Monthly CEO Business Review

Review the business and decide what changes

Once a month, step back from individual trades. Review results, decisions and systems so you can see what is helping the business, what is costing it and what to improve next.

01 Review the business numbers

Record the month, trading days, gross result, payouts or withdrawals, expenses and net business profit.

Why it matters: A payout alone does not establish profitability. Expenses still count.

02 Check processes and controls

Identify your best process improvement and biggest process failure. Count risk-rule violations, emotional or impulsive trades and account losses.

Why it matters: See whether your systems and guardrails are working reliably.

03 Examine key decisions

Name your best decision and most expensive mistake. Ask what worked, what did not, what cost money and what protected the business.

Why it matters: Recognize both the costs of mistakes and the value of protective decisions.

04 Decide what changes

Write what you will STOP, CONTINUE and START doing. State what will change next month.

Why it matters: Turn the review into decisions you can act on, rather than repeating the same problems.

05 Choose one process goal for next month

Choose one controllable behavior or process, not a forced P&L quota. Add CEO notes about anything you need to remember before the next formal review.

Why it matters: A clear process goal gives next month’s improvement a specific focus.

Want support turning your review into a plan?

The PGT group can help you build practical systems and accountability.

Explore Prop Girl Trading **propgirltrading.com**

Adapted from the Trading Business Plan workbook, Section 10: Monthly CEO Business Review.