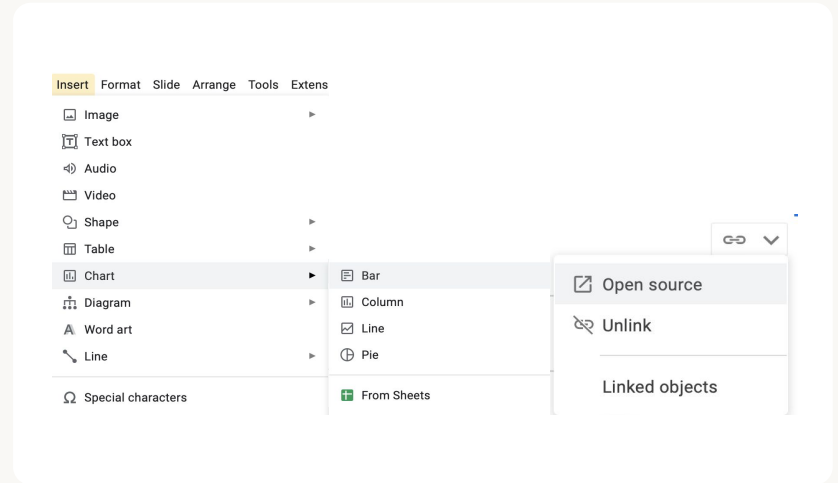# Monthly performance overview

Template

Notes

This template is a guide with suggestions - you're welcome to add as many metrics as you find relevant to your organization (but remember, sometimes short and sweet does the trick!)

It can also be useful to visualize the information. You can add slides with graphs using the following input on Google Slides. Once you've created a chart, edit it by selecting "open source" in the top right of the chart.
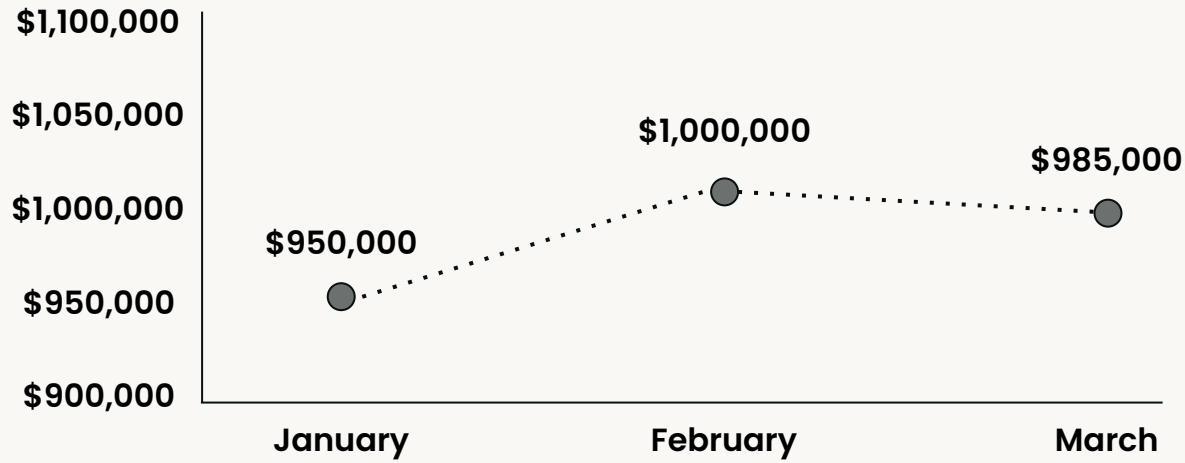
[Insert month] KPI updates

Metric	Number	vs previous month	Year to date value	% to target
# of sales	X	% change from previous month	YTD	% to target
Total revenue	$X,XXX,XXX	% change from previous month	YTD	% to target
Upsell/cross-sell revenue	$X,XXX,XXX	% change from previous month	YTD	% to target
Profit	$X,XXX,XXX	% change from previous month	YTD	% to target
Forecast	$X,XXX,XXX	% change from previous month	YTD	% to target

[Insert month] KPI updates

Monthly revenue (example chart)

[Insert month] conversion updates

Metric	Number	vs previous month	Year to date value	% to target
Lead to conversion	X:Y	Change from previous month	Average YTD	% to target
Total leads	X	% change from previous month	YTD	% to target
Total opportunities	X	% change from previous month	YTD	% to target
Total negotiation	X	% change from previous month	YTD	% to target
Total proposal	X	% change from previous month	YTD	% to target
Total wins	X	% change from previous month	YTD	% to target

[Insert month] team updates and shoutouts

Metric	Team member	Number
Most deals closed	John Doe	X
Biggest deal closed	Jane Doe	X
Most leads	Mary Smith	X
Most outbound calls	Joe Bloggs	X