

# MONTHLY RECAP: \_\_\_\_\_, \_\_\_\_\_

Complete this report monthly to provide greater visibility into your organization's operations and to help create a playbook for your company's future success.

## SALES & MARKETING

### Overview

Include high-level business statistics and key metrics:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Sales

#### KPIs:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

#### Notes:

What worked, what didn't work and what's coming up:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Marketing

**KPIs:**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

**Notes:**

What worked, what didn't work and what's coming up:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

# Customer Success

**KPIs:**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

**Notes:**

What worked, what didn't work and what's coming up:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

# DEVELOPMENT

## Overview

Include high-level business statistics and key metrics:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

## Feature Releases

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

## Inputs

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

## Outputs

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

## Impact

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_