[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).

[Company name]

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]
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]

[Company name]

Reviewed by	**[Name and role]**
Date	**[Date]**
Signature	**[Signature]**