

Dashboard Documentation

Sections 1 & 2 — System Overview, KPIs & Automations

Internal Reference Guide

Section 01 — Overview Dashboard

Section 01 presents a high-level summary of the pipeline's performance. It is designed to give managers and team leads an at-a-glance view of overall lead activity and contract progress.

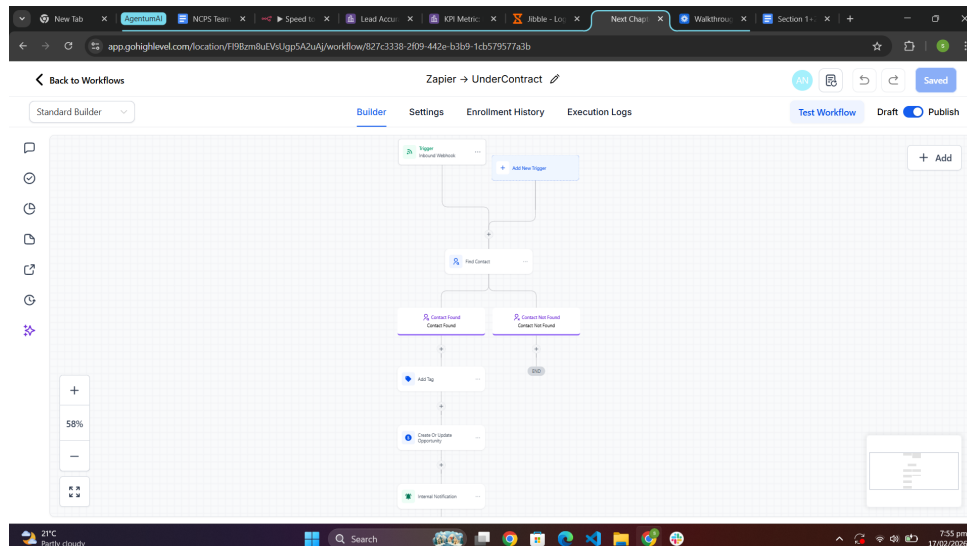
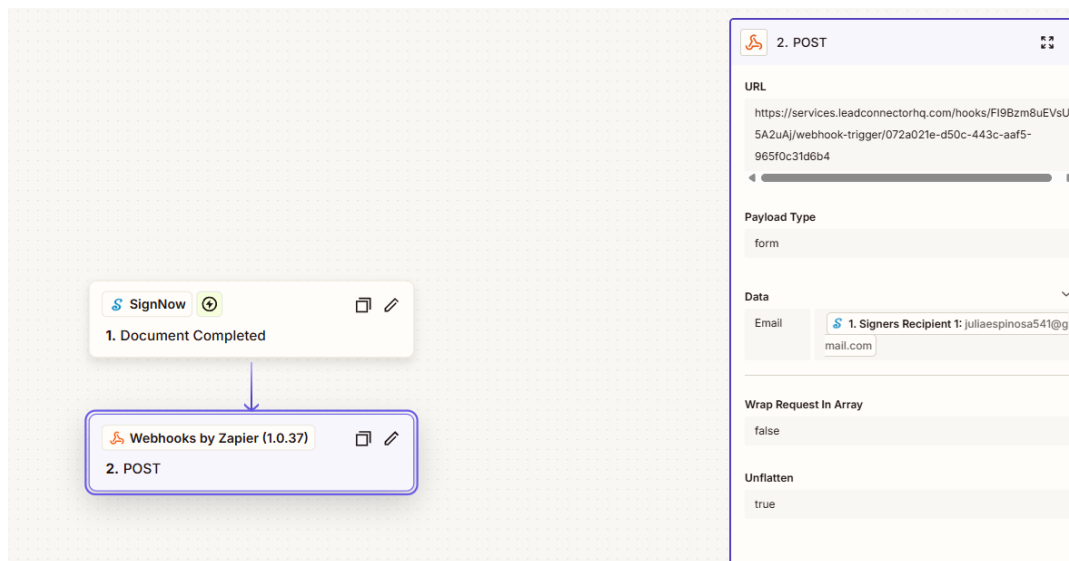


Figure 1 – under contract tag assignment

1.1 Key Widgets Displayed

The following three widgets are visible on the dashboard within the Section 01 folder:

- Total Active Leads – Total number of leads currently active in the pipeline.
- Contracts Signed – Total number of leads that have been moved to the "Under Contract" tag.
- Contract-to-Close Rate – Percentage of contracts that successfully closed.

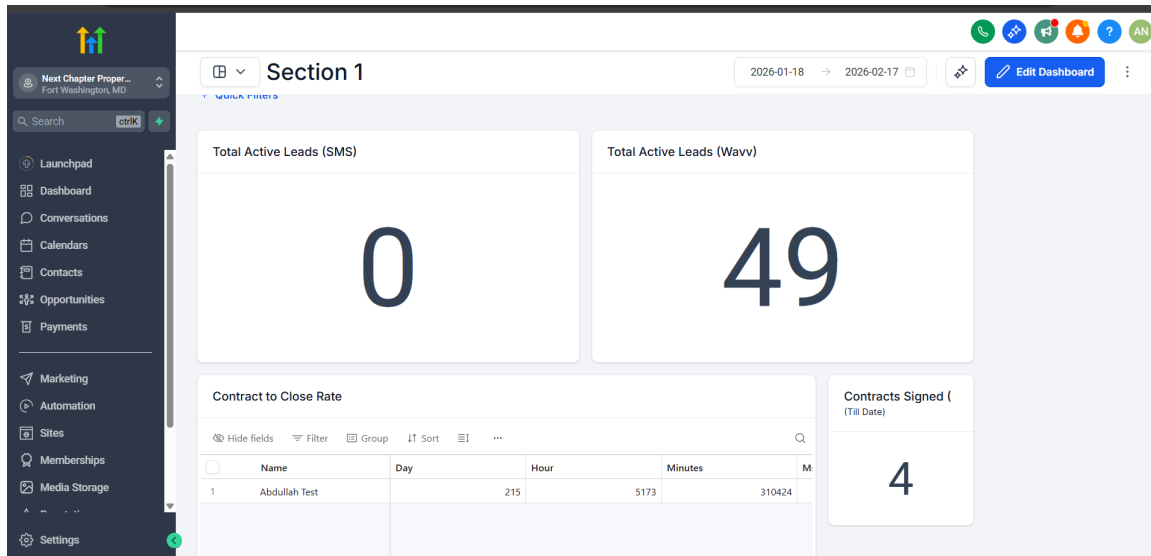


Figure 2 – Dashboard widgets: Active Leads, Contracts Signed, and Contract-to-Close Rate

1.2 Contracts Signed — Tag Logic

When a lead reaches the contract stage, it is tagged as "Under Contract" within the system. This tag is what drives the Contracts Signed count displayed in the widget.

Note: Ensure the "Under Contract" tag is applied accurately to avoid incorrect contract counts on the dashboard.

1.3 Section 01 Video Walkthrough

A recorded walkthrough of Section 01 is available at the link below for new team members:

[Section 01 Loom Walkthrough](#)

Section 02 — Role-Specific Performance Panels

Section 02 is divided into four panels, each tailored to a specific team role. Each panel contains relevant Key Performance Indicators (KPIs) and automated workflows to support that role's responsibilities.

Panel A — Data Specialist (DS)

A.1 Qualified Leads Added (Month-to-Date)

This widget displays the total number of qualified leads added during the current month. It filters records using the "qc-pass" tag, which is applied when a lead passes quality control review.

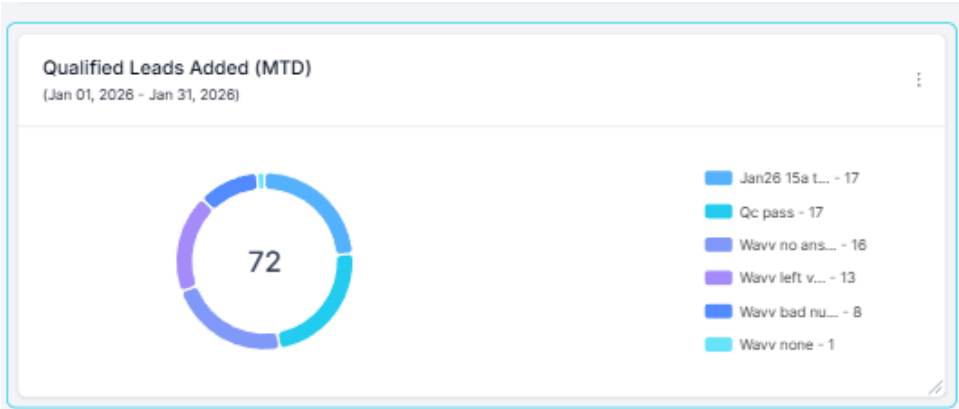


Figure 3 – Qualified Leads Added widget

Back Edit Widget X

Configure Conditions Themes

Tags Is qc pass

+ AND

+ Add Filter

Figure 4 – Filter configuration using the qc-pass tag

A.2 County Expansion & Market Discovery

This metric measures the number of new counties that were worked for the first time within the past 90 days. "Worked" is defined as a county that had at least one qualified lead submitted. The target is a minimum of 2 new counties per period.

Note: This widget operates on the "worked" tag — a county is counted only when a qualified lead has been created there.

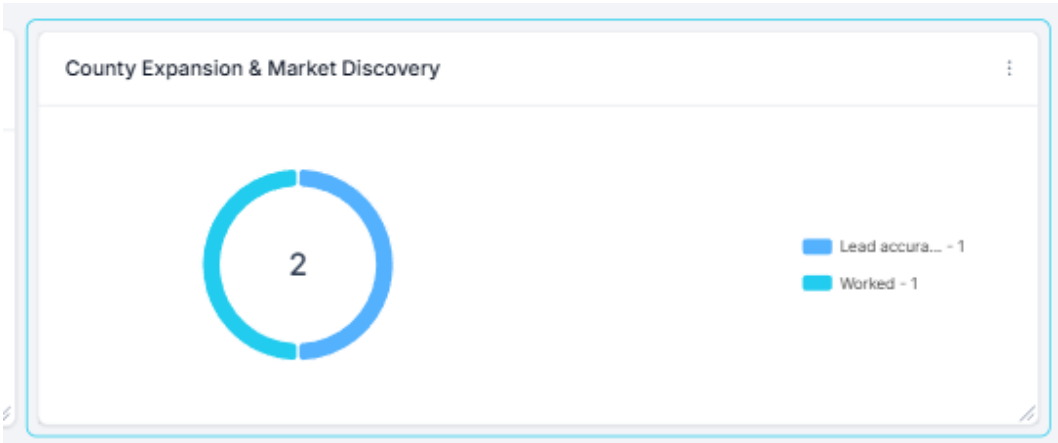


Figure 5 – County Expansion & Market Discovery widget

A.3 Consolidated Weekly Performance Brief

A cross-departmental KPI summary is automatically compiled and sent as a single email report each week. This report is delivered to the following recipients: Jezelle, Acel, Hayya, and James. The report consolidates performance metrics from all panels into one overview, reducing the need for multiple separate status updates.

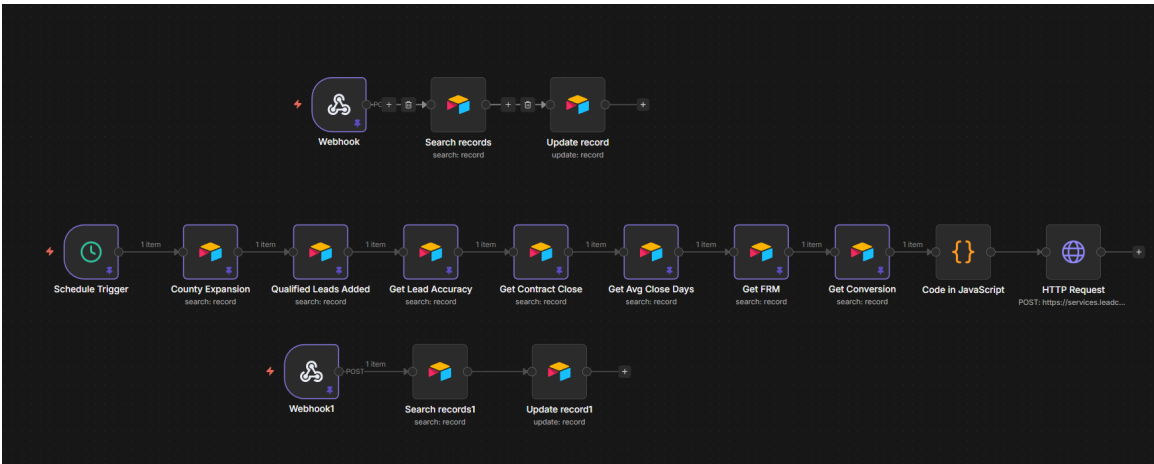


Figure 6 – Weekly Performance Brief email automation setup

Email Inbound 

Builder Settings Enrollment History Execution Logs

Test Workflow Draft ☒ Public

Trigger
Inbound Webhook

Internal Notification

END

Internal Notification [Learn More](#) 

Send a notification to someone other than the Contact

Edit Action **Statistics**

ACTION NAME
Internal Notification

TYPE OF NOTIFICATION
Email

From Name
From Name

If "From Name" and "From Email" fields are empty then Email will be sent using Default Values

From Email
From Email

To User Type
Custom Email

To Custom Email
uzair.agentum@gmail.com,uzairrajput2001@gmail.com

Cc **Bcc**

Subject *
{{inboundWebhookRequest.subject}}

Subject line is mandatory in email action, if you choose to keep it empty, we will fill in the subject line of the template

Figure 7 – Email content and layout for the weekly brief

Note: The "From Email" and "From Name" fields in the automation need to be configured with your organization's preferred sender details before this goes live.

```
Result
Item C < > Text Html Markdown

<div style="font-family: Arial, sans-serif; font-size: 14px; color: #111;">

<h2>Weekly Performance Brief</h2>
<p><strong>Date:</strong> January 16, 2026</p>

<hr/>

<h3>I. DATA SPECIALIST</h3>
<ul>
<li><strong>Leads Uploaded (MTD):</strong> 51 / 1,000</li>
<li><strong>Accuracy Rate:</strong> 50% (Target: 90%+)</li>
<li><strong>County Expansion & Market Discovery:</strong> 2</li>
</ul>

<hr/>

<h3>II. RESEARCHER</h3>
<ul>
<li><strong>Packets Completed (MTD):</strong> 132132</li>
<li><strong>Research Accuracy:</strong> 50% (Target: 85%+)</li>
<li><strong>Pending Research Loop:</strong> 14 leads currently in <em>Research-
Return</em></li>
<li><strong>Efficiency:</strong> 3.2 days per packet (avg)</li>
</ul>

<hr/>

<h3>III. ACQUISITIONS & PIPELINE</h3>
<ul>
<li><strong>Contracts Signed (MTD):</strong> 0</li>
<li><strong>Conversion Rate:</strong> 100%</li>
<li><strong>Total Contacts:</strong> 9972</li>
<li><strong>Pipeline Value:</strong> $45,000 (estimated)</li>
</ul>

<hr/>

</div>
```

Figure 8 – Full automation configuration for the weekly report

Panel B — Researcher

B.1 Research Packets Completed (Month-to-Date)

This widget tracks the total number of research packets completed during the current month. The count is derived using a formula provided by the team, which pulls values from the associated submission form.

Lead Accuracy Score & Research Packets Completed (MTD)	
Lead Accuracy Score Records > Overview Group Filter Sort [Menu] [Search] [More] Add record	
Lead Accuracy Score	Research Packets Completed...
50	132132
1 record	
Airtable View larger version	

Figure 9 – Research Packets Completed widget configuration

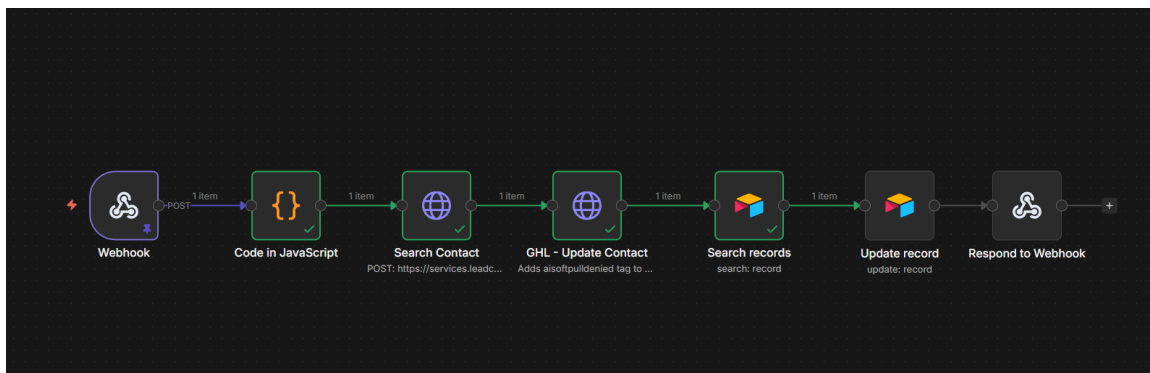


Figure 10 – Formula-based filter for packet completion count

B.2 Average Turnaround Time (Hours)

This KPI measures the average number of hours a researcher takes to complete a task once it has been assigned to their pipeline. The timer begins when a task enters the "Frm Acquisitions" stage of the Researcher's pipeline and ends upon task completion.

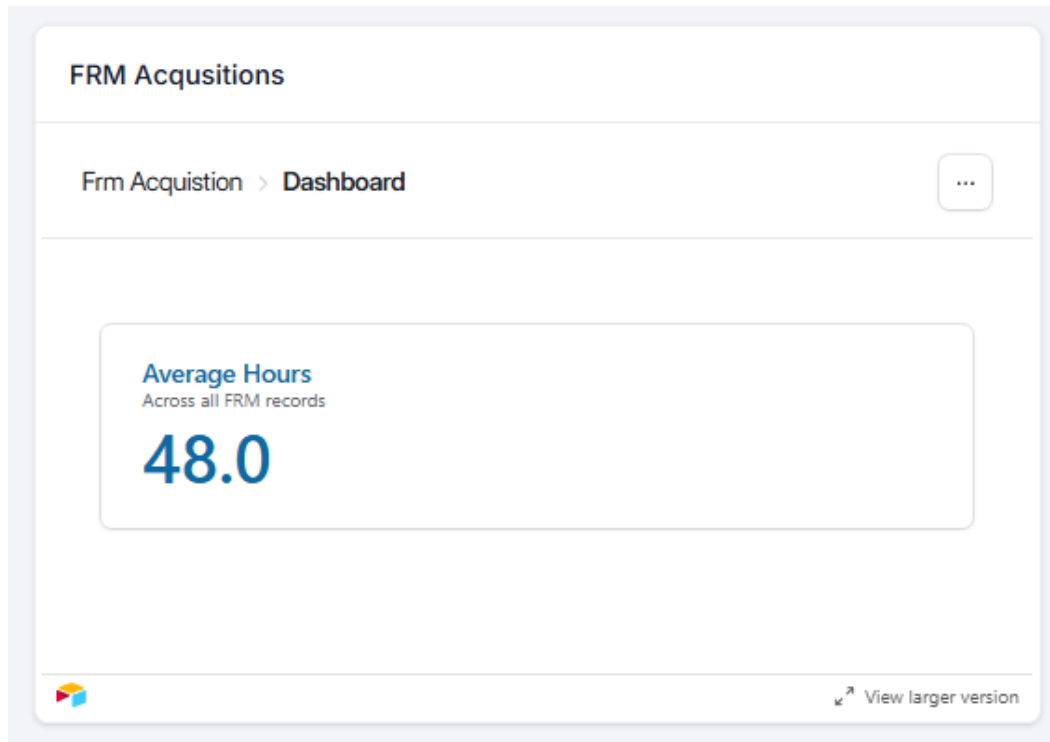


Figure 11 – Turnaround time configuration and stage mapping

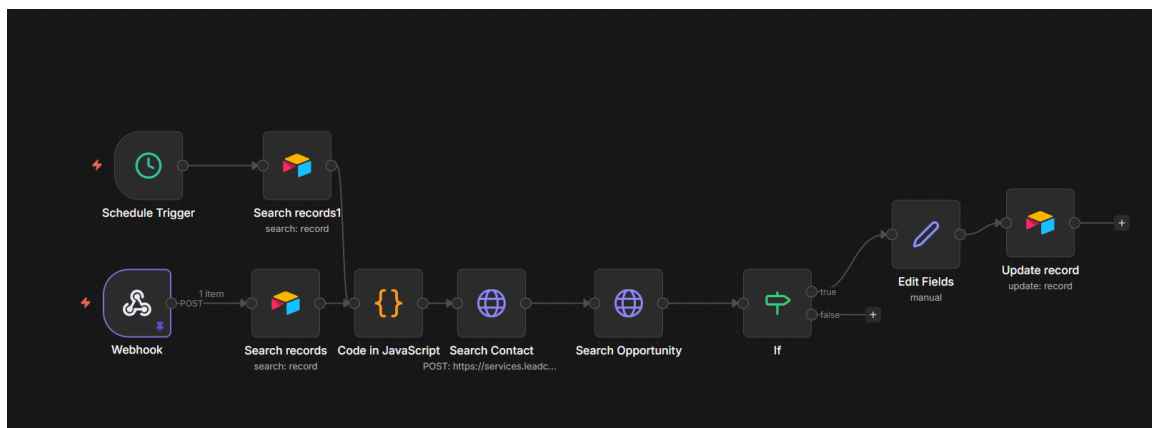


Figure 12 – Average Turnaround Time widget

B.3 Lead Accuracy Score

This score reflects the quality and accuracy of data submitted by a researcher. It is calculated using a formula provided by the team, which pulls data from the form submitted alongside each research packet.

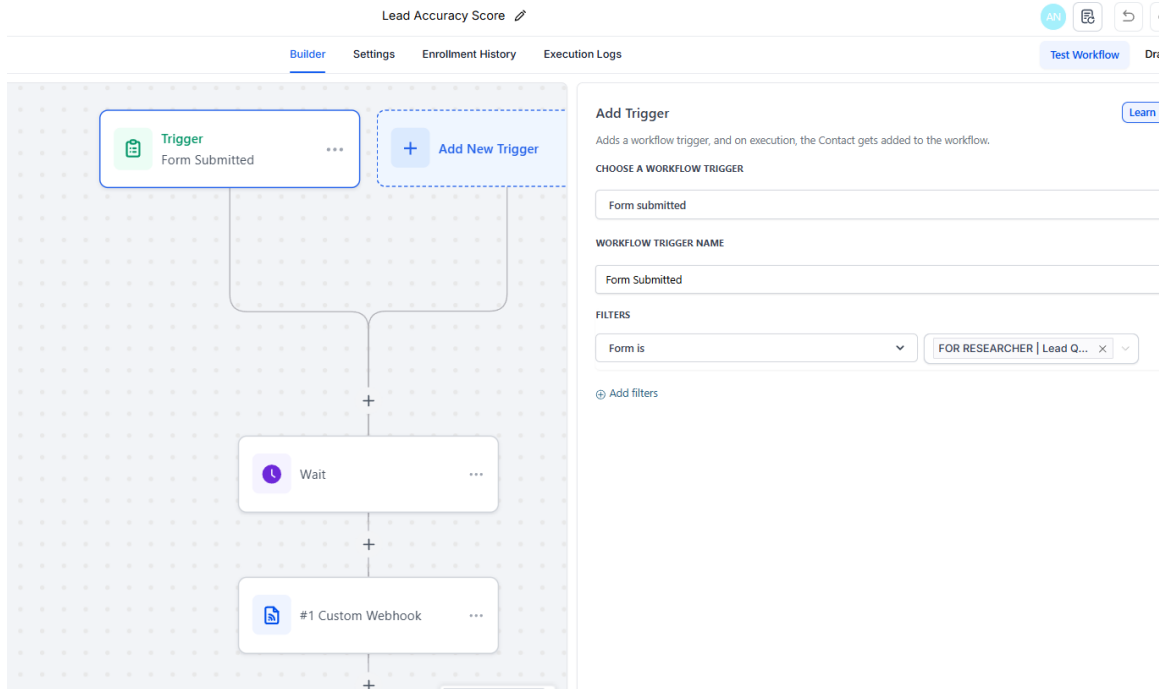


Figure 13 – lead accuracy

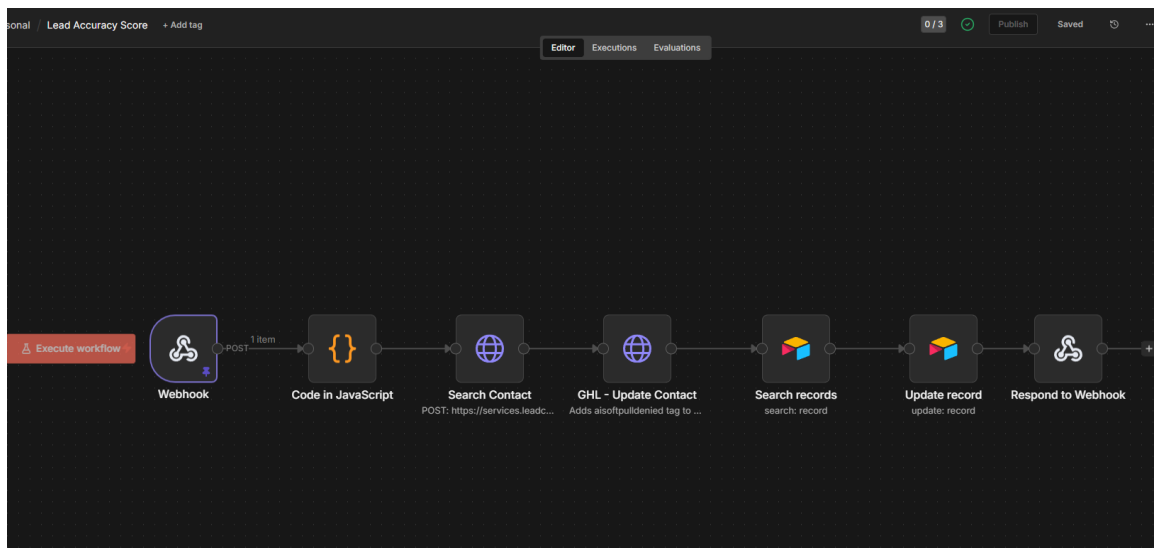


Figure 14 – n8n configuration for accuracy scoring

Panel C — Acquisitions

C.1 Leads Worked (Touches per Week)

This widget counts the total number of unique contacts that received at least one interaction during the current week. It is driven by contacts that have a WAVV-related tag assigned within the weekly time frame.

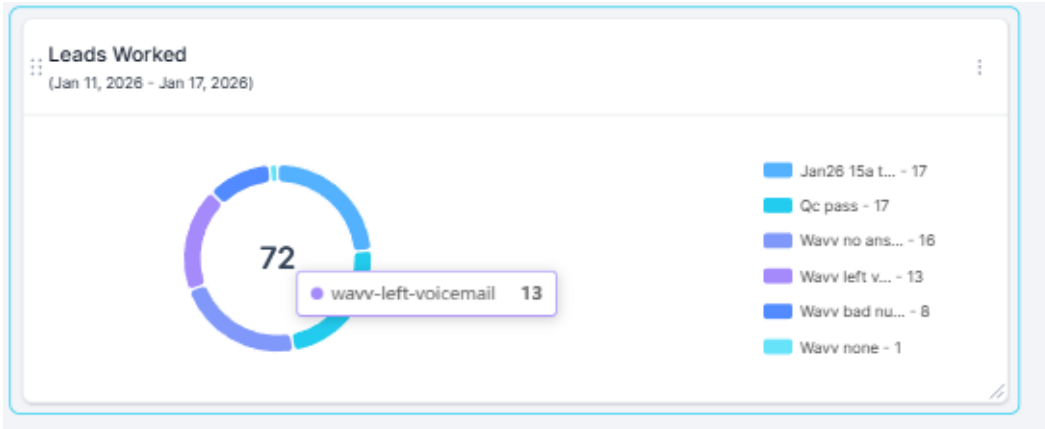


Figure 15 – Leads Worked widget

Tags Is one of

wavv-bad-number ×

wavv-appointment-set × +8

+ AND

+ Add Filter

Figure 16 – WAVV tag filter configuration

C.2 Speed to First Contact (Hours)

This KPI measures how quickly a newly added contact was reached for the first time. The timer starts from when a contact is added to the system and stops when the "first-contact" tag is applied, indicating that initial outreach was completed.

Speed to First Contact (hours)

Hide fields Filter Group Sort ...

	Name	Day	Hour	Minutes	Ms
1	Abdullah Test	215	5173	310424	18625468144
1 record		Sum 215	Sum 5173	Sum 310424	Sum 18625468144

Airtable Download CSV View larger version

Figure 17 – Speed to First Contact widget

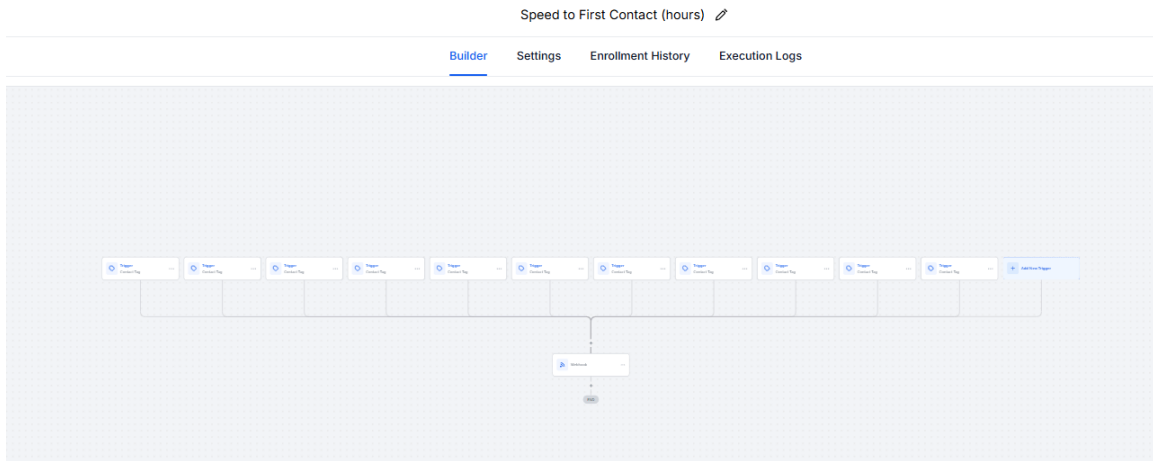


Figure 18 – Timer configuration: contact added to first-contact tag

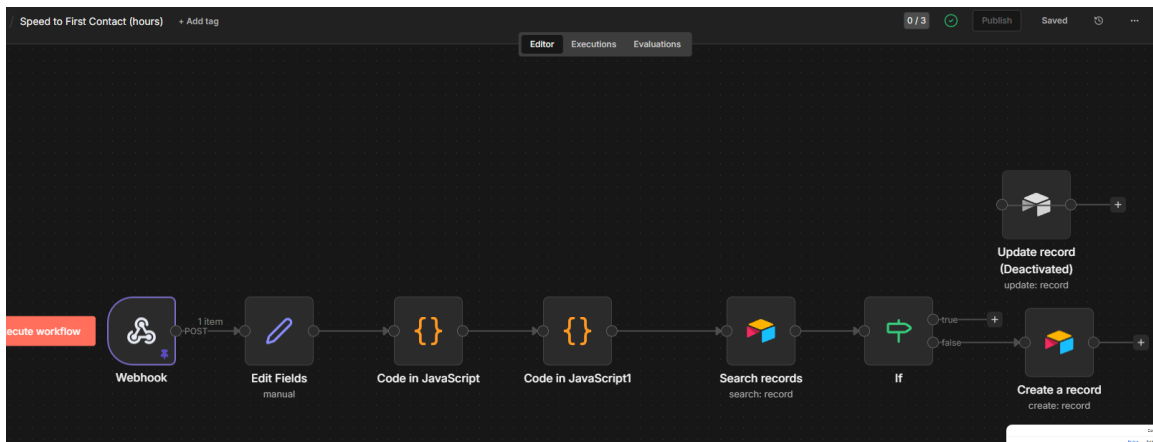


Figure 19 – Speed to First Contact formula setup

C.3 Contracts Signed (Month-to-Date)

This widget displays the total number of contacts who have been tagged as "Under Contract" within the current month. These leads exist within the Transaction Coordinator's "Under Contract" pipeline stage in GHL (GoHighLevel).

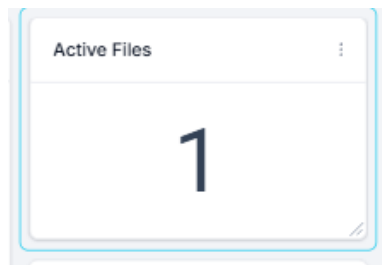


Figure 20 – Contracts Signed widget

Configure **Conditions** Themes

Pipeline

Is

Transaction Coordinator

AND

Stage

Is

Under Contract

+ AND

+ Add Filter

Figure 21 – Pipeline stage and tag filter for Under Contract

C.4 Conversion Rate (%)

The Conversion Rate represents the percentage of uploaded leads that progressed to the "Under Contract" stage. It is calculated by comparing the total number of leads in the smart list (uploaded leads) against those who have been tagged as "Under Contract."

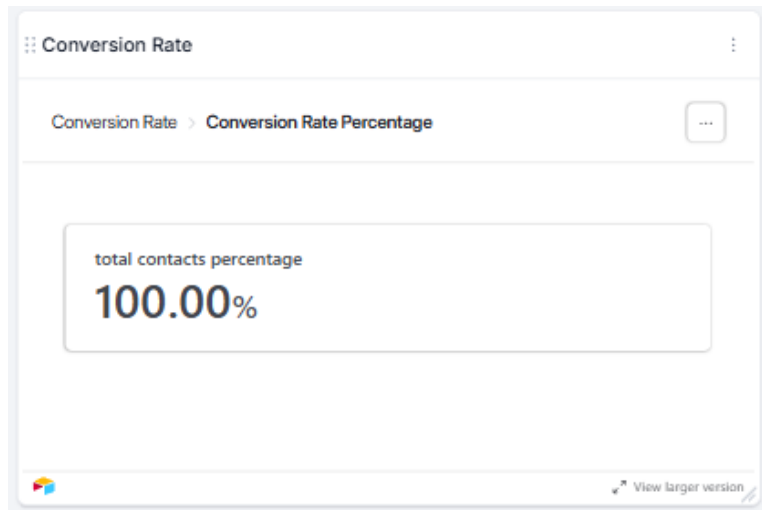


Figure 22 – Conversion Rate widget

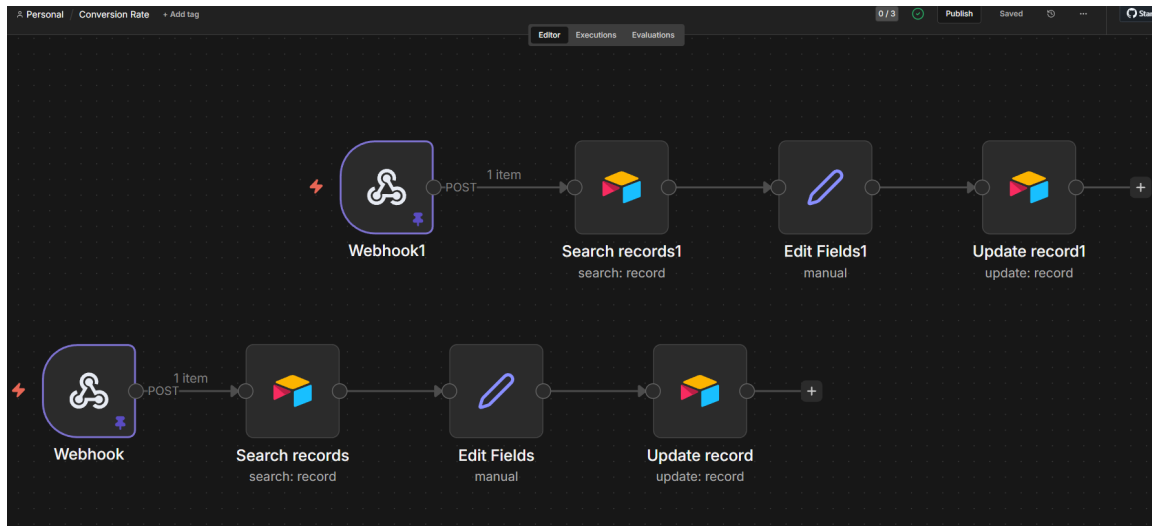


Figure 23 – Smart list vs. Under Contract comparison formula

C.5 Automation — No First Contact Within 24 Hours

This automation triggers a task reminder when a new contact has not been reached within 24 hours of being added. Specifically, if the "first-contact" tag has not been applied within 24 hours of a contact's creation, a task reminder is automatically sent to the assigned team member.

Note: This ensures that no new lead goes uncontacted, supporting a fast follow-up culture.

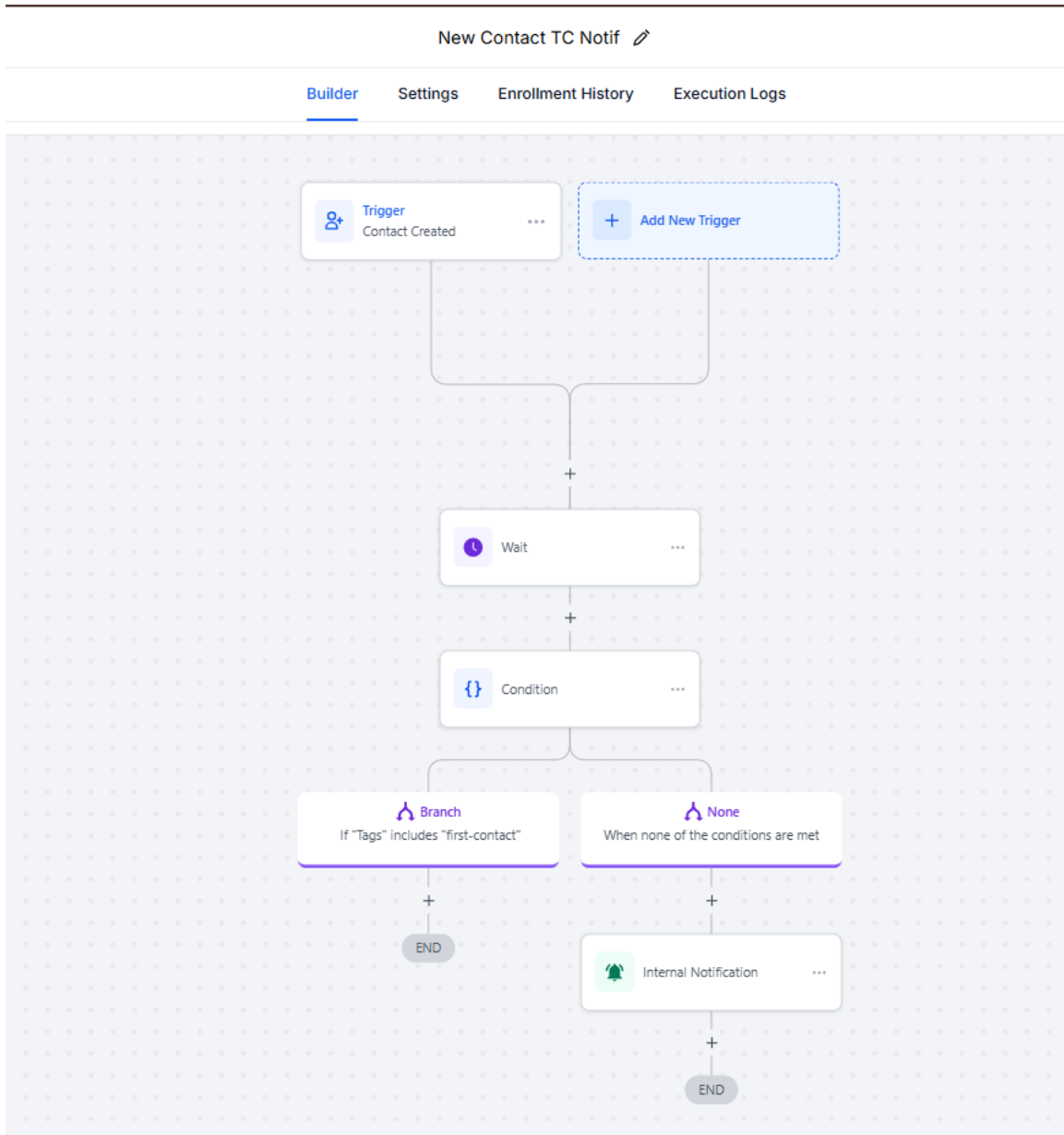


Figure 24 – No First Contact automation workflow

C.6 Automation — Contract Signed Notification

When a lead moves to the "Under Contract" stage, an automated notification is triggered to inform the relevant team members. This ensures that the right people are alerted as soon as a contract is signed, without any manual notification required.

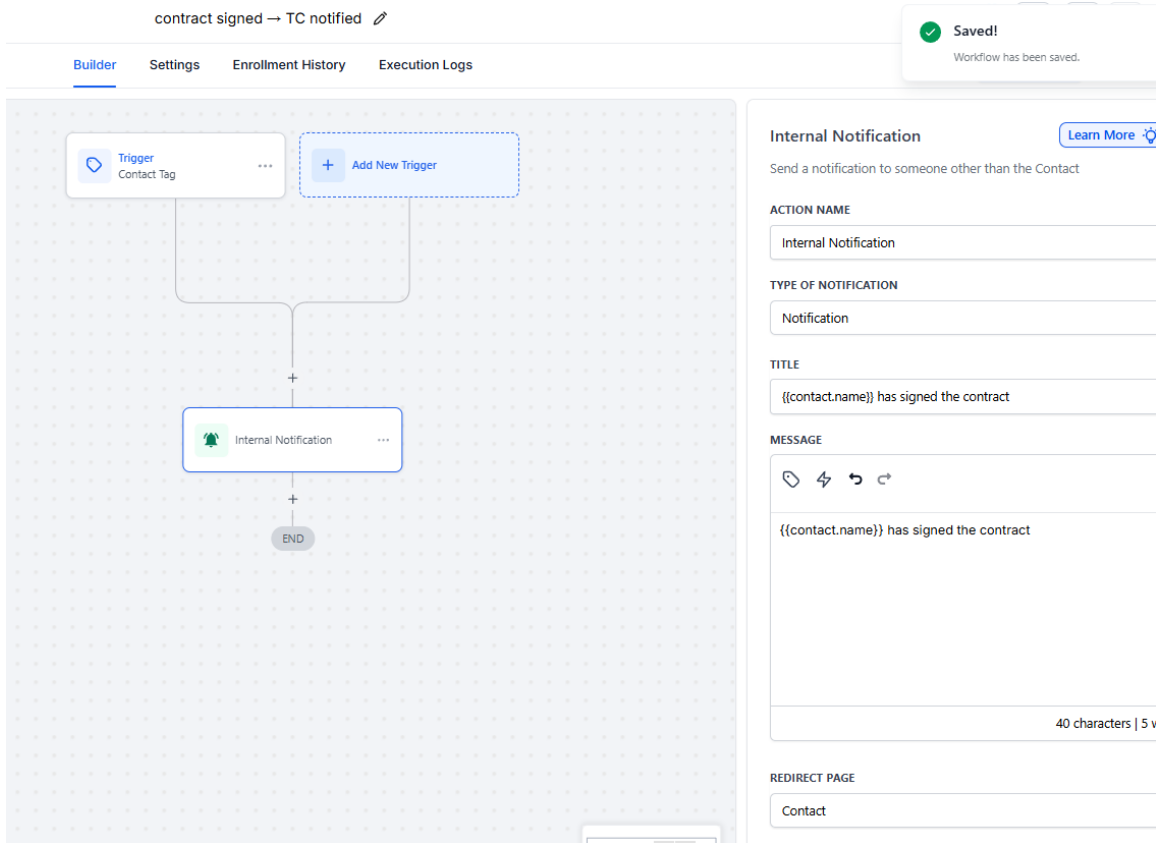


Figure 25 – Contract Signed notification automation

Panel D — Transaction Coordinator (TC)

D.1 Active Files

Active Files refers to all leads currently sitting in the "Under Contract" stage of the pipeline. This gives the Transaction Coordinator a real-time count of how many open contracts they are managing.

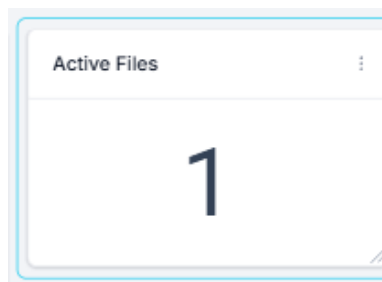


Figure 26 – Active Files widget

Configure

Conditions

Themes

Pipeline

Is

Transaction Coordinator

AND

Stage

Is

Under Contract

+ AND

+ Add Filter

Figure 27 – Pipeline filter: Under Contract stage

D.2 Contract-to-Close Rate

This metric answers the question: of all active files (leads that were "Under Contract"), how many actually reached a successful closing? It is expressed as a percentage of contracts closed versus those that were opened.

Edit Widget

Configure **Conditions** **Themes**

Pipeline Is

Transaction Coordinator

AND

Stage Is

Under Contract

AND

Status Is

Won

+ AND

+ Add Filter

Figure 28 – Contract-to-Close Rate formula configuration

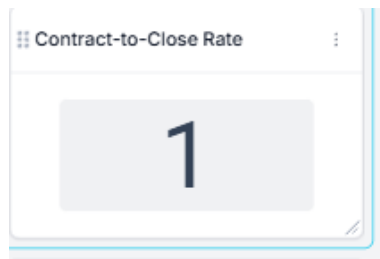


Figure 29 – Contract-to-Close Rate widget output

D.3 Average Days to Close

This KPI tracks the average number of days it takes for a lead to move from the "Under Contract" stage to a completed closing. It helps identify inefficiencies in the closing process and supports workload planning.

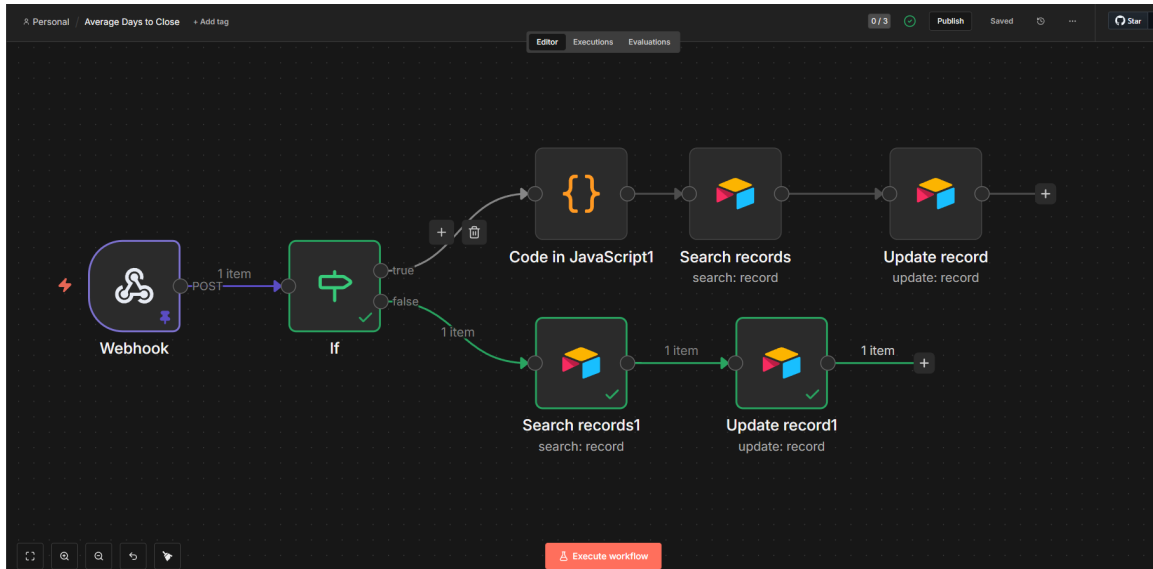


Figure 30 – Average Days to Close widget configuration

Average Days to Close

Interface > Average Days to Close

Group Filter Sort View Search ...

UnderContract Time	Won Time	Average Time
18:191/8/2026	12hr	12

1 record

Airtable [View larger version](#)

Figure 31 – Days-to-close formula and field mapping

D.4 Resolution Time for Open Title Issues

When a lead has an open title issue, this metric tracks the average time taken to resolve it. The system uses a custom field called "Average Resolution Speed" to record and calculate this value.

Note: This field must be filled in manually or through an integrated form submission when a title issue is resolved.



Figure 32 – Average Resolution Speed custom field

D.5 Automation — Delay Alert for Untouched Leads (48+ Hours)

If a lead in the Transaction Coordinator's pipeline remains untouched for more than 48 hours, an automated delay alert is triggered. The system already has a 1-day (24-hour) timer configured; this 48-hour version extends that logic for a secondary follow-up reminder.

Note: This automation is essentially a repeat/extension of the existing 1-day delay alert. Review the trigger settings to avoid overlapping notifications.

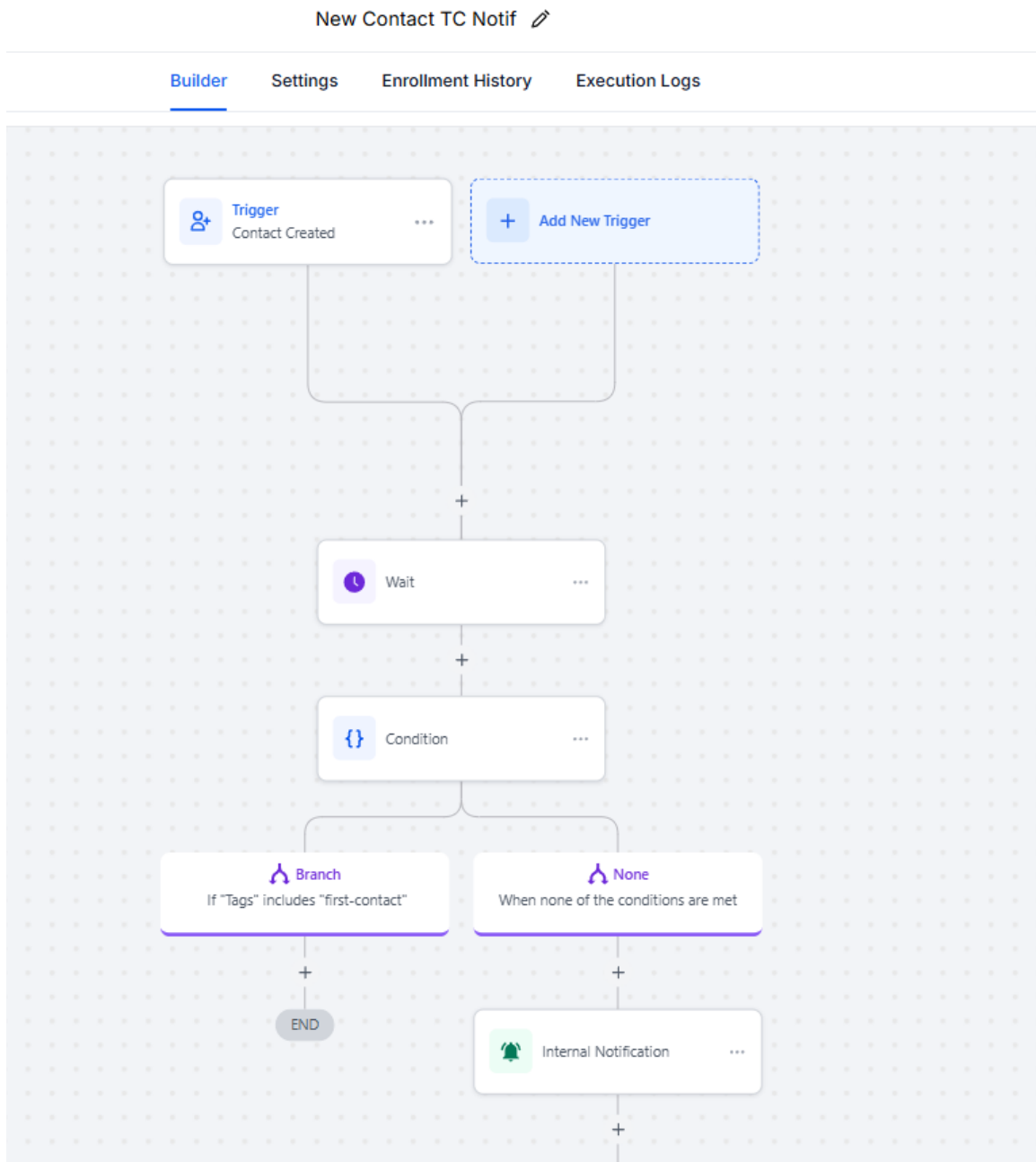


Figure 33 – 48-hour delay alert automation workflow

D.6 Automation — Automated Status Updates to Sellers/Buyers

This automation sends status update messages to sellers and/or buyers at key stages of the transaction process. It ensures stakeholders are informed of progress without requiring manual outreach from the Transaction Coordinator.

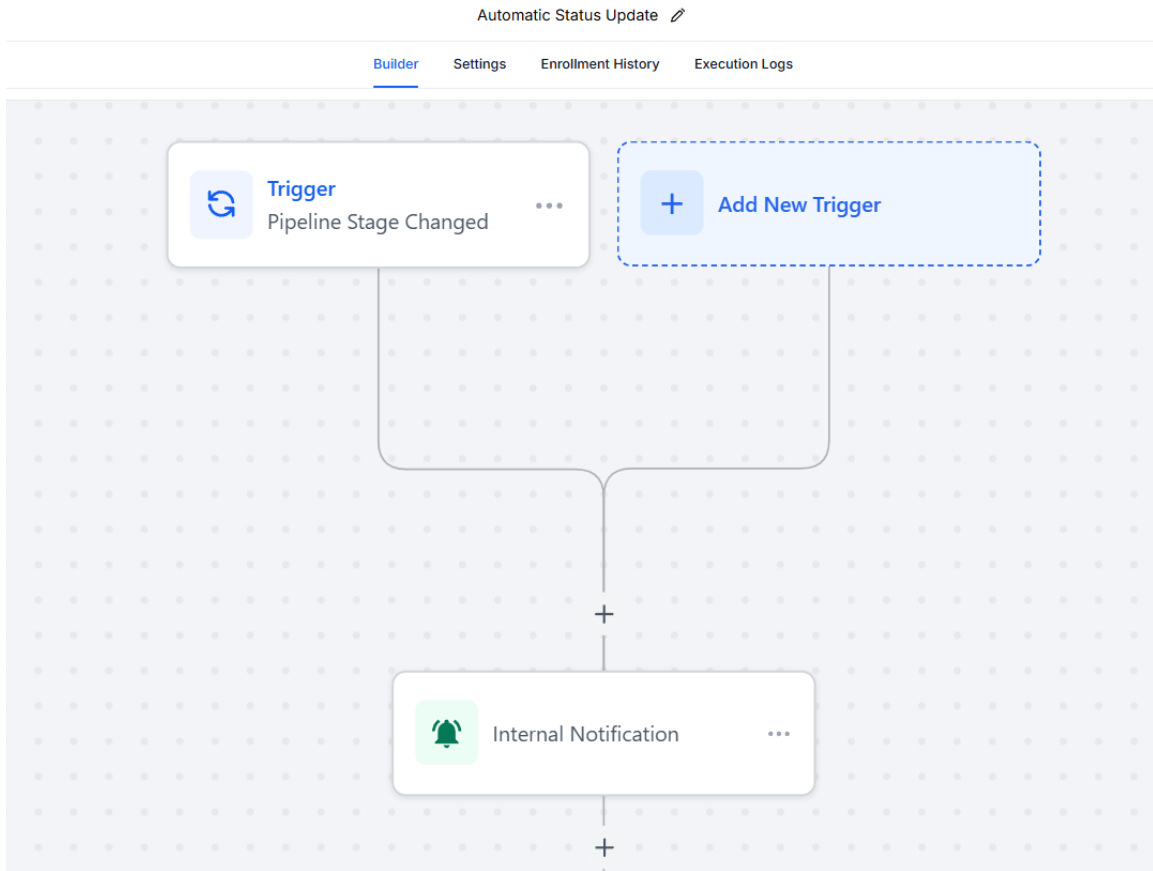


Figure 34 – Automated status update workflow for sellers and buyers

Section 02 Video Walkthrough

A recorded walkthrough of Section 02 is available at the link below:

[Section 02 Loom Walkthrough](#)

Section — Marketing & Researcher KPIs

This section documents the core KPIs tracked for the Marketing and Researcher roles. Each KPI has its own data source, calculation logic, and associated automations.

KPI #1 — Marketing Qualified Leads (MQLs)

This KPI tracks the total number of Marketing Qualified Leads generated. A lead is counted as an MQL when it is submitted through any of the designated intake forms and is subsequently tagged as "mql-new" in Airtable.

Data Source — Podcast Appearance Log Form

The Podcast Appearance Log is one of the forms used to capture lead data. When a host or guest submits information, the entry is logged and routed into the MQL pipeline.

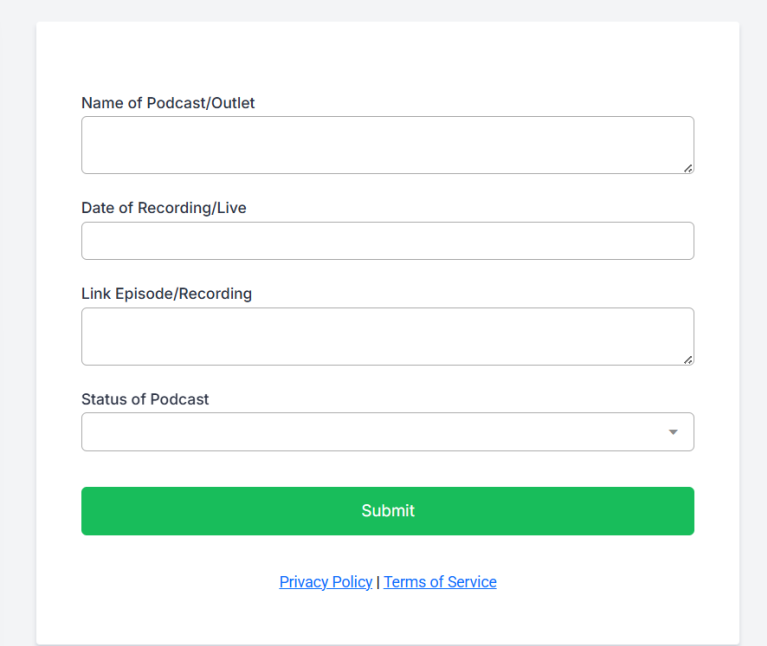
The image shows a web form titled "Podcast Appearance Log" with a light gray border. Inside the form, there are four input fields stacked vertically. The first field is labeled "Name of Podcast/Outlet" and is a text input. The second field is labeled "Date of Recording/Live" and is a date input. The third field is labeled "Link Episode/Recording" and is a text input. The fourth field is labeled "Status of Podcast" and is a dropdown menu. Below these fields is a large green "Submit" button. At the bottom of the form, there are two links: "Privacy Policy" and "Terms of Service".

Figure 1 – Podcast Appearance Log form structure

Form Skeleton Overview

All intake forms share a common skeleton structure. The screenshot below shows the standard layout used across forms to ensure consistent data capture.

Name	Last Updated	Updated By	
MARKETING	Jan 22, 2026 04:12 PM	Jezelle Cardenas	⋮
FOR RESEARCHER Lead QC Form	Jan 07, 2026 02:56 PM	Jezelle Cardenas	⋮
Joint Venture Opportunities Form	Jan 27, 2026 02:40 AM	Abdullah Nadeem	⋮
Master Contact Us Survey	Jan 27, 2026 10:45 PM	Abdullah Nadeem	⋮
PODCAST APPEARANCE LOG	Jan 26, 2026 09:31 PM	Abdullah Nadeem	⋮
SYSTEM INCIDENT & ENHANCEMENT LOG	Jan 23, 2026 11:21 PM	Abdullah Nadeem	⋮

Figure 2 – form place in GHL

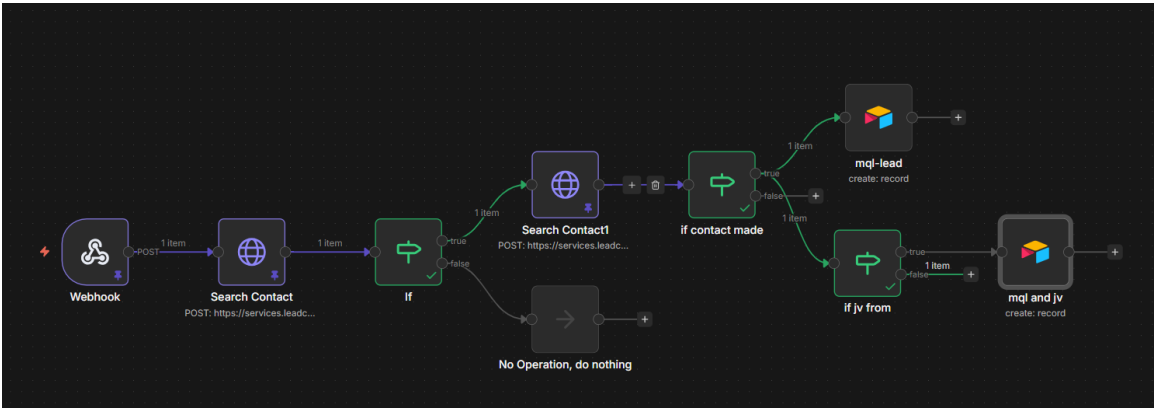


Figure 3 – n8n automation for keeping track of MQL and JV leads

Automation — MQL Tagging in Airtable

When a new lead is submitted through any of the tracked forms, an automation fires immediately to count the lead and apply the "mql-new" tag within Airtable. This ensures every new lead is captured and classified without any manual intervention.

	A email	A source	📅 created-at	A is-new-mql	A is-jv-lead	📅 week	Share view
1	support@agentumai.tech		2026-01-27 23:31	YES			5

Figure 4 – data in airtable

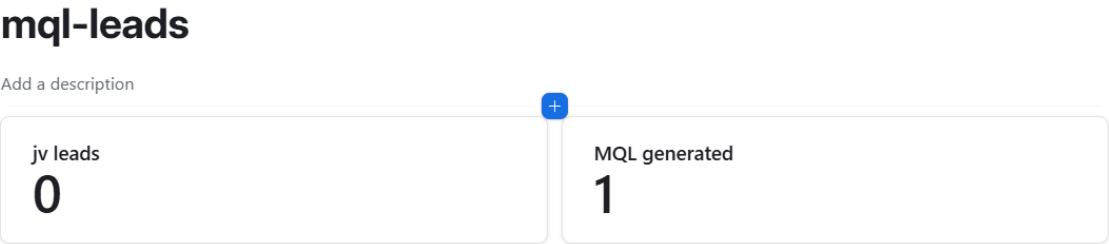


Figure 5 – Airtable dashboard: MQL lead count and JV lead count

Note: The widget on the dashboard displays two counts side by side: MQL Leads Count and JV Leads Count. Both are sourced from this Airtable automation.

KPI #2 — Visibility Metric Growth

This KPI measures the growth of the organization's public visibility over time. It tracks podcast appearances and email list size, comparing current totals against a defined starting baseline to compute a percentage growth figure.

Tracked Forms

The following forms contribute data to this KPI:

Name	Last Updated	Updated By
Waitlist Form	Jan 23, 2026 10:41 PM	Jezelle Cardenas
Webinar Form 1	Jan 23, 2026 10:43 PM	Jezelle Cardenas
Webinar Form 2	Jan 23, 2026 10:44 PM	Jezelle Cardenas

Figure 6 – Forms included in the Visibility Metric Growth KPI

Podcast Appearances — Calculation Logic

Podcast appearances are counted by reviewing submissions from the Podcast Appearance Log form. Only entries where the status is marked as either "Recorded" or "Published" are included in the count.

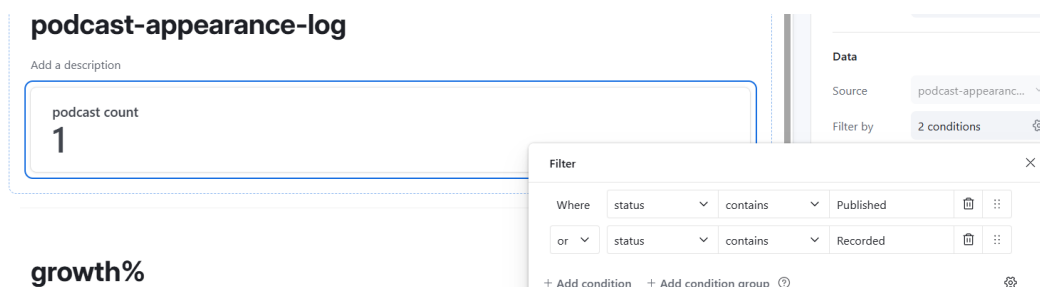


Figure 7 – Podcast Appearance Log filter: Recorded or Published status

```
9   throw new Error("Starting Total cannot be 0");
10 }
11
12 // Calculate growth %
13 const growthPercent =
14   ((currentTotal - startingTotal) / startingTotal) * 100;
15
16 return [
17   {
```

Figure 8 – growth percentage formula

Growth Percentage Formula

The percentage growth is calculated as follows:

Growth % = ((Current Total - Starting Total) / Starting Total) × 100

The Starting Total is set by marking one Airtable row as "active." All other rows remain blank. This allows the baseline to be updated as needed without changing the formula.

☐	A cycle_name	# starting_total	 start_date	A is_active
1	none	3	2026-01-06 8:41pm	active
2	hello	12	2026-01-06 8:45pm	
3				
+				

Figure 9 – Starting Total configuration: active row selection in Airtable

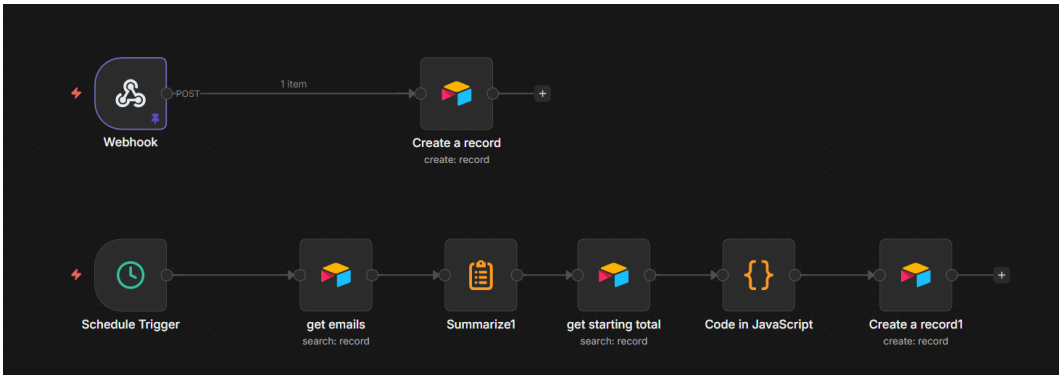


Figure 10 – Email list size source: unique submissions from Webinar Form 1, Webinar Form 2, and the MORE for Women Masterclass Waitlist Form

Growth Widgets

Two numeric widgets display this KPI on the dashboard:

- Podcast Appearances — total count of recorded and published appearances
- Total Email List Size — total unique email submissions across the three webinar/waitlist forms

☐	# growth%	# email-list-size	 created-at
1	100.0	6	2026-01-27 21:10
+			

Figure 11 – Growth metric display widget

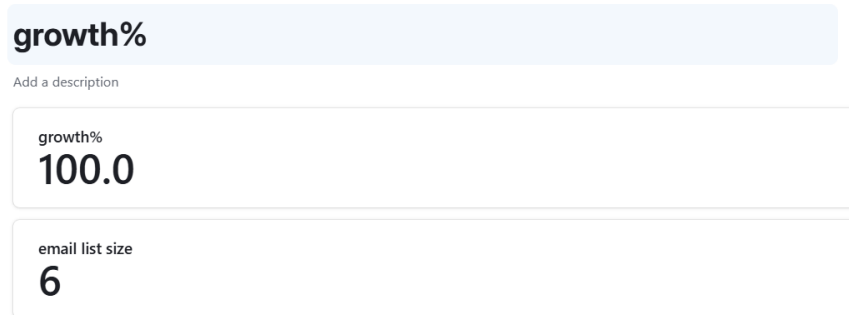


Figure 12 – Numeric widgets: Podcast Appearances and Email List Size

KPI #3 — Content Consistency Score

The Content Consistency Score measures how consistently the team is producing and publishing content across social media channels. It reflects both volume and regularity of posting activity.

Social Media Post Count

Social media activity is tracked by counting posts marked as "Published" within the GHL Social Planner. This gives a real-time view of how many posts have been made public.

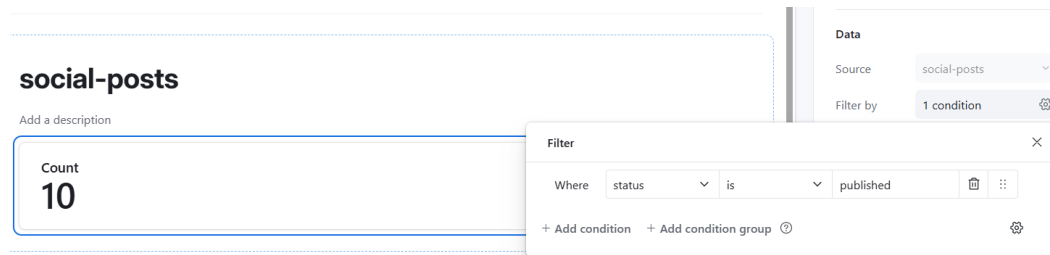


Figure 13 – GHL Social Planner: Published posts filter

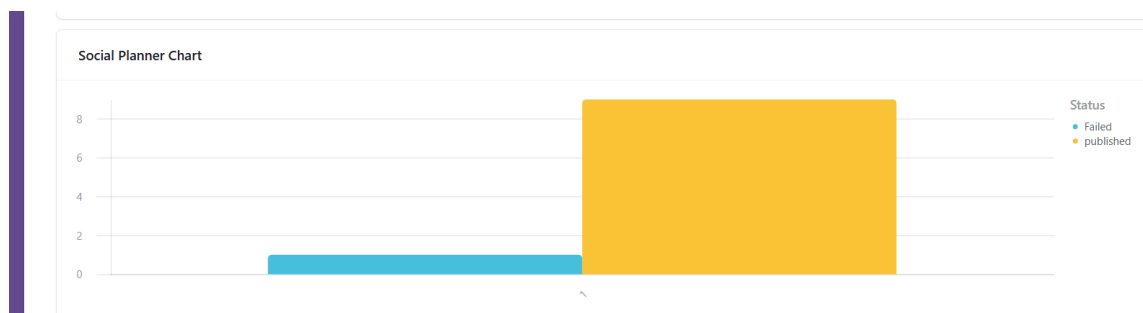


Figure 14 – Social post count widget configuration

Score Calculation Logic

The Content Consistency Score is calculated using a total of 12 content types. Newsletter content is currently excluded from this count. The formula aggregates output across all included content types to generate the score.

language

JavaScript

JavaScript

Code Ask AI

1

// Get total actual content pieces

2

const totalActual = \$input.first().json.count_id;

3

4

// Fixed monthly requirement

5

const totalRequired = 12;

6

7

// Prevent divide by zero

{

"total_actual": 10,

"total_required": 12,

"content_consistency_score": 83.33

}

}

Figure 15 – Content Consistency Score formula — 12 content types, newsletter excluded

e

Data Automations Interfaces Forms

All changes saved

Lau

Metric

project-velocity-pipeline

podcast-appearance-log

social-posts

email-leads

email_benchmark

growth%

mql-leads

content_consistency_score

+

Hide fields

Filter

Group

Sort

Color

Share

☐	published-at		A status	month		A platform	A post_id
1	2026-01-26 21:07		published		1	instagram	69778fdea8777657a5c3a958
2	2026-01-01 08:02		published		1	linkedin	6955e382c4a8b6fd2fb317ca
3	2025-12-31 21:08		published		1	instagram	6955490866d49676a736f5b2
4	2025-12-31 20:02		published		1	facebook	69553ae1735f885f2dfa0ffb
5	2025-12-25 19:03		published		1	facebook	694d43f2e82775bb0507bb...
6	2025-12-25 19:04		published		1	instagram	694d43cb73b145cbb53a42...
7	2025-12-25 18:04		published		1	linkedin	694d35dce82775c2d604c7c8
8	2025-12-25 18:04		published		1	linkedin	694d35dce827750e0c04c7de
9	2025-11-27 21:02		published		1	instagram	692875c1bb81ca43002711fb
10	2025-11-27 18:04		published		1	facebook	69284bdf482b88073d38b7...
+							

Figure 16 – Score breakdown and content type detail view

Airtable Widget

An Airtable widget is used to display the Content Consistency Score on the dashboard. Airtable was used here because GHL does not support conditional rendering of fields natively.

content_consistency_score

content-consistency-score

63

Figure 17 – Airtable widget configuration for Content Consistency Score

THE INTERNAL RETURN TO RESEARCH TOOL

Edit

Settings

Submissions

Country

Country

Postal Code

Postal Code

Return Category

Specific Reason

[Scope Expansion] Secondary Heir Discovery

[Scope Expansion] Acquisition Request

[Data Clarification] Conflicting Resources

[Benchmark Failure] Incomplete Obituary Mapping

[Benchmark Failure] Transcription Error

+ Add Option

Type a short label

Notes / Instructions:

Figure 18 – Airtable widget layout and field mapping

Note: GHL does not offer conditional rendering for dashboard fields. Airtable is used as a workaround to display dynamic content based on conditions.

Research Stage Integration

The Content Consistency Score also pulls in research stage data from the Acquisitions pipeline. This allows the KPI to reflect research activity as part of the overall content workflow.

Opportunities

Opportunities

Research

Quick Actions

← Research Pipeline

Stages

Smart Tags

Search

+ Add Stage

Stage Name	Show in Reports	Actions
From Acquisitions		

Figure 19 – Research stage filter from Acquisitions pipeline

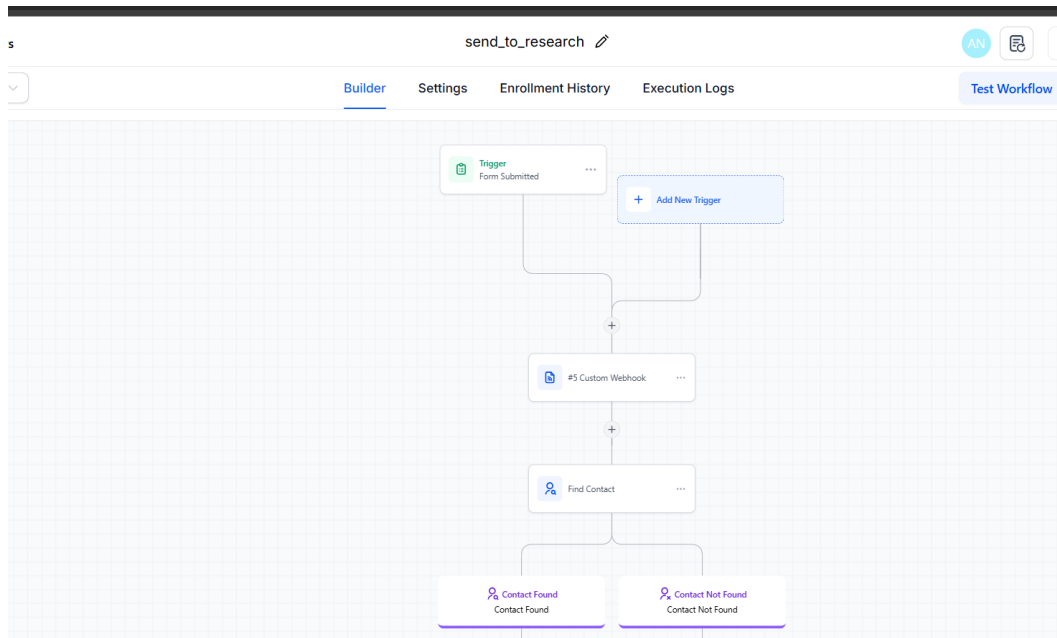


Figure 20 – Research stage data feeding into the Content Consistency Score

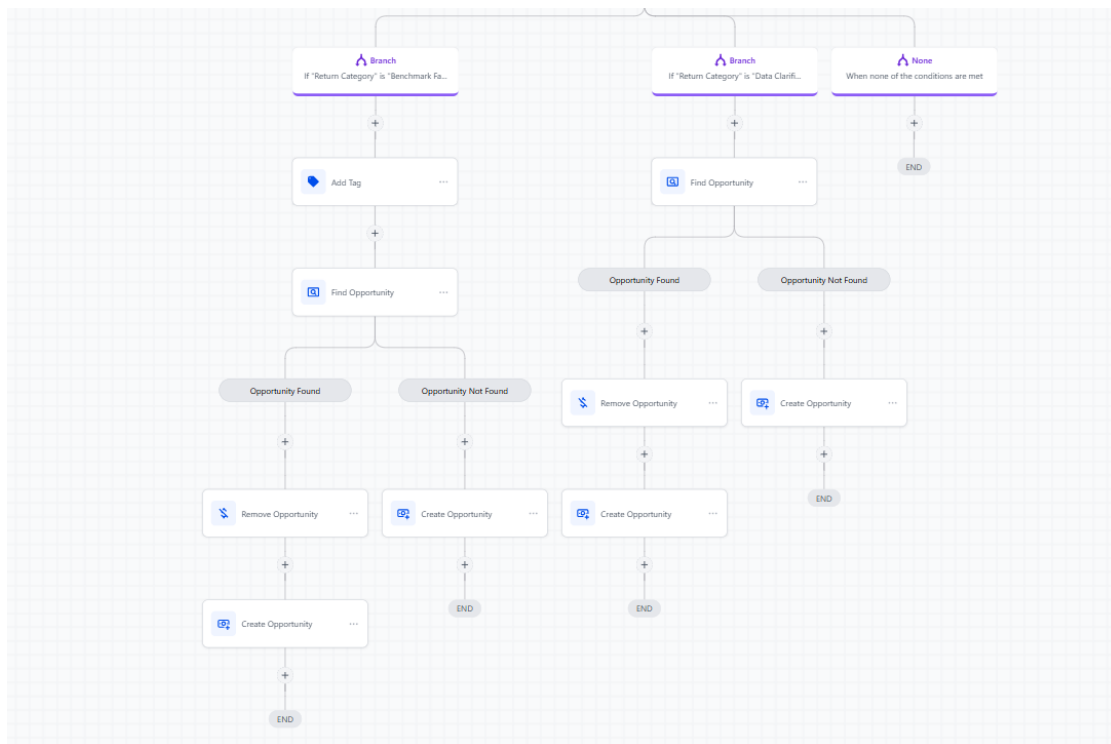


Figure 21 – Combined data view: content and research pipeline

Workflow Logic — The KPI "Brain"

The following section describes the core workflow that powers KPI calculations and accuracy tracking. This workflow runs in the background and drives the automated reporting and Slack notification system.

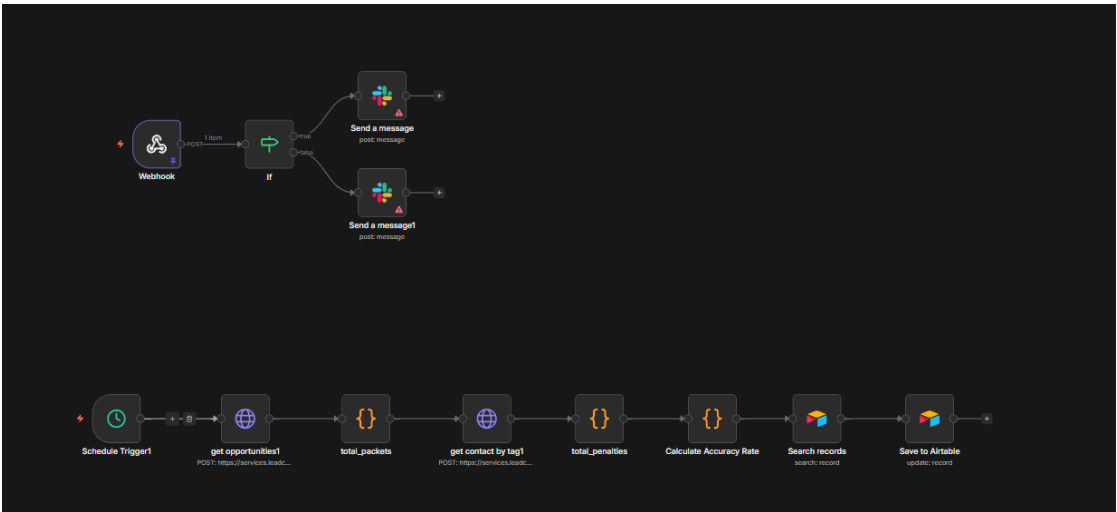


Figure 22 – KPI workflow overview: the automation brain

Accuracy Rate Calculation

The accuracy rate is calculated based on two counts pulled directly from the pipeline:

- Total Packets — the number of leads that have been moved to the "Research Completed" stage
- Total Penalties — the number of contacts that have been assigned the "kpi-accuracy-penalty" tag

The workflow uses these two values to compute an accuracy percentage, which is then sent as a Slack notification to the relevant team members.

☐	# Researcher Accuracy...	created-at	+
1	100	2026-02-05 15:54	
+			

Figure 23 – Accuracy rate logic: Research Completed count vs. penalty tag count

Section 2.5 — System Operations KPIs

This section covers operational KPIs that measure system reliability and process improvement activity.

KPI — Controllable System Uptime %

This KPI tracks the percentage of time the system is fully operational, excluding downtime events that fall outside the team's control. It focuses specifically on controllable failures such as operations or logic errors.

Calculation Logic

```
Uptime % = 100 - (Sum of "Downtime Duration" where Category =  
"Ops/Logic Error")
```

Note: Only downtime entries categorized as "Ops/Logic Error" are included. External or infrastructure-related outages are excluded.

KPI — Leverage: System Enhancements

This KPI counts the number of improvements made to the system during a given period. It measures proactive development and problem-solving by tracking submissions where the Resolution Type falls into one of the following categories:

- New Workflow
- System Optimization
- Tech Support / Fix

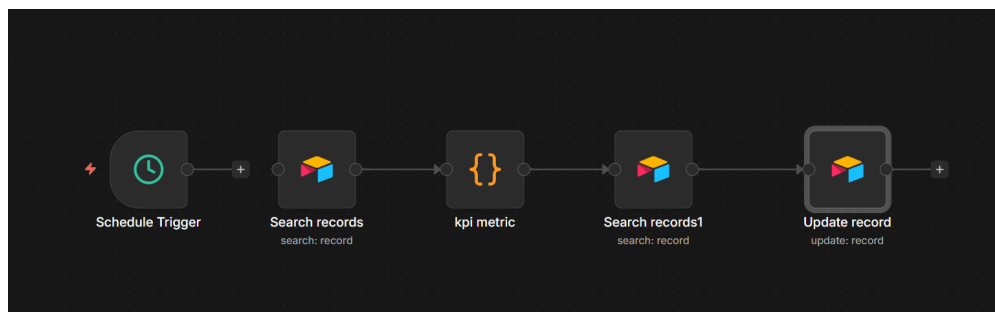


Figure 24 – System Enhancements KPI: Resolution Type filter

```
2 // CONFIG
3 // =====
4 const OPS_LOGIC_CATEGORY = "Ops/Logic Error";
5
6 // Resolution types that count as leverage
7 const LEVERAGE_CATEGORIES = [
8   "New Workflow/Automation",
9   "System Optimization",
10  "Tech Support/Fix",
11 ];
12
13 // =====
```

Figure 25 – Enhancements count widget

KPI Calculation in n8n

Both system operations KPIs are calculated inside n8n, the automation platform. The calculations run on a scheduled basis and push results to the dashboard.

☐	Calculated At	# operational_leverage	# Controllable System Uptime %	# Ops/Logic Downtime Minutes	A Month	▼
1	2/5/2026 21:30	4.0	99.8	85.0	2026-01	
+						

Figure 26 – n8n workflow: system KPI calculation nodes

Add a description

controllable system uptime %

99.8

operational_leverage

4.0

Figure 27 – n8n output for system uptime percentage

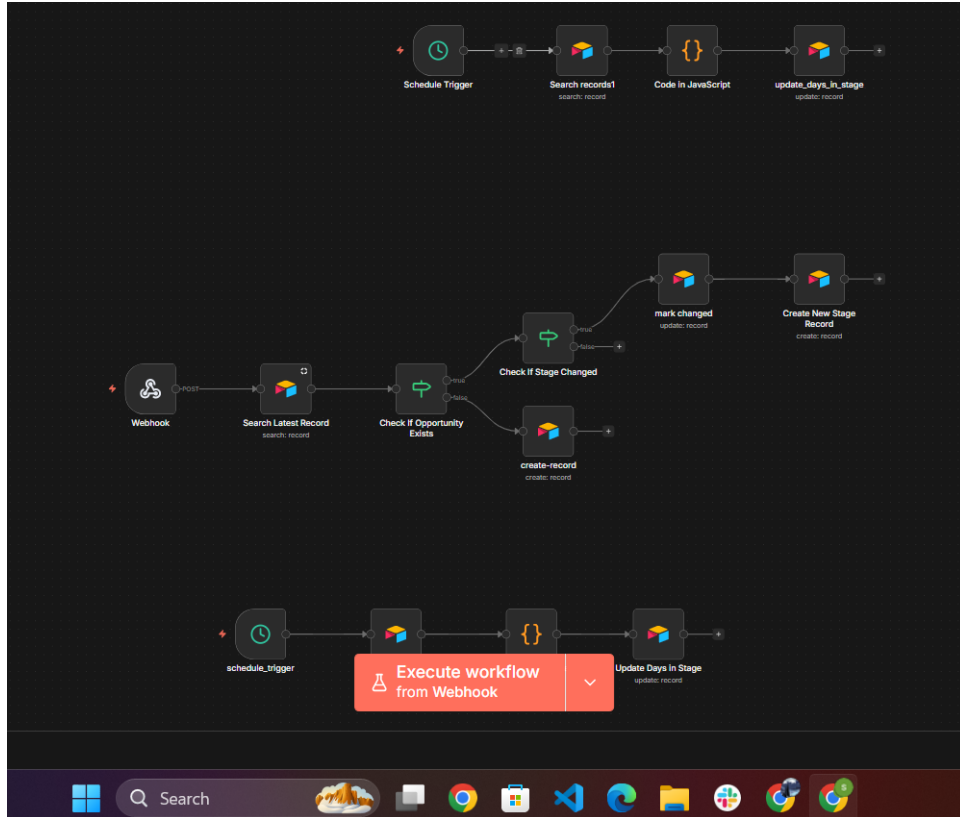


Figure 28 – Active Pipeline status table (In-Progress): Project Name | Current Stage | Days in Stage

☐	stage_entered_at	A pipeline_name	A stage_name	A pipeline_status	# days_in_stage	A full_name	A
1	2026-01-24 01:22	Project Velocity Pipeline	Ops Phase	open	0	Thigpen Michael D	(7
2	2026-02-05 21:53	Project Velocity Pipeline	Ops-Complete	open	0	Thigpen Michael D	(7
+							

Figure 29 – Pipeline status summary widget

Section 2.5 Video Walkthrough

[Section 2.5 and marketing Loom Walkthrough](#)

Section 3 — Monthly Bonus Tracker

The Monthly Bonus Tracker automates the calculation and display of performance bonuses for each team role. It evaluates KPI achievement percentages, applies a bonus formula, and tracks whether a team member has achieved a "Perfect Month" or "Perfect Quarter."

Dashboard Widgets

The following widgets are displayed within the Monthly Bonus Tracker section of the dashboard:

- KPI Achievement % by Role
 - Bonus Amount Earned (auto-calculated)
 - Perfect Month Indicator
 - Perfect Quarter Tracker — three consecutive green months triggers a bonus
-

Automation — KPI Achievement & Bonus Amount

Formula

The total KPI achievement percentage for each team member is calculated by combining their individual KPI scores, each weighted by its assigned importance:

$$\text{Total Achievement \%} = (\text{KPI 1 Score} \times \text{Weight}) + (\text{KPI 2 Score} \times \text{Weight}) + (\text{KPI 3 Score} \times \text{Weight})$$

Bonus Tiers

Once the achievement percentage is calculated, the following bonus rules are applied:

- Achievement < 49% → Bonus = \$0
- Achievement 50%–89% → Bonus = \$250
- Achievement 90% or higher → Bonus = \$500

Example: If a Data Specialist achieves 84%, they are entitled to a \$250 bonus under this tier structure.

Note: The example in the original documentation referenced a \$500 bonus at 84% — please verify the correct tier thresholds with your manager before communicating bonus amounts.

Visual Flow

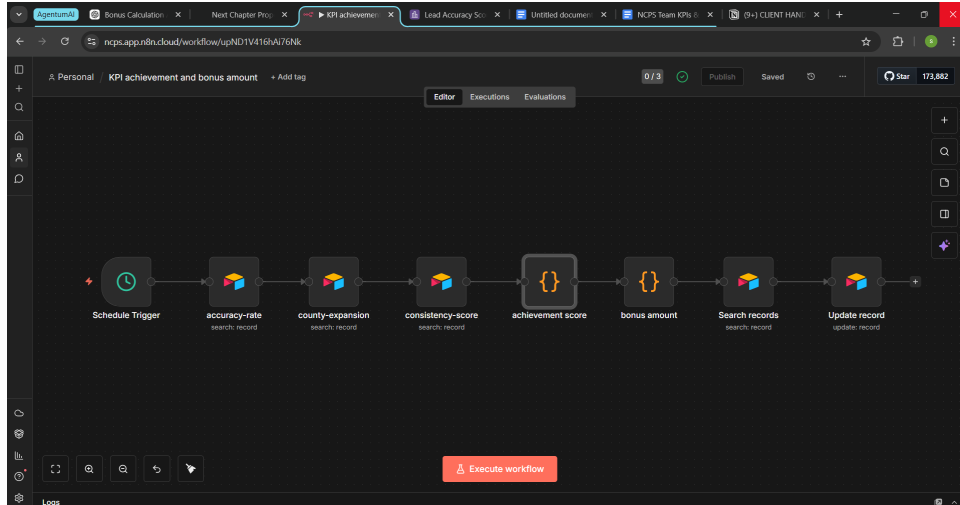


Figure 30 – KPI Achievement automation workflow in n8n

The screenshot shows an Airtable interface for a table named "Lead Accuracy Score Table". The table is in "Grid view" and has 1 record. The columns are "# achievement %" and "# bonus-amount". The first row shows values 41.0 and 0. The table is in "Grid view" and has 1 record.

	# achievement %	# bonus-amount
1	41.0	0

At the bottom of the table, there is a summary row showing "1 record", "Sum 41.0", and "Sum 0".

Figure 31 – Bonus calculation logic and output

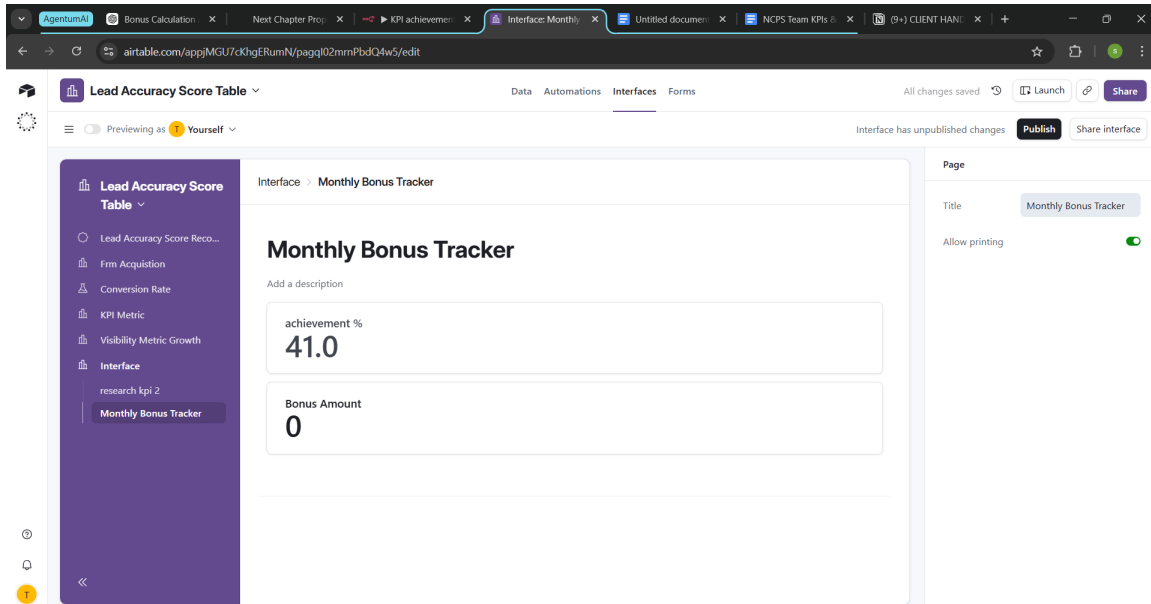


Figure 32 – Achievement % table: role-by-role breakdown

Where to Find This Automation

Location: *n8n* → *Workflows* → *"KPI Achievement and Bonus Amount"*

Permitted Edits

Schedule Trigger — you may adjust when the automation runs.

Restricted — Do Not Edit

- Any node other than the Schedule Trigger
- API connections
- *n8n* nodes — contact the development team if changes are needed

Automation — Perfect Month Indicator & Perfect Quarter Tracker

Formula

Two separate but related metrics are tracked:

Perfect Month = Contacts with "signed" tag AND Opportunities in "Under Contract" stage

Perfect Quarter = Perfect Month count / 3

A Perfect Quarter is achieved when a team member logs three consecutive Perfect Months within a quarter.

Visual Flow

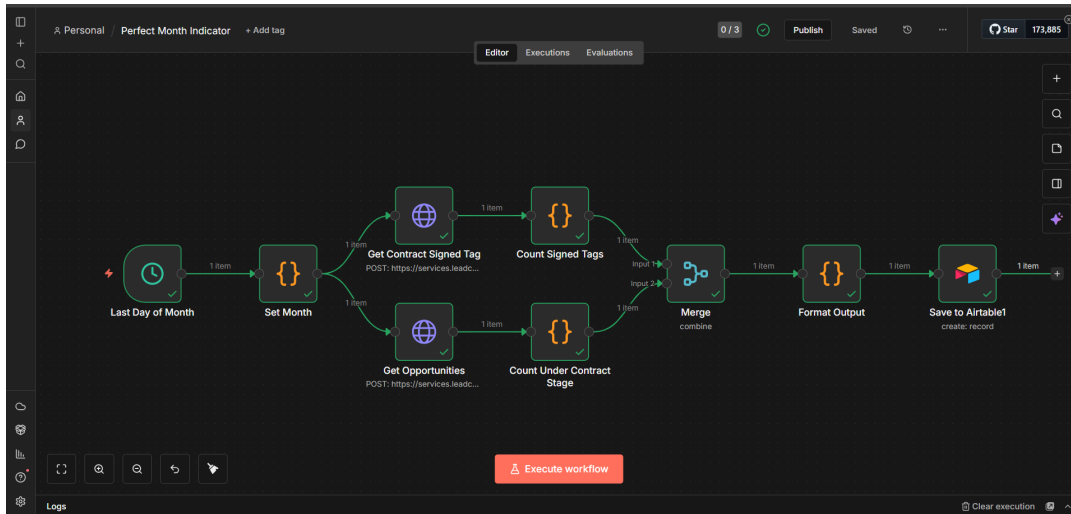


Figure 33 – Perfect Month Indicator automation workflow

	month	# Contracts with Signed Tag	# Contracts in Under Contract Stage	created-at	perfect month	quarter
1	2	1	0	2026-02-03 21:56	0	1
2	2	1	4	2026-02-03 22:02	1	1
3	2	1	0	2026-02-10 15:29	0	1
+						
3 months		Sum 6	Sum 3	Sum 4	Sum 1	Sum 3

Figure 34 – Perfect Quarter Tracker logic in n8n

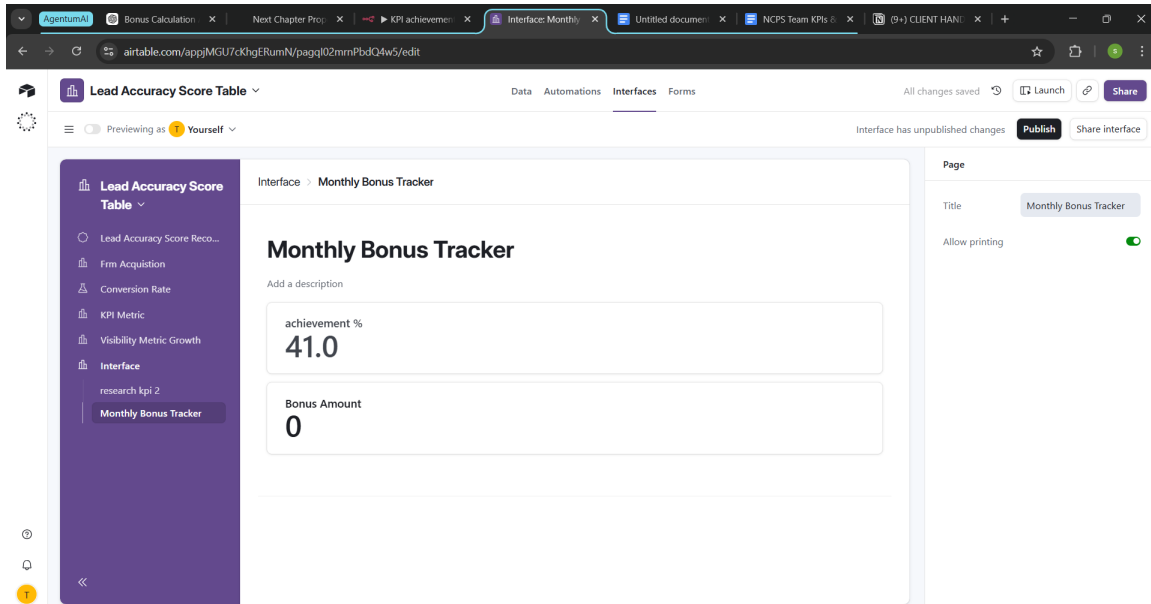


Figure 35 – Perfect Month Indicator table output

Where to Find This Automation

Location: *n8n* → *Workflows* → *"Perfect Month Indicator"*

Permitted Edits

Schedule Trigger — you may adjust when the automation runs.

Restricted — Do Not Edit

- Any node other than the Schedule Trigger
- API connections
- *n8n* nodes — contact the development team if changes are needed

Common Issues & Troubleshooting

Issue — Automation Has Stopped Running

If an automation appears to have stopped sending data or updating the dashboard, check the following:

1. Open *n8n* and locate the relevant workflow.
2. Verify the workflow status is set to "Published." If it shows "Draft" or "Inactive," the automation will not run.

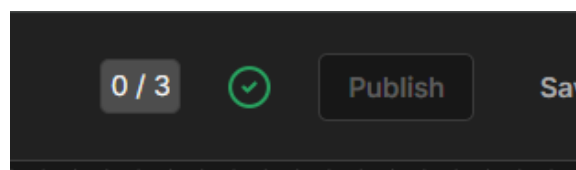


Figure 36 – *n8n* workflow status: must be set to Published

Issue — Cannot Log In

If you are unable to access the system, try the following steps in order:

3. Use the "Forgot Password" option on the login screen.
4. Confirm you are using the correct login URL.
5. If the above steps do not resolve the issue, contact the support team at [number].

Issue — Something Was Accidentally Deleted

Warning: STOP immediately. Do not attempt to undo or fix the deletion yourself.

Call the support team immediately at [number]. The system has full backups and the team will restore the deleted item safely. Attempting to fix it manually may cause further data loss.

Section 4 — Additional Automations

This section documents the remaining automations that run across the platform to handle document compliance, social media consistency, and deal management.

Automation — Missing Required Document

Formula

This automation monitors contacts for missing documentation. A contact is flagged when the following condition is met:

```
Count of contacts where tag = "missing-document"
```

How It Works

When a contact is tagged with "missing-document," they are automatically flagged on the dashboard and can trigger a follow-up notification. This ensures that no deal progresses past a compliance checkpoint without the necessary paperwork.

Visual Flow

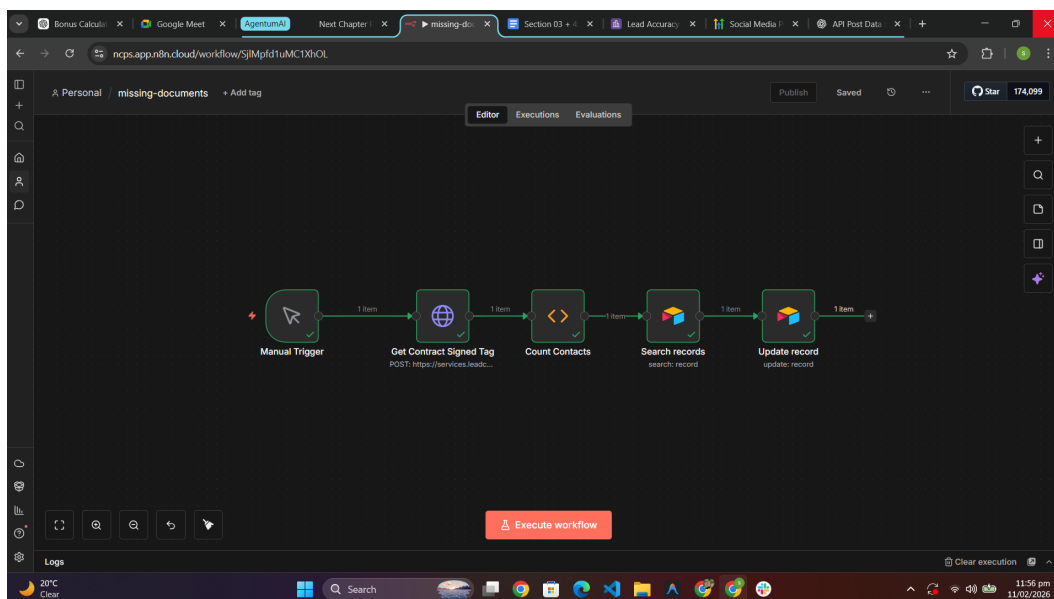


Figure 37 – Missing Required Document automation trigger and logic

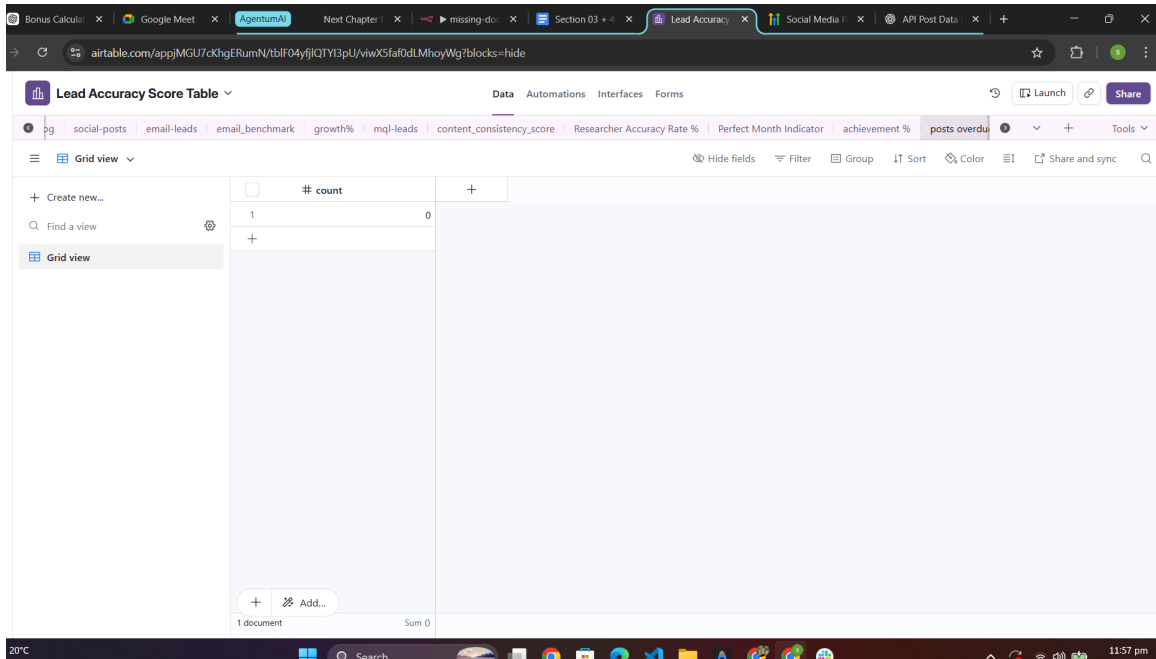


Figure 38 – Workflow: contact tagged and flagged for missing document

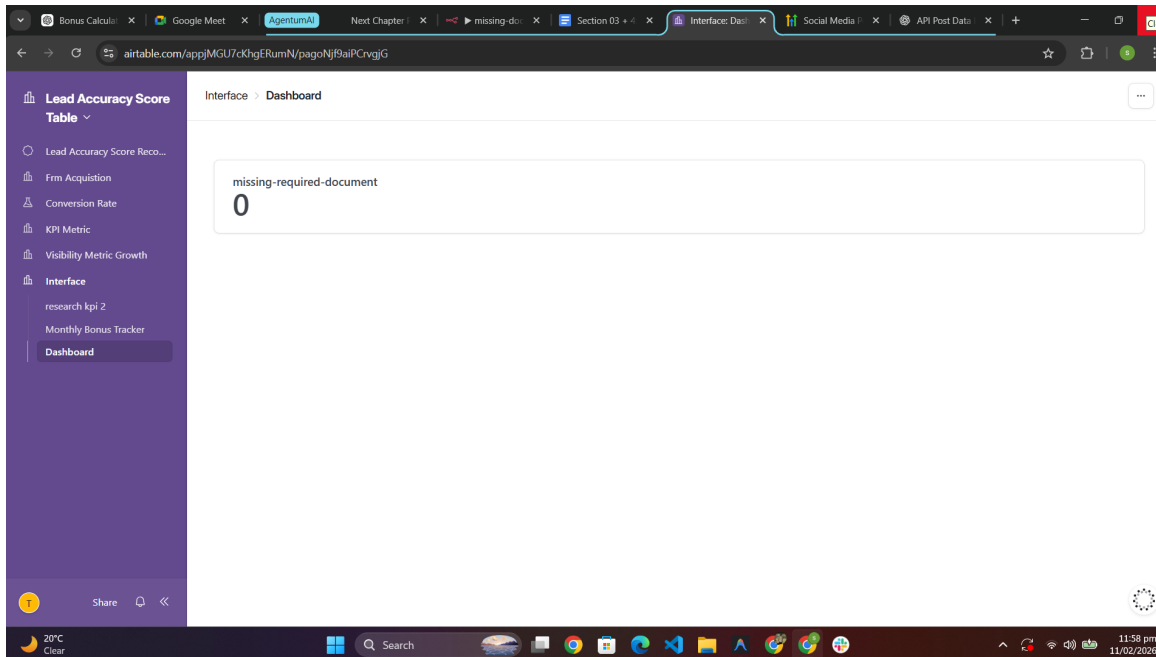


Figure 39 – Dashboard display: Missing Required Document count

Automation — Social Posts & Overdue Status

Logic

This automation monitors weekly social media posting activity. If the total number of posts published in a given week falls below the minimum threshold, the week is automatically marked as "Overdue."

If weekly social post count < 3 → Status = "Overdue"

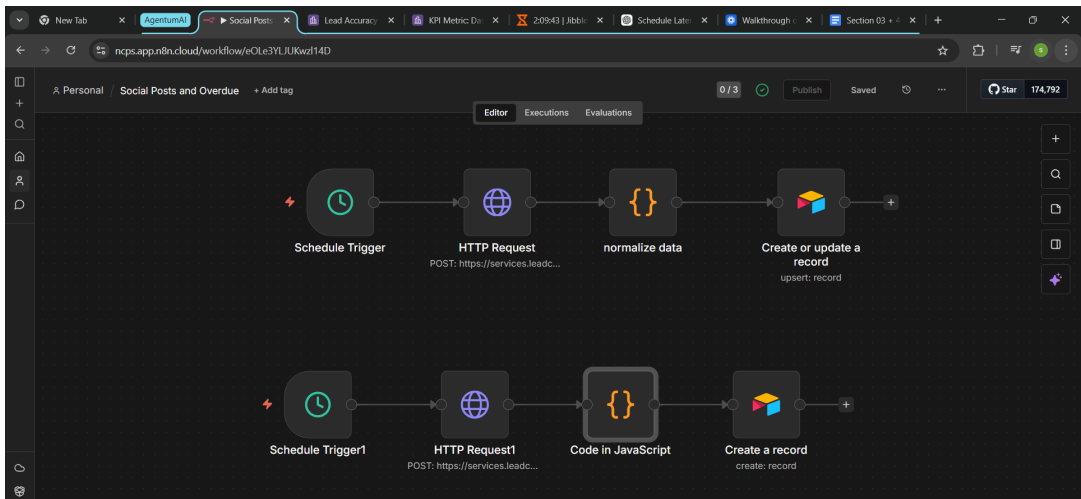


Figure 40 – Social post count evaluation: threshold check

Visual Flow

Lead Accuracy Score Table

bookmarkgrowth%mqi-leadscontent_consistency_scoreResearcher Accuracy Rate %Perfect Month Indicatorachievement %posts overduemissing-required-documentstalled-deals

Grid view

	Week Start	Week End	# Post Count	Status
1	2026-02-09 05:00	2026-02-16 04:59	0	OVERDUE

1 post

Sum 0

Figure 41 – Social Posts & Overdue automation workflow

Note: The overdue status is applied at the weekly level, not the individual post level. A week with 2 or fewer published posts will trigger this flag regardless of which days they were posted.

Automation — Stalled Deals

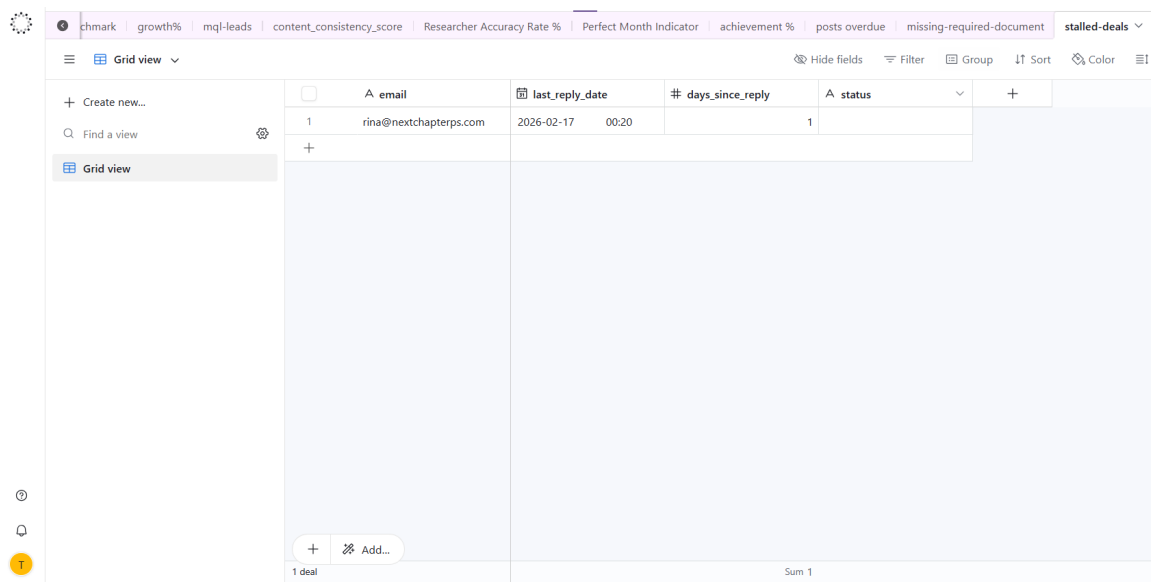
Logic

This automation identifies deals that have gone quiet — meaning no response or activity has been recorded from a contact for more than 7 days. Such deals are automatically marked as stalled to prompt follow-up action.

```
If days since last reply > 7 → Status = "stalled-deal"
```

How It Works

When a new contact replies, the system creates a fresh contact record and begins incrementing a day counter from zero. If that counter reaches 7 without a new reply being recorded, the stalled-deal status is applied automatically.



	A email	last_reply_date	# days_since_reply	A status	
1	rina@nextchapterps.com	2026-02-17 00:20		1	
+					

1 deal

Sum 1

Figure 42 – Stalled Deals automation workflow

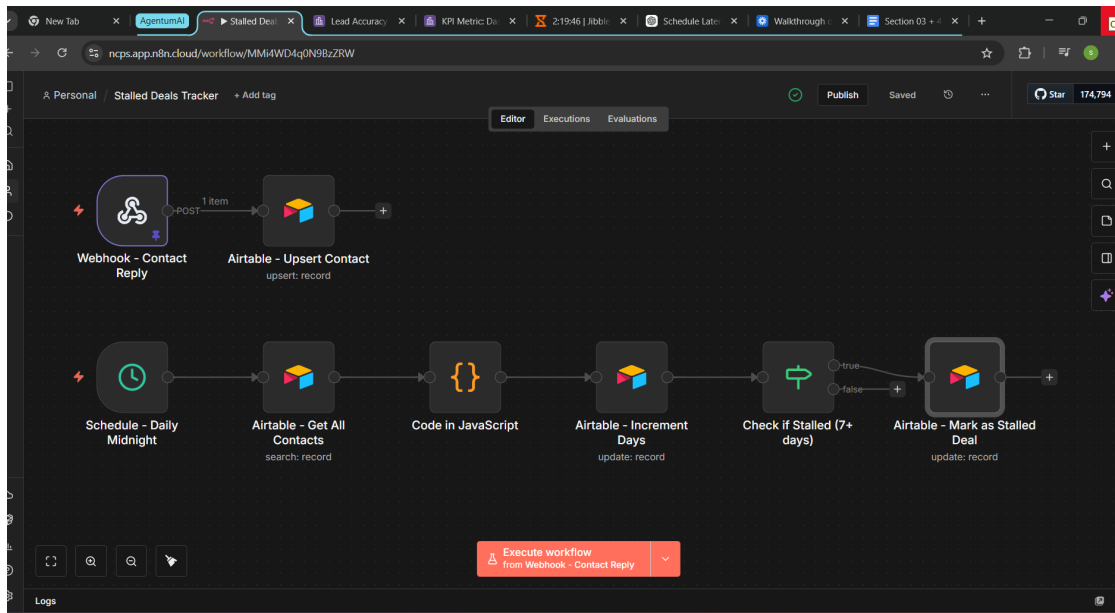


Figure 43 – Reply detection logic: new contact created on reply, counter resets

Section 4 Video Walkthrough

[Section 4 Loom Walkthrough](#)