monthly sales report/forecast (template)

sales dept/team ....   **month** ....

This basic sales report/forecast tool is for a small or new businesses which does not yet have a computerised full management information system, which would normally integrate sales reporting with other business processes.

sales for month	month				cumulative (year to date)			
	actual	plan	variance	%	actual	plan	variance	%
volumes/quantity/number								
values/revenues								
margin/contribution								
% margin/contribution								
number of orders								
average order value								

next month forecast	f'cast	plan	variance	%	f'cast	plan	variance	%
volumes/quantity/number								
values/revenues								
margin								

quarter forecast	f'cast	plan	variance	%	f'cast	plan	variance	%
values/revenues								
margin								

year forecast	f'cast	plan	variance	%
values/revenues				
margin				

see note (in msexcel version only, available from businessballs.com)

summary/forecast of sales performance and activities

comments on internal services affecting sales and customers (e.g., order processing, customer services, stock, distribution and deliveries/installations, service support, invoicing, major/national contracts, new product development, recruitment and training, etc)

competitor activity

market comments (trends, developments, SWOT factors of note, i.e., strengths, weaknesses, opportunities, threats)

Report compiled by ....   **Date** ....

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