

MONTHLY GROWTH MEMO

Review. Understand. Improve.

A senior-level framework for reviewing marketing performance, identifying growth opportunities, and planning the next 30 days.

Successful companies don't just review numbers — they identify trends, understand why performance changed, and decide with confidence what actions to take next. This memo is built to guide that conversation at the leadership table.

SECTION 01

Executive Summary

A single-page briefing designed for leadership review — the headline story before the detailed data.

MONTH REVIEWED

Enter reporting month & year

OVERALL PERFORMANCE

● Improving ● Stable ● Needs Attention

Wins

- ☐ Key win worth highlighting to leadership
- ☐ Metric or campaign that outperformed target
- ☐ Milestone reached this month

Challenges

- ☐ Area that underperformed against plan
- ☐ External or internal blocker encountered
- ☐ Risk that needs leadership attention

“Data becomes valuable only when it drives better decisions.”



KEY INSIGHT

The single most important takeaway from this month's data.



PRIORITY FOR NEXT MONTH

The one initiative that should receive the most focus and budget.



DECISION REQUIRED

Any approval, budget, or resourcing decision leadership must make now.

SECTION 02

Channel Performance Overview

Review each channel not just on volume, but on why the trend moved — interpretation matters more than the raw number.

Organic Search▲ — % Traffic Leads Revenue Conv. Rate	Paid Search● — % Traffic Leads Revenue Conv. Rate	Direct▲ — % Traffic Leads Revenue Conv. Rate	Referral▼ — % Traffic Leads Revenue Conv. Rate
Social▲ — % Traffic Leads Revenue Conv. Rate	Email● — % Traffic Leads Revenue Conv. Rate	Display▼ — % Traffic Leads Revenue Conv. Rate	

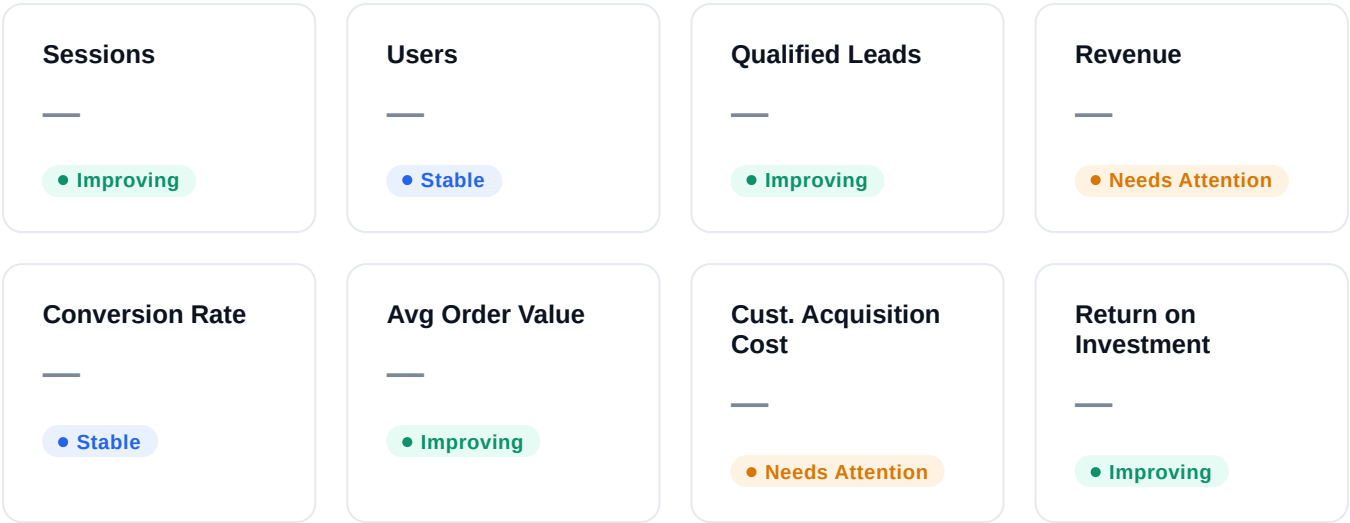
Interpretation Notes

For every channel, ask three questions before reporting a number: What changed since last month? Was the change driven by seasonality, a campaign, or an external factor? And does this trend require an action, or simply continued monitoring? Record the answer in one line per channel.

SECTION 03

Business KPI Dashboard

The eight metrics leadership should track every month, each scored by trajectory rather than raw movement alone.



Scoring Guide

Improving — trending favorably vs. prior month and on pace against target. **Stable** — holding steady within normal range, no action needed yet. **Needs Attention** — underperforming or trending the wrong direction.

SECTION 04

SEO & Organic Growth

A monthly checklist covering visibility, technical health, and emerging AI search surfaces.

■ Visibility & Traffic

- ☐ Keyword visibility trend vs. last month
- ☐ Organic traffic change, by segment
- ☐ Top landing pages & movement
- ☐ New backlinks acquired
- ☐ Featured snippet gains or losses

■ Technical & AI Search

- ☐ Technical issues identified & resolved
- ☐ Indexing coverage & crawl health
- ☐ Core Web Vitals status
- ☐ AI Overview / AI search visibility
- ☐ Entity growth & knowledge panel signals

■ Observations

Summarize the story behind this month's organic performance in two to three sentences — what moved, what caused it, and whether it changes the SEO roadmap for next month.

KEYWORD VISIBILITY

CORE WEB VITALS SCORE

AI OVERVIEW MENTIONS

SECTION 05

Content Performance

Evaluate what content is earning attention, driving conversions, and where the next opportunity lies.

METRIC	THIS MONTH	LAST MONTH	TREND
Top-performing pages	—	—	▲
Blog growth	—	—	▲
Conversion pages	—	—	●
Content engagement	—	—	▲
Bounce rate	—	—	▼
Average engagement time	—	—	●
Internal linking improvements	—	—	▲
Content opportunities identified	—	—	▲

Content Recommendations

- ☐ Recommended new content topic or format
- ☐ Existing page to update or refresh
- ☐ Internal linking opportunity to prioritize

SECTION 06

Conversion & UX Review

Audit how visitors actually experience the site — and where friction is quietly costing revenue.

Performance Audit

- ☐ Landing page performance by segment
- ☐ CTA effectiveness & click-through
- ☐ Form completion rate
- ☐ User journey & drop-off points

Behavioral Insights

- ☐ Heatmap insights & scroll depth
- ☐ Session recording takeaways
- ☐ Top exit pages
- ☐ Mobile experience quality

FORM COMPLETION RATE

MOBILE CONVERSION RATE

TOP EXIT PAGE RATE

Action Items

- ☐ Highest-impact UX fix to implement next
- ☐ Page or flow to A/B test
- ☐ Owner responsible & target date

SECTION 07

Opportunities & Risks

A balanced view of where growth can be accelerated, and where exposure needs to be managed.

Opportunities

- ☐ New keyword opportunities identified
- ☐ New content gaps to fill
- ☐ Local SEO expansion
- ☐ Answer Engine Optimization (AEO)
- ☐ Generative Engine Optimization (GEO)
- ☐ Schema & structured data upgrades
- ☐ Strategic partnership opportunities

Risks

- ☐ Traffic decline in a key segment
- ☐ Unresolved technical issues
- ☐ Competitor movement to monitor
- ☐ Core Web Vitals degradation
- ☐ Algorithm update impact
- ☐ Lost rankings on priority terms

Net Assessment

Weigh the opportunities against the risks and state, in one sentence, whether the month's net trajectory is positive, neutral, or requires intervention.

SECTION 08

Competitor Snapshot

A side-by-side view of where the business stands relative to the field — and where the gaps are.

METRIC	OUR WEBSITE	COMPETITOR A	COMPETITOR B	COMPETITOR C
Traffic	—	—	—	—
Authority	—	—	—	—
Content	—	—	—	—
Keywords	—	—	—	—
Backlinks	—	—	—	—
Local Visibility	—	—	—	—
AI Search Readiness	—	—	—	—

Competitive Gaps to Highlight

Call out any metric where a competitor holds a meaningful lead, and note whether the gap is closing, holding steady, or widening.

Strongest Position

Where we lead the field

Biggest Gap

Where a competitor leads

Watch List

Competitor move to monitor

SECTION 09

Next 30-Day Action Plan

Translate insight into a prioritized, owned, and time-bound plan of record.

- SEO
- Content
- Technical
- Conversion
- Analytics
- AI Search

PRIORITY	TASK	OWNER	EXPECTED IMPACT	STATUS
P1	—	—	—	—
P1	—	—	—	—
P2	—	—	—	—
P2	—	—	—	—
P3	—	—	—	—
P3	—	—	—	—
P3	—	—	—	—

How to Prioritize

- P1** — must ship this cycle; directly tied to revenue or risk.
- P2** — important, scheduled within the 30-day window.
- P3** — valuable but flexible on timing.

SECTION 10

Leadership Notes

A clean space to capture what was decided in the room — and what still needs an answer.

■ Key Decisions

Decisions made in this review cycle

■ Budget Considerations

Reallocations, approvals, or spend flags

■ Marketing Priorities

Top focus areas for the coming cycle

■ Cross-Team Actions

Dependencies owed to or from other teams

■ Questions for Next Review

Open items to revisit at the next monthly review

SECTION 11

Turn Monthly Reports Into Business Growth

Many businesses collect data every month but struggle to turn it into strategic action. RankForge helps leadership teams understand performance, identify opportunities, and build measurable growth strategies — so every review ends in a decision, not just a report.

SERVICES

✓ Executive SEO Consulting

✓ Monthly Growth Reporting

✓ Technical SEO

✓ Local SEO

✓ AI Search Optimization (AEO)

✓ Generative Engine Optimization (GEO)

✓ Entity SEO

✓ CRO Strategy

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