10 January 202X

|  |  |  |
| --- | --- | --- |
| **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 |

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|  |  |
| --- | --- |
| Sales Revenue | $955K |
| Operating Profit | $98K |
| Net Profit/ Loss | $46K |
| Cash Collected | $1.04M |
| Closing Balance | $411K |

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|  |  |
| --- | --- |
| 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**

List the main topics you want the board to consider in the meeting and the action needed.

|  |  |
| --- | --- |
|  | Action |
| Topic #1 | Discussion |
| Topic #2 | Decision |
| Topic #2 | Noting |

## **Top of mind**

Areas of focus or concern for the CEO. What’s keeping you up at night or most exercising your mind.

## **Big wins/learnings**

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

## **CEO Summary and Metrics**

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

##

## **[Name] of next level of key metrics**

(Insert your own metrics graphs)

### **Revenue and Customer Overview 202X**

Add commentary before the dashboard graphics, so that the board understands the context and what the data is saying.



(Graphs provided by www.datapine.com)





##

## **ADDITIONAL COMMENTS**

## Add commentary as required