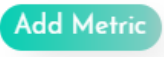
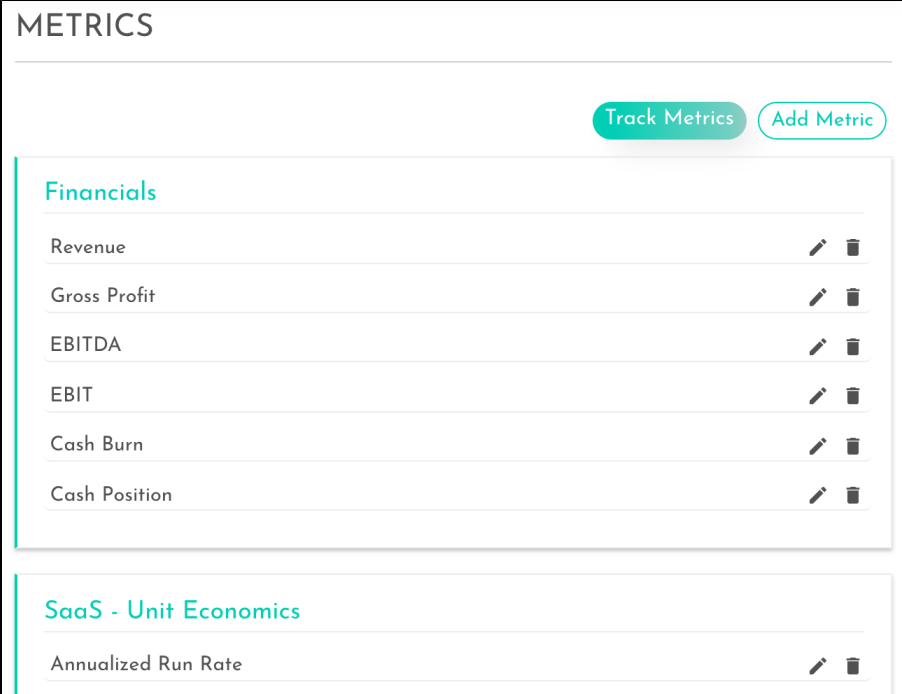


# Create a metric

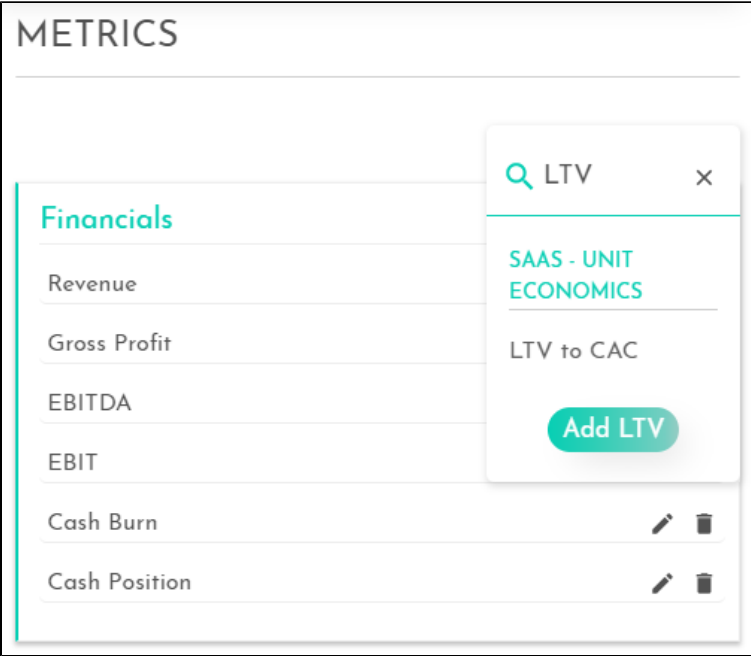
When you want your track a new metric related to your portfolio company, use this guide to add a metric.

## Step-by-step guide

1. On the 'Metrics' tab, select 



2. Type the name of the metric you want to create. Select from a list of recommendations, or add a new one.



3. Key in the details

✕

## Edit Metric

**Name**  
Lifetime Value of a Customer

---

**Code**  
LTV

---

3/10

**Aggregation**  
Sum

---

**Metric Group**  
SaaS - Unit Economics

---

**Description**  
Avg value of a customer over time

---

Save

- a. *Name*: Name of the metric
- b. *Code*: A unique shortcode for the metric
- c. *Aggregation*:
  - i. *Sum*: Aggregates value over multiple periods. eg: Monthly revenue sums up to annual value,
  - ii. *Last value*: Retains the latest metric value. eg: Cash position, # of employees
- d. *Metric group*: A custom list to group similar metrics. eg: SAAS Metrics, Impact Metrics, etc
- e. *Description*: To provide more detail about the metric.

4. Upon selecting the 'Save' button, you'd see the metric get added to the list.

## METRICS

Track Metrics
Add Metric

**Financials**

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Revenue	✎ 🗑
Gross Profit	✎ 🗑
EBITDA	✎ 🗑
EBIT	✎ 🗑
Cash Burn	✎ 🗑
Cash Position	✎ 🗑

**SaaS - Unit Economics**

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Annualized Run Rate	✎ 🗑
Lifetime Value of a Customer	✎ 🗑

5. You're all ready to use your new metric. Repeat the above process to add a new metric.

**Next steps:** [Create a plan](#) to collect metrics from your portfolio company.

Edit a metric



Use the edit icon next to the metric to edit the details.

Delete a metric



Use the delete icon to remove a metric. It can only be removed if it's not part of any plan.

## Related articles

### Content by label

There is no content with the specified labels