Ashford Business Services Ltd

Management Review Report

Ashford Business Services Ltd A review of how Ashford Business Services Ltd performed during the period, measured against plan, with the risks, decisions and actions that follow from it. Prepared for Board or management team.

Report details.

Company: _____ **Report period:** _____

Prepared by: Sarah Mitchell, Office Manager **Prepared for:** Board or management team

Date of review meeting: _____ **Previous review period:** _____

1. Executive summary. Write two or three short paragraphs that give the whole picture: whether the period went to plan, the main reasons for any gap, and what needs a decision at this review.

Enter executive summary as agreed at the meeting.

2. Performance against plan. Record each key measure with its planned figure, the actual figure, the variance and a RAG rating (Red, Amber or Green). Add or remove rows to match the measures Ashford Business Services Ltd tracks.

(1) Revenue: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(2) Gross profit: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(3) Operating profit: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(4) Cash at bank: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(5) New customers: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(6) Customer satisfaction: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(7) Staff turnover: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

(8) On-time delivery: Plan: _____ Actual: _____ Variance: _____ RAG: _____ Comment: _____

3. Financial summary.

(1) Revenue: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(2) Cost of sales: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(3) Gross profit: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(4) Operating costs: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(5) Operating profit: Plan: _____ Actual: _____ Variance: _____ Comment: _____

(6) Cash at bank: Plan: _____ Actual: _____ Variance: _____ Comment: _____

4. What went well.

November 2026 November 2026

November 2026

5. What did not go to plan.

Enter a point that did not go to plan, with the reason as agreed at the meeting. Enter a point that did not go to plan, with the reason as agreed at the meeting.

Enter a point that did not go to plan, with the reason as agreed at the meeting.

6. Risks and issues.

(1) Risk or issue as agreed at the meeting. Impact: High, Medium or Low Likelihood: High, Medium or Low Owner: Zoe Barnes, Finance Manager Mitigation or action: _____

(2) Risk or issue as agreed at the meeting. Impact: High, Medium or Low Likelihood: High, Medium or Low Owner: Omar Farouk, Office Manager Mitigation or action: _____

(3) Risk or issue as agreed at the meeting. Impact: High, Medium or Low Likelihood: High, Medium or Low Owner: Natalie Brooks, Finance Manager Mitigation or action: _____

(4) Risk or issue as agreed at the meeting. Impact: High, Medium or Low Likelihood: High, Medium or Low Owner: Aisha Bello, Office Manager Mitigation or action: _____

7. Decisions needed.

(1) Decision needed as agreed at the meeting. Options: Options considered Recommendation: Recommendation Decision: Decision taken as agreed at the meeting.

(2) Decision needed as agreed at the meeting. Options: Options considered Recommendation: Recommendation Decision: Decision taken as agreed at the meeting.

(3) Decision needed as agreed at the meeting. Options: Options considered Recommendation: Recommendation Decision: Decision taken as agreed at the meeting.

8. Actions agreed.

(1) Action as agreed at the meeting. Owner: Daniel Wright, Finance Manager Due: 9 November 2026 Status: Not started, In progress or Complete

(2) Action as agreed at the meeting. Owner: Laura Bennett, Office Manager Due: 9 November 2026 Status: Not started, In progress or Complete

(3) Action as agreed at the meeting. Owner: Tom Whitfield, Finance Manager Due: 9 November 2026 Status: Not started, In progress or Complete

(4) Action as agreed at the meeting. Owner: Emma Clarke, Office Manager Due: 9 November 2026 Status: Not started, In progress or Complete

(5) Action as agreed at the meeting. Owner: David Okafor, Finance Manager Due: 9 November 2026 Status: Not started, In progress or Complete

9. Next review. The next management review will be held on 9 November 2027 and will cover the period November 2026.

Sign-off.

Prepared by: _____ **Reviewed by:** _____

Date: _____ **Signature:** _____