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.

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| **month** | **cumulative (year to date)** |
| **actual** | **plan** | **variance** | **%** | **actual** | **plan** | **variance** | **%** |
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sales for month volumes/quantity/number values/revenues margin/contribution

% margin/contribution number of orders average order value

next month forecast volumes/quantity/number values/revenues

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **f'cast** | **plan** | **variance** | **%** | **f'cast** | **plan** | **variance** | **%** |
|  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |

margin

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)

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| **f'cast** | **plan** | **variance** | **%** |
|  |  |  |  |
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| **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 ………………..** |