**

**CEO REPORT – [ EXAMPLE ]**

**DD | MM | YYYY**

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| **STRATEGIC GOAL # 1** |

Provide a compelling ………. to the market to reduce direct cost per lead by 50% to $40 by FY27

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| Direct cost per lead | Free trial conversion rate |  | OrganisationalGuardrails |
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| --- | --- |
| Actual Quarter End Sep 24  | $51 |
| Budget FY25 | $48 |
| Prior year QE Sep 23 | $55 |

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| Actual Quarter End Sep 24  | 70% |
| Budget FY25 | 65% |
| Prior year QE Sep 23 | 63% |

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| --- | --- |
| Cash at Bank | $2.3M |

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| --- | --- |
| OpEx Cover | 3.2X |

|  |  |
| --- | --- |
| eNPS | 48 |

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|  **STRATEGIC GOAL STATUS***mage result for orange button* | **COMMENTS**Direct cost per lead is marginally behind target and we need to take corrective action. Refer analysis and options in section 1. |

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| **TOP OF MIND** |

Areas of focus or concern for CEO

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| 1. Direct Cost per lead (risk) #1
2. Record sales month (win)
3. Key staff member, XM wobbly (risk) #2
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| **DECISION OR ASSISTANCE NEEDED**  |

To be made by board | for input

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| 1. Input to options for mitigating direct cost
2. Switch product dev methodology
3. Quarterly STI Approval
 | **REF**#1#X#3 |

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| **CEO SUMMARY** |

At the half way point of the year we are off track on achieiving our key strategic metric of $48 per direct lead. We have achieved $51 per lead for the 6 months to Sep and whilst a 7% improvement over prior year, we need corrective action to achieve the target of $48 for the full year. Refer section 1 overleaf for discussion of options to get us on track. Your input is requested.

The organisation is otherwise on track to achieve it’s FY25 financial targets and it’s project deadlines. Specific discussions, decisions and feedback items are all noted above.

1. **Marketing & Sales**

Data, analysis and options for correcting under performance of direct cost per lead metric.

1. **Key Staff Member risk**

Reminder of person’s name and responsibilities, outline of situation and go-forward plan.

1. **Quarterly STI Approval**

Table of intended payments and related information on criteria met.