[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. Add or remove table rows to fit your needs. 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

Field	Entry
Company	**[Company name]**
Report period	**[Report period]**
Prepared by	**[Name and role]**
Prepared for	**[Board or management team]**
Date of review meeting	**[Date]**
Previous review period	**[Previous report 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.

Measure	Plan	Actual	Variance	RAG	Comment
Revenue	**[Plan]**	**[Actual]**	**[Variance]**	**[RAG rating]**	**[Comment]**
Gross profit	**[Plan]**	**[Actual]**	**[Variance]**	**[RAG rating]**	**[Comment]**
Operating profit	**[Plan]**	**[Actual]**	**[Variance]**	**[RAG rating]**	**[Comment]**
Cash at bank	**[Plan]**	**[Actual]**	**[Variance]**	**[RAG rating]**	**[Comment]**

New customers	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]
Customer satisfaction	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]
Staff turnover	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]
On-time delivery	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]

3. Financial summary

Item	Plan	Actual	Variance	Comment
Revenue	[Amount]	[Amount]	[Amount]	[Comment]
Cost of sales	[Amount]	[Amount]	[Amount]	[Comment]
Gross profit	[Amount]	[Amount]	[Amount]	[Comment]
Operating costs	[Amount]	[Amount]	[Amount]	[Comment]
Operating profit	[Amount]	[Amount]	[Amount]	[Comment]
Cash at bank	[Amount]	[Amount]	[Amount]	[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

Risk or issue	Impact	Likelihood	Owner	Mitigation or action
[Risk or issue]	[High, Medium or Low]	[High, Medium or Low]	[Name and role]	[Mitigation or action]
[Risk or issue]	[High, Medium or Low]	[High, Medium or Low]	[Name and role]	[Mitigation or action]

[Risk or issue]	[High, Medium or Low]	[High, Medium or Low]	[Name and role]	[Mitigation or action]
[Risk or issue]	[High, Medium or Low]	[High, Medium or Low]	[Name and role]	[Mitigation or action]

7. Decisions needed

Decision needed	Options considered	Recommendation	Decision taken
[Decision needed]	[Options considered]	[Recommendation]	[Decision taken]
[Decision needed]	[Options considered]	[Recommendation]	[Decision taken]
[Decision needed]	[Options considered]	[Recommendation]	[Decision taken]

8. Actions agreed

No.	Action	Owner	Due date	Status
1	[Action]	[Name and role]	[Date]	[Not started, In progress or Complete]
2	[Action]	[Name and role]	[Date]	[Not started, In progress or Complete]
3	[Action]	[Name and role]	[Date]	[Not started, In progress or Complete]
4	[Action]	[Name and role]	[Date]	[Not started, In progress or Complete]
5	[Action]	[Name and role]	[Date]	[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]**.

[Company name]

Sign-off

Field	Entry
Prepared by	**[Name and role]**
Reviewed by	**[Name and role]**
Date	**[Date]**
Signature	**[Signature]**