MARKETING PERFORMANCE / 01

A PRACTICAL SMALL-BUSINESS WORKBOOK

Marketing KPI Tracker

Measure what matters.

Connect your traffic, audience and campaigns to results you can act on.



TRACK · UNDERSTAND · DECIDE

01 Set a clear monthly direction.

02 Record results with consistent definitions.

03 Turn the evidence into your next action.

For small businesses, Etsy and eBay sellers, Shopify stores, print-on-demand sellers and KDP publishers.

10 WORKSHEETS · ANNUAL OVERVIEW · QUARTERLY REVIEW

START HERE

Make the numbers useful



A key performance indicator (KPI) is a measure tied to a business goal. Use this workbook to connect marketing activity with useful outcomes.

01 Where do visitors come from?

Use the traffic-source tracker to see how people reach your store.

02 What is growing?

Follow traffic, email subscribers and social audiences over time.

03 What converts?

Check how traffic moves through the buying journey.

04 What earns revenue?

Compare attributed revenue, advertising spend and results.

A RHYTHM TO REPEAT

Choose the same review day each month. Start with traffic, conversion and revenue; add the other measures as useful. Work through an example, complete your table, then finish with the monthly review and action plan.

BUSINESS / STORE

MONTHLY REVIEW DAY

REPORTING TOOL, DATE RANGE AND TIME ZONE

Examples follow the fictional Willow Lane Goods. Figures are illustrative, not forecasts or industry benchmarks. Print worksheet pages again for a new period.

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Your workbook, at a glance

Use the linked contents or PDF bookmarks to move between worksheets.

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MEASUREMENT REFERENCES · CHECKED 11 NOVEMBER 2026

Shopify: sessions and conversion definitions

Mailchimp: email open and click rates

Google Ads: revenue value and ad-spend return

Keep metric definitions, filters and attribution windows consistent. Where a platform does not expose a field, mark it N/A rather than inventing a value.

REFERENCE GUIDE

Marketing KPIs explained

Record the exact definition used by your reporting tool. A session is a visit; a visitor may make several sessions. They are not interchangeable.

METRIC	MEANING / METHOD
Traffic / visitors	Traffic may mean sessions or unique visitors. Write which you use and keep it consistent.
Traffic source	The channel credited with a visit. Use a single source report; channel totals must use the same basis.
Conversion rate	For a session funnel: purchase sessions ÷ all sessions × 100. A custom orders ÷ visitors × 100 ratio is different.
Average order value	Revenue ÷ orders. Use the same revenue treatment and time period in both inputs.
CTR / email click rate	Ad CTR = clicks ÷ impressions × 100. Email click rate commonly uses delivered emails as its base.
Open rate	Tracked opens as a percentage of delivered emails. Privacy features and bots can distort it.
Subscriber growth	(Ending list − starting list) ÷ starting list × 100. Record additions, unsubscribes and other changes.
Engagement rate	Interactions ÷ the stated base × 100. That base may be followers, reach or impressions; name it.
ROAS	Attributed ad revenue ÷ ad spend. A 2.33× ROAS means $2.33 in revenue per $1 of ad spend, not profit.
Reach	The estimated number of unique accounts or people shown your content; use the platform definition.

KEEP THE COMPARISON HONEST

A zero denominator makes a percentage or ROAS undefined: write N/A. Platform availability varies. Check the reporting tool, metric base and date range before comparing results.

01 / SET THE DIRECTION

Marketing goals dashboard

Set goals at the start of the month, then enter actual results at month-end. Mark Above, Met or Below against the stated goal; use N/A when a result is unavailable.

WILLOW LANE GOODS / ILLUSTRATIVE JUNE RESULTS

KPI	GOAL	ACTUAL	STATUS
Website traffic (sessions)	7,000	6,200	Below
Email subscribers	2,100	2,060	Below
Conversion rate	3.5%	3.0%	Below
Attributed revenue	$7,500	$7,068	Below
Social followers	11,500	11,025	Below

All five results improved or progressed, but none met the exact target. Record the trend separately from goal attainment.

YOUR MONTH / YEAR

TRAFFIC MEASURE USED

YOUR MONTHLY GOALS

KPI	GOAL	ACTUAL	STATUS
Website traffic			
Email subscribers			
Conversion rate			
Attributed revenue			
Social followers			
Your own KPI:			

Choose one to three priorities for the action plan. A goal is a planning decision, not a promised result.

02 / FOLLOW THE TREND

Monthly traffic tracking

Change % = (this period − previous period) ÷ previous period × 100. Use the same traffic measure, filters and date boundaries each time.

EXAMPLE / WEBSITE SESSIONS

MONTH	TRAFFIC	CHANGE	WHAT HAPPENED
January	4,800	N/A	Baseline
February	5,150	+7.3%	Started Pinterest
March	5,400	+4.9%	Email weekly
April	5,720	+5.9%	First ads
May	5,950	+4.0%	Regular activity
June	6,200	+4.2%	TikTok post gained reach

Traffic rose 29.2% from January to June. These notes suggest questions to investigate; they do not establish what caused the increase.

YEAR / SIX-MONTH PERIOD

TRAFFIC MEASURE AND REPORT

MONTH	TRAFFIC	CHANGE %	NOTES / CONTEXT

Repeat for the next six months. If the prior period is zero, enter N/A. Compare seasonal periods and note tracking changes before deciding what to test.

03 / TRAFFIC BY SOURCE

Website visitors tracker

Channel share = channel traffic ÷ total traffic × 100. The example uses sessions from one report. Unique visitors may overlap across channels and may not add up.

EXAMPLE / JUNE SOURCE REPORT

SOURCE	SESSIONS	SHARE	CONTEXT
Organic search	2,100	33.9%	Largest channel
Social media	1,550	25.0%	Mostly Pinterest
Direct	980	15.8%	Source not identified
Email	900	14.5%	Email referrals
Paid ads	670	10.8%	$420 ad spend
Total	**6,200**	**100%**	**One reporting basis**

Search and social together provide 58.9% of traffic. Check their conversion and revenue before changing budget; volume alone is not enough.

MONTH / REPORT / TRAFFIC MEASURE

SOURCE	TRAFFIC	SHARE %	NOTES
Organic search			
Social media			
Direct			
Email			
Paid ads			
Other / unassigned			
Total			

Use mutually exclusive channel categories when possible. Keep direct or unattributed traffic visible; do not assume it consists of repeat buyers.

04 / AUDIENCE AND ENGAGEMENT

Social media growth

Net growth = end − start. Growth % = net ÷ start × 100. Record engagement only when you can also record its definition; different platforms use different bases.

EXAMPLE / FOLLOWER COUNTS

PLATFORM	START	END	NET	GROWTH
Instagram	4,820	5,140	+320	+6.6%
Pinterest	2,300	2,520	+220	+9.6%
TikTok	1,150	1,410	+260	+22.6%
Facebook	1,900	1,955	+55	+2.9%
Total	**10,170**	**11,025**	**+855**	**+8.4%**

TikTok grew fastest in percentage terms; every platform grew. Total followers are account counts, not a deduplicated audience. Check sales and engagement too.

MONTH / YEAR

ENGAGEMENT DEFINITION / BASE

PLATFORM	START	END	NET	GROWTH %	ENG. %
Instagram					
Pinterest					
TikTok					
Facebook					
Other					
Total					

Do not add engagement percentages across platforms. Use N/A when the starting count is zero or the platform does not provide comparable data.

05 / LIST SIZE AND ENGAGEMENT

Email subscriber tracker

End = start + new − unsubscribed + other net adjustments. Growth % = (end − start) ÷ start × 100. Record your provider's rates and filtering settings.

MONTH / YEAR

PROVIDER / LIST / FILTERS

METRIC	EXAMPLE	YOUR MONTH
Subscribers at start	1,840	
New subscribers	260	
Unsubscribed	40	
Other net adjustments	0	
Subscribers at end	2,060	
Net growth	12.0%	
Reported open rate	42%	
Reported click rate	3.2%	

READ THE SIGNAL CAREFULLY

A 42% reported open rate is not proof of engagement. Mail privacy protection and bots can inflate open or click activity. Use consistent filtering and consider clicks, purchases, bounces and unsubscribes together.

Choose a relevant baseline for your list and sending pattern. Avoid removing contacts solely because a fixed number of days passed without a recorded open.

06 / THE PURCHASE JOURNEY

Conversion rate tracking

Use one coherent funnel and time period. In this example: purchase sessions ÷ all sessions × 100. Shopify's order count may differ from purchase-session count.

EXAMPLE / CLOSED SESSION FUNNEL

FUNNEL STAGE	SESSIONS	% OF TOTAL	DROP FROM PRIOR
All sessions	6,200	100%	N/A
Added to cart	496	8.0%	92%
Reached checkout	248	4.0%	50%
Completed purchase	186	3.0%	25%

INTERPRET THE DROP CORRECTLY

The largest loss is before cart addition: 92% of sessions. Among shoppers who added to cart, 50% did not reach checkout. Checkout-to-purchase loss is 25%. Investigate the cause before choosing an intervention.

MONTH / FUNNEL TYPE / REPORT

FUNNEL STAGE	COUNT	% OF TOTAL
All visits / sessions		
Added to cart		
Reached checkout		
Completed purchase		

Illustration: 6,200 × (3.5% − 3.0%) = 31 more purchase sessions. This assumes unchanged traffic and comparable conditions; it is not a forecast.

07 / CONNECT SPEND AND RESULTS

Revenue from marketing

ROAS = attributed ad revenue ÷ ad spend. Use one attribution model and window. Non-ad channels still have labor, software and other costs, even with $0 ad spend.

EXAMPLE / JUNE / ONE ATTRIBUTION REPORT

CHANNEL	REVENUE	AD SPEND	ROAS
Organic search	$2,360	$0	N/A
Email	$1,950	$0	N/A
Social media	$1,420	$0	N/A
Paid ads	$980	$420	2.33×
Direct	$358	$0	N/A
Total	**$7,068**	**$420**	**N/A**

Paid ROAS is $980 ÷ $420 = 2.33×. This is revenue return, not profit. Profitability depends on costs and margin; there is no universal profitable ROAS.

MONTH / ATTRIBUTION MODEL / WINDOW

CHANNEL	REVENUE	AD SPEND	ROAS
Organic search			
Email			
Social media			
Paid ads			
Direct / other			
Total			

Record currency and consistent refund/tax treatment. Do not sum separate platforms' attributed revenue if they may claim the same order.

08 / COMPARE A SPECIFIC EFFORT

Campaign performance

Give each campaign a consistent name. Record ad spend, clicks, sales and attributed revenue. ROAS = revenue ÷ ad spend; cost per sale = ad spend ÷ sales.

ILLUSTRATIVE CAMPAIGN EXAMPLES / SEPARATE PERIOD

CAMPAIGN	CHANNEL	SPEND	CLICKS	SALES	REVENUE	ROAS
Spring sale	Email	$0	180	64	$2,180	N/A
IG Story ads	Paid social	$250	540	38	$1,140	4.56×
Google Search	Paid search	$170	210	22	$760	4.47×

These separate-period examples do not roll into the June totals. Paid cost per sale is $6.58 for IG Story ads and $7.73 for Google Search. Margin, attribution and costs still determine profit.

YOUR REPORTING PERIOD / ATTRIBUTION WINDOW

CAMPAIGN	CHANNEL	SPEND	CLICKS	SALES	REVENUE	ROAS

Review live campaigns on a suitable schedule, allowing for reporting and conversion delays. Compare with your margin-based target before scaling or pausing.

09 / TREND AND TARGET

Monthly KPI review

Bring your headline measures together. Compare with last month and the goal separately: a result can improve while still falling short of its target.

EXAMPLE / JUNE COMPARED WITH MAY

KPI	THIS MONTH	LAST MONTH	GOAL	STATUS
Traffic (sessions)	6,200	5,950	7,000	Below
Conversion rate	3.0%	2.8%	3.5%	Below
Email subscribers	2,060	1,840	2,100	Below
Social followers	11,025	10,170	11,500	Below
Attributed revenue	$7,068	$6,640	$7,500	Below
Paid ad ROAS	2.33×	2.10×	3.00×	Below

Every example result rose, yet every exact target remains unmet. Select priorities using business impact, evidence and resources, rather than the number of below-goal labels.

MONTH / YEAR

PRIMARY PRIORITY

KPI	THIS MONTH	LAST MONTH	GOAL	STATUS
Website traffic				
Conversion rate				
Email subscribers				
Social followers				
Attributed revenue				
Paid ad ROAS				

Use Above / Met / Below against the exact goal, or define a tolerance in advance and record it. Mark unavailable or undefined values N/A.

10 / TURN EVIDENCE INTO ACTION

Your 30-day action plan

Choose up to three priorities. Define the reason, one testable action, a target and a review date. Keep a record of other changes that could affect the result.

EXAMPLE ACTIONS / HYPOTHESES TO TEST

FOCUS KPI	ONE ACTION	TARGET
Conversion	Test clearer product and delivery information.	3.0% to 3.5%
Email revenue	Test one relevant welcome sequence.	$1,950 to $2,400
Paid ad ROAS	Review low-margin ad traffic before reallocating.	2.33× to 3.00×

01 FOCUS KPI / WHY IT MATTERS

ONE ACTION / TARGET

BY WHEN / RESULT

02 FOCUS KPI / WHY IT MATTERS

ONE ACTION / TARGET

BY WHEN / RESULT

03 FOCUS KPI / WHY IT MATTERS

ONE ACTION / TARGET

BY WHEN / RESULT

A single change can make results easier to interpret, but before-and-after differences alone do not prove causation. Review the evidence and carry useful learning forward.

LONG-TERM TRACKING

12-month KPI overview

Complete one row each month using the same definitions. Keep a copy each quarter so you can compare your direction with seasonal patterns and business changes.

YEAR / BUSINESS

TRAFFIC MEASURE / CURRENCY

MONTH	TRAFFIC	CONV. %	EMAIL SUBS	SOCIAL	REVENUE
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

READ THE YEAR IN CONTEXT

Revenue is attributed revenue on the same basis as page 11. Social totals are account counts. Note tracking changes, product launches and seasonality before drawing conclusions from a trend.

REVIEW / RESET / CONTINUE

Quarterly review & next steps



Every three months, review the full set of trackers. Record what happened, what you learned and what you will test next.

WHAT WORKED? WHICH CHANNEL OR CAMPAIGN CONTRIBUTED MOST?

WHAT DID NOT? WHICH EFFORT NEEDS A CHANGE OR A CLOSER LOOK?

WHAT IS NEXT? ONE CHANNEL, ONE KPI AND A FRESH GOAL.

QUARTERLY NOTES

QUARTER	BIGGEST WIN	BIGGEST LESSON	NEXT FOCUS
Q1			
Q2			
Q3			
Q4			

A clear record today.
A more informed next step tomorrow.