

SaaS Metrics Dashboard Template

From Holdings — AI-Native Business Banking

Monthly metrics tracker with formulas for MRR, churn, LTV, CAC, Rule of 40, and Net Revenue Retention.

Monthly MRR Tracker

Metric	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Starting MRR	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____
+ New MRR	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____
+ Expansion MRR	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____
+ Reactivation MRR	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____
- Contraction MRR	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____
- Churned MRR	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____
Net New MRR	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____
Ending MRR	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____
ARR (MRR × 12)	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____	\$ ____
MRR Growth Rate	____%	____%	____%	____%	____%	____%	____%	____%	____%	____%	____%	____%

MRR Growth Rate = Net New MRR ÷ Starting MRR × 100

Churn Metrics

Metric	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Customers (start)	___	___	___	___	___	___	___	___	___	___	___	___
+ New customers	___	___	___	___	___	___	___	___	___	___	___	___
- Churned customers	___	___	___	___	___	___	___	___	___	___	___	___
Customers (end)	___	___	___	___	___	___	___	___	___	___	___	___
Customer churn %	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%
Gross rev churn %	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%

Customer Churn % = Churned Customers ÷ Starting Customers × 100

Gross Rev Churn % = (Churned MRR + Contraction MRR) ÷ Starting MRR × 100

Net Revenue Retention (NRR)

Metric	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Starting MRR	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___
+ Expansion MRR	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___
- Contraction MRR	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___
- Churned MRR	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___	\$ ___
NRR %	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%

NRR = (Starting MRR + Expansion - Contraction - Churned) ÷ Starting MRR × 100

Target: > 100% (existing customers growing faster than they're churning)

LTV & CAC

Total COGS	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___
Gross Profit	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___
Gross Margin %	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%	___%

Target: 70-85%+

Burn Rate & Runway

Metric	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Monthly revenue	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___
Monthly expenses	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___
Net burn	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___
Cash on hand	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___	\$___
Runway (months)	___	___	___	___	___	___	___	___	___	___	___	___

Net Burn = Expenses – Revenue (positive = burning cash)

Runway = Cash on Hand ÷ Net Burn

Runway	Status
18+ months	✅ Comfortable
12-18 months	⚠️ Start planning next raise or profitability path
6-12 months	🔴 Actively fundraise or cut costs
Under 6 months	🔥 Emergency — cut immediately

Rule of 40

Metric	Q1	Q2	Q3	Q4
YoY Revenue Growth Rate	___%	___%	___%	___%
Operating Profit Margin	___%	___%	___%	___%
Rule of 40 Score	___	___	___	___

Rule of 40 = Revenue Growth % + Profit Margin %

Target: ≥ 40 (most relevant at \$10M+ ARR)

Magic Number (Quarterly)

Metric	Q1	Q2	Q3	Q4
Net New ARR this quarter	\$ _____	\$ _____	\$ _____	\$ _____
S&M spend last quarter	\$ _____	\$ _____	\$ _____	\$ _____
Magic Number	_____	_____	_____	_____

Magic Number = Net New ARR (this Q) \div S&M Spend (last Q)

Magic Number	Assessment
Above 1.0	✔ Very efficient — invest more
0.75 – 1.0	✔ Healthy
0.50 – 0.75	⚠ Moderate — optimize
Below 0.50	✘ Inefficient — fix before scaling

Quick Health Check (Monthly)

Answer these each month:

- MRR growing? Y / N — Rate: _____%
 - NRR over 100%? Y / N — Actual: _____%
 - Monthly churn under 3%? Y / N — Actual: _____%
 - Gross margin over 70%? Y / N — Actual: _____%
 - LTV:CAC over 3:1? Y / N — Actual: _____:1
 - CAC payback under 18 months? Y / N — Actual: _____ months
 - Runway over 12 months? Y / N — Actual: _____ months
 - Top concern this month: _____
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