Don't trust your gut

AGENCY OPERATIONS METRICS
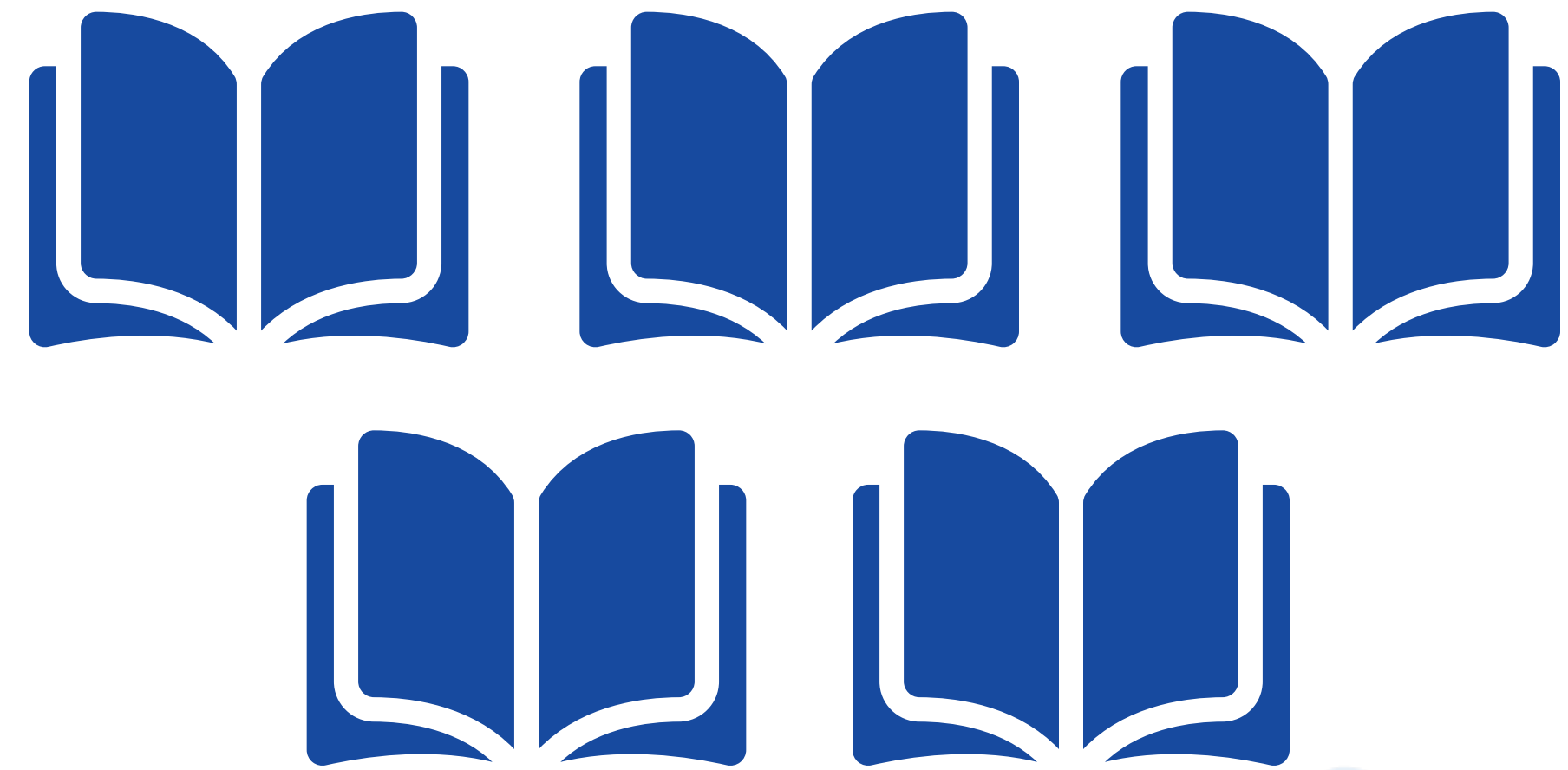
bluespark

The Metrics of Me

The Metrics of Me

x 159

13,006

days old

5

books read so far in 2018

The Metrics of Me

6.3
hours of sleep
per night

4.5
hours in dance class
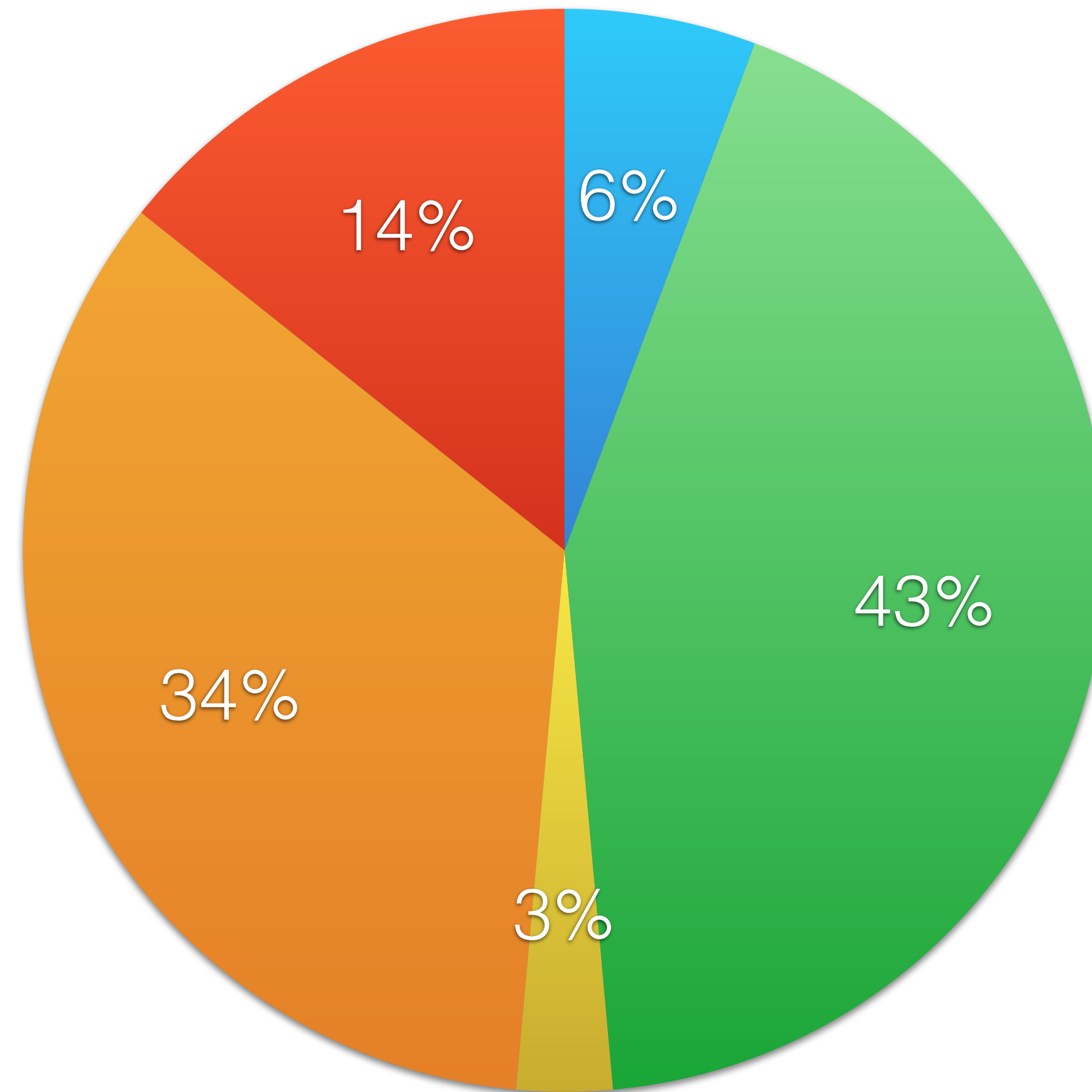each week

4
hours cooking
each week

0
hours commuting
each week

The Metrics of Me

Where I've spent my life:

6% Milwaukee, WI
43% Janesville, WI
3% Bourges, France
34% Paris, France
14% Chicago, IL

The Metrics of Me

1:1 Ratio

I have 2 children
girl & boy

50%

Married vs the time
I've known him

1/3rd

of my career
at Bluespark

Context Matters

BUT FIRST, A LITTLE CONTEXT

Bluespark

- Founded in 2009
- Current team size of 20 people, in-house design & development
- Time & Materials billing
- Growth of 61% in terms of revenue and 50% team size since 2015

Let's Take it Back to 2015
Drupalcon LA

—

- Party time!
- Excellent!
- Schwing!

2015 Drupalcon LA

SCALING YOUR BUSINESS STARTS WITH THE RIGHT SPREADSHEETS: PERFORMANCE METRICS

Sean Larkin's Talk:
"Scaling Your Business Starts with the Right Spreadsheets: Performance Metrics"

ThinkShout

Sean Larkin
Founder/Former CEO
ThinkShout

Billable Hours Matrix

- Set your rate and expenses and see their effect of profit
- Plan for maximum billable utilization
- Plan for realistic billable utilization
- Comparisons in terms of revenue, profit and hours of realistic to maximum
- Plan for team growth
- Plan for events, absences and effect on revenue in a given month

Under Contract

- Current work runway
- Sales pipeline
- Calculates value and timeline for existing portfolio
- Calculates future workload based on likelihood to close of sales pipeline

Adaptations Billable Hours Matrix

- Potential revenue per role (at reasonable billable rate)
- Revenue, profit and margin at different utilization rates
- Booked vs Capacity comparison with monthly and annual sales targets

Adaptations to Under Contract

- Under contract was a runway and pipeline tool in the original spreadsheet.
- My adaptations make it more of an operations tool.
- From view of current and potential client work, to a detailed planning document that combines project health, team utilization and schedules, with revenue projections and comparisons to actuals
- From Under contract to **MEGASHEET**

Megasheet

- Actuals
- Utilization rate
- Value of all current accounts
- Timeline and budget of all current accounts
- Velocity needed to complete projects on time
- Remaining budget on projects
- Projected work for the year
- Projected revenue for the year

Project Megasheet 2018 - Template

All Projects

TIMELINE

	Client code	Year	Project	Type	Status	AM	PM	Primary	% to close	Date Won/Closed	Today's date	Project Start date
4	NYC	2018	New York City Site Redesign	SO\	Active	GK	SH	SW	100%	12/10/2017	4/10/2018	1/10/2018
5	LA	2018	Los Angeles Site Redesign	SO\	Active	GK	SH	MJ	100%	1/24/2018	4/10/2018	2/1/2018
6	CHI	2018	Chicago Site Redesign	SO\	Active	GK	SH	SW	100%	1/30/2017	4/10/2018	3/1/2018
7	HOU	2018	Houston Site Redesign	SO\	Active	GK	SH	SW	100%	3/1/2017	4/10/2018	5/1/2018
8	PNX	2018	Phoenix Ongoing Retainer	RE\	Active	GK	SH	Sy\	100%		4/10/2018	
9	PHI	2018	Philadelphia Ongoing Retainer	RE\	Active	GK	SH	BD	100%		4/10/2018	
10	SANA	2018	San Antonio Ongoing retainer	RE\	Active	GK	BN	MJ	100%		4/10/2018	
11	SAND	2018	San Diego Maintenance	MAI	Active	MG	BN	RJ	95%		4/10/2018	
12	DAL	2018	Dallas Maintenance	MAI	Active	MG	BN	RJ	100%		4/10/2018	
13	SANJ	2018	San Jose Maintenance	MAI	Active	MG	BN	MV	100%		4/10/2018	
14	AUS	2018	Austin Maintenance	MAI	Active	MG	BN	EB	100%		4/10/2018	
15	JAC	2018	Jacksonville Maintenance	MAI	Active	MR	BN	TM	100%		4/10/2018	

All Contracts/Proposals | 2018 Projections | 2018 Actuals | Variables

Megasheet

- Will my current team configuration be able to complete the work we have lined up?
- How many people do I need to assign to this project to complete it on time?
- Do I need to hire?
- How much available capacity does my team have?
- How utilized is my team?
- How did my team perform last month compared to projections?
- How much revenue will my company bring in in future quarters with current signed portfolio?
- How much additional sales do I need to close to bill at capacity in future quarters?

Links! (This screen is small…)

The Megasheet
https://bit.ly/2qjlDOZ

Billable Hours Matrix 2.0
https://bit.ly/2qoxJXI

Tips for Implementing

- Start small
- Adapt and evolve over time
- Share it

Thank You!

Questions?

Ashleigh Thevenet
COO
ashleigh@bluespark.com

The Megasheet
https://bit.ly/2qjlDOZ

Billable Hours Matrix 2.0
https://bit.ly/2qoxJXl

@bluesparklabs

/bluesparkllc

bluespark.com