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**CEO REPORT [Template]**

**10 January 202X**

|  |
| --- |
| **METRICS** |

|  |  |  |
| --- | --- | --- |
| **Sales and Marketing** | **Financial** | **Operations** |
| |  |  | | --- | --- | | Premium customers won | 23 | | Premium customers lost | 1 | | Net Prem. Revenue Gain (monthly) | $48K | | Total customers won | 156 | | Total customers lost | 17 | | Net Prem. Revenue Gain | 98$K | | |  |  | | --- | --- | | Sales Revenue | $955K | | Operating Profit | $98K | | Net Profit/ Loss | $46K | | Cash Collected | $1.04M | | Closing Balance | $411K | | |  |  | | --- | --- | | CRM Implementation | ***On-track*** | | HQ Refurb | ***Off-track*** | | Systems Merge project | ***On-track*** | | New HR Policy | ***On-track*** | |

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| **KEY DECISIONS / DISCUSSIONS** |

To be made by board | for input

|  |
| --- |
| * List main topics you want board to consider this meeting and ensure on agenda |

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| --- |
| **TOP OF MIND** |

Areas of focus or concern for CEO

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| --- |
| * List whatever business issue(s) are keeping you up at night OR most exercising your mind |

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| **BIG WINS | LEARNING** |

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| List a few big wins or key learnings achieved this quarter.  I.e. a major new channel partnership |

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| **CEO SUMMARY** |

Add a few sentences to summarise position and direct attention of board to what you see as most important.

1. **[NAME] OF NEXT LEVEL OF KEY METRICS   
   (**Insert your own metrics graphs**)**

**Revenue and Customer Overview 202X**

datapine logo

(Graphs provided by www.datapine.com)

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**Chart

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**GRAPH | METRICS COMMENTARY**

*Add commentary as required*

1. **[NAME] SNAPSHOT REPORT**

*Insert next level of key business metrics here.*

***e.g. ANNUAL Programme Update / Issues***

|  |  |  |
| --- | --- | --- |
| ***Area*** | ***Qtr. July - Sept*** | ***Month Report*** |
| 1. ***Governance and monitoring*** | ***Task at hand*** | ***Update / Issues*** |
| *1.1 Compliance* |  |  |
| *1.2 Audit / AGM* |  |  |
| *1.3 Strategy* |  |  |
| *1.4 Training / Opportunities* |  |  |
| *1.5 HR* |  |  |
| 1. ***Membership Services*** | ***Task at hand*** | ***Update / Issues*** |
| *2.1 General Services* |  |  |
| *2.2 Listserv/Resources* |  |  |
| *2.2 Other Services* |  |  |
| 1. ***National Initiatives*** | ***Task at hand*** | ***Update / Issues*** |
| *3.1 Strategic Framework* |  |  |
| *3.2 Forum* |  |  |
| *3.3 Summer Campaign* |  |  |
| 1. ***Strategic Communications*** | ***Task at hand*** | ***Update / Issues*** |
| *4.1 Govt Submissions* |  |  |
| *4.2 Website* |  |  |
| *4.3 Social Media* |  |  |
| 1. ***Operational Update*** | ***Task at hand*** | ***Update / Issues*** |
| *5.1 HR* |  |  |
| *5.2 Finance* |  |  |
| *5.3 Management Plans* |  |  |
| *5.4 General Administration* |  |  |

**ADDITIONAL COMMENTS**

*Add commentary as required*