Executive reporting design



We design a board report with ten agreed indicators, thresholds and decision owners.

Who it helps

SME managers and reporting teams

The problem to solve

A board pack can be accurate but difficult to use if all figures have equal weight and no owner for follow-up.

Working through the brief

1. **Confirm the board’s reporting needs**

   Gather the agreed inputs. Your business questions, reporting examples and measure owners.

2. **Design ten indicator views**

   Track “Board indicator” and “Decision threshold” together so the reviewer can connect the source information to the result.

3. **Agree thresholds and owners**

   Use the report design to focus meetings on indicators that need a decision or an explanation.

4. **Check the scope at handover**

   Licences, hosting and extra data sources require separate agreement.

Worked example

An executive asks why a figure changed. Place the definition, reporting period and relevant comparison beside the measure.

Read the service scope / DAT-006

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