

Tools and templates



Template: One-page financial overview

Use this template to create an overview of the financial information you want to share with employees at the end of a quarter.

Tips for getting started:

- Speak to employees about the information they would find useful
- Break down jargon or complex concepts into simpler language
- Choose a handful of metrics to start with
- Only share numbers if you're comfortable with them being public knowledge

Template

Company name:

- State company name.

Summary:

- Briefly outline how the company has performed in the last quarter or month, and compare it with the same period in the previous year.

Financial performance:

- List three to four metrics that are important to convey to employees. These should be based on or linked to your KPIs, or other information that's critical to understanding business performance. For example:
 - Earnings before interest, taxes, depreciation and amortisation (EBITDA)
 - Net revenue
 - Quarter to quarter growth

Client update:

- List three to five of your biggest spending clients and how much they have spent with you during the period.

Tools and templates



Project update:

List your most important projects in the last quarter. Include the project date, the budget, the length of the project (particularly if it continues into the next quarter) and a brief description of its impact. For example:

- Project: Adding ecommerce function to website
- Date: 14 January
- Budget: £16,000
- Length: Eight weeks
- Impact: Revenue increased by five per cent

Sales of product or service:

Give a brief breakdown of your most popular products or services and their share of sales.

Potential financial risks:

Include a summary of issues you've identified, such as a key client that isn't happy and may leave or a target being missed. Flagging things early helps the team provide useful input.

Financial goals for next quarter:

List the company's financial goals for next quarter.