VIP TRAINING · DAY 3 · DO MORE

Build Your KPI Dashboard in Notion

Every number that matters, in one place. Five prompts, four formulas and a few clicks, built entirely inside Notion.

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START HERE

If You're Not Tracking It, You're Guessing

Most photographers know how busy they feel. Very few know their conversion rate, their average sale by month or which lead source actually books. This dashboard fixes that.

You'll build it inside Notion, right next to your SOPs, notes and to-do lists. You enter a few numbers each month, and Notion does the math, draws the charts and, with Notion AI, tells you what to focus on next.

What You'll Track

METRIC	WHAT IT TELLS YOU	HOW IT'S CALCULATED
Inquiries	Is your marketing working?	Count, by month and lead source
Conversion Rate	Are your replies and consults turning leads into clients?	Bookings ÷ Inquiries
Bookings	Is this year ahead of or behind last year?	Count, by month
Average Sale	Your most important number from Day 2	Total Sales ÷ Sessions Photographed
Total Sales	Are you on pace for your goal?	Month, year to date, vs. goal
Wall Art Rate	Is your product-forward process working?	Wall Art Clients ÷ Sessions Photographed
Goal Progress	How close each month came to plan	Total Sales ÷ Monthly Goal
Lead Sources	Where to spend your marketing time	Inquiries and bookings by source

BEFORE YOU START

Check your Notion plan. Notion AI's full agent, which builds databases and views from a prompt, comes with Notion's Business plan. Free and Plus plans get limited AI. Charts are unlimited on paid plans, and the Free plan allows one chart. No Notion AI? You can still build everything in this guide by hand, using the property lists as your blueprint.

How the prompts work

Open **Notion AI** from the left sidebar (or press the AI button on any page), paste the prompt and send it. Anything in **[brackets]** is where you fill in your own details. Keep the property names exactly as written. The formulas in Step 3 depend on them.

HOW TO USE THIS GUIDE

Your Step-by-Step Roadmap

Work through these in order. The first build takes about an hour. After that, it's about 10 minutes a month.

STEP	WHAT YOU'LL DO	TOOL
01	**Build your Monthly Numbers** database	Notion AI · Prompt 1
02	**Build your Inquiry Tracker** and its views	Notion AI · Prompt 2
03	**Add the math** with four formulas	By hand, about 2 minutes
04	**Add your numbers** from last year and this year	Notion AI · Prompt 3
05	**Build your charts** and dashboard layout	Notion AI · Prompt 4 + a few clicks
06	**Run your monthly check-in**	Notion AI · Prompt 5
07	**Keep it running** with a monthly routine	You, your VA + Notion AI

What You'll Need

- [ ] A Notion account, ideally with Notion AI
- [ ] Last year's numbers by month: inquiries, consults, bookings, sessions photographed, total sales and wall art clients (your studio management software, sales reports or a spreadsheet)
- [ ] Your revenue goal for this year. Mastermind members: use the monthly targets from your **90-Day Goal Bot**
- [ ] About an hour for the first build

STEP 01

Build Your Monthly Numbers

The heart of your dashboard: one row per month, holding every number you track.

Open Notion AI from the left sidebar and paste the prompt below. Then open the new database and compare it to the property checklist. Rename anything that doesn't match exactly.

NOTION PROMPT 1 · MONTHLY NUMBERS

Create a page called "KPI Dashboard" for my senior portrait photography business.

Inside it, create a database called "Monthly Numbers" with one row per month and these properties:

- Month (title), written like "2026-03 March"
- Month Start (date)
- Year (select: **[2025]**, **[2026]**)
- Inquiries, Consults, Bookings (numbers)
- Sessions Photographed (number)
- Total Sales (number, dollar format)
- Wall Art Clients (number)
- Monthly Goal (number, dollar format)
- Notes (text)

Add a row for every month of **[2025]** and **[2026]**, with Month Start filled in. Leave the numbers blank.

Your Property Checklist

PROPERTY	TYPE	WHAT GOES IN IT
Month	Title	"2026-03 March" keeps months in order
Month Start	Date	First day of the month, for charts
Year	Select	Used to filter charts by year
Inquiries	Number	Every new inquiry that month
Consults	Number	Consult calls or meetings held
Bookings	Number	Booked that month, not shot
Sessions Photographed	Number	Sessions you actually shot
Total Sales	Number ($)	Total sales that month, before tax
Wall Art Clients	Number	Clients who bought wall art
Monthly Goal	Number ($)	Your sales target for the month
Notes	Text	Your check-in summary (Step 6)

STEP 02

Build Your Inquiry Tracker

Your monthly totals show how many inquiries came in. The tracker shows where they came from and which ones booked.

1

Set lead sources that match your business

Use the ways clients really find you. Keep the list short, 5 to 7 options, so the chart stays readable.

2

Hand it to your VA

Logging a new inquiry takes 20 seconds. Make it part of your VA's daily inbox routine.

3

Always ask how they found you

Add "How did you hear about us?" to your contact form, and log the answer as the Lead Source.

NOTION PROMPT 2 · INQUIRY TRACKER

On my KPI Dashboard page, create a second database called "Inquiries" with these properties:

- Name (title)
- Date (date)
- Lead Source (select: **[AI search, Google, Instagram, Referral, Past client, Other]**)
- Status (select: New, Consult booked, Booked, Not booked)
- Session Date (date)
- Total Sale (number, dollar format)

Then add these views:

- "Open Leads": Status is New or Consult booked, newest first
- "Booked": Status is Booked, sorted by Session Date
- "This Year": Date is this year, grouped by Lead Source

KEEP CLIENT INFO LIGHT

This is a tracking tool, not a CRM. A first name and last initial is plenty. Keep phone numbers, emails and addresses in your studio management software.

STEP 03 · ABOUT 2 MINUTES

Add the Math

Notion AI can build databases and views, but it can't create formula properties yet. So this one part is by hand. Copy, paste, done.

For each formula: in Monthly Numbers, click **+** at the end of the column headers, choose **Formula** and type the name exactly as shown. Paste the formula into the editor and click **Done**. Then open the property's settings and set the number format shown.

Conversion Rate

FORMAT: PERCENT

```
if(prop("Inquiries") > 0, prop("Bookings") / prop("Inquiries"), 0)
```

The share of inquiries that booked. Shows 0 until you enter inquiries.

Average Sale

FORMAT: US DOLLAR

```
if(prop("Sessions Photographed") > 0, prop("Total Sales") / prop("Sessions Photographed"), 0)
```

What the average client spent that month.

Wall Art Rate

FORMAT: PERCENT

```
if(prop("Sessions Photographed") > 0, prop("Wall Art Clients") / prop("Sessions Photographed"), 0)
```

The share of clients who bought at least one wall piece.

Goal Progress

FORMAT: PERCENT

```
if(prop("Monthly Goal") > 0, prop("Total Sales") / prop("Monthly Goal"), 0)
```

100% means you hit your goal for the month.

IF A FORMULA SHOWS AN ERROR

- Check the property names. They must match exactly, including capital letters and spaces.
- Check that the properties are Number properties, not Text.
- Still stuck? Ask Notion AI: "Why isn't my Conversion Rate formula working?"

STEP 04

Add Your Numbers

Last year's numbers give you something to compare against right away.

1

Pull your numbers

Export monthly totals from your studio management software or sales reports, or copy them from a spreadsheet. Don't have inquiry counts for last year? Leave them blank and start tracking now.

2

Paste them in any format

A copied table, a list or numbers typed from your notes all work. Notion AI matches each number to the right month.

3

Set your monthly goals

Senior season is seasonal, so a different goal each month is more useful than one flat number. Mastermind members: use the monthly targets from your **90-Day Goal Bot**.

4

Spot-check the results

Open two or three months and compare them to your source. Then look at your formulas. They should fill in on their own.

NOTION PROMPT 3 · ADD YOUR NUMBERS

Here are my numbers by month. Fill them into my Monthly Numbers database, matching each one to the right month:

[Paste your numbers here: Month, Inquiries, Consults, Bookings, Sessions Photographed, Total Sales, Wall Art Clients]

My monthly goals for **[2026]** are: **[Jan $__, Feb $__, Mar $__ ...]** or **[the same $__ every month]**.

Don't change any other properties. If a number is missing or looks off, list it for me instead of guessing.

KEEP YOUR NUMBERS CONSISTENT

Decide once what counts, and stick with it. For example: Total Sales is before tax and includes session fees and products. Bookings count in the month the client booked, not the month you photographed them. Write your rules in the Notes of the first row so your VA follows them too.

STEP 05

Build Your Charts

Numbers in a table are easy to ignore. Charts show you the story in five seconds.

NOTION PROMPT 4 · CHARTS

On my KPI Dashboard page, add these chart views from my Monthly Numbers database:

- Number chart: Total Sales this year
- Bar chart: Total Sales by month, this year vs. last year
- Line chart: Average Sale by month
- Line chart: Conversion Rate by month
- Bar chart: Goal Progress by month

From my Inquiries database, add:

- Donut chart: inquiries by Lead Source, this year
- Bar chart: Booked inquiries by Lead Source

Lay them out in two columns, with Total Sales at the top. If you can't create any of these, give me click-by-click steps to add them myself.

Adding a Chart by Hand

If Notion AI can’t create a chart for you, it takes about a minute each:

1 ### Add a chart view

In your Monthly Numbers database, click **+** next to your view tabs and choose **Chart**.

2 ### Pick the chart type

Choose from vertical bar, horizontal bar, line, donut or number.

3 ### Set what it shows

Set the X-axis to **Month Start** and the Y-axis to the number you want, like **Total Sales**. Add a filter for **Year**. Can’t show both years side by side? Make one chart per year.

4 ### Put it all on one screen

Add a **Dashboard** view to arrange several charts in one layout, or drag linked chart views into columns on your KPI Dashboard page.

STEP 05 · CHEAT SHEET

Chart Settings at a Glance

Use these settings for any chart Notion AI couldn't build for you.

CHART	TYPE	DATABASE	X-AXIS	Y-AXIS
Sales This Year	Number	Monthly Numbers	—	Total Sales (sum), Year = this year
Sales by Month	Bar	Monthly Numbers	Month Start	Total Sales
Average Sale	Line	Monthly Numbers	Month Start	Average Sale
Conversion Rate	Line	Monthly Numbers	Month Start	Conversion Rate
Goal Progress	Bar	Monthly Numbers	Month Start	Goal Progress
Lead Sources	Donut	Inquiries	Lead Source	Count
What Books	Bar	Inquiries (Status = Booked)	Lead Source	Count

TIP

Each month is one row in Monthly Numbers, so Sum and Average show the same number on your monthly charts. For the percentage charts, set the Y-axis number format to Percent if Notion shows decimals.

STEP 06

Run Your Monthly Check-In

A dashboard only helps if you look at it. This prompt turns your numbers into one clear next step.

NOTION PROMPT 5 · MONTHLY CHECK-IN

Look at my Monthly Numbers and Inquiries databases and give me my monthly check-in for **[month]**:

- Total sales, average sale and conversion rate vs. last month and the same month last year
- Year-to-date sales vs. my goal, and what I need each month to hit it
- My top lead sources this year, and which ones actually booked
- One thing that's working, one thing to fix and one action for next month

Keep it short. Then add a two-sentence summary to the Notes for **[month]**.

What to Do With the Answers

Conversion rate is dropping

Look at your reply time and your first message. Day 1's personalized inquiry replies are the fix.

Average sale is flat

Revisit Day 2: StoryWalls, wall art mockups and your collections.

Inquiries are down

Check which lead source dropped, then put your content time where clients actually book.

Behind on your goal

Take the numbers to your 90-day plan. Mastermind members: rerun the 90-Day Goal Bot.

STEP 07

Keep It Running

Ten minutes a month keeps your dashboard honest. Put this routine on your calendar, and share it with your VA.

WHEN	WHAT	WHO
Every day	Log new inquiries and update their status	VA
1st of the month	Run the roll-up prompt, then enter sessions, total sales and wall art clients	VA + you
1st of the month	Run the monthly check-in prompt and read the summary	You
Every 90 days	Compare your quarter to your plan and set the next goals	You

Let Notion AI Count Your Inquiries

Once your VA is logging every inquiry, Notion AI can count them for you and fill in your Monthly Numbers.

MONTHLY ROLL-UP PROMPT

Look at my Inquiries database for **[month and year]**. Count:

- All inquiries dated that month (for Inquiries)
- Those with Status "Consult booked" or "Booked" (for Consults)
- Those with Status "Booked" (for Bookings)

Fill those counts into Inquiries, Consults and Bookings for **[month]** in my Monthly Numbers database. Show me the counts before you save them.

Want to go further? Record yourself updating the dashboard once, and turn it into an SOP for your VA, using the SOP process from today.

YOUR CHECKLIST

Build It This Week

Check these off, and you'll know your numbers by the end of the month.

Build

- [ ] Check your Notion plan
- [ ] Run Prompt 1: Monthly Numbers
- [ ] Run Prompt 2: Inquiry Tracker
- [ ] Paste in the four formulas

Fill

- [ ] Pull last year's monthly numbers
- [ ] Set this year's monthly goals
- [ ] Run Prompt 3: Add Your Numbers
- [ ] Spot-check a few months

See

- [ ] Run Prompt 4: Charts
- [ ] Add any missing charts by hand
- [ ] Arrange everything on one screen

Use

- [ ] Show your VA how to log inquiries
- [ ] Put the 1st-of-the-month routine on your calendar
- [ ] Run Prompt 5: your first check-in

START SIMPLE

You don't need every metric on day one. Start with inquiries, bookings and total sales, and add the rest as the habit sticks. A simple dashboard you use beats a perfect one you don't.