

Quarterly Business Review



BUILD A SHARED VISION WITH YOUR KEY CLIENTS

The Quarterly Business Review will help you create a strategic plan that should be understood by everyone in both your organization, and that of your client.

[Free Template](#)

- How is business?
- Discuss any supply issues, or current gaps they have in the supply chain.
- Forecast future product demands
- Possible risk or impacts to current business.
- How are you performing for them?
- Talk about KPI performance



Quarterly Business Review					
Account Info					
Customer Name		Sales Rep		Creation Date	
Account Location (City, State)		Project Manager		Review Date	
Key CUSTOMER Contacts (Name and function)		Key INTERNAL Team Members			
Sales Data					
Last Year Total Sales Revenue	\$	This Year Total Sales Revenue Budget	\$	Expected Growth %	#DIV/0!
Current Quarter Revenue	\$	Last Quarter Revenue	\$	YTD Revenue Total	\$
Business Outlook					
How is your current business performance?					
Forecasted sales for the next 3 months					
Upcoming production demands					
Possible impacts to business demands					
Initiatives for Next Quarter					
Action Plan for Initiatives					
Actions	Action Description	Owner	Due Date	Comments	
#1					
#2					
#3					
#4					
#5					

[\(CLICK HERE\)](#)

[Contact Us](#) today to learn how we can help develop and implement your coaching plan