SOG Tracker - Advanced Analytics Quick Start Guide

Get Started in 5 Minutes

A fast-track guide to using Rankings, Goals, and Forecasting

🚀 Quick Overview

SOG Tracker has three powerful analytics features:

Feature	What It Does	Minimum Data Needed
📊 My Rankings	Shows how you compare to other SOG members	1 month of data
🎯 Goals & Progress	Track performance against targets	Current month's data
🔮 Forecasting	Predicts future performance	3 months of data

📊 My Rankings - 2 Minute Start

What You'll See:
- Your overall percentile (e.g., "75th percentile" = better than 75% of companies)
- Individual metric rankings with color-coded badges
- 🏆 Gold = Top 10%, ⭐ Green = Top 25%, 👍 Blue = Above Average

Quick Steps:

1. Click **Analytics** → **My Rankings**

2. Select month and year

3. Click **"Load Rankings"**

4. Done! ✅

Quick Tip:

Pick months where multiple companies have entered data. Recent months work best.

🎯 Goals & Progress - 3 Minute Start

What You'll See:

- Your company goals with progress bars

- SOG recommended benchmarks for comparison

- Green = achieved, Yellow = in progress, Red = off track

Quick Steps:

1. Click **Analytics** → **Goals & Progress**

2. Review SOG benchmarks (already set for you)

3. Click **"+ Add Company Goal"**

4. Choose metric, enter target value, select period

5. Click **"Save Goal"**

6. Done! ✅

Quick Tip:

Start with 3 goals for your most important metrics. You can always add more later.

🧠 Forecasting - 3 Minute Start

What You'll See:

- Chart showing past performance + future predictions

- Trend summary (increasing/decreasing/stable)

- Confidence level (how reliable the forecast is)

- Specific recommendations for your business

Quick Steps:

1. Click **Analytics** → **Forecasting**

2. Select which metric to forecast (start with Gross Profit Margin)

3. Choose forecast period (6 months is a good default)

4. Click **"Generate Forecast"**

5. Done! ✅

Quick Tip:

Need at least 3 months of data. The more months you have, the better the forecast!

📈 Understanding Your Results

Rankings (Percentiles)

Badge	Meaning	Action
🏆 Top 10%	Outstanding	Document what you're doing right
⭐ Top 25%	Strong	Keep it up, minor improvements possible
👍 Above Average	Solid	Good, but room to improve
📊 Below Average	Fair	Focus improvement efforts here
⚠️ Bottom 25%	Needs Work	Priority area - investigate immediately

Goals (Progress %)

Progress	Status	Action
≥100%	✅ Achieved	Celebrate! Set new stretch goal
75-99%	🟢 On Track	Keep pushing, you're almost there
50-74%	🟡 Needs Attention	Review strategy, increase efforts
<50%	🔴 Off Track	Investigate issues, revise target or approach

Forecasts (Trend Strength)

R^2 Value	Confidence	What To Do

| 0.70-1.00 | Strong | Trust the forecast, use for planning |

| 0.40-0.69 | Moderate | Reasonable estimate, monitor closely |

| 0.00-0.39 | Weak | Need more data, don't rely on this yet |

🎯 Your First Week Plan

Day 1: Explore Rankings

- Check where you stand vs peers

- Identify 2 strengths and 2 weaknesses

Day 2: Set Goals

- Create 3 company goals for key metrics

- Review SOG benchmarks you're missing

Day 3: Generate Forecasts

- Forecast your top 3 metrics

- Understand if you're trending up or down

Day 4: Take Action

- Focus on metrics that are:

  - Low ranking (bottom 50%)

  - Behind on goals (< 75% progress)

  - Declining in forecasts

Day 5: Weekly Check-in Routine

- Review progress on goals

- Check if any rankings changed

- Update forecasts with new data

⚡ Power Tips

Get Better Rankings

✅ Enter data consistently every month

✅ Check rankings right after month-end

✅ Focus on your lowest percentile metrics

✅ Don't panic over 1 bad month - look for patterns

Achieve More Goals

✅ Start with SOG benchmarks as baselines

✅ Set realistic stretch targets (not too easy or impossible)

✅ Review progress weekly

✅ Adjust goals quarterly based on performance

Make Better Forecasts

✅ Enter at least 6 months of data

✅ Be consistent with data entry

✅ Check accuracy - compare last month's forecast to actual

✅ Use for short-term planning (3-6 months)

✅ Don't over-rely on long-term forecasts (>12 months)

🚨 Common Issues & Quick Fixes

"Not enough companies have data"

Problem: Rankings won't load

Fix: Choose a different month or wait for other members to enter data

"Need at least 3 months of data"

Problem: Forecasting won't work

Fix: Enter data for at least 3 months before generating forecasts

Progress shows 0%

Problem: Goals show no progress

Fix: Make sure you've entered data for the current year

Forecast seems wrong

Problem: Predictions don't make sense

Fix: Check your entered data for errors, need 6+ months for accuracy

Rankings keep changing

Problem: Your percentile moves up/down

Fix: This is normal! Rankings are relative as others enter data

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📊 Simple Math Cheat Sheet

Percentile Formula

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Your Percentile = (Companies below you ÷ Total companies) × 100
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Example: If 7 out of 10 companies are below you = 70th percentile

Progress Formula

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Progress % = (Your Value ÷ Target Value) × 100
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Example: GPM is 45%, target is 50% = 90% progress

Forecast Formula

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Predicted Value = (Slope × Month Number) + Intercept
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Example: Slope is 0.5, Month 10, Intercept is 40 = 45% predicted

Don't worry about calculating these yourself - the system does it automatically!

🎓 Next Steps

Learn More:

📖 Read the **Complete User Guide** for detailed explanations of all formulas and methodologies

Get Help:

💬 Click **Help** → **Send Support Request** for technical assistance

📧 Contact your SOG administrator for questions about benchmarks

Stay Updated:

✅ Check analytics weekly after entering data

✅ Review rankings monthly

✅ Generate new forecasts monthly

✅ Adjust goals quarterly

📞 Need Help?

Quick Questions?

- Check the FAQ Sheet (separate document)

- Review the Complete User Guide (detailed explanations)

Technical Issues?

- Click Help button → Send Support Request

- Include screenshots if possible

Business Questions?

- Contact your SOG administrator

- Discuss with other SOG members

✅ Success Checklist

First Time Setup:

- [ ] Enter at least 1 month of data

- [ ] Check your rankings

- [ ] Set 3 company goals

- [ ] Generate 1 forecast (if you have 3+ months)

Weekly Routine:

- [ ] Enter previous month's data (within 7 days of month-end)

- [ ] Check goal progress

- [ ] Review any ranking changes

Monthly Deep Dive:

- [ ] Generate new forecasts for key metrics

- [ ] Compare rankings month-over-month

- [ ] Adjust goals if needed

Quarterly Review:

- [ ] Analyze 3-month trends in rankings

- [ ] Set new quarterly goals

- [ ] Use forecasts for next quarter planning

🎯 Key Takeaways

1. **Rankings** = Where you stand vs peers (higher percentile = better)

2. **Goals** = Your targets (100%+ progress = achieved)

3. **Forecasting** = Where you're headed (strong trends = reliable predictions)

4. **Data quality matters** - accurate, consistent entry = better insights

5. **Focus on trends** - 1 month is noise, 3+ months is signal

6. **Take action** - analytics only help if you use the insights!

Remember: These tools are designed to help you improve, not judge you. Start simple, focus on 1-2 metrics, and build from there. You've got this! 💪

Questions? Check the Complete User Guide or contact support!

Ready to dive deeper? Read the FAQ Sheet for common questions!