



# Performance Metrics

“Scaling Your Business Starts with the Right Spreadsheets”

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# A Few Facts About Us

- Established in January 2011 in Portland, OR
- Started out with two of us putting \$1K into a bank account
- Now full-time team of 20 all onsite
- Over 50,000 websites powered by our open source contributions
- Named Portland Business Journal's 9th Fastest Growing Private Company in 2014





## The Problem with Intuitive Decision Making

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- How young Drupal shops function
- Early staffing/hiring decisions
- All hands on deck - all the time
- Specialization/innovation happens at night
- Marketing, sales, operations (i.e., non-client work) happen at night
  - or they don't happen at all...



## Data v. Information - Learning What to Track & What It Means

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- “Lazy metrics” - The pitfalls of non-meaningful metrics
- When is the data good enough?
- “Iterative information”
- Prediction as part of measurement



## Overview of a Metric/Planning System

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- Time tracking tool (Harvest)
- “Billable Hours” matrix
- Resource allocation spreadsheet (Or Harvest w/ Forecast App)
- “Aggregated pipeline” tool
- Pulling it together in your P&L (QuickBooks, etc.)



## Establishing a Data-Driven Framework: Turning the Dials

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Innovation



Staff Satisfaction

Client Success





## Spreadsheet Deep Dive

- *Why forecast by week rather than by month?*
- The Mongolian Tugrik
- The "Billable Hours Matrix"
- The "Aggregated Pipeline Spreadsheet"



# Thank you! Any questions?

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