[Company name]

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Quarterly Performance Report

[Company name]

Performance for the quarter against target, with variance commentary and the actions that follow. Prepared for **[Board or management team]**.

Report details

Field	Entry
Company	**[Company name]**
Quarter	**[Quarter and year]**
Quarter dates	**[Start date]** to **[End date]**
Prepared by	**[Name and role]**
Prepared for	**[Board or management team]**
Report date	**[Date]**

1. Quarter at a glance

[Enter a short summary of the quarter: the headline result, the main drivers, and the one or two things that matter most.]

Headline measure	Target	Actual	Variance	RAG
Revenue	**[Target]**	**[Actual]**	**[Variance]**	**[RAG rating]**
Gross profit	**[Target]**	**[Actual]**	**[Variance]**	**[RAG rating]**
Operating profit	**[Target]**	**[Actual]**	**[Variance]**	**[RAG rating]**
Cash at bank	**[Target]**	**[Actual]**	**[Variance]**	**[RAG rating]**
Customer satisfaction	**[Target]**	**[Actual]**	**[Variance]**	**[RAG rating]**

2. KPI performance against target

RAG means Red (off target and needs action), Amber (close to target, watch closely) or Green (on or above target).

KPI	Target	Actual	Variance	RAG	Comment
Revenue	**[Plan]**	**[Actual]**	**[Variance]**	**[RAG rating]**	**[Comment]**
Gross profit margin	**[Plan]**	**[Actual]**	**[Variance]**	**[RAG rating]**	**[Comment]**
Operating profit	**[Plan]**	**[Actual]**	**[Variance]**	**[RAG rating]**	**[Comment]**

[Company name]

Cash at bank	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]
New customers	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]
Repeat customers	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]
Order fulfilment	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]
Customer satisfaction	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]
Staff turnover	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]
Sickness absence	[Plan]	[Actual]	[Variance]	[RAG rating]	[Comment]

3. Variance commentary

For each material variance, explain what caused it, whether it is a one-off or a trend, and what is being done about it.

KPI or item	Variance	Cause	One-off or trend	Response
[KPI or item]	[Variance]	[Cause]	[One-off or trend]	[Response]
[KPI or item]	[Variance]	[Cause]	[One-off or trend]	[Response]
[KPI or item]	[Variance]	[Cause]	[One-off or trend]	[Response]
[KPI or item]	[Variance]	[Cause]	[One-off or trend]	[Response]

4. Performance by department

Department	Target	Actual	Variance	Key point
[Department]	[Target]	[Actual]	[Variance]	[Key point]
[Department]	[Target]	[Actual]	[Variance]	[Key point]
[Department]	[Target]	[Actual]	[Variance]	[Key point]
[Department]	[Target]	[Actual]	[Variance]	[Key point]

5. Risks and outlook

Risks that could affect the next quarter, and the outlook for the rest of the year.

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

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

6. Actions for next quarter

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]

Sign-off

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