

/ Ongoing Tasks / Progress Report /
 / Upcoming Tasks / Priorities /
 / Are you on track to hit your goal? / Y / N
 REVIEWED AND APPROVED BY:

KEY FINDINGS
 ABSTRACT SUMMARY
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TOTAL SPENT VS. SALES
 Total Budgeted Amount: \$ _____ Total Amount Spent: \$ _____
 Underspent/Exceeded By: \$ _____

Company Logo
PROJECT STATUS REPORT
 Write a Brief Statement or Something About Your Current Project

Monthly Sales Report
 Department:
 Date Range:

This Month:	Month				Cumulative/Year to Date			
	Actual	Projected	Variance	% Difference	Actual	Projected	Variance	% Difference
Sales in \$								
Revenues								
Margin								
Number of Orders								
Average Order Value								
Next Month:	Forecast	Plan	Variance	% Difference	Forecast	Plan	Variance	% Difference
Quantity/Volumes								
Revenues								
Margin								

PROJECT STATUS DETAILS
 Completed Tasks
 Current Obstacles:
 Current Risks:
 Additional Notes:
 INITIAL COMPLETION DATE: _____

THE BLULEADZ BUSINESS REPORT TEMPLATE PACK

Includes 5 Free Templates + Design Files



INTRODUCTION

A business report is a formal document that serves specific purposes for your business. Reports are essential for aligning teams, improving collaboration, and standardizing communication, simplifying how your team shares information and analyses that can impact your business growth.

There are so many different kinds of business reports that companies use. The most common types include:

- Analytical and research business reports that break down takeaways from sets of data.
- Informational reports that present a specific data set that requires interpretation.
- Summaries that explain complex topics and data in a concise manner.
- Performance reports that collect performance data for teams or individuals.
- Minority and majority reports that present opinions from conflicting sides related to a business decision.
- Periodic reports that showcase progress toward business goals during a set interval of time.

With so many different kinds of business reports, it can be difficult to know which one best fits each situation and where to get started compiling your report.

Save some time and get inspired using **the Bluleadz Business Report Template Pack**.

TEMPLATES

- 04 **EMPLOYEE ACTIVITY REPORT**
- 06 **PROJECT STATUS REPORT**
- 08 **DEPARTMENTAL, TEAM, OR STORE SALES REPORT**
- 10 **BUSINESS EXPENSE REPORT**
- 12 **BUSINESS RESEARCH REPORT**

EMPLOYEE ACTIVITY REPORT

This report template is perfect for employees to use to track their weekly performance. They can break down their accomplishments, ongoing tasks, and upcoming priorities, as well as track their progress toward monthly goals.

Your employees can follow along with these instructions as they fill out the template:

1. Provide your full name, along with your team name and the designated time frame.
2. Write out the individual tasks completed for the week.
3. List the current tasks in progress as part of the progress report section.
4. Describe any upcoming tasks and priorities in the coming weeks.
5. At the bottom of the report, record your total hours worked, define your monthly goal, and determine if you're on track or not.
6. Present this to your manager or team lead for review and approval, which they can sign off on in the bottom right corner.

EMPLOYEE ACTIVITY REPORT TEMPLATE

Employee Weekly Activity Report

Employee:

Team/Dept:

Week/Time Frame:

/ Tasks Completed for the Week /

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/ Ongoing Tasks + Progress Report /

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/ Upcoming Tasks + Priorities /

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Hours Worked:

Monthly Goal:

Are you on track to hit your goal?

Y / N

REVIEWED AND APPROVED BY:

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Edit any text on these templates using Adobe Acrobat or another supporting software!

Download InDesign File

Download the InDesign ZIP file to edit colors and add any other brand elements you might want!

PROJECT STATUS REPORT

This report template is a great resource for presenting the current state of an ongoing business project. It's purpose is to show a high level overview of a project that your stakeholders can review at a quick glance.

Follow along with these instructions as you fill out your template:

1. Write the name of the project and a brief description on the title page.
2. In the project overview portion, write the date of the report, along with the name of the project, project manager, and a brief summary of the report.
3. Break down the status of each component by using the checklist, including:
 - a. The status of your budget – are you over or under budget?
 - b. The current schedule – is your current target date of completion still realistic?
 - c. The quality of the output – are there any issues with the quality of your deliverables?
 - d. The current scope – is your progress on pace to be completed or paused?
4. Add any important notes about each status in the notes section underneath the checklist.
5. For the project status details page, list completed tasks along with the target date and completion date for important aspects of the project.
6. Add notes in the next section to describe any obstacles, risks, and other notable elements impacting the project.
7. At the bottom of the report, write the completion date and the new target completion date (if it has changed).

PROJECT STATUS REPORT TEMPLATE

Company Logo

PROJECT STATUS REPORT

Write a Brief Statement or Something About
Your Current Project

PROJECT OVERVIEW

Date of Report:
Project Name:
Project Manager:
Project Summary:

	Good	Satisfactory	Poor
Budget	Below Budget <input type="checkbox"/>	On Budget <input type="checkbox"/>	Above Budget <input type="checkbox"/>
Schedule	Ahead of Schedule <input type="checkbox"/>	On Schedule <input type="checkbox"/>	Lagging Behind <input type="checkbox"/>
Quality	Highest Quality <input type="checkbox"/>	Good Quality <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>
Scope	Controlled properly <input type="checkbox"/>	Clear as scope <input type="checkbox"/>	Went above & beyond scope <input type="checkbox"/>

Budget Notes:

Schedule Notes:

Quality Notes:

Scope Notes:

PROJECT STATUS DETAILS

Completed Tasks	Target Date	Completion Date

Current Obstacles:

Current Risks:

Additional Notes:

INITIAL COMPLETION DATE

NEW TARGET COMPLETION DATE

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DEPARTMENTAL/TEAM/STORE SALES REPORT TEMPLATE

This report template can be used on a weekly, monthly, or quarterly basis to record projected sales and actual sales assigned to a given team over a specific period of time.

Follow along with these instructions as you fill out your template:

1. Access your sales reports dashboards to gather all the data you need for this template
2. Add the correct data to the "actual" column. This data includes:
 - a. The dollar amount attributed to sales
 - b. Revenue information
 - c. The profit margin
 - d. The quantity of orders placed
 - e. The average dollar amount per order
3. Write out the projected amount for each row.
4. Calculate the variance between actual and projected for each row.
5. Indicate the percentage difference between the two.
6. Record the year-to-date (YTD) actual and projected sales.
7. Calculate the variance and percentage difference for YTD data.
8. For the next month section, write out the forecast, plan, variance, and percentage difference for the quantity of orders placed, the revenue, and the profit margin.

DEPARTMENTAL/TEAM/STORE SALES REPORT TEMPLATE

Monthly Sales Report

Department:

Date Range:

	Month				Cumulative/Year to Date			
This Month:	Actual	Projected	Variance	% Difference	Actual	Projected	Variance	% Difference
Sales in \$								
Revenues								
Margin								
Number of Orders								
Average Order Value								
Next Month:	Forecast	Plan	Variance	% Difference	Forecast	Plan	Variance	% Difference
Quantity/Volumes								
Revenues								
Margin								

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BUSINESS EXPENSE REPORT

This report template helps individual teams track their planned budget and actual expenses on a monthly or quarterly basis.

Follow along with these instructions as you fill out your template:

1. Write the time frame and details in the top section of the report.
2. List categories for each business expense area you're tracking, and write the allocated budget for each category.
3. At the end of the timeframe you're reporting on, add your actual expenses in the "expense" column.
4. In the "budget - expense" column, indicate the difference (e.g., if you spent \$1,500 more than the budget, write "-1500," or if you underspent by \$780, then write "780" to show the savings in the planned budget.
5. In the "total spent vs. saved" section, fill out the following:
 - a. The total amount you budgeted for
 - b. The total amount you actually spent
6. Then, fill out either how much you underspent by or how much you exceeded your budget by.

BUSINESS EXPENSE REPORT TEMPLATE

BUSINESS EXPENSE REPORT

Month/Time Frame:

Details:

Category	Budget	Expense	Budget – Expense

TOTAL SPENT VS. SAVED

Total Budgeted Amount: \$ _____ Total Amount Spent: \$ _____

Underspent/Exceeded By: \$ _____

+ = money saved - = money lost

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BUSINESS RESEARCH REPORT

This report template helps teams looking to conduct research and discover initiatives that align with new products or services.

Follow along with these instructions as you fill out your template:

1. Name the report based off of what this report is examining (e.g., new product name, new target market).
2. Write a brief description of the report underneath the title.
3. List the names of the researchers who worked on this project, including a short description of their individual roles in the "researched by" section.
4. List the most important discoveries from your research in the "key findings" section, using a bulleted list.
5. Write a concise description of your findings in the "abstract summary" section.
6. Write all your findings in the body portion of your report, which will include text, images, and figures.
7. Summarize your results in a concise paragraph in the "conclusion" section.
8. List action items you suggest based off of your research in the "recommendations" section.
9. List the resources you used during this project, including outside sources of information (e.g., industry reports, people you spoke to within your network, surveys you conducted).

BUSINESS RESEARCH REPORT TEMPLATE

Company Logo

NAME OF RESEARCH REPORT

Write a Brief Statement or Something About Your Research Report

Researched By:

Johnny Appleseed
Professional Job Title Here
Company Name

Johnny Appleseed
Professional Job Title Here
Company Name



KEY FINDINGS

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ABSTRACT SUMMARY

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RESEARCH BODY

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CONCLUSION

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RESOURCES

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START USING THESE TEMPLATES TODAY

With these templates, you're well prepared to improve team performance, track and manage ongoing projects, oversee key financial information related to budgets and expenses, and discover new opportunities to grow your business. Consider tailoring these to fit your unique needs and share them with your team to get everyone on the same page.



Build Your Free Business Growth Strategy

Speak to an inbound specialist for a free strategy consultation to improve team performance, streamline project management, and find new opportunities within your industry.

[Start Growing Now](#)