

22 · Marketing

Monthly Marketing Report Template

A monthly report linking objectives, channel results, spend and cost per result to interpretation, limits and next decisions, with a ready Excel sheet.

For: Marketing leads and business owners who report monthly to management or a client and want the report to end in decisions, not just numbers.

Level: Intermediate Version 1.0 · 2026-09-21

Why this template?

Many monthly reports are pages of screenshots and numbers without context: views went up, clicks went down, and nobody knows what to do after reading. A useful report answers three questions only: Did we achieve what we planned? What did we learn? What will we do next month? This template organises the report around those questions, and comes with an Excel sheet that calculates change and cost per result automatically.

The seven parts of the report

1. **Objectives:** start with the month's objectives as agreed at the start of the month, with target and actual. Do not change objectives at month end to make results look better.
2. **Channel results:** each channel has one clear result type (enquiry, order, sign-up, purchase). Do not add up different result types; ten enquiries and ten purchases are not twenty results.
3. **Consistent comparison periods:** compare the month with the previous month the same way every time, and if your business is seasonal, add a comparison with the same month last year when the data exists. Note any difference in number of days or measurement method.
4. **Spend and cost per result:** where there is spend, divide it by the number of results. That figure compares channels and months better than spend alone. Channels without direct spend (organic posting, newsletter) get no cost per result in the sheet, but remember they consume team time.
5. **Interpretation:** for each significant change, write what you know and what you assume. "Enquiries rose after we added a new angle" is an observation; "they rose because of the new angle" is a conclusion that needs evidence. Separate the two explicitly.
6. **Limitations:** what can the numbers not tell you this month? For example: a gap between platform and internal numbers, a new channel with no comparison, a change in tracking, or a sample too small to judge.
7. **Next decisions:** three to five decisions, each with evidence from the report, an owner, a due date and a way to know whether it worked. This part is why the report exists.

How the spreadsheet works

The Excel file has four sheets:

- **Objectives:** enter the objective, metric, target and actual, and choose the direction ("Higher is better" or "Lower is better"). The sheet calculates progress for higher-is-better objectives and gives a "Met" or "Not met" verdict for all of them. In the example, the actual cost per enquiry is pulled directly from the channel results sheet.
- **Channels (example):** invented data showing how it is used.
- **Blank template:** ten channel rows with the same formulas, ready for your data.
- **Decisions:** the next-decisions table.

The formulas are guarded against division by zero: if last month's results are zero or blank, "Change %" stays empty instead of showing an error. The same applies to cost per result when there is no spend or no results. A blank cell means "no valid comparison", not zero.

Enter raw numbers only (results and spend) and let the formula columns work. Pasting a hand-calculated number over a formula is the most common source of errors in monthly reports.

Written report template

Monthly marketing report

Marketing report for [month] compared with [month]

Prepared by: [] Report date: [] For: [management / client]

1) Summary in three lines

- Achieved: []
- Not achieved: []
- Most important proposed decision: []

2) Objectives

| Objective | Metric | Target | Actual | Verdict |

| [] | [] | [] | [] | [] |

3) Channel results (from the sheet)

- Biggest positive change: [channel, number, %]
- Biggest negative change: [channel, number, %]
- Total spend and its change: []

4) Interpretation

- What we know (with evidence): []
- What we assume (needs checking): []

5) Limitations

- [measurement differences / new channel / small sample / ...]

6) Next decisions

| Decision | Evidence | Owner | Due | How we know it worked |

| [] | [] | [] | [] | [] |

7) What we need from management or the client

- [approval / budget / information / material]

Example: a training centre's report

Illustrative example

"Riwaq Training Centre" is an invented centre in Tripoli offering design and digital-skills courses. All numbers in the sheet and here are invented for illustration. The comparison is September against August.

Summary: the cost-per-enquiry and newsletter objectives were met; the design-course enrolment objective was not (19 of 25, or 76%). The most important proposed decision: move part of the search-ads budget to social-platform ads for two weeks as a defined test.

Channel results:

- Social-platform ad enquiries rose from 118 to 142 (+20.3%), and cost per enquiry fell from \$4.58 to \$4.37 (−4.6%).
- Search-ad call requests fell from 41 to 38 (−7.3%), and cost per request rose from \$9.76 to \$10.79 (+10.6%).
- Organic posting: 57 enquiries against 49 (+16.3%).
- Newsletter: 12 workshop sign-ups, with no comparison because it is the first month.
- Website form: 21 requests against 26 (−19.2%).
- Total spend: \$1,030 against \$940 (+9.6%).

Interpretation: what we know: the "free trial workshop" angle was added mid-month, and social enquiries rose in the following two weeks. What we assume: that the angle caused the rise, and that some website visitors now contact the centre on WhatsApp instead of the form, which would explain fewer form requests. Both assumptions need checking.

Limitations: platform numbers are estimates; enquiries were reconciled with the WhatsApp log, but search call requests have not yet been reconciled. September is the start of the course season, so comparing it with August may not be entirely fair, and September data from last year is not available. Newsletter numbers are too small a sample to judge.

Next decisions: recorded in the "Decisions" sheet: the budget-shift test, adding a "How did you hear about us?" question to the WhatsApp chat, and reconciling search call requests with the phone log.

Common mistakes

- **Mistake:** a report made of platform screenshots. **Fix:** move the raw numbers into one table with consistent comparison periods.
- **Mistake:** adding up different result types into one total. **Fix:** one result type per channel; totals for spend only.
- **Mistake:** calculating a percentage change from a previous month of zero. **Fix:** leave the cell empty and state there is no comparison, as the sheet does.
- **Mistake:** presenting an assumption as fact. **Fix:** separate "what we know" from "what we assume" in every interpretation.
- **Mistake:** hiding limitations. **Fix:** state them plainly; they protect decisions from overconfidence.
- **Mistake:** a report with no decisions. **Fix:** do not send it until it has three to five decisions with owners and dates.

Report completion checklist

- ☐ The objectives are the ones agreed at the start of the month.
- ☐ Each channel has one result type, and results are not summed across types.
- ☐ The comparison period matches the previous report, and any difference is noted.
- ☐ Raw numbers are reconciled with internal sources where possible.
- ☐ No hand-typed numbers overwrite the formula columns.
- ☐ Every significant change has an interpretation separating known from assumed.
- ☐ Limitations are written down.
- ☐ Three to five decisions, each with evidence, owner, due date and success measure.
- ☐ A three-line summary opens the report.

About the author — Mohamad Charafeddine is an entrepreneur from Tripoli, Lebanon: founder of the Passion digital marketing agency, president of Takaful Youth Association, and founder of digital platforms. He trains individuals and teams in applied AI and marketing.

Examples in this file are fictional. Free to use in your work and organisation; credit the source if you republish.
mohamadcharafeddine.com/en/resources/monthly-marketing-report/