

FOR FRACTIONAL CFOS

Fractional CFO: The CEO Dashboard Starter Template

show CEOs the 7 numbers that actually matter - not another report.

How to show CEOs the **7 numbers that actually matter** — without overloading them with reports, spreadsheets, or finance noise.

HOW TO USE THIS TEMPLATE

This is not a full reporting package. it's a CEO-facing dashboard.

USE THIS WHEN

- A client is overwhelmed by too many reports
- The CEO keeps asking "what should I actually be looking at?"
- Leadership is deciding without clean financial visibility

position yourself as a strategic CFO - not a report generator.

YOUR GOAL

- Show the CEO the numbers that matter
- Explain what those numbers mean
- Connect the data to a decision — every month

the stronger the dashboard, the easier the decision.

THE DASHBOARD · 7 NUMBERS THAT ACTUALLY MATTER

<p>1 METRIC NO. 01 Cash Position how much room they have to move.</p> <p>WHAT TO SHOW</p> <ul style="list-style-type: none"> <input type="checkbox"/> Current cash balance <input type="checkbox"/> Cash available after upcoming obligations <input type="checkbox"/> Cash runway, if relevant <input type="checkbox"/> Any short-term pressure points <p>HOW TO EXPLAIN IT "Here's where cash stands today, here's what's coming up, and here's whether we have room to make decisions confidently." → Don't just report the number — explain what the cash number allows or restricts.</p>	<p>2 METRIC NO. 02 Cashflow Forecast where cash is headed next.</p> <p>WHAT TO SHOW</p> <ul style="list-style-type: none"> <input type="checkbox"/> Projected cash position over 30 / 60 / 90 days <input type="checkbox"/> Expected inflows <input type="checkbox"/> Expected outflows <input type="checkbox"/> Major timing risks <p>HOW TO EXPLAIN IT "Based on what we know today, here's where cash is likely headed and what decisions may need to be adjusted." → The forecast isn't about predicting perfectly. It's about preventing surprises.</p>
<p>3 METRIC NO. 03 Gross Margin is the model getting healthier or heavier?</p> <p>WHAT TO SHOW</p> <ul style="list-style-type: none"> <input type="checkbox"/> Current gross margin <input type="checkbox"/> Margin trend over time <input type="checkbox"/> Margin by service line, product, client, or location <input type="checkbox"/> Major margin pressure points <p>HOW TO EXPLAIN IT "Revenue is moving, but margin tells us whether the business is actually becoming more profitable as it grows." → This is where you shift the conversation from sales volume to business quality.</p>	<p>4 METRIC NO. 04 Net Profit growth, or just more activity?</p> <p>WHAT TO SHOW</p> <ul style="list-style-type: none"> <input type="checkbox"/> Monthly net profit <input type="checkbox"/> Year-to-date net profit <input type="checkbox"/> Net profit margin <input type="checkbox"/> Profit trend compared to revenue growth <p>HOW TO EXPLAIN IT "This tells us whether growth is turning into financial strength — or just creating more activity." → Revenue up but net profit flat? The business has an efficiency problem.</p>
<p>5 METRIC NO. 05 Payroll / Labor Ratio leverage, or pressure?</p> <p>WHAT TO SHOW</p> <ul style="list-style-type: none"> <input type="checkbox"/> Payroll as a percentage of revenue <input type="checkbox"/> Labor cost trend <input type="checkbox"/> Payroll growth compared to revenue growth <input type="checkbox"/> Team efficiency concerns <p>HOW TO EXPLAIN IT "Payroll isn't the issue by itself. The question is whether labor is creating enough output and profit to justify the cost." → This number helps prevent reactive hiring and bloated teams.</p>	<p>6 METRIC NO. 06 A/R & Collections earned isn't the same as collected.</p> <p>WHAT TO SHOW</p> <ul style="list-style-type: none"> <input type="checkbox"/> Total outstanding receivables <input type="checkbox"/> Aged receivables & overdue invoices <input type="checkbox"/> Collection risk <input type="checkbox"/> Average time to collect <p>HOW TO EXPLAIN IT "This shows how much revenue has been earned but hasn't turned into cash yet." → The fastest way to expose why a business feels tight despite strong sales.</p>
<p>7 METRIC NO. 07 Decision Watchlist end with decisions, not data.</p> <p>THE TOP DECISIONS THAT NEED ATTENTION THIS MONTH</p> <ul style="list-style-type: none"> <input type="checkbox"/> Should we hire now or wait? <input type="checkbox"/> Should we raise pricing, or cut a cost? <input type="checkbox"/> Should we pursue a growth investment? <input type="checkbox"/> Should we tighten collections or change capacity? <p>HOW TO EXPLAIN IT "Based on the numbers, these are the decisions that deserve leadership attention right now." → This is where you separate yourself from bookkeeping. The dashboard ends with decisions.</p>	<p>THE FORMAT · READ EVERY METRIC THIS WAY</p> <p>Four lines per number. number → trend → meaning → decision.</p> <ul style="list-style-type: none"> 1 Number "Current cash balance: \$185,000." 2 Trend "Down 14% from last month on payroll timing." 3 Meaning "Not a crisis — but less room to hire this month." 4 Decision "Delay the next hire until collections improve."

THE DASHBOARD RULE

If the dashboard doesn't help the CEO make a decision, it's just another report.

A STRONG CFO DASHBOARD ANSWERS FIVE QUESTIONS

- 01 Where are we now?
- 02 What changed?
- 03 What is at risk?
- 04 What decision needs to be made?
- 05 What should we watch next?

WHY THIS MATTERS

CFOs don't lose authority by lacking financial skill. they lose it when their work looks like reporting.

CEOs DON'T WANT MORE OF:

- × Spreadsheets
- × Raw reports
- × Finance noise
- × Data without meaning

THEY WANT:

- Clarity & direction
- Confidence & control
- Better decisions
- Value they can see every month

the best CFOs don't send numbers - they turn numbers into decisions.

WANT HELP BUILDING A HIGHER-VALUE ADVISORY BUSINESS — clearer positioning, better delivery, stronger retainers.

Apply for a Fractional CFO Growth Strategy Session

DESIGNED SPECIFICALLY FOR:

- Fractional CFOs, virtual CFOs & strategic finance consultants
- Advisory-focused accountants raising their positioning
- CFOs who want their value to be visible — and their retainers easy to justify

Book a Free Strategy Session →

We'll identify how your current offer is positioned, whether your client-facing assets make you look strategic or replaceable, and what needs to change to attract, close, and retain better CFO clients.

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