

MARKETING PERFORMANCE SERIES

Marketing KPI Tracker

Track your marketing performance, see what's actually working, and grow your store with confidence — one simple page at a time.

2026

EDITION

BUILT FOR

Small businesses

Etsy sellers

Shopify stores

eBay sellers

POD sellers

KDP publishers



START HERE

Welcome

Marketing without tracking is just guessing. You post, you advertise, you send emails — but which efforts actually bring visitors, followers, and sales? This workbook turns that guesswork into clear numbers you can act on.

A **KPI** (Key Performance Indicator) is simply a number that tells you whether your marketing is working. You do not need fancy software or a marketing degree — just a few minutes each month and the simple tables in this workbook.

Four questions this tracker answers

- 1 **Where do my visitors come from?** — which channels send people to your store.
- 2 **What is growing?** — traffic, followers, and email subscribers over time.
- 3 **What actually converts?** — how many visitors turn into buyers.
- 4 **What makes money?** — which marketing brings real revenue, not just clicks.

→ HOW TO USE THIS WORKBOOK

- Pick the **same day each month** (e.g. the 1st) to fill in your numbers — consistency is what makes trends visible.
- Each tracker has a **worked example**, clear **instructions**, a **benchmark** to compare against, and a **blank table** to print and complete.
- Finish each month with the **KPI Review** and **Action Plan** to decide what to improve next.

► TIP

Do not try to track everything at once. Start with traffic, conversion rate, and revenue — the three numbers that matter most — and add the rest as you get comfortable.



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Every worksheet follows the same simple rhythm — see an example, read the instructions, then fill in your own numbers.



GETTING STARTED

Marketing KPIs Explained

Here are the only terms you need to use this workbook. Keep this page handy — every tracker uses these words.

| TERM | WHAT IT MEANS (PLAIN ENGLISH) | HOW TO FIND IT |
|---------------------|---|----------------------------------|
| Traffic / Visitors | People who come to your store or listing | Store or platform analytics |
| Traffic source | Where a visitor came from (search, social, email) | Analytics → "Sessions by source" |
| Conversion rate | % of visitors who buy | Orders ÷ visitors × 100 |
| Average Order Value | Average amount spent per order (AOV) | Revenue ÷ number of orders |
| CTR (click rate) | % of people who click an ad, post, or email | Clicks ÷ views (or sends) |
| Open rate | % of emails that get opened | Email tool dashboard |
| Subscriber growth | How fast your email list is growing | (New – lost) ÷ start × 100 |
| Engagement rate | % of followers who like, comment, or share | Social platform insights |
| ROAS | Revenue earned per \$1 of ad spend | Ad revenue ÷ ad spend |
| Reach | How many unique people saw your content | Platform or ad insights |

◆ BENCHMARK

You do not need expensive tools. Free analytics inside Shopify, Etsy, eBay, your email provider, and each social app give you every number in this workbook.

▶ TIP

Write these definitions in your own words in the margin. KPIs only help when you truly understand what each one is telling you about your business.

01

TRACKERS & WORKSHEETS

Marketing Goals Dashboard

Start every month here. Set a target for each key KPI, then track how you actually did. Goals turn vague hopes ("grow more") into clear numbers you can hit.

→ HOW TO USE THIS PAGE

Write your goal for each KPI at the start of the month. At month-end, fill in the actual result and mark whether you are **Ahead**, **On track**, or **Below**. Keep goals realistic — aim to beat last month, not the whole industry.

EXAMPLE — WILLOW LANE GOODS

Willow Lane Goods is a small home & gift shop selling on Shopify and Etsy. We follow its numbers throughout this workbook. Here is its monthly dashboard:

| KPI | GOAL | ACTUAL | STATUS |
|------------------------|---------|---------|----------|
| Website visitors | 7,000 | 6,200 | Below |
| Email subscribers | 2,100 | 2,060 | On track |
| Conversion rate | 3.5% | 3.0% | Below |
| Revenue from marketing | \$7,500 | \$7,068 | On track |
| Total social followers | 11,500 | 11,025 | On track |

At a glance: traffic and conversion are the two areas falling short of goal — so those become the focus later in the Action Plan.

YOUR TURN — FILL THIS IN

| KPI | GOAL | ACTUAL | STATUS |
|------------------------|------|--------|--------|
| Website visitors | | | |
| Email subscribers | | | |
| Conversion rate | | | |
| Revenue from marketing | | | |
| Total social followers | | | |
| Add your own | | | |

▶ TIP

Pick just 3 KPIs to focus on each month. Five red flags at once is overwhelming — one clear target gets acted on.

02 TRACKERS & WORKSHEETS

Monthly Traffic Tracking

This page tracks your **total visitors month by month**. One month tells you little — the trend over time tells you whether your marketing is working.

→ **HOW TO USE THIS PAGE**

Each month, record your total visitors and calculate the change from the previous month: **(This month – Last month) ÷ Last month × 100**. Use the Notes column to record what you tried that month (a sale, a viral post, an ad).

EXAMPLE – WILLOW LANE GOODS

| MONTH | VISITORS | CHANGE | NOTES |
|----------|----------|--------|----------------------|
| January | 4,800 | — | 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% | — |
| June | 6,200 | +4.2% | TikTok post took off |

Six straight months of growth — about **+5% each month**. The exact number matters less than the steady upward line.

◆ **BENCHMARK**

For a growing small business, **5–10% traffic growth per month** is strong. Flat or falling traffic for 2–3 months in a row is your signal to try a new channel.

YOUR TURN – FILL THIS IN

| MONTH | VISITORS | CHANGE | NOTES |
|----------|----------|--------|-------|
| January | | | |
| February | | | |
| March | | | |
| April | | | |
| May | | | |
| June | | | |

▶ **TIP**

Always pair a number with a note. "+22% in June" is useful only when you remember it was the month a TikTok video took off — so you can do it again.

03 TRACKERS & WORKSHEETS

Website Visitors Tracker

Now break your visitors down by **source**. Knowing where people come from tells you which channels deserve more of your time and money — and which to drop.

→ **HOW TO USE THIS PAGE**

In your analytics, find "Sessions by source" or "Traffic sources." Record visitors from each channel, then calculate each one's share: **channel visitors ÷ total visitors × 100**.

EXAMPLE — WILLOW LANE GOODS

| SOURCE | VISITORS | % OF TOTAL | NOTES |
|----------------|--------------|-------------|------------------|
| Organic search | 2,100 | 33.9% | Top channel |
| Social media | 1,550 | 25.0% | Mostly Pinterest |
| Direct | 980 | 15.8% | Repeat buyers |
| Email | 900 | 14.5% | Best converter |
| Paid ads | 670 | 10.8% | \$420 spend |
| Total | 6,200 | 100% | — |

Two channels — organic search and social — drive nearly 60% of Willow Lane's traffic. Those are the engines worth protecting and growing.

◆ **BENCHMARK**

Most healthy stores have **2-3 strong channels**, not ten weak ones. If a single source is over 70% of traffic, that is a risk — build a second channel as a backup.

YOUR TURN — FILL THIS IN

| SOURCE | VISITORS | % OF TOTAL | NOTES |
|----------------|----------|------------|-------|
| Organic search | | | |
| Social media | | | |
| Direct | | | |
| Email | | | |
| Paid ads | | | |
| Other | | | |
| Total | | | |

▶ **TIP**

Spend your effort where it already works. Growing a channel that brings 25% of traffic beats trying to rescue one that brings 2%.

04 TRACKERS & WORKSHEETS

Social Media Growth Tracker

Track your follower count on each platform so you can see which ones are growing — and where your effort pays off best.

→ HOW TO USE THIS PAGE

Record each platform's follower count at the start and end of the month. **Net growth = End - Start**. **Growth % = Net ÷ Start × 100**. Add engagement rate if your platform shows it (likes + comments ÷ followers).

EXAMPLE — WILLOW LANE GOODS

| 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 is growing fastest (+22.6%) while Facebook has stalled (+2.9%). That is a clear hint about where to put creative energy next month.

◆ BENCHMARK

Follower count is a vanity metric on its own — **engagement rate** matters more. For small accounts, **1-3% engagement** is healthy; 3%+ is excellent.

YOUR TURN — FILL THIS IN

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

▶ TIP

Do not try to be everywhere. Pick the 1-2 platforms where your audience already engages and post consistently — consistency beats being on every app.

05

TRACKERS & WORKSHEETS

Email Subscriber Tracker

Email is usually the highest-ROI channel a small business has — you own the list, and it costs almost nothing to send. Track its size and health every month.

→ HOW TO USE THIS PAGE

From your email tool, record your list size at the start, how many subscribers you **gained** and **lost**, and your average **open** and **click** rates. End list = Start + New - Unsubscribed.

EXAMPLE — WILLOW LANE GOODS

| METRIC | THIS MONTH |
|--------------------------|--------------|
| Subscribers (start) | 1,840 |
| New subscribers | +260 |
| Unsubscribed | -40 |
| Subscribers (end) | 2,060 |
| Net growth | +12.0% |
| Average open rate | 42% |
| Average click rate | 3.2% |

A 42% open rate is excellent — this list is engaged, not just large. That is exactly the kind of list that drives repeat sales.

◆ BENCHMARK

Open rate 25-40% healthy · click rate 2-3%+ · list growth 2.5-5% per month. A small, engaged list beats a large, cold one every time.

YOUR TURN — FILL THIS IN

| METRIC | THIS MONTH |
|---------------------|------------|
| Subscribers (start) | |
| New subscribers | |
| Unsubscribed | |
| Subscribers (end) | |
| Net growth % | |
| Open rate | |
| Click rate | |

▶ TIP

Watch open rate, not just list size. If opens fall, remove subscribers who have not opened in 90 days — a cleaner list improves deliverability and your real reach.

06

TRACKERS & WORKSHEETS

Conversion Rate Tracking

Conversion rate is the single most powerful KPI: the % of visitors who actually buy. Doubling it doubles your sales with the same traffic.

$$\text{Conversion rate} = \text{Orders} \div \text{Visitors} \times 100 = \%$$

→ HOW TO USE THIS PAGE

Track your visitors and orders, then divide. To find *where* shoppers drop off, also record the funnel stages below — the biggest fall tells you exactly what to fix first.

EXAMPLE — WILLOW LANE GOODS

| FUNNEL STAGE | PEOPLE | % OF VISITORS |
|--------------------|--------|---------------|
| Visited the store | 6,200 | 100% |
| Added to cart | 496 | 8.0% |
| Reached checkout | 248 | 4.0% |
| Completed purchase | 186 | 3.0% |

Willow Lane converts at 3.0%. The biggest drop is checkout → purchase (4.0% to 3.0%) — a sign to simplify checkout or add trust badges.

◆ BENCHMARK

Ecommerce conversion: 1-3% is typical, 3%+ is strong. Willow Lane is solid at 3.0%. Even a jump to 3.5% would add about 31 sales a month on the same traffic.

YOUR TURN — FILL THIS IN

| FUNNEL STAGE | PEOPLE | % OF VISITORS |
|--------------------|--------|---------------|
| Visited the store | | |
| Added to cart | | |
| Reached checkout | | |
| Completed purchase | | |

▶ TIP

Find your biggest drop-off and fix that one step. Improving conversion is almost always cheaper than buying more traffic.

07 TRACKERS & WORKSHEETS Revenue From Marketing Tracking

Clicks and followers feel good, but revenue pays the bills. This page connects each marketing channel to the money it actually brings in.

→ HOW TO USE THIS PAGE

Record the revenue attributed to each channel (most platforms show "sales by source"). For paid channels, also record spend and calculate **ROAS = revenue ÷ spend** — how many dollars you earn per \$1 of ad spend.

EXAMPLE — WILLOW LANE GOODS

| CHANNEL | REVENUE | SPEND | ROAS |
|----------------|----------------|--------------|----------|
| Organic search | \$2,360 | \$0 | — |
| Email | \$1,950 | \$0 | — |
| Social media | \$1,420 | \$0 | — |
| Paid ads | \$980 | \$420 | 2.3x |
| Direct | \$358 | \$0 | — |
| Total | \$7,068 | \$420 | — |

Email and organic earn real revenue at almost no cost. Paid ads return only **\$2.30 per \$1** — below target once product costs are included.

◆ BENCHMARK

A common ROAS target is 3-4x or higher. Below ~2x usually loses money after product, shipping, and fees. Willow Lane's 2.3x ad ROAS needs improvement or trimming.

YOUR TURN — FILL THIS IN

| CHANNEL | REVENUE | SPEND | ROAS |
|----------------|---------|-------|------|
| Organic search | | | |
| Email | | | |
| Social media | | | |
| Paid ads | | | |
| Direct | | | |
| Total | | | |

▶ TIP

Pour more into your free, high-revenue channels (email, organic) before scaling paid ads. The cheapest sale is the one you do not pay an ad platform for.

08 TRACKERS & WORKSHEETS Campaign Performance Tracker

Use this page to compare individual campaigns — a sale, an ad set, an email blast — side by side, so you know which to repeat and which to retire.

→ HOW TO USE THIS PAGE

Give each campaign one row. Record spend, clicks, conversions (sales), and revenue. For paid campaigns add **ROAS = revenue ÷ spend**. Use consistent names so you can compare month to month.

EXAMPLE — WILLOW LANE GOODS

| CAMPAIGN | CHANNEL | SPEND | CLICKS | SALES | REVENUE | ROAS |
|-------------------|-------------|-------|--------|-------|---------|------|
| Spring Email Sale | Email | \$0 | 180 | 64 | \$2,180 | — |
| IG Story Ads | Paid social | \$250 | 540 | 38 | \$1,140 | 4.6× |
| Google Search | Paid search | \$170 | 210 | 22 | \$760 | 4.5× |

The Spring Email Sale cost nothing and earned \$2,180 — the clear winner. Both paid campaigns beat 4× ROAS, so they are worth scaling.

◆ BENCHMARK

Compare campaigns by **ROAS and cost per sale**, not by clicks. A campaign with fewer clicks but more sales is the better campaign. Cut anything under 2–3× ROAS; scale the winners.

YOUR TURN — FILL THIS IN

| CAMPAIGN | CHANNEL | SPEND | CLICKS | SALES | REVENUE | ROAS |
|----------|---------|-------|--------|-------|---------|------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

▶ TIP

Review campaigns weekly while they run, not just at month-end. Pausing a losing ad on day 3 instead of day 30 saves real money.

09 TRACKERS & WORKSHEETS

Monthly KPI Review

Once a month, bring your headline numbers onto one page. Comparing this month to last month *and* to your goal is how data becomes decisions.

→ HOW TO USE THIS PAGE

Pull the key figure from each tracker. Fill in this month, last month, and your goal, then mark the status. Reading all three together shows both your **trend** and your **target gap**.

EXAMPLE — WILLOW LANE GOODS

| KPI | THIS MO. | LAST MO. | GOAL | STATUS |
|-------------------|----------|----------|---------|----------|
| Website visitors | 6,200 | 5,950 | 7,000 | Below |
| Conversion rate | 3.0% | 2.8% | 3.5% | Below |
| Email subscribers | 2,060 | 1,840 | 2,100 | On track |
| Social followers | 11,025 | 10,170 | 11,500 | On track |
| Revenue from mktg | \$7,068 | \$6,640 | \$7,500 | On track |
| Ad ROAS | 2.3× | 2.1× | 3.0× | Below |

Everything improved over last month — good. But visitors, conversion, and ROAS are still below goal, so they lead the Action Plan.

YOUR TURN — FILL THIS IN

| KPI | THIS MO. | LAST MO. | GOAL | STATUS |
|-------------------|----------|----------|------|--------|
| Website visitors | | | | |
| Conversion rate | | | | |
| Email subscribers | | | | |
| Social followers | | | | |
| Revenue from mktg | | | | |
| Ad ROAS | | | | |

▶ TIP

Up vs last month is progress; below goal is opportunity. A KPI can be both — celebrate the trend, then close the gap.

10 TRACKERS & WORKSHEETS

Action Plan Worksheet

This is where tracking turns into growth. Take the KPIs that fell short, pick the ones with the biggest payoff, and commit to one specific action each.

→ HOW TO USE THIS PAGE

For each focus KPI, write **why** it matters, **one** concrete action, a **deadline**, and how you will measure the **result**. One action per KPI — clarity beats a long list.

EXAMPLE — WILLOW LANE GOODS

| FOCUS KPI | ONE ACTION THIS MONTH | TARGET |
|-----------------|---|-------------------|
| Conversion rate | Simplify checkout; add reviews & trust badges | 3.0% → 3.5% |
| Email revenue | Send 1 extra campaign + a welcome sequence | \$1,950 → \$2,400 |
| Ad ROAS | Pause the lowest-ROAS ad; reinvest in winners | 2.3x → 3.0x |

Willow Lane's biggest lever is **conversion** — lifting it from 3.0% to 3.5% adds roughly 31 sales a month with no extra traffic or ad spend.

YOUR 30-DAY ACTION PLAN

| FOCUS KPI | ONE ACTION THIS MONTH | BY WHEN | RESULT |
|-----------|-----------------------|---------|--------|
| 1. | | | |
| 2. | | | |
| 3. | | | |

▶ TIP

Choose just one KPI to move this month. When you change only one thing, you will know exactly what worked — and can repeat it.



LONG-TERM TRACKING

12-Month KPI Overview

Use this annual grid for the big picture. Fill one row each month and watch the trend across the whole year — this is where steady progress becomes obvious.

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

◆ **BENCHMARK**

Look for the **direction of the line**, not month-to-month bumps. A KPI that rises most months is healthy; one that drifts down for a quarter needs a new plan.

► **TIP**

Photograph or scan this page each quarter. A simple before-and-after of your numbers is the most motivating progress report you will ever keep.



WRAP-UP

Quarterly Review & Next Steps

Every three months, zoom out. Review your trackers together and ask three simple questions to set your direction for the next quarter.

◆ **WHAT WORKED?**

Which channel or campaign grew the most? Do more of it next quarter.

◆ **WHAT DIDN'T?**

Which effort cost time or money with little return? Cut it or fix it.

◆ **WHAT'S NEXT?**

Pick one channel to grow and one KPI to improve. Set fresh goals on the Dashboard and start a new month.



QUARTERLY NOTES

| QUARTER | BIGGEST WIN | BIGGEST LESSON | FOCUS NEXT QUARTER |
|---------|-------------|----------------|--------------------|
| Q1 | | | |
| Q2 | | | |
| Q3 | | | |
| Q4 | | | |

*"You can't grow what you don't track.
Measure it, and momentum follows."*

Revisit these trackers every month — small, consistent measurement is what turns marketing effort into real growth.