

# Outcome-Based Monthly Business Review Template

Quota Achievement Last Month: \_\_\_/\_\_\_  
*(examples: sales developing opportunity, sales accepted lead)*

Measurable Business Objectives Last Month: \_\_\_/\_\_\_  
*(examples: secondary goal or activities outside of opportunity creation)*

Forecast Accuracy: \_\_\_/\_\_\_  
*(this not be used if the rep did not submit a previous forecast)*

Next promotion: \_\_\_\_\_ Requirements: \_\_\_\_\_

Gap to Quarterly Quota: \_\_\_\_\_

Stretch Goal/Forecast for this month: \_\_\_\_\_

## Target Accounts

*Below include 3x the number of target accounts in your quota.  
 (For example, if quota is three, include nine accounts below).*

Account	Why is it a target account? <i>Ex. Use case, referral, ICP, new leadership, event</i>	Are there blockers? <i>Ex. Competitor, timing</i>	Plan of attack <i>Ex. Next meetings, contacts needed, build use case</i>

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