

# Work Report

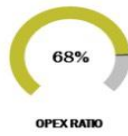
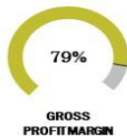
## Monthly Report for Management Including Budget and Key Statistics

This one page shows the brief summary of monthly business management report which includes introduction, mission, objectives, financial report, team management, last month business performance, key statistics and budget estimation.

### Introduction:

- For the XYZ company this month was a very challenging one, with **declining sales** and **rise in operating expenses** due to the weak market. Fortunately, the strategies the company has identified in previous months have greatly contributed to its **cash flow** and **revenue stable growth**.
- Add text here

### Key Stats:



### Budget Estimation:

BUDGET TOTALS	ESTIMATED	ACTUAL	DIFFERENCE
Income	63,300.00	57,450.00	(5,850.00)
Expenses	54,500.00	49,630.00	4,870.00
Balance (Income minus Expenses)	8,800.00	7,820.00	(980.00)

### Previous Month Goals and Current Goals

Objective	Actual Result	Status
Increase sale by 6-8%	Decrease in sale by 2%	
Reduce expenses by 5%	Expenses increased by 2%	
Increase Traffic by 10%	Website Traffic has increased by 12%	
Start social media marketing	Started a new program on Instagram	

### Our Team:



Vice President  
ALBERT BUCCIA



CEO  
STARKEY



Exact Director  
JOHN DOE



Director  
ADDY FEUERS TEIN

## Summary and General objectives of a work report :

Context review and significance:

- A work report is a structured summary of the business activities during a specific span.
- It offers a summary of significant data, details regarding the company's financial situation, and an analysis of the performance of important business areas.

General objectives :

- To evaluate prior results and to detect any shortcomings if any , for future improvement .
- To give a brief overview of your business activity with the information of the employees involved as it's crucially significant to provide the information of those employed for the activity.

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## General components of a work report :

### 1. A customized cover page :

- A professional branded cover page with the logo of the organization .

### 2. Mission , Vision and Values :

- Your organization's mission, vision, and value statements serve as the highest level summaries of your strategy.

### 3. Table Of Contents:

- Including a table of contents at the beginning of the report, can make it easier for management to find the required section .

### 4. Organizational scorecard views:

- This includes a high-level overview of the organization's or department or employee's scorecard.

### 5. Detailed pages:

- One detail page must be dedicated to each of your objectives or strategic goals.

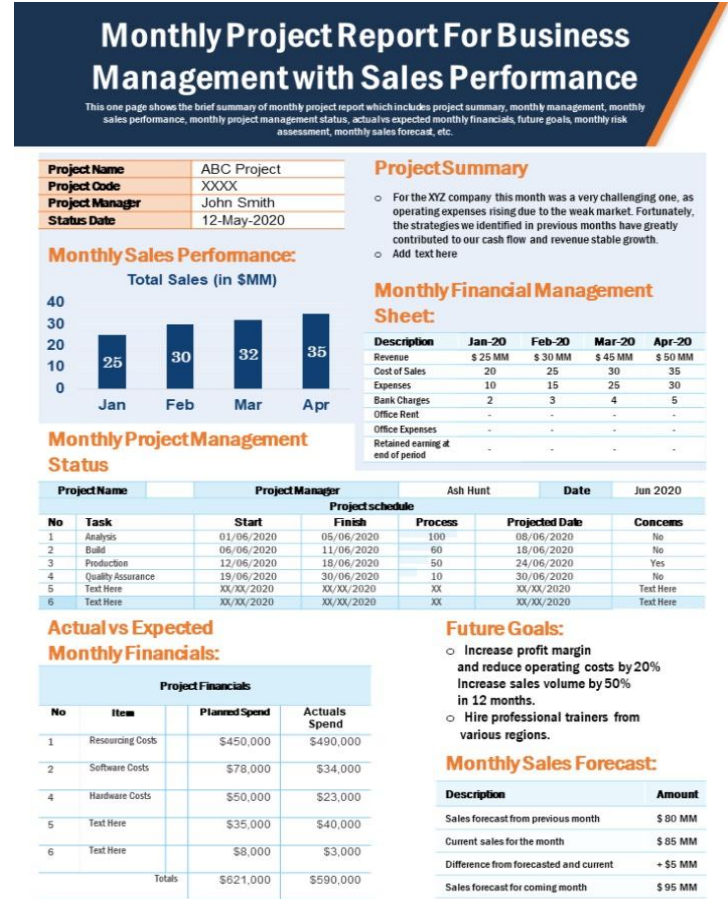
### 6. Executive summary :

- Include an overall status for each and all additional critical information, like percent complete and budget spent.

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## Project management :

- Project management is the execution of skills, knowledge, techniques and experience to achieve the specific objectives according to the criteria and fixed parameters.
- For efficient project management the following elements need to be addressed :
  - The drawbacks and issues
  - Objectives and priorities
  - Resources and the budget
  - skills required
  - roles and responsibilities of each member
  - deadlines



## Financial management :

- Financial management is the strategic planning, organizing, directing, and controlling of financial endeavours in a business/company/organization.
- Planning, organizing , decision making and implementing financial plans are the 4 key elements in financial management.
- Capital budgeting , Capital structure, Dividend decision and Working capital management decision are the four types of Financial management.

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# Business Management Monthly Report with Budget Expenses

This one page shows the brief overview of business management monthly report which includes monthly expense and budget report, monthly sales performance, product delivery monthly status, monthly project status, next month planning, expected outcomes, etc.

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<b>Presented by</b>	John Smith	<b>Project Name</b>	XYZ
<b>Intended for</b>	-	<b>Project Manager</b>	Project
<b>Start Date</b>	MM/DD/YYYY	<b>Finish Date</b>	MM/DD/YYYY
<b>Title</b>	-	<b>Add text here</b>	-

## Monthly Expense and Budget Report:

Product	Estimated Expenses for Each Product	Allocated Monthly Budget	Substantive Amount
Product Receivables	\$25K	\$35K	\$10K
Essential program for product recognition	-	-	-
Group program for product marketing	-	-	-

## Monthly Sales Performance:



## Product Delivery Monthly Status:

ISSUES/CONCERNS	ACTION ITEMS	TASK OWNER	TARGET DATE
1 Delayed testing of products	Review testing guideline Train employees	Project Manager Testers	Add Text Here
Add Text Here	Add Text Here	Add Text Here	Add Text Here

## Monthly Project Status:

Project Schedule						
No	Task	Start	Finish	Process	Projected Date	Concerns
1	Analysis	01/06/2020	05/06/2020	100	06/06/2020	No
2	Build	06/06/2020	11/06/2020	60	18/06/2020	No
3	Production	12/06/2020	18/06/2020	50	24/06/2020	Yes
4	Quality Assurance	19/06/2020	30/06/2020	10	30/06/2020	No
5	Text Here	XX/XX/2020	XX/XX/2020	XX	XX/XX/2020	Text Here
6	Text Here	XX/XX/2020	XX/XX/2020	XX	XX/XX/2020	Text Here

## Upselling/Cross-selling :

- Conveys details on the number and value of items upsold or cross-sold to customers .This can be used to review to identify future upselling and cross-selling opportunities.
- Upselling and cross-selling are very similar strategies. Although the methods are different, both increase the trader's profits.
- Upselling increases sales by promising a higher quality product, while cross-selling does the same by offering to buy more.



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### What is a weekly/Monthly/annually reporting Period ?

- The time frame for which a business reports its financial performance and financial standing is known as a reporting period.
- A business/company has the option of using a 12-month financial year or the standard 12-month calendar year.

### Quick steps to an efficient work report :

- Gather data for the concerned span
- Study and analyze the gathered data

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- Use graphs and charts
- Identify the problems and find the solutions for the solutions
- Review and summarize .

### **Purpose of a business work report in brief?**

- For better future decision making
- Aids in appropriate explanation , interpretation and prediction of the business related events by having a timely track of them.

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