⏱️ 30 MIN SETUP

Monthly KPI Dashboard in Google Sheets

Part of our Small Business Automation guide: what to automate first and the 10 easiest wins.

The problem

Your numbers are spread across different apps, so you rarely see the whole picture. An auto-updating Google Sheet gives you one monthly view in minutes.

What you need

- Google Sheets
- Zapier or Make
- Your sales, leads and accounting tools

Setup with Zapier

1. Create a sheet with one tab per data source (sales, leads, invoices) and a Dashboard tab.
2. For each source, create a Zap that adds a row on every new event (for example **Square, New Payment** or **Xero, New Invoice**).
3. On the Dashboard tab, use SUMIFS by month and add charts.
4. Optionally add **Schedule by Zapier** on the 1st of each month to email the dashboard link.
5. Check the numbers against each app for the first month.

Setup with Make

1. Add a scenario per source to append rows.
2. Add a monthly schedule with an email step.
3. Turn them on.

Message template

KPIs to track:

> Revenue · New leads · Lead-to-sale % · Average sale · Overdue invoices · New reviews

Consent and local rules

This is an internal message to you and your staff, not to customers. Only message staff on numbers or addresses they've agreed to use for work. This isn't legal advice.

FAQ

Do I need Looker Studio for a KPI dashboard?

No. Google Sheets charts are enough to start with. If you outgrow them later, Looker Studio can read the same sheet.

What if one of my tools has no Zapier trigger?

Export a CSV from that tool once a month and paste it into its tab. The dashboard formulas will pick it up like any other data.

Which KPIs should a small business track?

Start with a handful you'll actually act on, such as revenue, new leads, lead-to-sale rate, average sale and overdue invoices. You can add more once the habit sticks.

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- Automation for real estate agents: all the easy wins
- Automation for online shops: all the easy wins
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- Overdue invoice reminders in Xero and QuickBooks
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One-page checklist: Monthly KPI dashboard in Google Sheets

- ☐ Create a sheet with one tab per data source (sales, leads, invoices) and a Dashboard tab.
- ☐ For each source, create a Zap that adds a row on every new event (for example Square, New Payment or Xero, New Invoice).
- ☐ On the Dashboard tab, use SUMIFS by month and add charts.
- ☐ Optionally add Schedule by Zapier on the 1st of each month to email the dashboard link.
- ☐ Check the numbers against each app for the first month.

Consent note: only message people who have contacted you or agreed to hear from you, and include a way to opt out. This isn't legal advice.

Full guide: https://www.automatequick.com/guides/monthly-kpi-dashboard-sheets