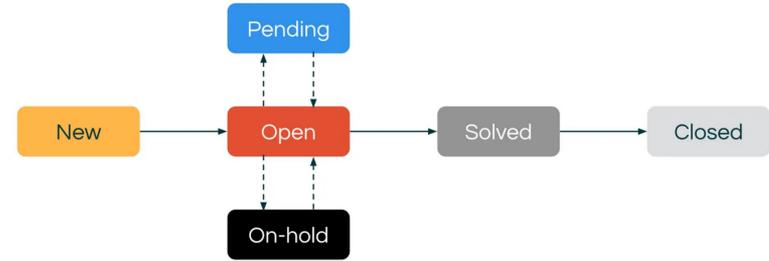
Sheet 5: Lead Sharing Tracker

Purpose

Share qualified leads with the client including contact details and quality indicators

Client Benefits

✓ Complete transparency in lead quality assessment

✓ Accurate prediction of closing probability and show rates

✓ Proper advisor assignment based on lead complexity

Sample Lead Profile

Name: John Smith

Location: Ottawa, ON

Closing Probability: High

Show-up Rate: Medium

Advisor Experience: Low

		Behavior score			
	Points	50+	25-50	2-24	<2
Demographics score	50+	Send to sales	Send to sales	Sales-oriented nurturing	General nurturing
	25-50	Send to sales	Sales-oriented nurturing	Sales-oriented nurturing	General nurturing
	2-24	Sales-oriented nurturing	Sales-oriented nurturing	Sales-oriented nurturing	General nurturing
	<2	General nurturing	General nurturing	General nurturing	Possibly purge/check for spam

Key Benefits for You

Clear Visibility

Complete transparency into agent and city performance metrics, allowing you to see exactly what's working and what needs improvement.

Resource Optimization

Confidence that your marketing budget and operational resources are allocated to the most efficient markets and activities.

Improved Collaboration

Stronger partnership and trust through transparent data sharing and collaborative problem-solving.

Better Outcomes

Enhanced results through data-driven decision-making and continuous performance improvement.

Business Performance Dashboards with New Customers and Gross Profit