Monthly Performance Report Template
Data-Driven Reports That Prove Your Value

Client: [Client Name] | Period: [Month Year]

Executive Summary
[2-3 sentence summary of the month's performance. Highlight the biggest win and any areas of focus for next month.]

Key Performance Metrics

Metric	Previous Month	This Month	Change	Target
[Metric 1]	[value]	[value]	[+/- %]	[target]
[Metric 2]	[value]	[value]	[+/- %]	[target]
[Metric 3]	[value]	[value]	[+/- %]	[target]
[Metric 4]	[value]	[value]	[+/- %]	[target]

What Worked Well
- [Win 1 with specific data]
- [Win 2 with specific data]
- [Win 3 with specific data]

Areas for Improvement
- [Area 1 + what we're doing about it]
- [Area 2 + what we're doing about it]

ROI Summary

	Amount
Monthly automation savings	$[amount]
Your monthly investment	$[amount]

Net monthly benefit	$[amount]
Cumulative ROI to date	**[X]%**

Recommendations for Next Month

1. [Recommendation 1 with expected impact]

2. [Recommendation 2 with expected impact]

3. [Recommendation 3 with expected impact]

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