

Weekly Business Review Template

A comprehensive, structured template for turning weekly performance data into executive-ready business reviews. Covers metrics, movement analysis, risks, root causes, decisions, and owner accountability.

Category:	Management / Operations
Audience:	Managers, analysts, operations leaders, program managers
Use When:	Weekly reviews, leadership updates, risk reviews, project health checks
Sections:	10 structured sections with tables and guidance

SECTION 1

Performance Scorecard

Start every WBR with the numbers. This table shows each metric, its current value, prior week, target, week-over-week movement, and status. Fill this first — everything else interprets it.

METRIC	THIS WEEK	LAST WEEK	TARGET	WoW CHANGE	STATUS
Revenue	\$1.2M	\$1.15M	\$1.3M	+4.3% Up	Below Target
Gross Margin	38.2%	37.8%	40%	+0.4pp Up	Watch
Order Volume	8,420	8,100	9,000	+3.9% Up	Below Target
Fraud Rate	0.42%	0.38%	<0.5%	+0.04pp Up	On Track
Avg Resolution Time	4.2h	5.1h	<4h	-17.6% Down	Watch
Customer NPS	62	64	65	-2pts Down	At Risk
Shrink Rate	1.8%	1.9%	<2%	-0.1pp Down	On Track
Open Incidents	14	11	<10	+27% Up	At Risk

How to read this table: Green = on track. Red = needs action. Amber = trending toward risk. Focus discussion on red and amber rows.

Movement Analysis

For each metric that moved significantly (>5% or crossed a threshold), explain:

- What moved and by how much
- Why it moved (root cause hypothesis)
- Whether the movement is expected to continue
- What action is needed, if any

METRIC	MOVEMENT	ROOT CAUSE HYPOTHESIS	EXPECTED TREND	ACTION NEEDED

SECTION 2

Executive Summary

Write 4-6 bullets that a senior leader can read in 30 seconds. Cover: overall performance, biggest win, biggest concern, key decision needed, and one forward-looking signal.

#	EXECUTIVE SUMMARY BULLET

Rule: If a leader reads only this section, they should know the state of the business and what they need to decide.

SECTION 3

Highly Debated Topics

List the 2-3 topics where the team disagrees, where data is ambiguous, or where a trade-off must be made. These are the items that need live discussion — not email.

TOPIC	POSITION A	POSITION B	DATA AVAILABLE	DECISION OWNER

Purpose: This section prevents the WBR from becoming a one-way status update. It forces the room to debate what matters.

SECTION 4

What Changed This Week

Narrative explanation of the most important changes. Focus on surprises, breaks from trend, and new information that was not available last week.

Key Changes

CHANGE	IMPACT	NEW OR RECURRING	REQUIRES ACTION

SECTION 5

Risk Register

Active risks that could impact next week or beyond. Score impact and likelihood. Assign an owner and a concrete next action with a deadline.

RISK	IMPACT	LIKELIHOOD	EXPOSURE	OWNER	NEXT ACTION	DUE

Risk Escalation Criteria

- Impact = High AND Likelihood = High: Escalate immediately to leadership.
- Impact = High AND Likelihood = Medium: Assign owner, review daily.
- Any risk open > 2 weeks without progress: Escalate.

SECTION 6

Root Cause Analysis

For each major issue this week, document the root cause investigation. Separate facts from assumptions. Identify what is still unknown.

ISSUE	WHAT HAPPENED	WHY (HYPOTHESIS)	EVIDENCE	UNKNOWN	NEXT CHECK

Discipline: Do not list symptoms as root causes. Ask "why" at least 3 times. If you cannot state evidence, mark it as assumption.

SECTION 7

Actions Taken This Week

What was completed. Include result and whether it resolved the issue or needs follow-up.

ACTION	OWNER	STATUS	RESULT	FOLLOW-UP NEEDED

SECTION 8

Blockers

Anything preventing progress. Be specific about what support is needed and from whom.

BLOCKER	BLOCKED SINCE	IMPACT IF UNRESOLVED	SUPPORT NEEDED FROM	ESCALATED TO

SECTION 9

Decisions Needed

Decisions that leadership must make this week. Include why it matters, the deadline, options, and a recommendation.

DECISION	WHY IT MATTERS	DEADLINE	OPTIONS	RECOMMENDATION

Rule: Every decision should have a recommended option. Do not present problems without a proposed path forward.

SECTION 10

Operational Updates

Brief updates on ongoing initiatives, projects, or process changes. Keep each to 1-2 lines. Only include what changed since last week.

INITIATIVE	STATUS	WHAT CHANGED	NEXT MILESTONE	OWNER

SECTION 11

Next Week Focus

The 3-5 priorities for next week. Each must have an owner, expected outcome, and due date. If it does not have an owner, it is not a priority — it is a wish.

PRIORITY	OWNER	EXPECTED OUTCOME	DUE DATE	SUCCESS MEASURE

SECTION 12

Owner Accountability Matrix

Every open action, risk, and decision mapped to a single owner. This is the contract for next week. Review it at the start of the next WBR.

OWNER	OPEN ACTIONS	OPEN RISKS	PENDING DECISIONS	TOTAL ITEMS	OVERDUE

Accountability rule: If an item has no owner, assign one now. If an item is overdue, explain why and set a new date.

SECTION 13

Signals to Watch

Early indicators that may become issues next week. These are not yet risks — they are weak signals worth monitoring.

SIGNAL	SOURCE	WHY IT MATTERS	THRESHOLD TO ESCALATE	WHO IS WATCHING

SECTION 14

AI Prompt — Copy and Paste

Use this prompt with ChatGPT, Claude, or any AI assistant. Paste your data where indicated.

Act as a senior business operations leader.

Create a Weekly Business Review using the data below.
Output must be clear, concise, and executive-ready.

Structure:

1. Performance Scorecard (table with WoW movement)
2. Executive Summary (4-6 bullets)
3. Highly Debated Topics (2-3 items needing discussion)
4. What Changed This Week (surprises and breaks from trend)
5. Risk Register (impact, likelihood, owner, action)
6. Root Cause Analysis (facts vs assumptions)
7. Actions Taken (status and result)
8. Blockers (what support is needed)
9. Decisions Needed (with recommendation)
10. Operational Updates (what changed since last week)
11. Next Week Focus (owner + outcome + date)
12. Owner Accountability Matrix
13. Signals to Watch

Rules: Plain English. No fluff. Highlight risks early.
Separate facts from assumptions. Assign owners.

Input data: [PASTE METRICS HERE]

Context: [PASTE CONTEXT HERE]

Known risks: [PASTE RISKS HERE]

Blockers: [PASTE BLOCKERS HERE]

Decisions needed: [PASTE DECISIONS HERE]

How to Use This Template

- Collect your metrics and fill Section 1 first.
- Write the Executive Summary last (after you understand the data).
- Use the AI prompt to generate a first draft, then edit for accuracy.
- Bring Highly Debated Topics to the live meeting for discussion.
- End every WBR by confirming the Owner Accountability Matrix.

SECTION 15

Common Mistakes

Avoid these patterns that make WBRs ineffective:

- Reporting numbers without explaining what changed or why.
- Hiding bad news under neutral language or averages.
- Listing actions without named owners or deadlines.
- Treating symptoms as root causes.
- Using the WBR as a status update instead of a decision forum.
- Including too many metrics — focus on the 5-8 that drive decisions.
- Failing to separate facts from assumptions.
- Presenting problems without a recommended path forward.
- Skipping the "Highly Debated" section and avoiding conflict.
- Not reviewing last week's commitments at the start.

SECTION 16

Best Practices

What the best operators do differently:

- Start with the scorecard. Let the numbers set the agenda.
- Write the Executive Summary last — after you understand the full picture.
- Keep the WBR under 30 minutes. Longer means unfocused.
- Use the "Debated Topics" section to force real conversation.
- Every metric must have an owner. Unowned metrics drift.
- Review last week's Owner Accountability Matrix first.
- Close every WBR with: "Who owns what by when?"
- Track time-to-decision, not just time-to-detect.
- Use the Signals section to build early warning muscle.
- Rotate the WBR presenter to build team-wide ownership.

Final principle: A WBR is not a report. It is a decision-making ritual. Design it for action, not for comfort.