**BUSINESS PERFORMANCE REVIEW TEMPLATE**

This template is designed to help SMEs conduct a quarterly or annual performance review of their business across core functions. It includes financial analysis, operational efficiency, customer satisfaction, marketing effectiveness, and goal alignment.

**Section 1: Financial Performance**

Use this section to review key financial metrics for the review period.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Metric | Target | Actual | Variance | Comments |
| Revenue |  |  |  |  |
| Gross Profit Margin |  |  |  |  |
| Net Profit |  |  |  |  |
| Operating Expenses |  |  |  |  |
| Cash Flow |  |  |  |  |

**Section 2: Operational Efficiency**

Evaluate how efficiently your team and systems performed.

- Were deadlines consistently met?

- Was there minimal wastage or downtime?

- Were resources used efficiently?

- Were there any complaints about service delivery?

Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Section 3: Marketing & Sales Effectiveness**

Review your marketing strategies and sales conversions.

- Number of Leads Generated: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Conversion Rate: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Major Campaigns Run: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Social Media Growth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Section 4: Customer Satisfaction**

Include summaries of reviews, surveys, or feedback received.

- Average Customer Rating: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Key Compliments Received: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Key Complaints/Issues: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

- Retention/Repeat Customers: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Section 5: Alignment with Strategic Goals**

- Did you hit your quarterly/yearly targets?

- What goals were missed and why?

- Action steps for next quarter/year:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_