

EOS Core Process: Performance Tracking and Reporting

Process Owner: [Person from EOS Accountability Chart]

Last Updated: [Date]

Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:

Related EOS Rocks: [Current quarter Rocks that improve this process]

EOS Scorecard Metrics: [Weekly numbers tracked for this process]

Accountability Chart Connection: [Which seat owns this process]

Process Overview

Purpose: Measure, analyze, and report on marketing performance to optimize strategy and demonstrate ROI

High-Level Steps

1. Define KPIs and reporting schedule
2. Set up tracking and data collection
3. Compile and analyze performance data
4. Create reports and dashboards
5. Present insights to stakeholders
6. Implement optimization recommendations



Core Process Detailed Steps

Step 1: Define KPIs and Reporting Schedule

- Align KPIs with business objectives and marketing goals
- Set benchmarks and targets for each metric
- Determine reporting frequency (daily, weekly, monthly, quarterly)
- Identify stakeholders and their reporting needs
- Create standardized reporting templates

Step 2: Set Up Tracking and Data Collection

- Implement analytics tools (Google Analytics, marketing automation)
- Configure goal tracking and conversion funnels
- Set up automated data collection and integration
- Create UTM parameter standards for campaign tracking
- Establish data quality checks and validation

Step 3: Compile and Analyze Performance Data

- Collect data from all marketing channels and tools
- Clean and validate data for accuracy
- Calculate key metrics and performance indicators
- Identify trends, patterns, and anomalies
- Compare performance against targets and benchmarks

Step 4: Create Reports and Dashboards

- Compile data into standardized report formats
- Create visual dashboards for real-time monitoring
- Include executive summaries with key insights
- Highlight wins, challenges, and recommendations
- Ensure reports are accessible to all stakeholders

Step 5: Present Insights to Stakeholders

- Schedule regular reporting meetings
- Present findings with context and recommendations
- Facilitate discussion on performance and strategy
- Answer questions and provide additional analysis
- Document feedback and action items

Step 6: Implement Optimization Recommendations

- Prioritize optimization opportunities based on impact
- Create action plans for performance improvements
- Implement changes to campaigns and strategies
- Monitor impact of optimization efforts
- Update processes based on learnings

Quality Standards & Success Metrics

Must-Have Standards:

- [] Standard 1 (measurable)
- [] Standard 2 (measurable)
- [] Standard 3 (measurable)

EOS Scorecard Metrics:

Weekly Metric 1: [Target number]

Weekly Metric 2: [Target number]

Monthly Metric: [Target number]

Accountability: Marketing team owns all steps, Leadership team participates in step 5

Frequency: Daily monitoring, weekly reports, monthly deep dives, quarterly reviews

Success Metrics: Reporting accuracy, stakeholder satisfaction, optimization implementation rate, overall marketing ROI

Process Connections

Receives From: [Which EOS core process feeds into this one]

Hands Off To: [Which EOS core process this feeds into]

Dependencies: [Other processes or resources needed]



Tools & Resources

Required Systems/Tools:

Tool 1

Tool 2

Template/Document links

Training Materials:

Link to training video

Link to detailed SOPs (if needed)

Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:

Problem 1 → Solution 1

Problem 2 → Solution 2

Problem 3 → Solution 3

Escalation: [When to involve process owner or leadership team]



Process Improvement

Last Quarter's Improvements: [What was changed and why]

Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]

Issue 1

Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]

Leadership Team Review: [Date reviewed in Level 10 or quarterly]

Next Review Date: [Align with EOS quarterly cycle]



Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]

[Step 2 summary]

[Step 3 summary]

[Step 4 summary]

[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]

