

Quarterly business review worksheet

A four-page working pack to turn performance, cash and strategy into decisions for the next 90 days.

Use this worksheet with the full Accendo guide. Adapt the measures and questions to the organisation, its risks and the decisions facing management. This is an internal decision-support framework, not a prescribed governance standard.

1. Meeting details

Review period		Meeting date	
Chair		Participants	
Three decisions required			

2. Close the previous quarter

For every unfinished commitment, decide whether to complete, change or stop it. Moving the date is not a decision unless the action still matters and the owner has the capacity and authority to deliver it.

Previous outcome	Owner	Evidence due	Status and reason	Decision now

3. Explain performance and update the outlook

Use measures that lead to decisions. State the source and use consistent definitions. Add or remove rows where the business model requires it.

Measure	Actual / current	Budget / target	Current forecast	Explanation and evidence	Decision or action
Revenue / income					
Gross margin / contribution					
Operating profit					
Cash and headroom					
Working capital					
Pipeline / order book					
Capacity and delivery					
Strategic priorities					
Principal risks					

Forecast assumptions that matter most

Assumption	Current view	Downside tested	Decision affected

CHALLENGE QUESTIONS

4. Move from reporting to decisions

Choose the questions that matter this quarter. Record evidence or a decision beside each selected question.

Performance

Which result is materially different from plan, and what evidence explains it?	
Are we improving because of a repeatable change or a one-off event?	
What part of reported profit has not converted into cash?	

Cash and funding

What is the lowest forecast cash point over 13 weeks and 12 months?	
Which receipts, facilities or funding assumptions matter most?	
Which new commitment would reduce headroom below tolerance?	

Delivery and capacity

Which constraint is most likely to prevent delivery next quarter?	
Where are key decisions dependent on one person?	
What should stop, be delegated or be narrowed?	

Strategy, risk and accountability

Which strategic assumption has become less credible?	
Which risk increased during the quarter?	
What evidence will demonstrate completion, and when should an exception be escalated?	

Decision papers or further analysis required

Question to resolve	Owner	Scope and evidence	Due

5. Decisions and action sheet

Limit the quarter to a few material outcomes. One person owns each result, even when several people contribute.

Decision or outcome	Owner	Deadline	Evidence of progress / completion	Escalation condition

Meeting close test	What will be different in the next 90 days because we held this review?
Next review	

Use with: From strategy to delivery: a practical guide to the quarterly business review. Draft prepared for Accendo review, 8 October 2026. Do not publish until approved.