ChiefAdvice

FREE PRINTABLE PLANNER

Monthly Business Review

A one-hour monthly check-up for your business: goals, money, customers, sales, achievements, problems, lessons and next month's priorities.

BUSINESS NAME

MONTH AND YEAR REVIEW DATE

Free to print and use for your own business.
chiefadvice.com

START HERE

How to use this review

Set aside one hour at the end of each month. Gather your numbers first, then work through the pages in order. The point is to learn, not to judge yourself.

1. **Gather your numbers.**
   Bank or accounting records, sales reports, invoices, website statistics and customer messages.

2. **Review last month's goals.**
   Page 3. Compare what you planned with what happened, then set this month's goals.

3. **Look at money in and money out.**
   Page 4. Compare planned and actual figures for income and expenses.

4. **Check customers and sales.**
   Pages 5 and 6. See where customers came from and what sold.

5. **Capture wins, problems and lessons.**
   Pages 7 to 9. Write down what you did well, what went wrong and what you learned.

6. **Choose next month's priorities.**
   Page 10. Pick three things that matter most, and a first step for each.

HAVE THESE READY BEFORE YOU START

- ☐ Bank or accounting records
- ☐ Sales report or invoices
- ☐ Website or shop statistics
- ☐ Customer messages and reviews
- ☐ Last month's review
- ☐ A quiet hour

PART 1

Monthly goals

Start by checking last month's goals, then set this month's. Keep goals few and measurable.

LAST MONTH: WHAT I PLANNED AND WHAT HAPPENED

GOAL	TARGET	ACTUAL	DIFFERENCE	MET?

THIS MONTH: MY TOP GOALS

GOAL	HOW I WILL MEASURE IT	TARGET	BY WHEN

WHY THESE GOALS MATTER MOST RIGHT NOW

PART 2

Revenue and expense overview

Compare what you planned with what actually happened. Use the same categories every month so you can spot trends.

MONEY IN (REVENUE)

SOURCE OF INCOME	PLANNED	ACTUAL	DIFFERENCE

MONEY OUT (EXPENSES)

EXPENSE CATEGORY	PLANNED	ACTUAL	DIFFERENCE

TOTAL REVENUE	TOTAL EXPENSES	PROFIT OR LOSS

WHAT STANDS OUT, GOOD OR BAD, IN THESE NUMBERS?

PART 3

Customer acquisition

Find out where new customers came from and what each channel cost you.

CHANNEL OR SOURCE	MONEY SPENT	NEW CUSTOMERS	COST PER NEW CUSTOMER	WORTH REPEATING?

WHERE DID MY BEST CUSTOMERS COME FROM?

WHAT CUSTOMERS SAY ABOUT FINDING ME

NEW CUSTOMERS

TOTAL SPEND

REPEAT CUSTOMERS

ENQUIRIES

ONE ACQUISITION IDEA TO TEST NEXT MONTH

PART 4

Sales performance

See what sold, to whom, and at what size.

TOP PRODUCTS OR SERVICES	ORDERS	REVENUE	NOTES (PROFIT, TRENDS)

ORDERS	AVG ORDER VALUE	REFUNDS	REPEAT ORDERS

WHAT SOLD BETTER THAN EXPECTED

WHAT SOLD WORSE THAN EXPECTED

SALES OPPORTUNITIES I DID NOT FOLLOW UP (QUOTES, LEADS, ABANDONED ORDERS)

PART 5

Key achievements

Write down what went well. Wins are easy to forget and useful to repeat.

MY FIVE BIGGEST WINS THIS MONTH

1. _____
2. _____
3. _____
4. _____
5. _____

WHAT I AM MOST PROUD OF

_____

_____

_____

WHO HELPED, AND HOW I WILL THANK THEM

_____

_____

_____

WHAT MADE THESE WINS POSSIBLE THAT I CAN REPEAT?

_____

_____

_____

PART 6

Problems and challenges

Name the problems plainly. For each one, decide on an action and an owner.

PROBLEM OR CHALLENGE	IMPACT ON THE BUSINESS	MY BEST GUESS AT THE CAUSE	ACTION I WILL TAKE	OWNER AND DATE

THE ONE PROBLEM THAT, IF SOLVED, WOULD HELP MOST

PART 7

Lessons learned

Turn the month into knowledge. Write short, specific lessons you can act on.

WHAT I LEARNED ABOUT MY CUSTOMERS

WHAT I LEARNED ABOUT MY NUMBERS

WHAT I LEARNED ABOUT HOW I WORK

WHAT I WOULD DO DIFFERENTLY

ONE DECISION I SHOULD HAVE MADE SOONER

PART 8

Next month's priorities

Choose three priorities. A priority is something that moves the business forward, not just something urgent.

PRIORITY	FIRST STEP	WHO	DEADLINE

THINGS I WILL STOP DOING

THINGS I NEED HELP WITH

RISKS OR DATES TO WATCH NEXT MONTH

NEXT REVIEW DATE

REVIEW TIME I HAVE BOOKED