The Monthly Business Review

A structured step back — turning a month of weekly data into next month's direction.

1. Resource Overview

Official Title	The Apex Monthly Business Review
Category	Foundation
Purpose	To give owners a structured monthly step-back that turns four weeks of activity into one clear decision about what's next.
Learning Objective	By the end of this resource, the owner can run a consistent monthly review and leave it with 1–3 named priorities for the following month.
Intended Audience	Owners who've built the Weekly CEO Checklist habit and are ready for a monthly layer above it.
Estimated Completion Time	30–40 minutes, monthly

2. Educational Introduction

Weekly Keeps You Close. Monthly Keeps You Honest.

The Weekly CEO Checklist is a pulse check — fast, close to the ground, focused on this week. It's excellent at catching small things early. What it's not built for is stepping back far enough to see a pattern, or to notice that four good weeks in a row still added up to a flat month.

The Monthly Business Review exists for that wider view. Once a month, it asks the owner to look at four weeks of financial, operational, team, and sales activity together, and to leave with a small, specific list of what matters most for the month ahead — not a long list, a short one.

This is a rhythm, not a report. It's meant to take well under an hour and to end in a decision, not just a summary.

> *"Sustainable growth outperforms reckless growth. A monthly review is where the pace gets checked before it gets away from you."*

How to Use This Resource

- Schedule it — same week each month, ideally after your books are closed for the prior month.
- Pull your Weekly CEO Checklists from the past four weeks if you've kept them; patterns will jump out faster.
- Move through each section once. Resist re-litigating every week individually — you're looking for the pattern, not re-living the month.
- End with Section 3's priorities field filled in before you close the review. That's the entire point of the exercise.

3. The Worksheet

Financial Review

✓	Financial Review	Notes
☐	Revenue this month is known and compared against plan.	
☐	Cash position at month-end is known and understood.	
☐	No expense surprised me this month.	
☐	Margin trends (up, flat, down) are clear, not guessed at.	

Operational Review

✓	Operational Review	Notes
☐	I can name what slowed the team down most this month.	
☐	Any process breakdown this month has a fix in progress, not just a note.	
☐	Turnaround times (production, delivery, service) met expectations.	
☐	Nothing repeated this month that we said we'd fix last month.	

Team Review

✓	Team Review	Notes
☐	Every team member had at least one real conversation about performance this month.	
☐	Staffing levels matched the actual workload this month.	
☐	No unresolved team tension is being carried into next month.	
☐	I know who's thriving and who's struggling right now.	

Sales & Pipeline Review

✓	Sales & Pipeline Review	Notes
☐	This month's sales numbers are known against plan.	
☐	Pipeline for next month is healthy enough to hit the plan.	
☐	I know which lead source performed best this month.	
☐	No deal went cold without a clear reason why.	

Next Month's Priorities

List no more than three. If everything feels like a priority, nothing is.

4. Reflection Prompts

Looking at all four sections together, where is the clearest pattern — good or bad — across the month?

What did this month confirm that you already suspected? What did it surprise you with?

5. CEO Notes

Space for anything that doesn't fit neatly into the four sections above.

6. Key Takeaways

- Weekly catches small things. Monthly catches patterns. You need both.
- A review that doesn't end in a decision is just a summary — always close with named priorities.
- Three priorities, done well, outperform ten priorities done halfway.

7. Suggested Layout (Canva)

- Same navy/gold/off-white system as prior Foundation resources, for library-wide continuity.
- Design the "Next Month's Priorities" section as a visually distinct closing panel — off-white fill, gold border — so it reads as the destination of the whole exercise, not just another section.
- Include a small "Month of ___" field at the top, matching the "Week of ___" convention from the Weekly CEO Checklist.

8. Printing Recommendations

- US Letter, portrait, double-sided is fine — this is a once-a-month document, not a daily-use one.
- Consider a simple binder or folder for keeping 12 months together; the pattern across a full year becomes its own insight.
- Digital-first owners: a recurring monthly note or fillable PDF, dated and archived, works well.

9. Where This Fits in Apex Academy

Belongs In	Foundation track — the monthly layer that sits above the Weekly CEO Checklist and below quarterly planning.
Expands Into (Paid Workbook)	The Monthly Operating Rhythm Workbook — adds scorecard tracking and trend analysis across a full year.
Complementary Workshop	"Running the Monthly Review That Actually Matters" — a live session on turning review time into decision time.
Supports Future Certification	Apex Certified Business Operator — Module 1: Business Systems Fluency.