

Thanks for downloading Next Steps Marketing's **TOP 5** report template. We produce and use this report monthly to keep our clients informed about key audience-related metrics that impact their business.

It is useful for:

- seeing trends
- uncovering opportunities
- tracking performance of specific promotions and tests

It can easily be amended to follow other key audience metrics like:

- site visits
- eMail newsletter sign-ups
- community growth

We recommend adding a NARRATIVE page to the report so that you easily pull-out key information that you want to make sure gets communicated or highlighted.

The report template that follows is the "roll-up" section of the report. Each section is backed by data provided by your fulfillment system, newsstand distributor(s) and in-house financial reports.

If you would like some assistance building out the template so that it meets your specific needs or have a question about any of the sections please feel free to get in touch with Mike at the contact information below.

**Mike Popalardo**

**mike@nextstepsmarketing.com**

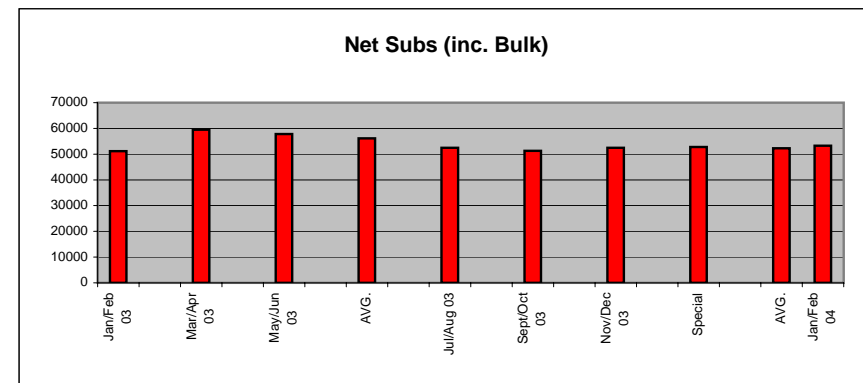
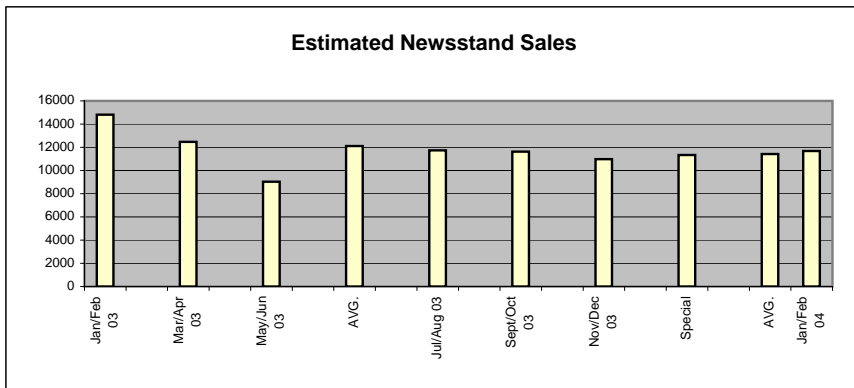
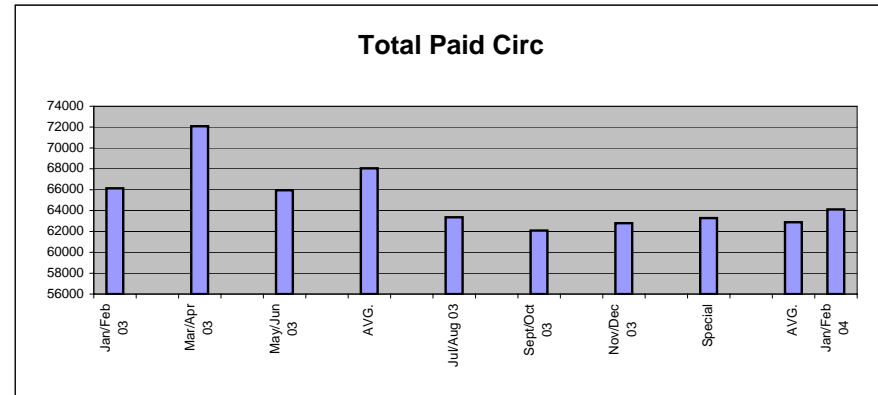
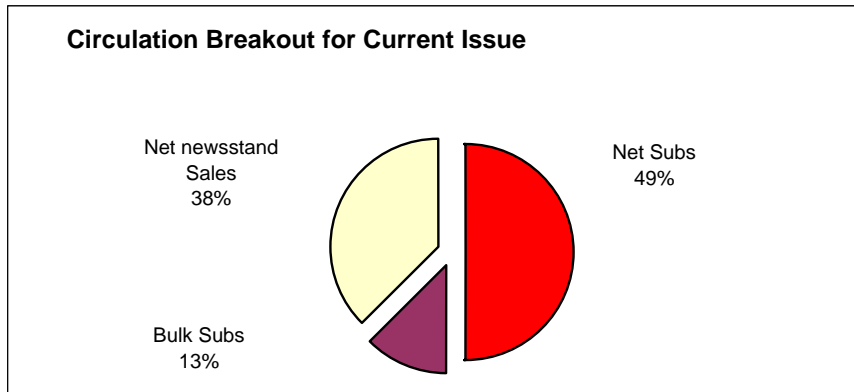
**415-773-1840**



**Circulation Break-Out** Individual subs & newsstand sales are estimated to completion.

Source: on-off reports, label reports, newsstand reports

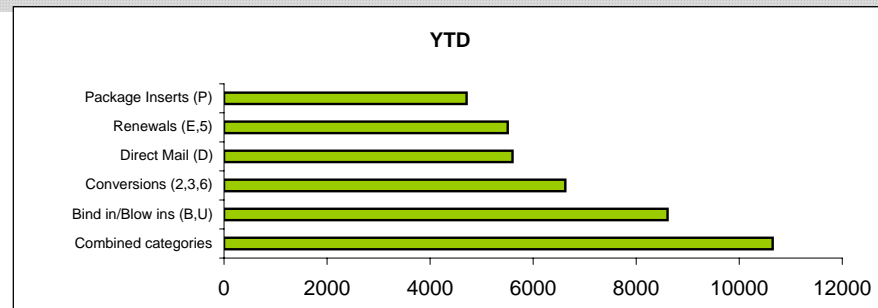
Issue	current	YTD	Variance
net subs	40,000	40,000	0%
bulk subs	9,500	10,000	-5%
net newsstand	35,000	30,000	17%
<b>Total Paid Circ</b>	<b>84,500</b>	<b>80,000</b>	<b>6%</b>



**Sub Order Production** For major sources.

Source: production by month report

	current	YTD	Percentage
Combined categories	1,237	10,649	25%
Bind in/Blow ins (B,U)	889	8,608	20%
Conversions (2,3,6)	788	6,624	15%
Direct Mail (D)	3	5,598	13%
Renewals (E,5)	716	5,505	13%
Package Inserts (P)	42	4,707	11%
<b>Bolded sources comprise:</b>	<b>3,675</b>	<b>41,691</b>	<b>97%</b>
<b>Total Sales by Source</b>	<b>3,784</b>	<b>43,042</b>	<b>100%</b>



## Renewal Performance & Pay-Up By Source

Source: summary renewal reports

**RENEWAL % BY SOURCE** Includes unidentified renewals for finalized expire groups only

	Agent	DTP	Conversions	Renewals
Renewal %	21%	63%	41%	67%

Source: S174-3, 174-2

**RENEWAL BY SOURCE** Identified Renewals for finalized expire groups only

	expire	renew	% that renew	% of total renewed
Direct Conversions	6,756	4,318	64%	23%
Renewal	5,136	3,595	70%	20%
Direct Mail	8,141	3,172	39%	17%
Agent	12,786	2,650	21%	14%
Bind In/Blow in	3,238	1,746	54%	9%
<b>TOTAL TOP 5 RENEWALS</b>	<b>36,057</b>	<b>15,481</b>	<b>43%</b>	<b>84%</b>
<b>GRAND TOTAL RENEWAL</b>	<b>37,601</b>	<b>18,404</b>	<b>49%</b>	<b>100%</b>

Source: promotion key reports, billing reports

**PAY-UP BY SOURCE** Top Sources of Order Production - Finalized bill keys only

	gross orders	net orders	% that paid	% of total paid
Bind in-Blow in	9,186	4,758	52%	32%
Direct Mail	5,542	4,494	81%	30%
Agency	3,416	3,416	100%	23%
Package Inserts	3,164	1,217	38%	8%
DTP Conversions	1,192	867	73%	6%
<b>Top 5 Pay-up</b>	<b>22,500</b>	<b>14,752</b>	<b>66%</b>	<b>93%</b>
<b>Grand Total</b>	<b>23,777</b>	<b>15,824</b>	<b>67%</b>	<b>100%</b>

## Newsstand Sales Info

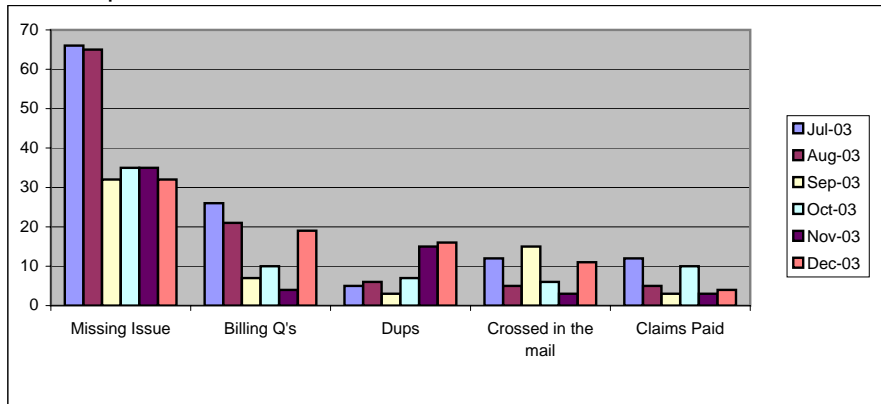
Source: Newsstand Reports

Issue name	Draw			Copies Sold			Sell Through %	
	Budget	Act/Fcst	Var	Budget	Act/Fcst	Var	Actual	Budget
#1	40,000	42,026	5.1%	8,400	8,657	3.1%	21%	21%
#2	47,000	43,012	-8.5%	11,750	12,473	6.2%	29%	25%
#3	47,000	41,043	-12.7%	11,750	9,029	-23.2%	22%	25%
#4	47,000	40,479	-13.9%	13,160	11,739	-10.8%	29%	28%
#5	47,000	41,513	-11.7%	13,160	11,624	-11.7%	28%	28%
#6	47,000	41,441	-11.8%	13,160	10,982	-16.6%	27%	28%
<b>Total</b>	<b>275,000</b>	<b>249,514</b>	<b>-9.3%</b>	<b>71,380</b>	<b>64,504</b>	<b>-9.6%</b>	<b>26%</b>	<b>26%</b>
<b>Average</b>	<b>45,833</b>	<b>41,586</b>	<b>-9.3%</b>	<b>11,897</b>	<b>10,751</b>	<b>-9.6%</b>	<b>26%</b>	<b>26%</b>

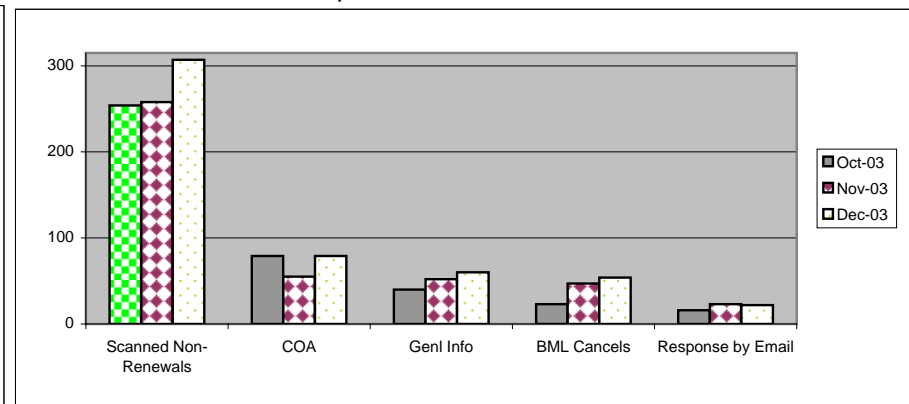
## Customer Service Summary

Source: customer service reports

C/S Review--Complaints



C/S Review--non-Complaints



## Revenue & Expense vs. Budget

Source: Financials (in-house)

### Current Month/Yr

	Actual	Forecast	Forecast \$ Variance	% Variance	Budget	Budget \$ Variance	Budget % Variance	Actual Prior Yr	\$ Variance	%Variance
Circ Revenue	\$2,814	\$0	\$2,814	0%	\$1,420	\$1,394	98%	\$3,972	(\$1,158)	-29%
Marketing Expense	\$13,552	\$16,134	(\$2,582)	-16%	\$16,641	(\$3,089)	-19%	\$16,979	(\$3,427)	-20%
Distribution Expense	\$1,390	\$150	\$1,240	827%	\$200	\$1,190	595%	(\$1,893)	\$3,283	-173%
Gross Profit	(\$12,128)	(\$16,284)	\$4,156	-26%	(\$15,421)	\$3,293	-21%	(\$11,114)	(\$1,014)	9%

### YEAR-TO-DATE

	Actual	Forecast	Forecast \$ Variance	% Variance	Budget	Budget \$ Variance	Budget % Variance	Actual Prior Yr	\$ Variance	%Variance
Circ Revenue	\$675,489	\$622,984	\$52,505	8%	\$588,887	\$86,602	15%	\$672,143	\$3,346	0%
Marketing Expense	\$337,970	\$337,543	\$427	0%	\$356,325	(\$18,355)	-5%	\$337,671	\$299	0%
Distribution Expense	\$159,101	\$152,882	\$6,219	4%	\$135,521	\$23,580	17%	\$156,462	\$2,639	2%
Gross Profit	\$178,418	\$132,559	\$45,859	35%	\$97,041	\$81,377	84%	\$178,010	\$408	0%

## What's New

### Direct Mail

- Control Pkg - Buckslip + Premium - Ctr'l Price
- Control Pkg - Buckslip + Premium - Test Price
- Twin Buck Package - Ctr'l \$ w/Premium #1
- Twin Buck Package - Ctr'l \$ w/Premium#2

	Qty			Net Response	
Sub Price	Mailed	Gr Response	Gross %	To Date	Net %
\$ 14.97	140,542	4185	2.98%	2550	1.81%
\$ 15.97	18,743	505	2.69%	291	1.55%
\$ 14.97	14,060	411	2.92%	238	1.69%
\$ 14.97	14,061	416	2.96%	274	1.95%

Response thru: 6/3/2009  
 Drop Date 2/15/2009  
 weeks from Drop 15  
 weeks to final: 5