[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Management Review Report

[Company name] A review of how [Company name] performed during the period, measured against plan, with the risks, decisions and actions that follow from it. Prepared for [Board or management team].

Report details.

Company: _____ **Report period:** _____

Prepared by: [Name and role] **Prepared for:** [Board or management team]

Date of review meeting: _____ **Previous review period:** _____

1. Executive summary. Write two or three short paragraphs that give the whole picture: whether the period went to plan, the main reasons for any gap, and what needs a decision at this review.

[Enter executive summary]

2. Performance against plan. Record each key measure with its planned figure, the actual figure, the variance and a RAG rating (Red, Amber or Green). Add or remove rows to match the measures [Company name] tracks.

(1) Revenue: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(2) Gross profit: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(3) Operating profit: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(4) Cash at bank: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(5) New customers: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(6) Customer satisfaction: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(7) Staff turnover: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(8) On-time delivery: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

3. Financial summary.

(1) Revenue: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(2) Cost of sales: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(3) Gross profit: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(4) Operating costs: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(5) Operating profit: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(6) Cash at bank: Plan: _____ Actual: _____ Variance: _____ Comment: _____

4. What went well.

[Enter a point that went well during the period] [Enter a point that went well during the period]
[Enter a point that went well during the period]

5. What did not go to plan.

[Enter a point that did not go to plan, with the reason] [Enter a point that did not go to plan, with the reason]
[Enter a point that did not go to plan, with the reason]

6. Risks and issues.

(1) [Risk or issue] Impact: [High, Medium or Low] Likelihood: [High, Medium or Low] Owner: [Name and role] Mitigation or action: _____

(2) [Risk or issue] Impact: [High, Medium or Low] Likelihood: [High, Medium or Low] Owner: [Name and role] Mitigation or action: _____

(3) [Risk or issue] Impact: [High, Medium or Low] Likelihood: [High, Medium or Low] Owner: [Name and role] Mitigation or action: _____

(4) [Risk or issue] Impact: [High, Medium or Low] Likelihood: [High, Medium or Low] Owner: [Name and role] Mitigation or action: _____

7. Decisions needed.

(1) [Decision needed] Options: [Options considered] Recommendation: [Recommendation] Decision: [Decision taken]

(2) [Decision needed] Options: [Options considered] Recommendation: [Recommendation] Decision: [Decision taken]

(3) [Decision needed] Options: [Options considered] Recommendation: [Recommendation] Decision: [Decision taken]

8. Actions agreed.

(1) [Action] Owner: [Name and role] Due: [Date] Status: [Not started, In progress or Complete]

(2) [Action] Owner: [Name and role] Due: [Date] Status: [Not started, In progress or Complete]

(3) [Action] Owner: [Name and role] Due: [Date] Status: [Not started, In progress or Complete]

(4) [Action] Owner: [Name and role] Due: [Date] Status: [Not started, In progress or Complete]

(5) [Action] Owner: [Name and role] Due: [Date] Status: [Not started, In progress or Complete]

9. Next review. The next management review will be held on [Date of next review] and will cover the period [Next report period].

Sign-off.

Prepared by: _____ **Reviewed by:** _____

Date: _____ **Signature:** _____