

Monthly marketing report template

Grey values are an example (a made-up B2B software team). Hints under each field say what to write. Replace both before you send.

Grey italic text is an example. Replace it with your own content.

1. REPORT HEADER

Report period <i>Calendar month, start and end date</i>	<i>October 1 to October 31</i>
Reader and decision <i>Who reads it and what they decide with it</i>	<i>VP Marketing, approves November budget split</i>
Data cut-off <i>The date you pulled the numbers, at least 48 hours after period end for analytics data</i>	<i>November 3</i>
Prepared by <i>One named owner</i>	<i>Marketing operations manager</i>

2. EXECUTIVE SUMMARY

Headline <i>One sentence: result against goal and the main reason</i>	<i>Qualified leads beat target by 9%, but pipeline finished 8% short because cost per lead rose to \$162.</i>
What changed <i>Three bullets at most, each with a number</i>	<i>Paid social cost per lead up 18%; webinar series added 41 leads; organic non-branded sessions up 9%</i>
Decision needed <i>What you need from the reader, with a deadline</i>	<i>Approve moving \$4,000 from paid social to paid search by November 8</i>

3. KPIS AGAINST TARGETS

Metric	Target	Actual	vs target	vs last month
<i>Marketing-sourced pipeline</i>	<i>\$250,000</i>	<i>\$231,000</i>	<i>-8%</i>	<i>+6%</i>
<i>Qualified leads</i>	<i>180</i>	<i>196</i>	<i>+9%</i>	<i>+4%</i>
<i>Cost per qualified lead</i>	<i>\$145</i>	<i>\$162</i>	<i>+12%</i>	<i>+7%</i>
<i>Spend</i>	<i>\$30,000</i>	<i>\$31,750</i>	<i>+6%</i>	<i>+3%</i>
<i>Visit-to-lead conversion rate</i>	<i>2.4%</i>	<i>2.1%</i>	<i>-0.3 pts</i>	<i>-0.1 pts</i>
<i>Organic non-branded sessions</i>	<i>14,000</i>	<i>15,300</i>	<i>+9%</i>	<i>+5%</i>

Metric	Target	Actual	vs target	vs last month

4. RESULTS BY CHANNEL

Channel	Spend	Qualified leads	Cost per lead	One-line note
<i>Paid search</i>	\$14,000	88	\$159	<i>Branded terms steady, two non-brand ad groups paused</i>
<i>Paid social</i>	\$9,500	46	\$207	<i>Frequency above 4 on the main audience</i>
<i>Email and webinars</i>	\$3,250	41	\$79	<i>October webinar converted 14% of registrants</i>
<i>Organic search</i>	\$5,000	21	\$238	<i>Content and tooling cost, leads from guide downloads</i>

5. WHAT WE LEARNED

What worked <i>One result and the likely reason</i>	<i>Webinar follow-up email with one call to action converted better than the three-link version</i>
What did not <i>One result and what you'll stop or change</i>	<i>Lookalike audience on paid social: cost per lead rose for the third month</i>

6. NEXT MONTH

Priority	Owner	Hypothesis	Metric to judge it
<i>Shift \$4,000 to paid search</i>	<i>Paid media lead</i>	<i>Search captures the demand that social no longer converts</i>	<i>Cost per qualified lead under \$150</i>
<i>Rebuild the paid social audience</i>	<i>Paid media lead</i>	<i>A narrower audience lowers frequency and cost</i>	<i>Frequency under 3, cost per lead</i>
<i>Repeat the webinar format</i>	<i>Lifecycle manager</i>	<i>A second session at the same cost adds leads at a lower cost per lead</i>	<i>Qualified leads per session</i>

7. DATA NOTES

- Source of truth per metric named (web analytics, ad platforms, CRM)
- Tracking, form, redirect or consent changes during the period listed
- Leads in analytics reconciled to leads in the CRM, gap explained
- Definitions or targets that changed since last month marked