

Stepping into The Golden A.G.E

An effective way to lead your business into new levels of success



Golden AGE of Business
Going from Average to Good to Excellent

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Bookkeeping Team Performance Review

Bookkeeper Performance - A.G.E targets				
Goals	Average	Good	Excellent	Actuals
BK capacity	15 per month	20 per month	25 per month	
Days to Close*	On Time	-1 Day	-3 Days	
Client Services	75%	80%	90%+	

* Days to close are based on the BK's due dates set by the Accounting Manager each month

** Accuracy is based on the average number of corrective notes per client (1 - total corrections/total transactions classified)



Marketing Team Performance Review

Marketing Assistant Performance - A.G.E targets				
Goals	Average	Good	Excellent	Actuals
Content Distribution	5 per week	3 per day	7 per day	
Content Engagement	5%+	15%+	30%+	
Leads Generated	8	12	15	

* Content Distribution is a cumulative across all content platforms

** Content Engagement the percentage of impressions that engage (comment, react, share) the content



Sales Team Performance Review

Sales Performance - A.G.E targets				
Goals	Average	Good	Excellent	Actuals
Sales per month	1 @\$1,000	2 @\$1,200	3 @\$1,200	
Marketing CAC	\$1,500	\$1,200	\$1,000	
Client Services	1 Touch point monthly	1 Touch point monthly + Tax prep	Bi-weekly Touchpoint	

* Marketing CAC is the cost to acquire a new client (last 3 months spend divided by new clients during that time)

** Client Services how many times are we communicating or providing the client with something of value (email, reporting, call, meeting, etc)



Golden A.G.E. Strategies

Follow us for more tips on how to apply the Golden A.G.E. process to the following areas of your business:

www.1GoldenAGE.com

- Accounting & Finance
- Product Development
- Production & Execution
- Customer Success Journeys
- Business Development

- Talent Management
- Marketing
- Customer Support
- Sales
- Pricing Strategies





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