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| Client Name: |  | Date: |  |



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| 1 | REVIEW OF PRIOR PERIOD RESULTS |
| * Review of KPI’s and business goals * Comparison to targets |
| 2 | WHAT WENT WELL? |
| List up to 3 key things your business did well last period to help you achieve your KPI’s / goals:  1.  2.  3. |
| 3 | WHAT COULD HAVE BEEN DONE DIFFERENTLY or BETTER? |
| List up to 3 key things that made it difficult for you to achieve your KPI’s / goals:  1.  2.  3. |
| 4 | SUMMARY: MOVING FORWARD |
| * Summary of today’s meeting * Looking forward to next month’s targets – what are they and are they realistic? * What can we do to assist you? |

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| Set Date for next review meeting: |  |