



MONTHLY BUSINESS REVIEW

AI Systems for Small Business
Chapter 7 Worksheet

Use this template every month to run a structured review of your business performance. Pull your data, load it into an AI conversation, capture the key findings here, and walk away with a clear action plan for the next 30 days.

Time estimate: 60–90 minutes (faster after your first few reviews).

Tip: Make a copy of this template each month so you build a running archive of your reviews.

Review Date: _____ **Month Covered:** _____

Step 1: Identify and Gather Your Data

Check off each data source you're pulling from this month. You don't need all of them. Even two or three sources produce useful insights. If you're unsure what's available, ask AI to help you discover what each platform provides.

Suggested prompt:

“Acting as a marketing analyst, I want to run my monthly business review. I'm going to tell you what tools and platforms I use. Tell me what data to pull from each one that would be most useful for understanding my business performance this month. Ask me what tools I'm currently using.”

Data Source Checklist

- Website analytics (Google Analytics, etc.)
- Email platform (open rates, click-through rates, etc.)
- CRM / sales data (pipeline, deals, revenue)
- Social media insights (per platform)



- Google Business Profile
- Advertising platforms (Google Ads, Meta Ads, etc.)
- Other: _____
- Other: _____

First time?

Don't try to pull everything. Pick the two or three sources you have easiest access to. You can add more sources in future months as the process becomes routine.

Step 2: Run the AI Analysis

Load your data into an AI conversation in sections. Let AI analyze each area, then ask for a full synthesis at the end.

Suggested prompt:

“Acting as my Chief Marketing Officer, it’s time for our monthly business review. I’m going to load performance data from across my business. I want you to analyze everything, summarize what’s working and what isn’t, identify the most important trends, and give me a prioritized action plan for the next 30 days. Ask me any questions you need before we start.”

Website Performance

Metric	This Month
Total visitors / sessions	
New vs. returning visitors	
Top traffic sources	
Top pages by traffic	
Conversion rate (leads, sales, etc.)	



AI analysis: key website findings

Email Performance

Metric	This Month
Emails sent	
Average open rate	
Average click-through rate	
Unsubscribes	
Best-performing email (subject / topic)	

AI analysis: key email findings

Social Media Performance

Metric	This Month
Platform 1: _____ Engagement	
Platform 1: Reach / impressions	



Platform 2: _____ Engagement	
Platform 2: Reach / impressions	
Top-performing post (topic / format)	

AI analysis: key social media findings

Sales Performance

Metric	This Month
New leads	
Lead-to-customer conversion rate	
Revenue (new sales)	
Average order / deal value	
Reviews generated	

AI analysis: key sales findings



Advertising (if applicable)

Metric	This Month
Total ad spend	
Clicks / click-through rate	
Conversions from ads	
Cost per conversion	
Return on ad spend (ROAS)	

AI analysis: key advertising findings

Step 3: The Big Picture

After loading all your data and reviewing each area, ask AI for the full synthesis. Capture the key takeaways here.

Suggested prompt:

“Based on everything we’ve reviewed, what are the three most important things I should know about my business this month? And what are the three most impactful actions I should take in the next 30 days?”

Insight 1: The most important thing to know this month



Insight 2

Insight 3

Step 4: Your 30-Day Action Plan

These should be specific, data-informed actions with clear outcomes. Not goals. Actions.

Action	Expected Outcome	Complete By
Action 1:		
Action 2:		
Action 3:		

Quarterly Check: Review the Review

Every three months, evaluate the review process itself. Also, load your last three monthly summaries into a single AI conversation and ask for longer-term trend analysis.



- Am I doing the review consistently each month?
- Are my action plans translating into real changes?
- Am I asking the right questions, or should I adjust my focus?
- Should I add another data source next quarter?
- Have I loaded previous summaries into AI for trend analysis?

Quarterly trend notes / adjustments to the review process

For more resources and tools:
fistbumpmedia.com/ai-for-business