



REPORTS / FREE PDF

Monthly Performance Report

A blank reporting workbook for results, context, learning, and next actions.

**PLAN IT.
MAKE IT.
YELL IT.**





01 / Report what the numbers mean

This is a reporting workbook, not a research study. Add your own verified data and explain its source and limitations.

1 Define the period

Record the start and end dates, time zone, accounts included, and data source. Use a comparable period for any change calculation.

2 Connect results to objectives

Put the primary business outcome first. Add channel metrics that help explain what happened, rather than filling the report with every available number.

3 Keep definitions consistent

State how metrics are calculated. Engagement rate can use different denominators; name yours and avoid comparing unlike definitions.

4 Show context

Record paid activity, launches, changes in posting volume, tracking gaps, or unusual events that could affect interpretation.

PUT IT TO WORK / Use the worksheet on page 4 to capture your decisions.



02 / Turn the report into a decision

A useful report ends with a small number of evidence-based actions. Separate observations from explanations you have not yet tested.

1 **Observation**

Describe what the data shows in plain terms. Include the source, period, and relevant comparison.

2 **Possible explanation**

Offer a reasonable interpretation and state uncertainty. Correlation alone does not show why a result occurred.

3 **Next action**

Choose what to continue, change, or investigate. Name the owner and the date of the next review.

4 **Check the arithmetic**

Percentage change = (current minus previous) divided by previous, multiplied by 100. If the previous value is zero, report the absolute difference instead of an undefined percentage.

PUT IT TO WORK / Use the worksheet on page 4 to capture your decisions.



Your working sheet

Print this page or annotate it in your PDF reader. Add your own details, then give each next step an owner.

● Reporting period, accounts, and data sources

● Primary objective and measured outcome

● Metrics: current / previous / definition

● Context, tracking gaps, and limitations

● Key observations and possible explanations

● Actions, owners, and next review date
