

**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.

**sales for month**

**volumes/quantity/number**  
**values/revenues**  
**margin/contribution**  
**% margin/contribution**  
**number of orders**  
**average order value**

month				cumulative (year to date)			
actual	plan	variance	%	actual	plan	variance	%

**next month forecast**

**volumes/quantity/number**  
**values/revenues**  
**margin**

f'cast	plan	variance	%	f'cast	plan	variance	%

**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](http://businessballs.com))

f'cast	plan	variance	%

**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 .....**