General marketing board reporting template

This marketing board reporting template is your tool for data-driven revenue growth. It consolidates critical marketing metrics and insights, enabling strategic decisions, budget management, and actionable recommendations. Customize it to your needs, collaborate with your team, and use it as your guide to optimizing marketing efforts and enhancing ROI.

| **Report title:** | | |
| --- | --- | --- |
| **Report period:** Month/Quarter, Year | | |
| **Report date:** | | |
| **Key highlights:**   * Summarize the most important insights and achievements from the reporting period. * Include any notable successes, challenges, or opportunities. | | |
| **Goals and objectives:**   * List the marketing objectives and KPIs set for the reporting period. * Indicate whether these objectives were met or not. | | |
| **Section** | **Contents** | **Data** |
| **Executive summary** | Overview of key metrics and KPIs | * Provide a snapshot of the main KPIs. Include metrics like ROI, CTR, and Conversion Rate. * Compare to previous periods and targets. |
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| High-level results summary | Result 1: |
| Result 2: |
| Result 3: |
| Key takeaways and insights | Takeaway 1: |
| Takeaway 2: |
| Takeaway 3: |
| **Market overview** | Analysis of market size, growth, segmentation | Market size: |
| Growth: |
| Segments: |
| Industry and technology trends | Trend 1: |
| Trend 2: |
| Trend 3: |
| Competitor landscape and positioning | Competitor 1: |
| Competitor 2: |
| Competitor 3: |
| **Brand performance** | Brand awareness and familiarity metrics | Awareness: |
| Familiarity: |
| Consideration and favorability scores | Consideration: |
| Favorability: |
| Market share analysis and growth | Market share: |
| Growth: |
| Performance vs. category growth | Category growth: |
| Brand growth: |
| **Marketing channel performance** | Traffic, leads, conversions for each channel | Channel 1 traffic: |
| Channel 2 leads: |
| Channel 3 conversions: |
| ROI and effectiveness of each channel | Channel 1 ROI: |
| Channel 2 effectiveness: |
| Opportunities and recommendations per channel | Channel 1 opportunities: |
| Channel 2 recommendations: |
| **Campaign performance** | Results overview for each campaign/initiative | Campaign 1 results: |
| Campaign 2 results: |
| Budget, spend, ROI per campaign | Campaign 1 budget: |
| Campaign 2 ROI: |
| Performance vs. goals per campaign | Campaign 1 goals: |
| Campaign 2 performance: |
| Key learnings and optimizations | Campaign 1 learnings: |
| Campaign 2 optimizations: |
| **Customer and audience Insights** | Demographic and psychographic data | Demographics: |
| Psychographics: |
| Customer journey maps and personas | Journey map: |
| Persona 1: |
| Persona 2: |
| Voice of customer (surveys, reviews, feedback) | Survey feedback: |
| Reviews: |
| Customer preferences and behaviors | Preferences: |
| Behaviors: |
| **Competitive intelligence** | Overview of key competitors | Competitor 1 |
| Competitor 2 |
| Competitor 3 |
| Competitor product offerings, pricing | Offerings: |
| Pricing: |
| Competitor campaigns and positioning | Campaigns: |
| Positioning: |
| Implications and recommendations | Implications: |
| Recommendations: |
| **Financials** | Marketing budget vs. actual spend | Budget: |
| Actual spend: |
| Marketing contribution to revenue | Contribution: |
| Marketing ROI and effectiveness | ROI: |
| Effectiveness: |
| **Priorities and recommendations** | Key strategic initiatives and priorities | Initiatives: |
| Areas of focus and improvement | Focus areas: |
| Improvements: |
| Marketing optimization opportunities | Opportunities: |