

Monthly Team Review

Performance summary for leadership reporting



HOW TO USE THIS TEMPLATE
Complete at the end of each month. Fill in the metrics table with actuals vs last month, summarise wins and challenges, and set priorities for the month ahead. Designed to be shared directly with senior leadership or dropped into a slide deck.

MONTH

TEAM / DEPARTMENT

PREPARED BY

Key Metrics

METRIC	THIS MONTH	LAST MONTH	VARIANCE	TARGET
Calls Handled				
Avg Handle Time				
CSAT / NPS				
First Call Resolution				
QA Score (avg)				
Agent Attrition				

Biggest Wins

Biggest Challenges

Root Cause Themes from Calls

Actions Taken This Month

Priorities for Next Month