

This is just the title page. Keep reading and don't forget to read these orange blurbs!

# **Sample Monthly Report**

---

## **From Bright Orange Thread**

# Marketing Goal

---

The primary outcome we're working toward, which is used to guide decisions and measure overall progress.

Sperr's Fuel and Heating goal is to win 25 home heating oil customers per month.



We always start meetings with a reminder of why you hired us in the first place. It keeps us on track and puts the rest of the report in context.

# Client Acquisition Cost (CAC)

How much it costs to get a new customer, and how effectively your marketing spend drives growth.

**5.3%**

Conversion Rate\* > 2%

**\$750**

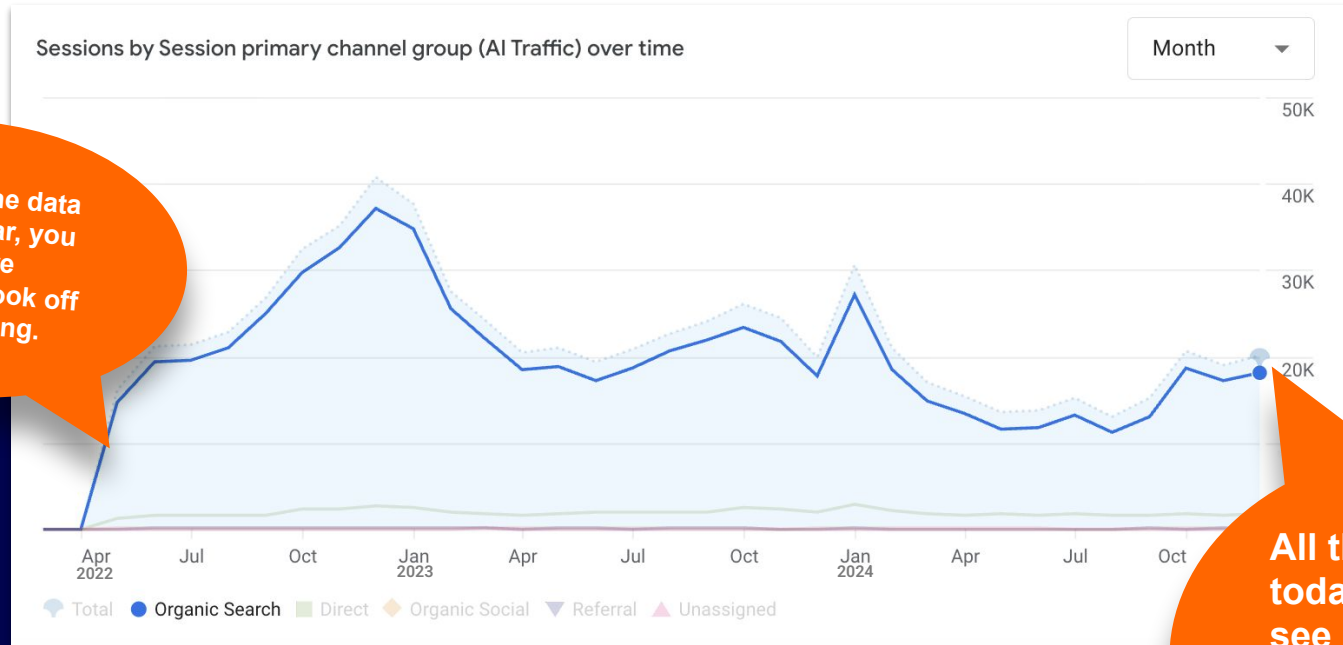
Cost/Customer\* < \$800

This is usually the metric CEOs want to see first. It shows how effectively customers are being acquired.

*\* Key performance indicators (KPIs) are set at the beginning of the engagement based on your baseline metrics and the growth targets we agreed on.*

# Momentum (Organic Search Traffic)

How often people are discovering the business on search platforms.



\*Data from Google Analytics

Looking at the data year over year, you can see where momentum took off at the beginning.

All the way to today... Here we can see if we're keeping pace, or if we need to make changes.

# Momentum (Email Engagement)

A measure of how actively the audience is opening, reading, and interacting with communications.

**3,942** Contacts

**11%**

Open Rate\* > 12%

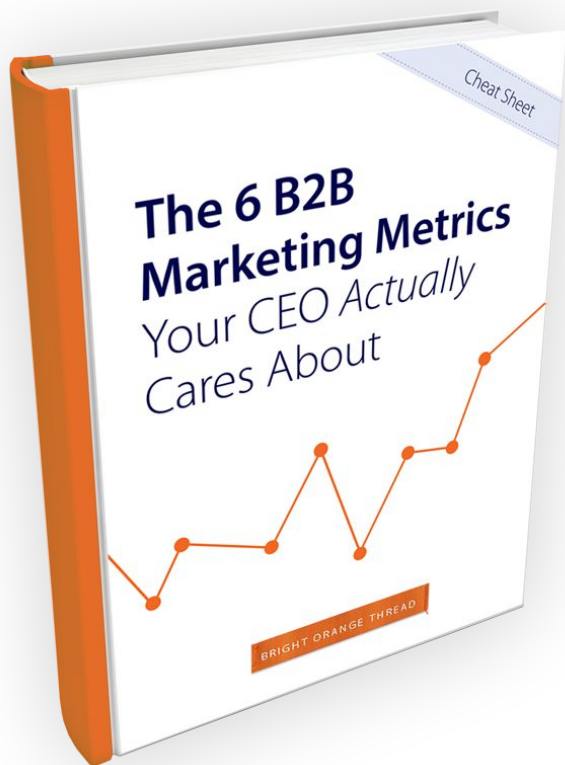
**.2%**

Click Rate\* > .2%

These numbers tell us something simple but important: whether or not people are paying attention. If the audience is engaged, growth gets a whole lot easier.

This is why reporting is important. We can both see we're not meeting the KPI. No one is in the dark, and we can pivot appropriately.

*\*Key performance indicators (KPIs) are set at the beginning of the engagement, based on your baseline metrics and the growth targets we agreed on.*



# Prove Marketing ROI

---

Discover the 6 Marketing Metrics  
You Actually Need to Track ROI

[Download the Whitepaper](#)