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 | | |  |  | | --- | --- | | 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 | |

## **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.

datapine logo

(Graphs provided by www.datapine.com)

Chart, bar chart

Description automatically generatedChart, bar chart

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Chart

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## **ADDITIONAL COMMENTS**

## Add commentary as required