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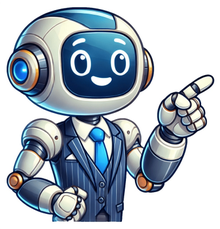

Our collection of free marketing templates will save you time creating them from scratch! Opt for editable, printable, and downloadable blanks in Google Docs, Word, Excel, and Google Sheets. Find your digital marketing, performance, KPI, quarterly, or monthly marketing report template on this page, and start customizing in a few clicks using a convenient format. Writing a marketing report? Do it in the right way. It's much easier and more pleasant to present any information with our template. Making an annual report is a complex task that takes time. But we will gladly make your job more manageable. Just use the ready-made Marketing Annual Report With Orange template right now! Introducing our sleek and professional Basic Blue Trading Report template, designed to assist traders and investors in organizing and presenting their trading activities with clarity and precision. Was you marketing campaign successful? If you are going to report about your achievements, our template will help you to highlight the main points. It has a great design with a perfect colour balance. With our Stylish Weekly Marketing Reports template, you can provide information to your clients or management in a modern design. Digitizing the market report is certainly a task you can get from your boss. To save some time when creating the report, you can use our template. Real Estate Marketing Report With daily sales reports like this for your company, you're sure to get a promotion! Use the ready-made Turquoise Daily Marketing Report template for free. Sorry, no templates match the selected filters. Please choose different filters. Creating a marketing plan for the whole company is a very responsible task. So that you can deal with it as efficiently as possible, and clients do not worry about possible success or failure, you need to provide the most accurate report with all the explanations and present your services only from the best side. Our team of professional template developers is happy to help you cope with this seemingly difficult and tedious job! Here you will find only the best and most professional marketing reporting templates! We ask for your information in exchange for a valuable resource in order to (a) improve your browsing experience by personalizing the HubSpot site to your needs; (b) send information to you that we think may be of interest to you by email or other means; (c) send you marketing communications that we think may be of value to you. You can read more about our privacy policy here. Weve collected the most useful free monthly marketing report templates for marketing managers, sales managers, chief marketing officers, and more. Use these customizable templates to organize and present your marketing data, metrics, and insights. On this page, you'll find five dynamic monthly marketing report templates, including a digital marketing monthly report template, a sales marketing monthly report template, a monthly marketing report presentation template, and more. Plus, learn what to include in monthly marketing reports, how to create a monthly marketing report, and monthly marketing report best practices. Download the Basic Monthly Marketing Report Template for Excel Use this basic monthly marketing report template to effectively analyze your marketing endeavors, improve your strategies, and grow your business. Easily track the completion rate, value, and conversion rate for each marketing goal in a visually dynamic dashboard that populates automatically as you enter your data. This basic monthly marketing report template is the perfect solution for organizations looking to track and improve key goals, leading to informed decisions and business growth. Download a Monthly Marketing Report Template forExcel | Google SheetsThis comprehensive monthly marketing report template is ideal for helping you set, track, and reach your marketing goals. It has everything you need to quickly grasp trends, make informed decisions, and improve your strategies. Youll find space for tracking metrics such as site visits, leads, and conversion rates. Vertical bar charts can display your marketing reach by channel, total marketing reach, website visits by source, total visits, and more. Download the Digital Marketing Monthly Report Template for Excel Maximize your online presence with this visually dynamic digital marketing dashboard template, designed for tracking comprehensive online marketing analytics. Monitor monthly paid media visits, organic media visits, and total visits per month. This visually rich template helps you evaluate the alignment of paid promotions and organic search traffic with your marketing objectives, all while computing average ROI and total monthly revenue.For more resources on marketing metrics in dashboard format, check out this collection of free marketing dashboard templates. Download a Sales Marketing Monthly Report Template forExcel |Microsoft Word |Adobe PDF Sales involves selling products or services directly to customers, while marketing involves promoting products to attract or retain customers. This template allows you to track important metrics for both. Simply enter your monthly sales data into the template. It will calculate both the current month's sales and the total sales for the year, helping your team better understand trends and refine marketing strategies for better results.Check out these free sales report forms and templates for more sales resources. Download the Monthly Marketing Report Template forPowerPoint | Google SlidesUse this dashboard-style monthly marketing report template to visually present and analyze marketing data. Input your data on metrics such as website traffic, page per session (PPS), average duration, bounce rate, and conversion rates. The template automatically streamlines data communication and enhances communication around the effectiveness of your marketing strategies. In a monthly marketing report, include key performance indicators (KPIs) such as website traffic, social media engagement, conversion rates, and ROI. In addition, highlight notable campaigns, analyze trends, and provide insights to demonstrate the effectiveness of your marketing strategies.A well-structured monthly marketing report consolidates data on customer segmentation and behavior, detailing which segments are responding best to campaigns. It might incorporate heatmaps or click-through data to visualize user interaction patterns, delve into user personas' responses, and explore competitive landscape changes to understand market dynamics. Furthermore, it can offer a section on lessons learned and actionable recommendations.You might also incorporate a section detailing the allocation of your marketing budget across different channels. When you include customer retention metrics such as churn rate and repeat purchases, you get a comprehensive view of customer loyalty. Integrating qualitative feedback from customer interactions provides context to the quantitative data, enriching the report with real-world perspectives.Here are several items to consider including in your monthly marketing report:High-Level Overview: Whether with an executive summary or with dashboard-style data, provide a concise overview of key marketing achievements, challenges, and trends observed during the month.KPI Performance: Include data on KPIs such as website traffic, conversion rates, and social media engagement.Campaign Insights: Analyze recent marketing campaigns, including information about strategies, reach, and impact.Goal Progress: Note any progress made toward meeting monthly marketing goals, highlighting successes and areas for improvement.Competitor Analysis: Compare your performance against competitors' activities and market trends.Channel Breakdown: Provide information on performance across various marketing channels, such as email, social media, and paid advertising.Lead Generation: Enter metrics related to lead-generation efforts, such as sign-ups, inquiries, and downloads.Content Performance: Assess the effectiveness of your content marketing, including blog posts, videos, and other assets.ROI Calculation: Calculate the return on investment (ROI) for specific campaigns or marketing activities.Future Recommendations: Suggest strategies and optimization methods based on data insights to improve future marketing efforts.By including these items in your monthly marketing report, you can enhance the report's transparency, allowing stakeholders to comprehend the financial implications, customer relationships, and human insights driving marketing outcomes. When creating a monthly marketing report template, be proactive and adaptable. By foreseeing possible challenges and creating a detailed outline of strategies, businesses can mitigate the effects of unexpected shifts and guarantee consistent tracking of marketing metrics and strategies.Here are some key steps to follow when creating a monthly marketing report:Gather Data: Collect relevant data from various sources such as website analytics, social media platforms, and sales records.Choose KPIs: Select the most important KPIs that reflect your marketing goals and objectives.Use a Template: Choose an existing monthly marketing report template, and customize it to be sure youre capturing all of the KPIs you need. For example, using a template to track return on advertising spend will enable your team to evaluate the effectiveness of advertising campaigns and make informed decisions for future marketing investments.Analyze Trends: Examine month-to-month trends and changes in KPIs to identify growth patterns or areas of concern.Evaluate Goals: Assess whether you achieved your set marketing goals for the month.Identify Insights: Extract meaningful insights from the data to inform strategic decisions and optimizations.Address Challenges: Discuss any challenges or setbacks encountered during the month, and outline potential solutions.Highlight Successes: Showcase successful campaigns, initiatives, or improvements that contributed to positive results.Align the Budget: Compare marketing expenses to the outcomes achieved and assess ROI.Plan Ahead: Suggest strategies and adjustments based on data analysis for the upcoming month's marketing efforts.Keep in mind that its important to proactively review your monthly marketing data to ensure that you, your team, and other stakeholders all stay informed about your marketing performance. Creating an effective monthly marketing report involves tracking key metrics such as website traffic, conversion rates, and social media engagement. Highlight significant campaigns, analyze trends, and share insights to demonstrate marketing impact and shape future marketing strategies. Marketing teams can get buried in data and metrics, making it harder to move from insights to decisions, says Cari Jaquet, Chief Marketing Officer at CoreView. Make sure you have defined a short set of questions you want data to help you answer, then expand the list of questions as you go. And make sure you have the right data to help you answer them. For example, if your top-level objective is to understand how much you spend to acquire a customer, make sure you assign campaign costs in your CRM or marketing automation system, along with a per-lead allocation, so getting to the answer is a lot simpler.Be sure to apply the following essential monthly marketing report best practices to effectively showcase your marketing efforts and guide strategic decisions:Clear Objectives: Define distinct goals and objectives for your report to ensure it aligns with your marketing strategy.Relevant KPIs: Select and emphasize the KPIs that are most relevant to your goals.Consistent Format: Maintain a consistent and organized format that is easy to follow and understand.Visual Presentation: Utilize visuals such as graphs and charts to present data in a visually engaging manner.Comparative Analysis: Include month-to-month or year-to-year comparisons to highlight trends and improvements.Data Accuracy: Ensure accuracy by using reliable data sources and verifying the integrity of the information presented.Contextual Insights: Provide insights and explanations for the data presented, helping stakeholders understand its significance.Actionable Recommendations: Include actionable recommendations based on data insights to guide future marketing strategies.Regular Review: Schedule regular review meetings to discuss the report's findings with relevant stakeholders and to help make informed decisions.Remember, the best practices you implement should be tailored to your specific business objectives, industry, and audience to create a meaningful and impactful monthly marketing report. Monthly marketing report templates streamline the reporting process by offering a consistent structure for showcasing key metrics, campaign highlights, and insights. This not only saves time but also ensures clarity, enabling you to present comprehensive, organized, and visually appealing reports.Check out any of the following diverse and customizable marketing templates designed to streamline your reporting process and effectively communicate your marketing efforts.See this free marketing plan template to guide you in systematically outlining your marketing goals, strategies, and tactics to achieve desired business outcomes.See this free content marketing planning template to help you strategically organize and schedule your content creation efforts, ensuring consistent and targeted messaging to engage and attract your audience.See this free digital marketing plan template to assist you in mapping out your online marketing strategies, channels, and campaigns to effectively reach and engage your target audience in the digital landscape.See this free marketing project management calendar template to enable you to meticulously schedule, track, and coordinate various marketing tasks, ensuring efficient project execution and timely delivery of campaigns.See this free marketing strategy template example for a practical framework that helps teams understand how to structure and present their marketing strategies.See this free marketing strategy slide deck template to visually convey your marketing plans, objectives, and tactics in a concise and engaging manner.See this free sales and marketing plan timeline template to assist you in plotting out a strategic schedule of sales and marketing activities, providing a clear visual representation of key milestones.See this free marketing performance dashboard template to provide a comprehensive and informative snapshot of your marketing metrics, allowing you to track key indicators, assess campaign effectiveness, and make data-driven decisions. Empower your people to go above and beyond with a flexible platform designed to match the needs of your team and adapt as those needs change. The Smartsheet platform makes it easy to plan, capture, manage, and report on work from anywhere, helping your team be more effective and get more done. Report on key metrics and get real-time visibility into work as it happens with roll-up reports, dashboards, and automated workflows built to keep your team connected and informed. When teams have clarity into the work getting done, theres no telling how much more they can accomplish in the same amount of time.Try Smartsheet for free, today. Try Smartsheet for Free Get a Free Smartsheet Demo If youre a modern marketer, you probably live and die by your companys KPIs, and you can probably talk in detail from memory about your monthly traffic. But communicating that information to others isnt always so easy, which is why your team needs a stable of marketing report templates. Learn more about what a marketing report template is, why you need one and why youre missing the boat if youre not including engaging visuals in your marketing reports. And when inspiration strikes, use Venngages report maker and marketing report templates to create a professional, informative marketing report for your company or agency. A marketing report is a document that analyzes the performance of your marketing strategy or the success of marketing campaigns, and/or makes recommendations regarding potential future campaigns. A marketing report presents an analysis of all the data gathered from a particular marketing strategy or campaign, measured against a predetermined set of goals and key performance indicators (KPI). From there, you can understand what works and what doesnt, and learn about ways you can improve future marketing efforts. It can be a one-pager like this one, which focuses on a companys website traffic across different devices: EDIT THIS REPORT TEMPLATE But it can also contain multiple pages, like this marketing report that analyzes the performance of marketing efforts in Q3 as well as next steps for Q4: EDIT THIS REPORT TEMPLATE As well explore later, there are many types of marketing reports, but most often, these reports includewebsite traffic insightsand marketing metrics like engagement rates Like many other types of reports companies generate, the content of a marketing report typically extends to facts and data. In this case, though, the facts and data are most often related to the marketing efforts a company is undertaking. They differ from, say, financial reports, which will typically focus on metrics like sales, expenditures and revenue. And just as a financial report can be used to gauge the fiscal health of a company, a marketing report can be used to better understand the state of a firms marketing efforts and how theyre measured against KPIs, like in the example below: EDIT THIS REPORT TEMPLATE The most common types of content in a marketing report include: Goals Projected outcomes Campaign results Budget Spending Strategy Impressions User analysis Traffic Recommendations Of course, depending on the type of the report (which well talk about in a second), the content can vary. Heres an example of a quarterly marketing report that focuses on product sales and strategy: Marketing reports serve various purposes, from tracking campaigns in real-time to guiding budget and strategy decisions. They also include competitor analysis reports that provide valuable insights into market positioning. The best use of a marketing report for your company will depend on what youre hoping to get out of it. Here are some good questions to ask before deciding what type of marketing report to use: What marketing data do we collect? How often do we collect it? Who makes our marketing decisions? What types of information will inform them best? How much time do we have to review reports? Generally, you can divide marketing reports into two broad types: data-driven and text-driven. While both types should, of course, have both data and text, the difference is that in data-driven marketing reports, the numbers are the star. Conversely, with text-driven marketing reports, the purpose is analysis or recommendations. Lets look a bit closer at the differences: In our internet age, digital marketing accounts for the lions share of the average companys marketing spending. In fact, in 2021, one report found that digital marketing comprised 58 percent of marketing budgets and its expected to grow by another 15 percent in 2022. This template, based on our analysis of Hubspot data, is an excellent entry point for how your company can better visualize all types of information for your digital marketing report. EDIT THIS REPORT TEMPLATE We partnered with HubSpot to create this report, containing up-to-date data on marketing trends and insights you all need to know for 2022. Want to see the full report? Download it for free here. For most companies, social media is one of their most important ways to reach consumers. Social media reports can cover broad areas or specific campaign results or they can do both. This social media marketing report presents the performance of three different social media channels (Facebook, Instagram, and Twitter) for a marketing campaign called Make Someone Smile: EDIT THIS REPORT TEMPLATE If you want some more inspiration, heres another social media report template for the same campaign. This particular one focuses on the planning phase of the campaign, as it talks about the objectives, the target audience, retargeting past users, as well as the actual strategy:: EDIT THIS REPORT TEMPLATE You can certainly use both templates to plan and report on the performance of your social media marketing campaigns! Marketing isnt a one-time, set-it-and-forget-it prospect, so having several templates on hand that can help your company track metrics in close to real-time is important. Consider using a monthly marketing report template like this one, which is ideal for companies that need to get better insight into their user base. EDIT THIS REPORT TEMPLATE Email continues to be a critical channel for marketers, and email marketing reports are a necessity for modern teams. Given the plethora of metrics related to email marketing, its even more important for these types of marketing reports to be straightforward and simple to understand and include key metrics like email deliverability. Lots of email marketing tools likeHubSpotor Mailchimp will come with built-in marketing reports included in their platform. EDIT THIS REPORT TEMPLATE While this template was created for a sales team, its perfectly applicable on the marketing side of operations as well. Using this type of template for your marketing team is an excellent way to make sure your colleagues (and executives) take note of important metrics as they occur. EDIT THIS REPORT TEMPLATE Search engine optimization is one of the services most commonly offered by marketing agencies, teams and departments, so being able to chart things like organic traffic and engagement with charts like those in this report is crucial. EDIT THIS REPORT TEMPLATE Did you know we did a survey about the role of visuals in content marketing? Check out the results of the survey here. As they say in sports, stats dont lie, and marketing teams often live and die by KPIs. Use a template like this to visualize how your campaigns are going on various channels and how well you are engaging with users. EDIT THIS REPORT TEMPLATE In addition to keeping tabs on how successful your company is in marketing itself on a weekly or monthly basis, the concept of marketing itself can be the subject of a marketing report, such as in this example, which shares a series of marketing statistics. EDIT THIS REPORT TEMPLATE When your marketing report doesnt need to focus on rapidly changing metrics, consider a template like this one that will allow you to dig into the WHY of your numbers, telling data-driven stories that can help your companys decision-makers chart the best course for the company. EDIT THIS REPORT TEMPLATE Learn more about using data to tell a story about your brand. Marketing analytics reports can be in-depth, as the previous example, or they can be short and sweet, sharing a few key metrics but focusing largely on taking the reader through the information with well-placed analysis. EDIT THIS REPORT TEMPLATE Whether youre a consultant or an internal worker, marketing strategies reports can help you explain why you think a certain strategy or tactic is best. Use this template to sell your services or sell your higher-ups on a bigger budget or emergence into a new channel. EDIT THIS REPORT TEMPLATE Marketing agency reports can also help your company establish its thought leadership in your space. Take a page from this template and forecast trends in your field or make a policy recommendation by creating a whitepaper. EDIT THIS REPORT TEMPLATE Use this project status template as a team marketing report to keep your department on track. Particularly if your marketing team is remote, ensuring everyone is working toward the same goal on the correct pace is critical. If youre launching a new campaign, a template like this can help everyone visualize whats to come. EDIT THIS REPORT TEMPLATE Some marketing reports will be almost entirely data, meaning you wont have to write much at all. Others can be very heavy on text, including analysis and recommendations. A good rule of thumb, though, even if your marketing report does rely heavily on data is to make sure that each chart or table is clearly explained with a small header, usually above the chart. Heres an example of how that looks: EDIT THIS REPORT TEMPLATE Depending on its purpose, you could also provide more analysis or key takeaways within the body of your marketing report: The easiest way would be to choose the type of marketing reports you want to create, pick a template of that type and edit using the existing content! If you want to make your marketing report reflect your brand, you can add your brand colors and logos using Autobrand: And apply all branding elements to the report using My Brand Kit: Regardless of whether its data-driven or text-driven, a good marketing report should tell you something you didnt already know. In the context of a company or marketing team, that means providing insight about your marketing campaigns. For example, if youre creating a marketing report for your colleagues, they may already know that a certain social media channel is your most successful, so simply reporting those numbers may not do much good. A truly useful marketing report will help them make mental connections. That could mean showing that the previously mentioned channel has had a certain number of weeks of growth or decline, or some other useful insight. Wisely using visuals can help in this effort. Thats because the human brain processes things like charts and graphs more quickly and more effectively than text. This marketing report about user demographics, for example, can give readers information in the blink of an eye that they would need to read paragraphs of content to understand. EDIT THIS REPORT TEMPLATE And even if they understood it intellectually, visualizing data can make information more memorable, and in the context of a fast-paced marketing department, making information sticky is critical.Related: 20 Professional Report Cover Page Examples & Templates [100% Customizable] Theres no shortage of marketing data generated by the average company over the course of a day. In fact, in the time its taken you to read this post, your KPIs have probably changed a little bit. Harness the power of data visualization and analysis to enable better decision-making in your company. You can easily create a marketing report using Venngages easy-to-edit templates. Its free to get started. Create Professional Marketing Reports in MinutesNico de Jong, CEOForward Marketing1. Customizable Cover PageThe cover page of a Marketing Report serves a critical function: it establishes the quality and depth of the content that follows. With the Report Cover and Section Design Customization Feature, selecting a background color or uploading a custom image that aligns with your agency's brand is quick and easy. And applying your design throughout the report is a breeze, too. Customizable title and image widgets offer additional avenues to extend this branding throughout the report. When a particular design resonates, save it as a template. This ensures that future reports maintain the same level of consistency and professionalism, streamlining the reporting process.An effective report design sets the expectation for the data and insights throughout. It serves as an initial indicator of your agency's attention to detail and commitment to quality. In turn, this contributes to building stronger, longer-lasting relationships with your clients.2. Marketing Report Summary4. Monthly Leads Generated5. Traffic Metrics by Channel and DeviceA marketing report template helps agencies organize and present all the data gathered from their clients marketing campaigns in one report. It provides provides a summary of key performance metrics across channels like Google Analytics, Google Ads, Google Business Profile, and Facebook in a consistent format. Whether youre reporting on paid advertising, content marketing, or social media marketing campaigns, it automatically generates a digital marketing report that highlights marketing performance and key metrics, reinforcing the success of your marketing strategy. A complete marketing analytics report template should include website traffic, organic sessions, bounce rate, conversion rate, and key performance indicators. It should also cover data from platforms like Google Analytics, ad platforms, and social media channels to give marketing teams a full picture of their marketing efforts. Agencies typically deliver reports on a monthly basis, but weekly marketing reports or quarterly marketing reports are also common depending on the clients marketing objectivesbut always align with client expectations. For clients who need updated data more frequently than a weekly marketing report, marketing dashboards give marketing agencies the flexibility to keep clients informed with real-time data updates.Yes. AgencyAnalytics makes it easy for agencies to automate marketing reports by pulling real-time data from multiple sources into one report. Agencies schedule weekly, monthly, or quarterly reporting so clients always receive the latest insightswithout the need for manual updates or exporting data into tools like Google Data Studio. Automated client reporting helps agencies save time while keeping clients informed with accurate, up-to-date performance data across all marketing channels. The best templates focus on client goals, highlight key metrics, and follow a clear structure. Templates that include visuals, automated data pulls, and space for agency insights offer the most value to clients. Agencies often start with popular templates like a PPC report template, SEO report template, social media report template, or content marketing report. Each template presents data from different marketing channels, helping agencies provide clients with informative marketing reports that highlight the best part of their digital marketing performance. Marketing reports help agencies present data in a way that makes it easy for clients to understand the big picture and make informed decisions. By providing real-time insights, competitor analysis reports, and thought leadership, agencies build trust and strengthen client relationships through transparency and actionable recommendations. It builds trust through transparency. A strong report shows results, explains strategy, and reinforces the agencys value. It also prompts strategic conversations, helping clients feel involved and informed. Marketing reports let you track key performance indicators (KPIs) in ways that are repeatable, easy to understand, and visually appealing.And there are a few benefits to that.As Emma Williams, Founder & CEO of the SEO agency Seene, says:I find that a brief overview highlighting key findings and recommendations or quick wins is extremely important. Many clients are time-poor and want a top-line summary to read or to provide feedback to the C-suite.This is why were providing seven templates for a variety of marketing reports.Our report templates generally consist of tables and graphs. And report monthly key performance indicators (KPIs) over a full year:By the end of this article, youll know exactly how to use each template to create your own reports. And youll also learn how to automate data collection with Semrushs My Reports tool.All-in-One Marketing Report TemplateThe all-in-one marketing report template consolidates all key marketing data into a single spreadsheet with data and graphs for SEO, PPC, social media, email marketing, and more.Completing this marketing report is easiest if you include all relevant team members. And assign one or more sheets to each person.This and all the other templates are designed for monthly reporting, but you can change them to weekly reporting by simply changing the column headings.Key Report Metrics Total traffic: Overall traffic gives a high-level look at how effectively all your marketing efforts are driving people to your website Leads: The number of leads generated shows how well your offer is resonating with your website users Cost per lead: This indicates whether you need to optimize your campaign targeting or messaging Purchases: The amount of purchases shows whether youre growing your customer base Cost per purchase: Tracking your cost per purchase over time shows whether youre able to implement practices that persuade customers to buy more Brand mentions: The sum of your brand mentions shows how well youre building awareness about your companySEO Report TemplateOur SEO report template helps you understand and communicate your websites organic performance related to traffic, keywords, and backlinks.If youve signed up for monthly email notifications from Google Search Console or Google Analytics, consider treating those messages as a reminder that its time to gather all your SEO metrics and compile them in your report.You can also schedule monthly email updates in Semrush tools like Backlink Analytics. Which is great for quickly seeing all the sites linking to you.Our tip for the Keywords sheet is to copy the numbers from Semrushs Organic Research tool. Because it shows total values you would otherwise need to calculate if you were using Google Search Console.Key Report Metrics Non-branded organic traffic: Traffic from non-branded keywords indicates how well youre attracting users who arent already familiar with your brand New keywords: The number of new terms youre ranking for on search engine results pages (SERPs) shows how effectively youre expanding your site's organic visibilityand growing this number is often a precursor to more organic traffic New backlinks: The number of fresh inbound links from external websites indicates whether youre growing your sites authorityPPC Report TemplateThe PPC report template makes it easy to track the performance of your Google and Meta pay-per-click (PPC) campaigns to assess ad effectiveness, optimize budget allocation, and improve return on investment (ROI).If youre running any short-term, one-off campaigns, consider adding separate sections for them. And include some text boxes to provide commentary.Key Report Metrics Cost per click (CPC): The amount you pay for clicks helps you evaluate the efficiency of your ad spend to optimize your bidding strategies Conversion rate: The change in conversion rate reveals whether the changes you make to your site (like its design) are working Cost per conversion: Your average cost per conversion is a good way to gauge whether your audience targeting and landing page experiences are effectiveSocial Media Marketing Report TemplateThe social media marketing report template breaks down the results of your campaigns across platforms to quickly help you see where youre succeeding (and where youre not).Gather all the data for this report from the platform analytics within Facebook, Instagram, and LinkedIn. If you want to see all metrics at a glance, you can use Semrushs Social Analytics tool.Adjust the sheets in the template if youre marketing on platforms other than Facebook, Instagram, and LinkedIn.Key Report Metrics Page likes/total followers: Both metrics reveal whether youre growing your audience and by how much Engagement rate: Your engagement rate helps you see whether your social media content is resonating with your audience. And you can use your overall rate as a benchmark to assess the success of individual posts. Published posts: The number of published postswhen viewed alongside engagementhelps you determine whether youre publishing the right amount of content for your audienceEmail Marketing Report TemplateOur email marketing reporting template lets you evaluate whether your email marketing strategy is driving results.To populate your copy of the template as quickly as possible, leave the formulas that calculate average open rate, average click-to-open rate, and average conversion-to-click rate in place.Your email analytics platform might include them too, but theres no need to copy them over manually.Key Report Metrics Unsubscribed: The number of recipients who unsubscribe can help you spot whether your messages are annoying or irrelevant, so you can adjust your email frequency and content as needed Average open rate: This metric reveals whether your subject lines are compelling Conversions: The number of conversions lets you see whether your emails are effectively driving recipients to take actionCompetitor Analysis Report TemplateOur competitor analysis report template shows where youre outperforming a single competitorand where you could improve.To get started quickly after creating a copy, select Edit > Find and replace, enter [Competitor Website]in the Find field, and enter your chosen rivals actual name in the Replacefield. And click Replace all.We recommend getting all the numbers for this report from Semrush tools. To ensure all the values are comparable.Key Report Metrics Average visit duration: Comparing visit duration helps you determine whether your content is more relevant and/or than that of your competitor Organic traffic: Looking at your and a competitors organic traffic reveals which one is driving people to the website via SEO campaigns PPC keywords: The number of PPC keywords helps you gauge the amount of work your PPC team has to invest into managing their ad campaigns Total mentions: This metric shows if people are more aware of your brand than your competitorsBrand Reputation Report TemplateThe brand reputation report template helps you track how aware people are of your product or service, and what their sentiment toward it is.Use the Brand Monitoring app to quickly populate the template with your data. You can also set up a monthly digest of all mentions as a reminder to fill out the report.If you want to go further than categorizing mentions, consider feeding them to ChatGPT or another large language model and prompting it to extract key themes.Key Report Metrics Positive mentions: The number of positive mentions helps you determine if your marketing efforts are improving your reputation Neutral mentions: The number of neutral mentions represents how many opportunities you have to create more brand advocatesAutomate Your Reporting ProcessWith our report templates, youll be well-equipped to understand the strengths and weaknesses of your marketing campaigns. And be able to clearly communicate wins and losses to stakeholders.If youre ready for something more hands-off and scalable, My Reports removes the need to manually copy numbers from different tools. And updates those metrics automatically.To use it, click the most relevant template (were showing the Monthly SEO Report).Follow the prompts to configure your basic report. And click Create report.Youll then have a full report. And you can customize it by adding additional metrics, commentary, etc.If you want to report on another time frame, simply change it at the top of the report. And all numbers will update.Trying to decide which option is right for you?It depends on your needs.The most important thing is to heed Emmas advice:Make sure to break down the data, so its easy to understand and aligns with the brands unique business goals and objectives.Whatagraph is a marketing intelligence platform that connects, standardizes, and reports on multi-source marketing data in one place. It helps agencies deliver accurate, customizable reports at scale, and get actionable insights for growth. Do you want to make better decisions as a manager or business owner and grow your business? Creating a monthly report is an excellent way to do that. But what does it take to write one? A good report should be clear and concise, with an overview of the month's activities and key findings.Fortunately, a monthly report template can help you write a report in minutes. In this guide, we will discuss how to write a monthly report and share some monthly report templates across multiple industries so you can find one suited for you.Before you dive in, watch this video to learn about the essential elements of effective business reports along with design templates you can use. Heres a short selection of 8 easy-to-edit monthly report templates you can edit, share and download with Visme. View more templates below: Table of Contents Quick ReadA monthly report is a summary of your business activities during a specific month.Monthly reports track your performance over time and identify problems before they get out of hand. They also help prioritize your tasks and stay productive.Monthly reports consist of objectives, a project status, metrics/KPIs and plans for next month.If you are ready to create a monthly report, use Visme's online report maker. Choose a report template and customize it in the Visme editor to make it your own. If you're racing against the clock, use our AI report maker to get your report writing and design done faster.What Is a Monthly Report?A monthly report is a summary of your business activities during a specific month. It provides an overview of key statistics, information about the company's financial position and a review of the performance of critical business units.This report is usually prepared at the end of each month, although some companies may produce annual or weekly reports.Here is a great monthly report example: Customize this template and make it your own! Edit and Download 25 Monthly Report Templates You Can UseNow lets dive into 25 professionally made monthly report templates you can start to incorporate into your business, team or projects.Alternatively, you can use the Visme'sReport Writer, to create a ready-to-use monthly report. Write the prompt in the chatbot including all the sections you need the report to feature, select one of the styles suggested and let the AI work its magic.1. Modern Customer Service Monthly Report Template Customize this template and make it your own! Edit and Download As a customer service representative or manager, it's important to track your team's metrics, wins, and losses, especially when reporting to high-level management.If youre looking for a customer service report that helps you achieve this with bold, colorful, and dynamic design, this template is for you. It allows you to highlight customer service metrics with bright colors and timeless fonts.Like any other report, a customer service report should clearly outline and communicate customer success findings and terminology, making it easy for anyone in your company to understand, regardless of their customer service experience. In fact it's one of Lincoln Brooke, the Customer Service Manager at Visme, best practice. When creating a customer support report is to ensure that communication is clear and organized. Present information with clarity so that the reader feels confident in their next steps. Clearly outlining these steps ensures that each experience is investigated and resolved quickly. The design of this template thrives on its unique color combination. Replace the images and edit the text and other information to fit your industry and brand personality.2. Simple Monthly Report Template Customize this template and make it your own! Edit and Download Monthly reports dont have to be overcomplicated or elaborately designed, at the end of the day you want to make it as straight to the point and hassle free as possible for anyone reading the report, including yourself.The principle of "less is more" is epitomized in this simple monthly reporting template. The template reduces the number of visual elements that your readers need to take in. Therefore, it will allow them to quickly absorb and digest all the information in a short amount of time.The monthly project report template is designed for digital marketing teams to show their monthly performance. However, you can customize it for any business regardless of size or industry.Plus, If you want to simplify your monthly report even further, try creating a one-pager report or an Amazon six-pager instead. By opting for either the six-pager or one pager format you can work smart and not hard when it's time to fill in the information.When youre editing your report be sure to use Visme's dynamic fields. It allows you to insert your information and automatically assign any necessary value. The best part is that you can update all the values in the fields across multiple projects at once. 3. Monthly HR Report Template Customize this template and make it your own! Edit and Download Present your companys attendance rates for the month with this colorful report template. Highlight an attendance overview and leave vs attendance with a pie chart and donut chart respectively. But dont be afraid to swap out charts to showcase metrics that matter the most to you. HR reporting is essential for any company; however, an HR report for a remote, hybrid, or in-office team will differ. A best practice is that you should create an HR report tailored to your unique HR goals. What metrics matter to you the most and start to find gaps, wins and ways to improve from there. Use 3D graphics to visualize the information and make the report more amenable. Create a highlights page with data widgets, avatars, a small bar graph and an array; all color coded according to your brand guidelines.For a report that includes data from multiple teams, take advantage of the Visme workflows features and assign department heads to their part of the report. Ask them to fill in the data for their team right into the report, eliminating any back and forth. 4. Monthly Sales Report Template Customize this template and make it your own! Edit and Download Are you looking for a sales or business monthly report that helps you to showcase all your data but also gives a strong corporate feel?Use this template to create your own right now. Show your budget allocation, revenue growth, quotas and deal sizes with professional-looking tables and with graphs and data widgets.As you write your sales report to showcase data and showcase next steps or propose a project youd like the team to tackle, be sure to narrow analysis where decisions are drawn from.This is a commonly used best practice Kalyn Lewis, Head of Sales & Customer Experience uses often. She states;When Im creating a sales report and I have a scope of analysis and data that needs to be reviewed together to drive decision and follow-up actions:I pull my data points, and get things into Visme to present a better visual narrative.I keep the views simple with Vismes charts, graphs, and data widgets I then bring in call out visuals and interactive pop-ups that drill into things more from the simple views achieving the drill down.Golden ticket is to try to predict the questions that will come up, and make sure you have data and visuals to answer those questions too"Visme allows you to create tables for any industry in a few clicks with the pre-filled table options. You can also import data from salesforce or excel sheet directly into your report to reduce the back-and-forth between apps. 5. Monthly Customer Service Report Template Customize this template and make it your own! Edit and Download When youre creating a report, it can be easy for team members and management to glance over crucial numbers that affect the overall results of your customer service department.Use this monthly report template in your next customer service meeting using this monthly report template. Discuss issue types and response times, requests closed and other key metrics.Even with a professionally made report you should also keep in mind that when youre presenting your customer service report dont just state numbers and results, give a quick overview of why youre tracking this metric(s) and how they drive the overall departments efficiency. Make your monthly analysis report more engaging using customizable vector icons, cool shapes and 3D animated graphics. Learn more about how to take advantage of these animated illustrations in this video below: 6. Creative Monthly Report Template Customize this template and make it your own! Edit and Download Are you looking for a template to create a report on how multiple departments across your organization perform?Customize this creative report to match your brand, niche or industry with ease. You can swap out images and brand colors for your own or use as inspiration for your next report. This template comes equipped with marketing and sales sections that speak on organic search performance, paid advertising performance, social media performance, ROI, and more.Give your reports a more realistic feel using Visme's interactive Flipbook effect. Your readers will feel they are holding an actual document using this feature. 7. Monthly Marketing Report Template Customize this template and make it your own! Edit and Download This monthly marketing report template has a simple and clean design layout that can easily attract your readers. With the marketing strategies section, timelines, tables and line graphs, you can easily track your business progress and present them in an attractive way.And when youre customizing this report or creating any type of marketing report for that matter, be sure not to get too overwhelmed with metrics, only focus on what truly matters. As Doug, the Marketing Manager at Visme puts it:For most businesses, which are often lead-driven, monthly reports at a higher level should provide a birds-eye view of traffic across key properties. Include complex factors like paid campaign spend, CPM, reach, and objectives, whether its mid- or bottom-funnel focused.Monthly reports should remain high-level to keep the focus on essential channels, assets, and the metrics that impact the business most.8. Social Media Analytics Monthly Report Template Customize this template and make it your own! Edit and Download To present a social media analytics report, you need to collect and analyze data points that help you measure your social media performance. One of the best components of a good social media report is brevity. There are so many intricate insights and analytics at our fingertips, but being a good Social Media Manager is knowing which to include. Then highlighting the most important insights using charts or design elements, making sure they impact the viewer. With the help of this social media analytics monthly report, you can incorporate unique data visualizations and help you turn your data into valuable insights. Add live data widgets to sections and snapchats from your most used social media apps to paint a clear picture of your wins and areas of improvement.9. Monthly Sales Report Template Customize this template and make it your own! Edit and Download Next on the list is another sales report template that comes with a bold design with contrasting color schemes and a strong font combination.This monthly report template comes with segments for highlights, metrics and target vs gains related to your monthly sales. When youre incorporating your data, be sure to be prepared for follow-up questions from stakeholders. You might want to anticipate these questions or concerns ahead of time by sharing some insight ahead of time or discussing it with your team.10. Consumer Goods Sales Monthly Report Template Customize this template and make it your own! Edit and Download Here's another monthly sales report template, but this time, it's specially designed for consumer goods businesses. The template will help you showcase your sales team's performance, challenges and opportunities, profit and loss (P&L) and many other metrics.Customize it in Visme's drag-and-drop editor to replace the text, images, data sets and more.Visme offers a wide variety of other report templates for annual reports and weekly reports. Check out the library of other report templates and customize them in the Visme editor.RELATED: 45+ Annual Report Design Templates & Awesome Examples (2024)11. Textile Production Monthly Report Template Customize this template and make it your own! Edit and Download Combine beautiful layouts with effective data viz in a monthly report like this template for a textile production company. Use data visualizations like the line charts on page 6 to show essential information about your companys efforts during the last month. You can also use it to compare this and the previous year's exact month and date to provide a quick YoY growth analysis.Vismes data visualization options are varied. Line charts for example can be customized to look like straight lines, wavy lines or steps with or without risers. In page 6, both visualizations are line graphs but with different type settings. 12. Monthly Project Operations Report Template Customize this template and make it your own! Edit and Download Monthly reports arent always documents, they can also be slide decks. In this case, a presentation with bold headlines and a unique color combination that evokes a modern business mood.Present your monthly analytics, KPIs, click through rates and cost per acquisition stats across several minimal-style slides. Complete the report with milestones, campaign updates, upcoming goals and next steps.If you need more slides for your report, add them easily from the slide library. Choose from hundreds of slide types that you can customize easily to match the rest of the presentation. 13. Interactive Monthly Marketing Report Template Customize this template and make it your own! Edit and Download Make your monthly reports more engaging by using an interactive template like this one. The interactive properties of this monthly reporting presentation template make it the perfect visual aid for a live presentation.Click on each section to reveal information as you progress through the slides with your team and managers. You can also repurpose it as an executive presentation to share with stakeholders and the leadership team.This template is pre-designed for reporting on a websites monthly performance. Slide five visualizes average visit time, bounce rate and site speed using colorful data widgets. You can customize the accent colors to match your style guide, brand or chosen color theme. Its important to look at the rate of changeis it growing or slowing each month? Keep an eye on the range of deviations, like any big dr

information you gather from the previous month are the building blocks of your report. You need at least a few pieces of information to write your report, but if you can get more, even better! To gather this information:Take notes on all meetings or conversations with stakeholdersReview relevant documents (e.g., financials) and make sure they're up-to-dateReview past performance metrics related to goals set out by managementAnalyze the Collected DataOnce you have gathered all the data you need from the various departments, it's time to analyze them. It will help you determine what led to specific outcomes and what caused errors. Then create an official statement explaining specific causes, consequences and the actions taken.Identify Problems and Provide SolutionsYour report should offer solutions to problems identified in the previous month. These solutions should be measurable and time-bound so that you can track their progress. For example, if your company has been experiencing slow sales growth lately, you might want to strengthen your marketing strategies to boost sales.If you don't have any specific action items in your report, try writing down some ideas for future reports. It will help improve business operations or make them more efficient over time.Section 2: Create the ReportFollow these steps to create your report in an ideal monthly report format.Start with a Monthly Report TemplateA good template will have all the information you need to create your monthly report, so it's easy to use and update over time. Choose a monthly report template from Visme's library and customize it to fit your needs.Replace the texts, change the background, images, fonts, colors, icons, illustrations and other elements. You can also make your report interactive by adding a clickable menu, an interactive table of contents, hover effects or liable pop-ups and many more. Create an Amazing Cover PageCreate an eye-catching cover page to ensure your report looks as professional as possible. It will grab your readers' attention and welcome them to turn the cover and read the report tirelessly.All the monthly report templates in Visme's library include a stunning cover page. Customize them according to your brand guidelines to make them more engaging.Use the brand guidelines infographic template below to get inspired. Customize this template and make it your own! Edit and Download Watch the video below to learn how to create an amazing report cover page.Use Data VisualizationYou might want to present some statistics and figures to show your business growth from the previous month. Visme's data visualization tools will help you turn complex data into stunning visuals.The data visualization tools include 30+ widgets such as radial gauges, progress bars, population arrays and more. Additionally, if you want to present larger data sets, Visme offers 20+ charts, graphs and even interactive maps.Consider Your BrandingWhile creating your monthly report, keep your brand identity in mind. Your monthly report should be consistent with your branding regardless of its type. Use your company logo, brand colors, brand fonts and other branding elements.Visme's brand design tool will allow you to save your branding elements and automatically add them to your report. Learn how to create a branding kit for your business in Visme.Here is a detailed video to help you do that.Involve Your TeamCreating the monthly report requires input from various stakeholders across the organization. You will need to collect data, feedback and other information to write the report. So, include your key stakeholders in the process.With Visme's collaboration features, you and your team can work together on the same project in real-time. Ask your team to collaborate by sending email invitations or via a link. They can leave comments or make changes to the document and the changes will appear live. Watch the video below to learn more about Visme's collaboration features.Share Your Monthly ReportOnce you are done editing your monthly report, it's time to download or share it.In Visme, you can download your report in various formats, such as JPG, PNG, PDF, HTML5 and more. Alternatively, you can share your report online using a link or embed it anywhere on a web page using a snippet of code. Create Your Monthly Report with VismeA monthly report can help you keep track of your business's health and make changes that will strengthen it further. But, creating a monthly report shouldn't be difficult and time-consuming. Use this article, along with monthly report best practices, as a guide to create monthly reports quickly and easily.Choose a monthly report template from the list above and customize them using Visme. Sign-up for Visme's online report maker today to get started! The monthly marketing report is a vital tool for shaping your marketing strategy. Its essential to select metrics that align closely with your business goals. Monthly reporting helps your marketing team: Track the monthly growth of visits, leads, and customers with visually engaging reports. Identify the most effective marketing channels for your organization. Detect gaps in your marketing strategy, allowing you to pivot and improve. With Xtensio, you can easily generate tailored marketing reports that meet your objectives. Collaborate with colleagues, clients, and key stakeholders to create and refine your marketing reports. Introduce your marketing report by including your company or your clients company name and logo. Specify the month youre reporting for, and update the folios color scheme and background to match your company branding. Next, create a section outlining the contents of your marketing report. The specific metrics you report on will depend on your marketing goals, but here are key items most marketing reports should include: Marketing Goals and KPIs SEO data and website visitors Email marketing data Paid ads and campaign (PPC) stats Leads and customers Social media analysis Key learnings and future strategies Explain what the marketing team has accomplished this month and how these achievements align with the project or organizations overall growth goals. Highlight key takeaways from this months data and identify areas for improvement for the next month. If you are launching a major campaign, describe the tasks completed and any roadblocks encountered. Provide a concise overview of the most important metrics and your marketing strategy. Focus on metrics that report on your key performance indicators (KPIs). Concentrate on 1-3 major campaigns with measurable KPIs, which may vary depending on the report and the audience. If you are unsure about the core KPIs, ask for clarification. If there is no one to ask, recommend KPIs based on your client or company objectives and business goals, and seek agreement on these from the onset of the campaign. When it comes to marketing efforts, managers care about how many people youre reaching and whether that reach is increasing month over month (MoM). The more people you reach, the more leads youll generate. Your marketing reach metrics measure how well your content is engaging your audience and how effectively youre developing your marketing database. Highlight three successes your team achieved that impacted your marketing reach: Successful campaigns Significant increases in KPIs Roadblocks your team resolved KPIs are crucial for tracking growth and impact. Reflect on the KPIs set in the previous section and highlight key numbers related to your marketing reach, such as: Growth in total marketing reach across all platforms Increase in organic traffic to website landing pages Follower growth across all social media channels Increase in email newsletter subscribers Using Google Analytics or another tracking tool, examine your website visitors. Tracking this activity is essential for understanding how well your inbound marketing is attracting potential customers to your site. Identify the top 3 pages that were visited this month: Home Page 10,600 visits (22%) Product Page X 5,300 visits (11%) Blog Post A 2,650 visits (6.5%) Share detailed information about what you have done to achieve these results. Use analytics tools such as these to gather this data: Google Analytics Moz SEM Rush If you are running PPC campaigns as one of your major marketing efforts, dedicate a report section to metrics specific to paid channels. Key metrics to include for each PPC channel are: Impressions Clicks Conversion Rate Cost Per Conversion Click-through Rate Ad Spend Use a pie chart or another chart/graph module to visualize your site traffic and segmentation. If youre using an email marketing platform, most offer in-app analytics to gather this information. These platforms might include: MailChimp Constant Contact Campaign Monitor ConvertKit HubSpot Use a table to take a deep dive into your email marketing campaigns, including metrics such as email subject, traffic from each email, click-through rate (CTR), open rate, unsubscribes, conversions, and bounce rate. You can also outline the number of emails sent and other relevant data points to provide a comprehensive overview of your email marketing performance. Social media marketing insights are an important element of your monthly marketing report. Provide an overview of performance for each active social media channel: Facebook, Twitter, LinkedIn, Instagram, and YouTube. Focus on engagement metrics to understand how successful your clients are on each channel. Metrics to consider include likes, shares, comments, and overall engagement rate. Additionally, you could write a comprehensive social media report and link it to this section of the marketing report for more detailed analysis. 4o Leads are crucial to your business growth as they represent individuals who have expressed interest in your product, service, or related offerings. Measure the amount of new interest generated for your companys products and services to gauge the future sales pipeline. Understanding this will help you predict what the sales pipeline is likely to look like in the coming weeks or months. Your marketing team is involved in numerous campaigns. This section is an excellent spot to highlight the most successful campaigns that helped you reach the goals listed above. Use this section to showcase the specific campaigns that drove your success. Based on these metrics, you can recommend where the company should focus next month. Additionally, mention other marketing initiatives your team worked on: List any events you hosted or attended this month. Did your team conduct any surveys, create blog posts, or produce other marketing material for the event? Did your company sponsor any groups, trade events, or charity causes? How are these sponsorships impacting your marketing and sales efforts? Are there any partners youre collaborating with? How are you working together to promote each others brands? What does the data tell you about your marketing strategy? Identify any standout trends or insights, whether positive or negative, and consider what these mean for your brand. For example: Example A: Increased site visits after the new product page is launched suggest strong interest in the new offering. Example B: Increased leads and customers correspond with the recent social media campaign, indicating its effectiveness. Example C: Email campaign B failed due to a low open rate, highlighting the need for improved subject lines or targeting. Example D: Emerging topics and strategies you uncovered can guide content creation and engagement efforts. Discuss the marketing strategy for the next month, quarter, or year. Based on your key findings, explain the next steps and how you plan to adjust your approach to achieve better results.

**What to include in a marketing report. How to write a marketing report. Monthly marketing report. Monthly marketing report template. Monthly marketing report example.**