

Monthly Review

REFLECTIONS

MONTH

List out everything you achieved in your business over the past month.

List here the things you wanted to do but didn't manage to complete.

Monthly Review

GOAL TRACKING

Revisit your plan for this past month. Did you achieve the goals you set?

Yes No

If no, what impact does this have on your quarterly plan and what needs to happen to get back on track?

What will you let go of and what will you carry forward in your business next month?

Monthly Review

FINANCES

How much did you generate in sales over the past month?

A

How much did you spend on your business over the past month? (include payment fees and taxes)

B

What was your net profit/loss (A minus B) in your business over the past month?

C

Did your business meet your financial needs in the past month?

Yes

No

If no, what was the shortfall?

Which of your products or services brought in the most money over the past month?

Are you on track to meet your annual financial goal? If no, what needs to change?