CG

LEAD & SCALE

QUARTERLY BUSINESS REVIEW

Review performance, make decisions, and convert insight into focused execution.

2026 EDITION / PRACTICAL BUSINESS RESOURCE

01 / EXECUTIVE REVIEW

Establish the Quarter in Context

Record the period reviewed, participants, headline results, and the decisions this review must produce.

Review detail	Record
Business / division	
Quarter and year	
Review date	
Review leader	
Participants	
Strategic theme	
Overall quarter rating	
Primary decision required	

Quarter in one sentence

_____

_____

Most important achievement

_____

_____

Most important concern

_____

_____

02 / PERFORMANCE SCORECARD

Measure What Matters

Compare the quarter’s most important measures with targets, prior results, and the evidence behind each rating.

Key measure	Target	Actual	Prior qtr.	Trend	Status	Comment
Revenue						
Gross margin						
Operating profit / cash flow						
Customers / clients						
Sales pipeline						
Delivery / quality						
Customer experience						
Team capacity						
Strategic milestone						
Business-specific KPI						

What the scorecard says about the business

03 / FINANCIAL PERFORMANCE

Understand the Economics

Review income, costs, cash, margin, and financial variances so that decisions reflect economic reality.

Financial measure	Plan	Actual	Variance	Prior qtr.	Explanation / action
Revenue					
Cost of sales					
Gross profit					
Operating expenses					
Operating profit					
Cash balance					
Accounts receivable					
Accounts payable					
Capital expenditure					
Runway / liquidity					

Financial decisions

Decision / adjustment	Owner	Due
Pricing or margin action		
Cost or spending action		
Cash collection action		
Investment or funding action		

04 / CUSTOMERS & REVENUE

Evaluate Demand and Commercial Progress

Examine customer acquisition, retention, sales conversion, revenue concentration, feedback, and market signals.

Commercial measure	Result	Insight / implication
Qualified leads		
Conversion rate		
Average transaction / contract value		
Sales cycle		
New customers		
Repeat / retained customers		
Customer churn		
Customer concentration		
Customer satisfaction / referrals		
Top market signal		

What customers valued most

Where the customer journey must improve

05 / MARKETING & BRAND

Assess Reach, Relevance, and Return

Review the activities that created awareness, engagement, qualified demand, and stronger market positioning.

Channel / initiative	Objective	Investment	Result	Continue / change / stop
Website / search				
Email				
Social media				
Content / insights				
Advertising				
Events / partnerships				
Public relations				
Referral program				
Brand initiative				

Best-performing message or offer

_____

_____

Next-quarter marketing decision

_____

_____

06 / OPERATIONS

Strengthen Delivery and Systems

Identify capacity constraints, quality issues, workflow delays, system gaps, and operational improvements.

Operational area	Performance	Constraint / risk	Improvement	Owner	Due
Service / product delivery					
Quality and rework					
Cycle time / responsiveness					
Capacity and utilization					
Technology and systems					
Supplier / partner performance					
Policies / SOPs					
Compliance / controls					
Data and reporting					

Operational change with the greatest leverage

07 / PEOPLE & LEADERSHIP

Confirm Capacity and Accountability

Review leadership effectiveness, role clarity, capability, workload, engagement, and the support required for execution.

People / leadership area	Status	Evidence / gap	Required action	Owner
Leadership alignment				
Role clarity				
Accountability				
Capability / training				
Workload / capacity				
Communication rhythm				
Performance management				
Culture / engagement				
Hiring / contractor need				
Succession / continuity				

Leadership behavior to strengthen next quarter

08 / STRATEGIC PRIORITIES

Review Progress Against the Plan

Determine which priorities advanced enterprise value, which stalled, and what should continue, change, pause, or stop.

Strategic priority	Intended result	Progress	Evidence	Decision	Owner
Priority 1					
Priority 2					
Priority 3					
Priority 4					
Priority 5					
Priority 6					

Portfolio decisions

Decision	Initiative / rationale
CONTINUE	
ACCELERATE	
REVISE	
PAUSE	
STOP	
ADD	

09 / RISKS & OPPORTUNITIES

Act Before Conditions Change

Update the most consequential threats and opportunities, including evidence, exposure, response, ownership, and triggers.

Risk / opportunity	Type	Likelihood	Impact	Response / action	Owner	Trigger / due

Scenario requiring immediate leadership attention

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_____

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10 / LEARNING REVIEW

Convert Experience into Better Decisions

Capture the assumptions tested, lessons learned, repeatable practices, and changes required before the next quarter begins.

Review question	Evidence and learning
What worked better than expected?	
What underperformed and why?	
Which assumption proved correct?	
Which assumption proved incorrect?	
What did customers teach us?	
What did the team learn?	
What should become a standard practice?	
What should never be repeated?	

The single most important lesson from this quarter

_____

_____

_____

11 / NEXT-QUARTER DIRECTION

Choose the Few Priorities That Matter Most

Translate the review into a disciplined set of objectives, measurable results, owners, resources, and dependencies.

Objective	Key result / measure	Baseline	Target	Owner	Resources / dependency
Objective 1					
Objective 2					
Objective 3					
Objective 4					
Objective 5					

Priority test

Question	Decision
Does each objective materially advance the strategy?	
Can the team execute these priorities with available capacity?	
Are tradeoffs and items not being pursued explicit?	
Are owners and measures unambiguous?	

12 / 90-DAY EXECUTION

Sequence the Next Quarter

Break priorities into monthly milestones, establish a review rhythm, and make responsibility visible.

Priority	Days 1-30	Days 31-60	Days 61-90	Owner	Measure
Priority 1					
Priority 2					
Priority 3					
Priority 4					
Priority 5					

Execution rhythm

Review	Cadence	Participants	Purpose
Weekly operating review			
Monthly performance review			
Quarter midpoint review			
Quarter-end review			

13 / COMMITMENTS

Close the Review with Clear Decisions

Record the decisions, actions, owners, deadlines, and leadership commitments that govern the next quarter.

Decision / commitment	Owner	Due	Success evidence

Final confirmation	Select
Results and variances reviewed	☐
Priorities and tradeoffs agreed	☐
Resources and capacity confirmed	☐
Risks and dependencies assigned	☐
Owners and deadlines accepted	☐
Review cadence scheduled	☐

Leadership statement for the next quarter

Review complete: The value of a quarterly review comes from the decisions made, the tradeoffs accepted, and the disciplined follow-through that occurs afterward.

THE CUMBERBATCH GROUP

Practical tools for building better businesses.