

# WEEK THREE - KPIS

## WHERE TO FIND THEM & WHAT TO DO WITH THEM WHEN YOU DO

Name: \_\_\_\_\_

### Profit and Loss Basics

We want you to spend some time getting comfortable with the basics here and track the same things consistently. Please tell us three things from your Profit and Loss statement that you are looking at or want to start looking at and if you know what section of the P&L to look at to find the information!

1. \_\_\_\_\_

\_\_\_\_\_ Do you know where to find it? **YES** **NO**

2. \_\_\_\_\_

\_\_\_\_\_ Do you know where to find it? **YES** **NO**

3. \_\_\_\_\_

\_\_\_\_\_ Do you know where to find it? **YES** **NO**

Do you know if you are currently below, at or above your budget for the following: (If you don't have a budget, do you know where you are compared to the industry standard?)

**Below**

**At**

**Above**

Revenue

COGS (cost of goods sold)

Labor - DVM

Labor - Non-DVM

Administrative

Advertising



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### PMS Basics

You may not need to be the person in your practice who is the software guru! But there are definitely some things you need to know how to find. Please find the following information and tell us how you did for April.

1. New clients \_\_\_\_\_

2. Active clients \_\_\_\_\_

3. ATF/ATC \_\_\_\_\_

4. Number of transactions per DVM

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Number of transactions total for clinic

\_\_\_\_\_

6. Individual DVM production

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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