METRICS THAT MATTER

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Metrics that matter

The essential KPIs every accounting firm should track & measure.

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Don’t look back

For any business owner, success is only possible if they know their business inside and out. Accounting firms are not exempt. Knowing what makes your practice tick, where the money comes from, how staff are performing, and how much you are getting out of every resource is all critical knowledge.

The answers to these questions have always been found by following what every accounting firm before you has measured. But these common metrics came about in the age of desktop software, time-billing, and pen-pushing-only work—so the question must be asked: are they still relevant? Are these traditional KPIs still leading indicators of where your firm is headed? Do they surface the critical issues that require your attention?

“How is my accounting firm performing?” has always been answered by looking backwards with lag measures such as utilization and realization .

Calculating measurements like these has traditionally given partners the in-depth knowledge they need to know how their firm has been performing, along with enough detail to know any areas that need improving. But looking backward with these measures does not suffice any more.

“The world has moved to a subscription-based economy. The difference for many accountants switching to new pricing models is that this transition brings with it not only process change, but a whole new set of metrics for senior team members and staff alike.”

— Darren Glanville, Kandoo

Accounting has changed to a subscription-based service. You are witnessing first-hand how much the industry is evolving, with improved processes led by cloud software and a greater focus being placed on service delivery, output and client relationships. Traditional metrics are no longer sufficient for the modern accounting firm that implements value-based pricing, has a remote workforce, is doing away with timesheets, is collaborating with global or remote clients, or is conducting most of its work online. Today, you need to not only understand exactly where you are currently, but you also need to look forward and predict where you will be tomorrow.

If your practice has new skills or your team is virtual in any way, has reduced geographical dependence, or uses modern technology, you must measure your practice in ways that give you greater visibility and meaning than what traditional metrics, such as profitability and revenue, can provide. To survive the accounting revolution, you need new KPIs for success, output, performance and progress.

There is now one characteristic above all others that your firm must be striving for: scalability—the extent to which your firm can do more with less. To help you measure it, this guide details the essential metrics for the new accounting firm. 15 KPIs that you need to be tracking and measuring—with clear explanations of what each metric is, why it is important and how you can measure it.

Revenue metrics

The revenue coming into your accounting practice is one of the key factors that impacts your success, so it is critical that you understand it inside out. Not just from the point of view of how much is coming in—but how fast, how much you are losing, and where where any noteworthy activity is happening. The following metrics uncover this.

Monthly recurring revenue (MRR)

$$MRR = (Rev(p) + Rev(nc)) - Cancellations$$

What is it?

MRR tracks the sustainability of your firm by taking into account your recurring revenue at the end of your previous month, added to any additional committed revenue this month, less any cancellations from existing clients. You should usually measure this when your revenue is committed—your client has agreed to pay.

Why measure it?

One of your single most important metrics to track, your MRR is the lifeblood of your accounting practice. It very reliably predicts your ongoing revenue, which should be the major contributor to your top line. And remember, once a new client is acquired, there is no ongoing sales or marketing expenditure associated with that revenue regularly coming in.

> “MRR is the most important metric for us because it provides a predictable outlook on future revenue and cash flow, which makes it easier to manage our practice.”
>
> — Mike Doan, Basic 365 Accounting

MRR in action

If you have 35 clients paying $1,000 each a month, your MRR is $35,000. If the following month you acquire 2 more $1,000 clients, your MRR would grow to $37,000.

$$MRR = (\$35{,}000 + \$2{,}000) - 0 = \$37{,}000$$

You can also multiply your MRR by 12 to determine your Annual Recurring Revenue (ARR), which in this case would be is $444,000.

Outside of your recurring revenue, it is likely that your firm will perform some one-off projects or have once-a-year clients. For tax services or special projects where there is an additional recurring component, you can annualize this one-off revenue and add it to your MRR. For onboarding or other one-off jobs without a recurring component, you can still do the same, or discount them completely and remove them from your recurring reports.

Expansion monthly recurring revenue (Expansion MRR)

What is it?

Your expansion MRR shows any increase in MRR from your existing customers. For example, if a client goes from engaging you just for compliance, to engaging you for compliance and also advisory services, this additional revenue would be counted as expansion MRR.

Why measure it?

Expansion MRR shows how much you are providing additional services to existing clients, on top of the services they were already paying for previously. This metric allows you to see the potential and opportunities your firm's services have to offer. It is much more cost-effective to expand the services you provide to existing clients than to acquire new clients, so knowing this figure will highlight how well—or how poorly—your firm is upselling and cross-selling your services.

> "We wanted to get our average revenue per client up and our number of clients down, because we had a lot of clients who we weren't making money from. We fired lots of clients but our revenue stayed the same, because we were able to increase our prices on everyone else and added lots of expansion MRR."
>
> — Bruce Phillips, HPC CPA

Expansion MRR in action

Two clients agree to pay an additional $500 per month for CFO services, and another pays an additional $200 per month for tax planning, your Expansion MRR would be $1,200. If you began the month at $37,000, your new MRR would now be $38,200.

Churned monthly recurring revenue percentage (Churned MRR %)

$$\textit{Churned MRR \%} = \frac{\textit{Lost MRR}}{\textit{Total MRR}}$$

What is it?

Churned MRR % looks at any reduction in MRR as a percentage of overall MRR. The reduction in MRR can be as a result of clients who decide they no longer need your services, from clients who decide to downgrade the services your provide to them, or from clients that your firm has decided to fire.

Why measure it?

Knowing this figure highlights areas where you lose revenue and how that affects your bigger picture. Churned MRR is not necessarily a result of a client not being satisfied with your firm's services—it might mean that client went out of business or you fired them because they were proving inefficient. But a Churned MRR figure that grows will highlight larger problems that you must address.

Measuring your Churned MRR as a percentage of your overall MRR will show you more about what this lost revenue means. You should look at it together with details of lost clients—are you losing a few big clients, or many little clients? Or worse, are you losing several large clients?

"I watch my MRR grow and my churn. We have almost no churn because we don't accept everyone who wants to sign up."

— Jody Padar, New Vision CPA Group

Churned MRR in action

If your current MRR is $38,200 and 1 client paying $1000 each month decides to switch accountants, your churned MRR % is 2.6%. This percentage does not sound alarm bells, however you should monitor it constantly over time to ensure it does not grow, and explore what type of clients are downgrading their services or no longer requiring your services.

$$\textit{Churned MRR \%} = \frac{\$1,000}{\$38,200} = 2.6\%$$

Client churn rate

$$\text{Churn rate} = \frac{\text{Lost clients}}{\text{Total clients}}$$

What is it?

Also known as attrition rate, your client churn rate counts your percentage of clients lost (as opposed to churned MRR, which measures their lost revenue value). Usually it makes more sense to factor in only consistent monthly clients, not one-off clients.

Why measure it?

Knowing your client churn rate highlights areas where revenue is lost. To grow, the number of new clients you acquire must exceed your churn rate. When your churn rate steadily grows, you know you have a problem. Like your churned MRR %, understanding your client churn rate requires you to look at your sources of churn to properly understand whether you have an issue that needs addressing.

Client churn rate in action

Divide your of clients lost, by your total number of clients. If you lost 1 client this month out of 36, your client churn rate is 2.8%.

$$\text{Churn rate} = \frac{1}{36} = 2.8\%$$

Average revenue per client (ARPC)

$$ARPC = \frac{MRR}{Total\ clients}$$

What is it?

ARPC tells you how much, on average, each client is contributing to your top line.

Why measure it?

ARPC is an extremely handy metric to know because it indicates if your practice is growing or not, and why. Are you aiming your business at higher paying customers—and probably less of them? Or are you aiming for volume—lots of bookkeeping clients that you can service very efficiently? When you have an understanding of your ideal client and have tailored your services and sales and marketing activities to reach them, your ARPC will tell you how well you are achieving that.

This metric also allows you to segment your clients to determine the effectiveness and combined revenue of your different client types and service offerings.

> "Each of our customers are on a fixed monthly fee, which allows us to set growth goals with real numbers to compare. We keep track of cost per customer, and the average revenue and profit per customer."
>
> — Justin Thomsen, Slate Accounting

ARPC in action

Dividing your MRR by your total number of clients gives you your ARPC. If you have 35 clients and a current MRR of $37,200, your ARPC would be $1063. This is interesting to know, but knowing your ARPC becomes even more meaningful when you can monitor its change over time, with a detailed understanding of who your ideal client is.

$$ARPC = \frac{\$37,200}{35} = \$1,063$$

Return on investment metrics

Growing your accounting practice requires an investment of time, money and resources. Smart growth happens when you are investing in the areas you know will bring you a return, without wasting effort in areas that do not deliver results. These ROI metrics will help you grow smartly, by showing you how much you are spending acquiring each client, how quickly you are paying this back, and what that client will be worth to you over your entire relationship with them.

Cost of client acquisition (CAC)

$$CAC = \frac{\textit{Marketing \& sales expenses in previous period}}{\textit{New clients acquired in equivalent current period}}$$

What is it?

This metric tells you the average amount your firm is spending to acquire a new client. This spend usually refers to any sales and marketing expenses.

Why measure it?

Tracking your CAC measures the profitability of your sales and marketing efforts. Not only is CAC useful on its own, when it is used in conjunction with your Payback Period and LTV it becomes even more powerful. Looking at it with these other metrics enables you to calculate how much profit you are making from your clients relative to the amount you spend acquiring them.

If you acquire clients through multiple channels (eg. referrals, social media, events), CAC can be used to assess which channels are the most profitable.

"A key measurement of practice growth and profitability is to look at the costs to acquire customers, including salaries and marketing costs. Spend less and earn more—it's that simple."

— Darren Glanville, Kandoo

CAC in action

Calculate CAC by combining all of your sales and marketing expenses for a period (eg. last quarter, for example) and dividing that by the number of new clients added in the equivalent current period (eg. this quarter).

During the previous quarter, your firm may have spent a total of $4,300 on hosting your website, an external copywriter for your blog, a social media course for one of your staff members and advertising using Google AdWords. On top of this, $26,000 of staff wages from that quarter can be attributed to sales and marketing activities. In total, you sales and marketing expenses were $30,300.

If you acquire 8 new clients in the current quarter, your CAC would be $3,787.

$$CAC = \frac{\$30,300}{8} = \$3,787$$

Payback period

$$Payback\ period = \frac{CAC}{ARPC}$$

What is it?

Payback period is the time, usually in months, that it takes for your firm to break even on your CAC, from revenue.

Why measure it?

This metric tells you whether you are spending too much acquiring clients, or if you are not attracting the right kind of clients.

If your payback period is longer than you thought it would be—typically, accounting firms should expect around 3-4 months—then you need to think carefully about reducing your sales and marketing costs, or targeting larger prospects who will have greater funds to spend with your firm.

Payback period in action

With CAC of $3,787 and ARPC of $1094, your firm's payback period is 3.45. This would mean that on average, it takes you 3.5 months with a new client to break even on what you spent acquiring them. Generally, a payback period of 3.45 shows your firm is doing well in this area, but it does indicate that you can afford to invest slightly more in sales and marketing to acquire great new clients, and should explore this option.

$$Payback\ period = \frac{\$3,787}{\$1,094} = 3.45$$

Lifetime value of a client (LTV)

$$LTV = Gross\ margin\ \% \times \left(\frac{1}{Churn\ rate}\right) \times ARPC$$

What is it?

LTV shows the total financial benefit you can expect from a client over the course of your firm's entire relationship with them.

Why measure it?

On its own, LTV is a useful estimate of what a client is worth to your firm over the course of their relationship with you. You can segment your clients and assess the LTV of various client types, which will help you to identify your more profitable groups and find out who are the clients you should be aiming to gain more of. Your findings will become even more useful when you compare your LTV to your CAC.

> "Only by looking at the LTV can we truly get a deeper view. If the LTV is low and your CAC is high, you could be delivering services for an extended free period or simply not have the fuel in the tank to go and acquire new clients."
>
> — Darren Glanville, Kandoo

LTV in action

To calculate your LTV you first need to know how long your clients are staying with your firm. Start with your churn rate and invert that value (1 / Churn rate) to calculate how many months on average your clients stay with you. A 2.8% churn rate works out to 35.7 months.

You will also need to know your Gross Margin percentage (the percentage of profit that remains after your costs have been paid), and your ARPC.

So, with a Gross Margin of 60%, Churn Rate of 2.8%, and ARPC of $1,094, your calculation would look like this, giving you a LTV of $23,433.48.

$$LTV = 60\ \% \times \left(\frac{1}{2.8\ \%}\right) \times \$1{,}094 = \$23{,}433.48$$

LTV:CAC ratio

What is it?

Your LTV:CAC ratio compares a client's lifetime value to your firm, with your costs to acquire them.

Why measure it?

Comparing LTV with CAC shows you if your practice is spending enough on marketing activities to ensure long term growth, or if you would be better off reducing the total number of clients you are servicing. It also reinforces the importance of building long, mutually beneficial relationships with your best clients, instead of aiming for smaller, more immediate wins.

Common LTV:CAC ratios in the accounting industry are 4:1 and 5:1, which means practices are earning from clients 4 or 5 times the amount they spent acquiring them. If you are seeing a ratio lower than this, you know you are spending too much.

A higher ratio is not necessarily good either—this can indicate you are spending too little on sales and marketing and could be missing out on valuable business.

LTV:CAC ratio in action

If your firm's LTV is $22,645.80 and your CAC is $3,787, your LTV:CAC ratio is 5.9:1. While this means your cost to acquire new clients is being outweighed significantly by your clients' LTV, it highlights that you have a lot of scope to grow and should invest more on client acquisition.

$$LTV : CAC = \$22{,}645.80 : \$3{,}787 = 5.9 : 1$$

Scale & efficiency metrics

Effectively understanding your accounting firm's scalability is extremely valuable. This shows you the extent to which you can do more with less, and will greatly assist with any strategic planning and process refinement. The following metrics help to predict your long term growth by determining whether you are achieving the right balance of investment in areas such as client acquisition, and looking at your team and their efficiency.

AaaS Quick Ratio

$$AaaS\ Quick\ Ratio = \frac{(New\ MRR + Expansion\ MRR)}{(Churned\ MRR + Downgraded\ MRR)}$$

What is it?

The Accounting as a Service (AaaS) Quick Ratio predicts how well your practice can reliably grow recurring revenue by comparing added MRR (new or expansion MRR) with lost MRR (churned or downgraded MRR). It is very useful for measuring the long term viability of your firm.

Why measure it?

Quick Ratio takes into account the strength of both your client acquisition (sales and marketing) and your client retention to predict your firm's potential for future growth, and this trend over time. If your accounting practice is achieving a ratio of 4.0 for example, you are adding revenue at 4 times the rate that it is leaving.

The ratio will not tell you much if your firm is in its first year of existence—your client churn should be very low or even zero this early—but it will show you a lot when you start comparing your numbers year on year. Are you gaining expansion MRR as quickly as you think? Is churn really a non-issue for your accounting practice, or is it something you need to be paying more attention to?

> "This data allows us to measure how we are progressing towards an advisory firm versus a reliance on tax revenue or one-time revenue generators."
>
> — Michael Moffitt, MSM Advisors

AaaS Quick Ratio in action

To calculate your AaaS Quick Ratio, compare Added MRR with Lost MRR. For example, this month you might gain $2,000 in new MRR and $1,200 in expansion MRR, equating to $3,200 in Added MRR. On the other side, you may lose $1,000 in churned MRR and $200 in downgraded MRR, resulting in $1,200 lost MRR.

Comparing your added MRR and lost MRR using these figures will give your practice a Quick Ratio of 2.6.

$$AaaS\ Quick\ Ratio = \frac{(\$2{,}000 + \$1{,}200)}{(\$1{,}000 + \$200)} = 2.6$$

On it's own, a ratio like this that is greater than 1 will not tell you anything more than, your firm has grown this month. But when you track your Quick Ratio for months and years, you can see trends and truly analyze your firm's growth, or lack thereof.

As a general rule, if you can sustain a Quick Ratio greater than 1 over a sustained period, you are growing at a steady rate—the higher your figure, the more efficient your growth. A Quick Ratio below 1 on the hand, should sound alarm bells. This would mean your accounting practice is slowing diminishing, and you will need to make moves quickly to turn things around.

AaaS magic number

$$\text{AaaS Magic Number} = \frac{(\text{Q2 revenue - Q1 revenue}) \times 4}{\text{Q1 sales \& marketing expenses}}$$

What is it?

Your AaaS magic number, or sales efficiency benchmark, tells you the health of your practice from the perspective of growing MRR. It shows you how effective the previous quarter's sales and marketing spend was on your current MRR growth.

Why measure it?

The total amount you are spending acquiring new clients and new MRR creation is critical to measure and monitor. If you are underinvesting in sales and marketing in relation to added MRR, you will not see the growth your firm is capable of. On the other hand, if you over-invest, your profit margin will not expand. Calculating your AaaS Magic Number will help you determine your optimal balance.

"As a bookkeeping-specific firm that produces over $1million a year in revenue, it's crucial to us that we know our fixed recurring revenue compared to total labor cost."

— Jeremy Allen, System Six Strategic Bookkeeping & Analysis

AaaS magic number in action

Calculating your AaaS Magic Number takes into account your increase in revenue in the current quarter compared to last, and how much you spent acquiring new clients in the previous quarter.

For example, if your revenue in the current quarter is $25,000, and the previous period was $18,000, you had a revenue increase of $7,000. If you spent $30,300 in the previous quarter on sales and marketing, your AaaS Magic Number would be 0.92.

$$\text{AaaS Magic Number} = \frac{(\$25{,}000 - \$18{,}000) \times 4}{\$30{,}300} = 0.92$$

If your AaaS magic number is 1, it shows that your sales and marketing expenses last quarter will be earned back over the next 4 quarters in incremental revenue. Generally, a magic number greater than 1 indicates that you should be investing more in this area, while less than 0.7 means you need to cut down and make your client acquisition techniques more cost effective.

Jobs completed per staff member

What is it?

The number of jobs or tasks completed by an individual staff member during a given period.

Why measure it?

Accounting is becoming increasingly output-focused. With the shift moving away from input and lag measures such as time, you need new ways to keep track of each staff member's productivity and how much everyone contributes towards the bigger picture of your practice. Looking at the jobs, or individual tasks, each member of your team completes each week, month, or quarter is one straightforward way of measuring this.

Jobs completed per staff member in action

Complexity of jobs or tasks will vary across your team, so how you measure this will require some tailoring depending on your firm's unique attributes. For example, your onboarding specialist might successfully onboard 4 new clients this month, while one of your outsourced bookkeepers processes more than 30 payroll lodgements in the same time. Comparing the output of these staff members would be pointless.

Instead, you should be tracking the jobs or tasks completed by staff in the same or similar roles, as well as an individual staff member's output over a prolonged period. Their completed task count should be maintained, or ideally increasing over time.

For separate teams, or smaller practices, consider a leaderboard of completed tasks or jobs in a given period. Accountants are competitive, and putting their pride on the line against their peers will encourage everyone to boost their output.

Average time to complete a job

What is it?

The average length of time it takes across your firm and/or per staff member, to complete a job or task.

Why measure it?

Similarly to calculating the number of jobs completed per staff member, this KPI is useful for any output-focused accounting firm. While you may have moved away from tracking time in timesheets, you still want an idea of how long each type of job will take to complete. With expected benchmarks for each process, you will know with confidence if a staff member is taking too long to complete common tasks, and can continuously strive to cut down on average time by looking at ways to improve each process.

As well as comparing efficiency of an individual or a team, tracking this by job type will help you to accurately formulate estimates to help you budget, allocate workload across your team, and forecast your profitability by staff member or client.

> "While we don't track time anymore, we still have expected time targets for processes that help me budget, forecast and allocate work evenly across the team."
>
> — Bruce Phillips, HPC CPA

Average time to complete job in action

This is another metric that can be measured in multiple ways—an average completion time for each job type, and an average completion time for all jobs completed by a certain staff member in a given period. The latter will be helpful to compare across averages across your practice or the staff member's team.

To be effective, this KPI relies on documented, standardized processes. You can only accurately measure the efficiency of individual team members if everyone is completing jobs with the exact same steps, not if they are making their own adjustments each time.

Client metrics

Without clients, you would not have an accounting practice, so you must be measuring the quality of the service you are providing to them and what they think of this service. While there is no single metric that will tell you everything you need to know when it comes to client satisfaction, the following two are great places to start.

Email response time

What is it?

The average time it takes to respond to an email, usually measured per staff member.

Why measure it?

Email can be an inefficient and, depending on your team's practice management solution, siloed method of communication. Despite this, 90% of practice communication is still conducted over email—it is comfortably the most common way for accountants to communicate with clients.

As previously discussed, clients who feel neglected or undervalued run the risk of churning or downgrading their services, and causing this can be as simple as regularly taking too long to respond to an email.

This is all reason to monitor the email response time of your team. This should not necessarily create a goal to continually reduce your practice-wide response time, instead it should be measured to ensure no client is being neglected and that no team members take too long to go back to their clients.

Email response time in action

This metric should be measured as an average across your firm, broken into individuals, and depending on your practice size, perhaps into teams as well. This will give you a benchmark to determine who is consistently taking too long.

Studies show that checking your inbox just three times each day, at set periods, is the optimum amount to ensure productivity isn't lost. So measuring your response time in minutes isn't realistic and can be detrimental to overall efficiency. Instead, aim to keep average response time across your practice to a reasonable level measured in hours (five hours, for example), and monitor individual staff members who continuously exceed this length of time.

Similarly useful metrics to consider tracking in regards to email include average number of replies per email conversation—which is useful to show which clients or colleagues are often inefficient coming to a resolution—and average emails per client—which determines any clients who are particularly needy and regularly consume time from your team.

Net promoter score (NPS)

NPS = % promoters - % detractors

What is it?

Your NPS measures the experience your clients have with your practice by asking them one simple question: "how likely are you to recommend our accounting practice to a friend or colleague?"

Why measure it?

NPS measures client satisfaction, loyalty and advocacy to predict the growth of your practice. One of the defining characteristics that differentiates your firm from competitors is the way you treat and serve your clients, and NPS measures how successful you are at this. Because accounting firms rely heavily on referrals to acquire new business, and client satisfaction to keep churn low, this metric is pivotal to track and measure.

"Our focus is on the client relationship. Our objective is to please our clients so that they never consider leaving us. Because of this, our retention rate is high—some of our clients have been with us since we've been in practice and they continue to refer new business to us."

— Jennifer Moore, Moore Details Bookkeeping

NPS in action

To answer the question, "how likely are you to recommend our accounting practice to a friend or colleague?" your clients are able respond with a number between 0 (not at all likely) to 10 (extremely likely).

Depending on their response, these responds will place them in one of 3 categories:

- **Promoters (scores 9 – 10):** *enthusiastic clients who will keep using your services and refer others.*
- **Passives (scores 7 – 8):** *satisfied but unenthusiastic clients who are at risk of moving to a competitor.*
- **Detractors (score 0 – 6):** *unhappy clients who can damage your brand and impede your growth with negative word of mouth.*

With responses to this question, you can determine your NPS by calculating the difference between the percentage of promoters and detractors as an absolute number. For example, if your practice has 50% promoters, 40% passives and 10% detractors, your NPS is +40. Any positive NPS is what you should be aiming for at a minimum, and the higher the better. Globally, the best performing accounting practices are achieving NPS scores of 40 or more.

NPS = 50% - 10% = +40

Knowledge is power

To flourish in the new age of accounting, you must look at your practice through a different lens. This does not require you to measure every aspect of your accounting practice, instead, you need to measure what matters most. Each of these 15 metrics tracks an individual aspect of your practice, and when combined, they will give you a comprehensive view of how you are performing and where you trending.

They hold the power to change the levers by which you run your practice. With this knowledge you can make better strategic decisions that will improve your internal processes, the value you provide to the clients that matter most, and your overall profit. These metrics that matter will show you the way to take your accounting firm to greater success.

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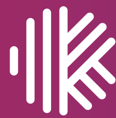
"We track all these metrics on a weekly basis. I think of our business as divided into five equally important parts: financial (MRR, ARPC), quality (NPS, response time, internal reviews), sales (expansion MRR), marketing (CAC), and hiring & retention (hiring & churn rates)."

— Vanessa Kruze, Kruze Consulting



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