

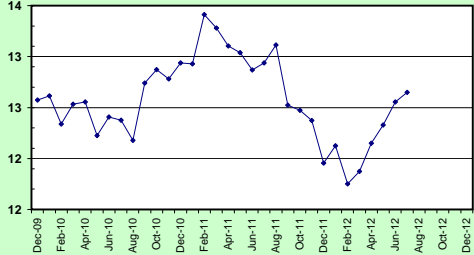
**UPDATED -- 2012**

Please scroll down three pages for instructions and helpful hints to customize and use this tool!

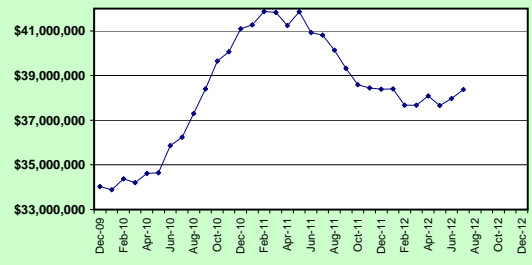


**ABC Company: CFO Financial Dashboard**  
**8-Charts: Financial and Employee Information**

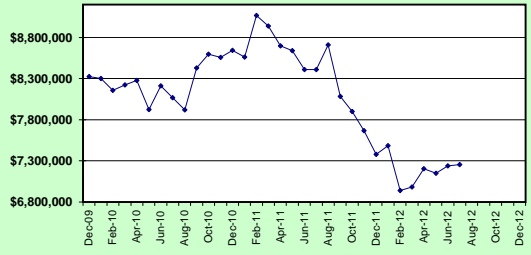
**What Causes Sales - # Salespeople 12MMA**



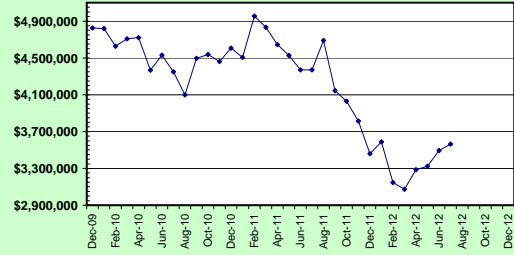
**Revenues = Actual Billings - T12M**



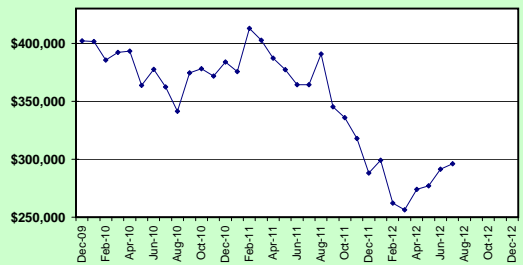
**EBITDA \$ - T12M**



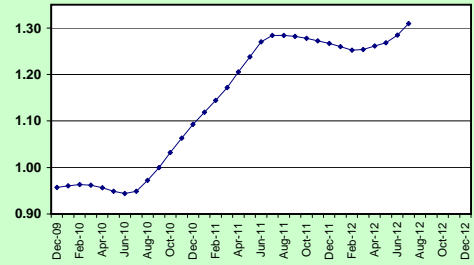
**Pretax Earnings \$ - T12M**



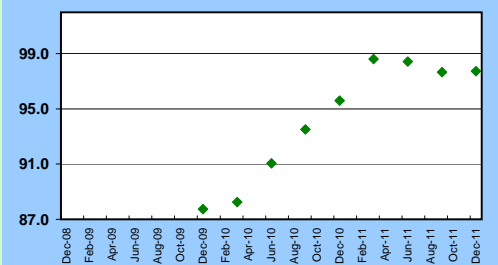
**Change in Cash \$ - 12MMA**



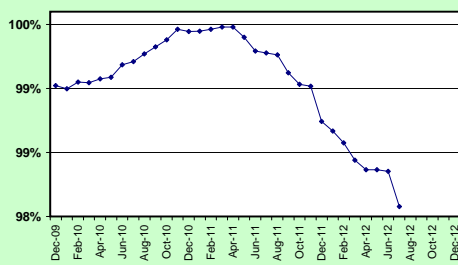
**Debt:Equity Ratio**



**Employee Happiness - Ratio**



**Employee Retention % - 12MMA**



This 8-Chart Tool is from the author of: *CEO TOOLS...for EVERY Manager's Success!*  
 Visit us at [www.ceotools.com](http://www.ceotools.com) for more tools and information on the hot-selling book/CD.  
 Contact Kraig Kramers at 770-389-8511 or email [kwker@mindspring.com](mailto:kwker@mindspring.com), please!

**BUY IT!** To buy this tool in easy to use Excel Format, go to: [www.ceotools.com](http://www.ceotools.com) and use Visa or M/C. Just \$57.95 in ready-to-use Excel format. Download link will immediately be emailed to you!



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## CFO Dashboard: Manage up to 8 Operations or 8 Key Indicators at once!

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### HOW TO USE this extraordinary management tool for up to 8 divisions or 8 key indicators:

1. Understand how to use Trailing 12 Month (T12M) Charts by visiting [www.ceotools.com](http://www.ceotools.com) website and getting the free download of T12M Charts (click the refresh button until T12M appears in the free tools box on the right of the homepage, then request that tool and it will be in your email in-basket instantly). Even better, read all about T12M Charts in Kraig Kramers' book (pages 86 - 97): **"CEO Tools: the Nuts 'n Bolts of Business for Every Manager's Success."**
2. To prepare your 8-Charts on one page, either enter or import your data into the appropriate data fields (green headings) under the "Data" tab at the bottom of your screen. If you plan to use the eight charts shown above, you're almost done once you've entered your data. All you need to do to complete your chart page is to re-scale each of the four charts and type the name of your business at the top. To re-scale the charts, double-click your cursor in the vertical scale on the left side of the chart. Then select "Scale" at the top of the dropdown. Enter the minimum and maximum amounts for your data and click "okay." Save your charts under the name you choose.
3. If you wish to change the charts to reflect other information, simply change the titling to suit. **Even better, go to [www.ceotools.com](http://www.ceotools.com) to check out the GREAT 4-Chart Tool for each Division!**
4. With that you can catapult your business to higher long-term profits by managing the 3 things that drive profit, namely Billings \$, Gross Margin-%, and Operating Expenses. Figure out what drives billings (i.e., "what causes sales" page 92 of CEO Tools), and MANAGE THAT! Work on gross margin improvement through price, mix and volume enhancements. Finally, control operating expenses to be in line with gross margins, especially as to timing of expense control. You'll find you react sooner to cut expenses, and faster to accelerate sales, by using these charts.



The 8-Charts Tool is from the author of: *CEO TOOLS...for EVERY Manager's Success!*  
Visit us at [www.ceotools.com](http://www.ceotools.com) for more tools and information on the hot-selling book/CD.  
Contact Kraig Kramers at 770-389-8511 or email [kwker@mindspring.com](mailto:kwker@mindspring.com), please!



## **Kraig's Chart Tips**

- 1. Line graphs, never bar charts, seldom pie.**
- 2. One graph per chart...stack charts vertically if you want comparatives!**
- 3. Two years of history plus the year we're now in and tracking.**
- 4. Re-scale to fill up vertical space (see Page 7 aka Fix Up Your Chart!).**
- 5. T12M for one variable vs. 12MMA for two (% , ratio, index).**
- 6. Right chart time frequency: T12M, T4Q, T52W, and/or T365D.**
- 7. Power-Tools: 4-Charts, 5-Charts, 8-Charts @ [www.ceotools.com](http://www.ceotools.com).**
- 8. Only T12M-type charts; those ordinary and YTD charts lie!**
- 9. You can track ANYTHING with T12M and related charts.**
- 10. Use to forecast budget or projections – and track actuals against.**
- 11. No trailing 3-month, 6-month, or 18-month charts: they'll bite you!**
- 12. Charts should have white background and big data point markers along the lines of your graphs.**
- 13. Eventually, we'll talk about 3-over-3 and 12-over-12 charts (also known as rate-of-change charts), but please understand T12Ms thoroughly first, else confusion will probably result! Yes, I do love those RoC charts, too!**
- 14. Try Dashboards: visit [www.ceotools.com](http://www.ceotools.com), click on New Tools Catalog, then scroll down to various dashboards on many business topics!**

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## **FIX UP YOUR CHARTS!**

From CEO Tools at [www.ceotools.com](http://www.ceotools.com)

Many users have complained that Microsoft Excel's charting is not user-friendly and doesn't "work." This forced us to develop some information on using, applying, and overcoming Excel's charting shortcomings. Excel can indeed work, and we're all stuck with it, so here are a few tips, tools, and ideas based on extensive use of Excel's XP versions...other versions and operating environments before and after XP (e.g., 95, 2000, Vista, Seven) contain many of the same challenges, inconveniently re-packaged by Microsoft into even more challenging apps. Please use this guide to overcome these, but also please adapt our approach to different Excel versions. These tips also work for most charts in other software.

**How to Re-Scale Your Charts:** It is necessary to re-scale your chart when you first enter your data in any Trailing 12-Month (T12M) Chart or 12-Month Moving Average (12MMA), dashboard, or for that matter, any ordinary chart (it's just basic Excel 101A), and then every once in a while thereafter. The idea is to get your graph on each chart to "fill up" the vertical space of the chart border, so that your eye can most easily see ups and downs over the months. To re-scale, right-click in the vertical (left-hand, Y-axis) of each chart to get a "Format Axis" dropdown; then just select "Options" or "Format Axis" and you should see where you can select "Scale." Do select Scale and then change the Min, Max, Major & Minor Units, as well as the X-Axis Cross Point to be compatible with the full range of your calculated or entered numbers being charted. Again, the idea is to run your graph from your smallest number to the largest from that column (take a look at how we did it on T12M Charts at [www.ceotools.com](http://www.ceotools.com)). Save after re-scaling!

Another thought: you may need to re-scale or change the horizontal axis to show the right months. At [www.ceotools.com](http://www.ceotools.com) we re-set all charts each year so that you can download them with the upcoming year ready-to-go. If you want to do this yourself, just follow the same logic presented for the vertical axis to change your time (horizontal) axis.

**How to Structure Your Charts:** We like our charts to have two years of history plus the year we're currently tracking (currently in). What this does is allow you to see an overall trend, not just this year versus last. But at the same time, you don't want more than two years of history, else your chart might be scaled so severely that you don't see the fluctuations in current months that you need to see. So, let's say you want to set up a chart to track your sales each month during 2010 – you'll want to show each month of actual sales for 2008 and 2009 with the 12 months of 2010 on the chart with no numbers in them as you start the year. Take a quick look at the free PDF of the T12M Chart at [www.ceotools.com](http://www.ceotools.com) to see an example of this.

**How to Update Your T12M or 12MMA Charts Each Month:** As you enter your regular monthly number each month into the data column for an Excel chart, it will be necessary to *copy-paste* the logic for calculating that month's *T12M* or *12MMA number* down one row each month as you enter the actual new monthly number.



**CEO Tool: What Causes Sales!**  
**Command Your Sales Growth Destiny from Now On!**

“What Causes Sales” is different in almost every business, but you and your senior management team can figure out what it is! Once you do, you can move toward controlling your sales growth and your profit destiny for a long time.

Get your team together and brainstorm what really causes sales in your business. Focus on moving back up the chain-of-events that leads from booking the sale to lead inception. Find the step that you can manage (like number of salespeople, if that’s what really causes sales) but make sure it is a step that enables you to measure and control it *reliably* and *consistently*. Those elements are really important!

Here are some of the things that cause sales in various businesses. In some cases below, it’s how you get the measure to happen. Pick the *one* that creates the most impact in your business and then manage it *aggressively!* Take a look at this list and brainstorm with your management team what really works for you...*figure out what causes the following things to happen and then go manage those causes!*

Many Businesses:	# of Sales Feet on the Street measured over time (Monthly) # and \$ of RFP's (Requests for Proposal) in the Door per Month # of Telemarketing Calls or Email Hits per Week # of Qualified Leads per Week # of New Customers per Month
Manufacturing Companies:	# of New Distributors or Dealers per Month # of Net New Salespeople added per Month # of New Products Introduced per Month
Retailers:	# of Transactions per Day or Week \$ per Transaction per Day or Week # and Quality of P-O-S Encounters # of New Customers per Month
Repetitive Sellers:	% New to Existing Customers per Month % Repeat Customers per Month
Construction Companies:	# of Legitimate Change Orders per Month # and \$ of RFP's in the Door per Week or Month
Retailers:	# and Frequency of Direct Mail Drops per Month \$ of Retail Advertising per Month (of the kind that works) # of Referrals per Week or Month (know how to measure this)
Distribution Companies:	# of New Customers per Month and what causes this in your case! % Repeat Customers per Month and what causes this in your case!
Printing Companies:	# of Salespeople (technical consultant/salesperson)
Financial Services:	# of Referral “Asks” per Week
Restaurants:	New business: referrals or national TV/Radio advertising. Repeat customers: hostess/host demeanor, wait-staff & daily chef performance.

## What Causes Sales Tool

New edition May 2009.



Some Other Businesses: # of direct mailings or # of ads or # of tradeshow or # of internet hits.  
Special note: we have found that many b2b customers prefer to place orders on their own schedule and don't want to be "interrupted" by salespeople; leaders in these segments find that using internet ordering captures huge amounts of market share over salesforce approaches. The web, and customers' reaction to its convenience, are changing how we sell!

Please note: it's usually **not** a combination of the above, nor is it a handful, it's usually **one** of these! Yes, there are always four or five things that influence, or lead to sales, or help the customer buy from you, but Pareto's Principle applies here as everywhere (the 80/20 rule) – only one of the five is the real driver behind your getting orders.

If you sell through different channels, like direct and via the internet, then indeed you will almost certainly have a separate Cause of Sales in each channel. This will be similar for divisions doing different things, of course.

Brainstorm, then identify one-two possibilities, then test those ones you've chosen. Once proven, go with the number one Cause of Sales in your business.

Hope this is helpful in making your business more successful!

With very best wishes,  
*Kraig* and [www.ceotools.com](http://www.ceotools.com)

PS – Check out all the great tools in Kraig Kramers' book, *CEO TOOLS: The Nuts-n-Bolts of Business for Every Manager's Success* at our website [www.ceotools.com](http://www.ceotools.com). Also, check out the other tools available at [www.ceotools.com](http://www.ceotools.com) and the newest ideas and input from many of our business friends at our new blog [www.ceotools.com/blog](http://www.ceotools.com/blog) -- hope you enjoy using all the tools!