

NXTCATALYST

SAMPLE ARTIFACT

Sample Metrics and Reporting Spec

Definitions, sources, cadence

Example artifact, not client specific

NXTCatalyst, Sample artifact, not client specific

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SAMPLE ARTIFACT

Purpose

Defines what gets measured, how it is calculated, where the data comes from, and who owns it.

NXTCatalyst, Sample artifact, not client specific

KPI: Speed-to-Lead

Definition

Time elapsed from lead creation to first outbound attempt by sales or automation

Formula

(time of first reply) minus (time lead came in)

Target

Under [X] minutes during business hours

KPI: Lead to Booked Conversion

Percent of leads that book an appointment

Show rate

Measure: Percent of booked appointments that actually show up

Cycle time

Measure: Days from first contact to closed won (or next milestone)

Failure rate

Measure: Percent of leads that hit an error, dead end, or manual review

KPI: Show Rate

Definition

Percentage of booked appointments where the prospect actually shows up

Formula

$\text{shows} / \text{booked_appointments}$

Target

[Z] percent show rate

KPI: Cycle Time

Definition

Duration from first touch with prospect to closed won status or next key milestone

Formula

`milestone_ts - first_touch_ts`

Target

Reduce by **[N]** percent quarter over quarter

KPI: Failure Rate

Definition

Percentage of automation events that encounter an error, reach a dead end, or require manual intervention

Formula

$\text{failed_events} / \text{total_events}$

Target

Maintain below **[A]** percent

Sources, Cadence, and Alerts

Data Sources

- **CRM:** Lead created, stage changes, owner, opportunity outcomes
- **Phone:** Call events, missed calls, callback timestamps
- **Email/SMS:** Sent events, reply events
- **Calendar:** Booked, rescheduled, no-show, attended
- **Automation layer:** Error logs, retries, fallbacks

Reporting Cadence

- **Daily:** Speed-to-lead, failures, backlog
- **Weekly:** Conversion and show rate, top sources, owner SLA compliance
- **Monthly:** Cycle time trends, ROI notes, change log summary

Alerts

- Response SLA breach (over [X] minutes)
- Failure spike (over [A] percent in 24 hours)
- Routing backlog (manual queue over [N] items)
- Tool outage detected

Ownership

Metric Owner

[Name or role]

Operations Owner

[Name or role]

Review Meeting

[Day/time cadence]