

REPORT TEMPLATE

Executive Business Review

A structured report to communicate progress, value, and priorities to executive stakeholders each quarter.

Executive Summary

Overview

Summarize the relationship, review period, and overall trajectory in a few sentences a busy executive can scan in under a minute.

Overall Health

Review Period

Goals Achieved

Goal

Original objective set with the customer.

Progress

Where things stand today.

Status

On track, at risk, or achieved.

Key Performance Indicators

Metric 1

Metric 2

Metric 3

Metric 4

Product Adoption

Active Users & Trend

Who's using the product, and is usage growing or shrinking?

Feature Usage

Which features are driving the most value?

Training Completed

Certifications, onboarding milestones, enablement sessions.

Success Stories

Concrete wins the team has achieved with the product.

Return on Investment

Revenue Impact

Cost Savings

Productivity Gains

Time Saved

Cost of Inaction

Overall ROI

Risks

**Risk**

Description of the risk and why it matters.

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Recommendations

1

Recommendation

What we suggest doing next, and why.

2

Recommendation

What we suggest doing next, and why.

3

Recommendation

What we suggest doing next, and why.

Next-Quarter Objectives

OBJECTIVE	OWNER	TARGET DATE	SUCCESS MEASURE