WEEKLY BUSINESS DASHBOARD

A one-page weekly scorecard of your key numbers, with targets and automatic calculations.

TYPE: WORKSHEET REVIEWED: NOVEMBER 2026 TIME: 15 MINUTES A WEEK LEVEL: BEGINNER

AT A GLANCE

- Page 2 is a **fillable dashboard** for one month: a target column and up to five weeks.
- Enter your numbers every week. The dashboard calculates your **average sale** and **cost per new customer**.
- Which numbers matter most for your business is explained in **O-10 Tracking the Numbers That Matter**.

How to use it

1. **Set your targets** in the first column at the start of the month.
2. **Every week, at the same time**, fill in that week's column from your point-of-sale system, bank and bookkeeping software.
3. **Compare each number with the target.** Circle anything far off.
4. **Write one action** for the coming week in the notes box.
5. **Save a copy each month** to see trends over time.

What each line means

Line	Where to find it
Sales	Point-of-sale system, online store or bookkeeping
Number of sales	Transactions, orders or jobs
Average sale	Calculated: sales divided by number of sales
New customers	Your customer list, booking system or "how did you hear about us"
Marketing spending	Bank and card statements
Cost per new customer	Calculated: marketing spending divided by new customers
Gross margin (%)	From your bookkeeping, or an estimate. See **M-08 Costs, Margins and Break-Even**.
Cash in the bank	Your bank balance at week's end
Owed by customers	Unpaid invoices
New reviews	Your review sites
Owner hours worked	Your own estimate. See **S-09 Pacing Yourself: Building Without Burning Out**.

EXAMPLE

Grace noticed her average sale dropped from $68 to $52 for two weeks, even though the number of sales rose. Customers were ordering single meals instead of weekly bundles after she changed her website. She moved the bundles back to the top of her menu, and her average sale recovered the next week.

TIP

Calculations work in **Adobe Acrobat Reader** (free) and most desktop PDF apps.

Where to go next

- **O-10 Tracking the Numbers That Matter**
- **M-14 Monthly Money Checklist**
- **R-22 Investor Updates: Keeping Investors in the Loop**

IMPORTANT
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Fill in one column each week. Shaded lines calculate automatically.

Month

	Target	Week 1	Week 2	Week 3	Week 4	Week 5
Sales						
Number of sales						
Average sale						
New customers						
Marketing spending						
Cost per new customer						
Gross margin (%)						
Cash in the bank						
Owed by customers						
New reviews						
Owner hours worked						

What went well this month

What to change

One action for next week

Fill in the white boxes. Shaded boxes calculate automatically.