How a Simple KPI Dashboard Increased Profitability by 18%

Visibility into a few key metrics helped leaders make better decisions faster.

18%
higher net profit in six months

6 KPIs
on one page

5 days
to monthly reports, down from 15+

KPIs · Dashboards · Financial Reporting · Business Intelligence

The situation

A $10 million services company was growing, but profit was flat. Leaders relied on monthly reports that arrived more than two weeks after month-end and didn't show which services or customers made money.

The challenge

Without timely, focused information, decisions were made on instinct:

- **Slow reporting** — financials arrived 15 or more days after month-end.
- **No service-level view** — leaders didn't know which services lost money.
- **Gut-feel pricing** — prices hadn't been reviewed against actual costs in years.
- **Too much data** — reports were long, but none answered the key questions.

The six KPIs they chose

KPI	Question it answers
Revenue and gross profit by service	What actually makes money?
Gross margin trend	Are costs rising faster than prices?
Top 10 customers by profitability	Who are our best and worst customers?
Sales pipeline and win rate	Is future revenue on track?
Expenses as a percentage of revenue	Is overhead under control?
Days to close the books	Are we getting information in time to act?

What they did

- Picked six KPIs that tie directly to profit.
- Shortened the monthly close to five business days.
- Built a one-page dashboard that updates monthly.
- Held a 30-minute KPI review with leaders every two weeks.
- Repriced or redesigned two services that were losing money.

The outcome

Within six months, net profit rose 18%. Leaders spend less time hunting for numbers and more time acting on them, and each department now knows which measures it owns.

Fictional, composite educational scenario. Not an actual IAG client engagement and not legal, tax, or accounting advice. IAG is not a CPA firm or law firm.

© 2026 Integrity Advisory Group, LLC

Self-check: could this happen to you?

- ☐ Do you know which metrics truly drive your profit?
- ☐ How many days after month-end do you get financials?
- ☐ Do you know which services or customers lose money?
- ☐ Do leaders review KPIs on a regular schedule?
- ☐ How quickly could you spot a problem or opportunity?

Want to talk through what this means for you?

Integrity Advisory Group opens for client services in 2028. Until then, explore our free checklists, assessments and courses, and subscribe for new case studies each month.

integrityadvisorygroup.org/contact

Educational scenario. This case study is a fictional, composite scenario created for education. It is not an actual Integrity Advisory Group client engagement; names, figures and details are illustrative. It is not legal or accounting advice.

© 2026 Integrity Advisory Group, LLC