

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

volumes/quantity/number
values/revenues
margin/contribution
% margin/contribution
number of orders
average order value

month				cumulative (year to date)			
actual	plan	variance	%	actual	plan	variance	%

next month forecast

volumes/quantity/number
values/revenues
margin

f'cast	plan	variance	%	f'cast	plan	variance	%

quarter forecast

values/revenues
margin

f'cast	plan	variance	%	f'cast	plan	variance	%

year forecast

values/revenues
margin

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

f'cast	plan	variance	%

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