



Monthly Business Review

For the month of _____

NAVIGATING BUSINESS SUCCESS: A COMPREHENSIVE
MONTHLY PERFORMANCE REVIEW

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Executive Summary

Brief overview of the month's performance in 2-3 sentences.

KEY ACHIEVEMENTS

CONCERNS

Sales & Marketing Performance

Total sales for the month	
Total sales for last month	
Total new customers	
Most profitable service/product	
Which offer/promotion performed the best?	
What marketing strategy or channel brought in the most leads/sales?	

Feel free to add additional metrics/questions that suit your particular business in the additional rows

Financial Health & Metrics

Account	Current Month	Previous Month	Comments
P&L=Income and Expenses			
Gross Income			
COGS			
Total Expenses			
Net Income/Profit			
When looking at the above accounts, consider the following: • Are you making money after all of your expenses? Hint-look at your Net profit • Is your gross income increasing at a rate you are comfortable with?			
Balance Sheet=Assets & Liabilities			
Cash accounts			
Credit Cards			
Other short-term debts (< 1 year)			
Long-term debts (>1 year)			
When looking at the above accounts, consider the following: • If your cash accounts decreased, why? • If your debts increased, what can you do to try and decrease them?			

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NOTE ANY BIG CHANGES FROM LAST YEAR VS THIS YEAR

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This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on its right side, suggesting it's resting on a surface.

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On a scale of 1-10, how would you rate this month overall? _____

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A business report is not just a tool for tracking performance; it's a compass that guides us through the ever-changing landscape of business. It provides clarity, direction, and insights into our journey, helping us make informed decisions and chart our course towards success.