

Monthly Client Report — Facilitator Run Sheet

Folder: `monthly-client-report` · Category: scenario kits · solo or per account owner · 60 min per report · offline + online · print props · scenario kit

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60

MINUTES

In person + online

SETTING

Monthly Client Report — Delivery Kit Guide

A monthly report has one job: make next month's meeting shorter and your fee feel obvious. Most reports fail the other way — a dump of charts the client skims, a meeting that starts with “so, what happened?”, and a freelancer who spent Sunday editing a slide nobody reads. This kit runs the whole delivery loop — a data checklist that kills the scavenger hunt, the three-sentence spine every section hangs on, a send calendar the client agrees to, and a keep/stop/start review that turns report five into a better report than report one.

Objectives

By the third report, the account owner will have:

1. A fixed data checklist collected in one pass — no more mid-month scramble for “can you send last week's numbers”.
2. Every section built on one spine: what happened, so what, now what — three sentences before any chart earns its place.
3. A send calendar both sides agreed to, a running keep/stop/start ledger per client, and a report that takes under an hour to assemble.

When to use this kit

- You report to clients monthly — agency, freelance, retainer, in-house serving internal “clients” — and the report costs you more hours than it earns trust.
- Your meetings start with the client asking the questions your report should have answered.
- You have quietly noticed the report getting longer and skimmed more.

What this is not

- Not a dashboard. If the client wants live numbers, point them at a dashboard; this kit is the monthly moment where a human says what the numbers mean. That sentence is the part they are paying for.
- Not a data-correctness system. Sources stay the authority; the report renders and interprets. If a number is wrong, it is wrong at the source — fix it there and re-render.
- Not for daily/weekly ops reporting. The cadence this kit protects is monthly, where the conversation lives.

Setup

Space: 60 quiet minutes on the same day each month; the review is a standing line in the quarterly call.

Materials per client: the data checklist (printed or as a recurring reminder), the three-sentence spine card, last month's report and its keep/stop/start ledger, this kit's review sheet.

Materials for your desk: one card deck per account — the checklist faces are what you hand the client who keeps sending numbers late, politely.

Grouping: solo works; agencies run one deck per account owner and compare ledgers at the quarterly review.

Roles: the account owner collects, writes and sends. The client owns the “so what” check — every section must survive one question from them: “and why should I care?”

How to run it

Time	Phase	What you do	The client does
Day 1–3	Collect	Run the data checklist in one pass; anything missing gets a named owner and a date, not a chase.	Receives the “what we need by when” note; sends on time because the list never changes.
Day 3–10	Write the spine	For each section: what happened, so what, now what — three sentences first. Charts only after a sentence earns them.	Reads three sentences per section, not thirty slides.
Day 10–12	Cut	Apply the cut card: any chart nobody references in the meeting dies next month.	Sees a shorter report every quarter, not a longer one.
Day 12	Send	Send on the agreed calendar date — same day monthly, no exceptions, no “sorry for the delay”.	Gets predictability; trust moves from the numbers to the rhythm.
After the call	Ledger	One line each: keep / stop / start — written in the ledger before you close the laptop.	Gets asked what to cut; their answer changes next month’s report.

The card deck

Use the faces from [monthly-client-report-prop-cards.pdf](#): a master card (the loop in one view), the data checklist card, the three-sentence spine card, the send calendar card, the cut card (what to delete before sending), and a watch-out card — plus branded backs and blanks for your channel-specific metrics.

Failure modes

1. **The chart dump.** Everything the tool exports ships in the deck; the client reads none of it. Rescue: no chart enters without a sentence in front of it — what happened, so what, now what.
2. **The moving calendar.** Sent “when it’s ready”; the client stops expecting it, then stops reading it. Rescue: the send date is agreed once and defended forever — late once is a policy change.
3. **Bad-news burial.** The missed target goes on page 14 in small font. Rescue: the bad news gets the first sentence of its section and the first minute of the meeting — burying it costs the trust the report exists to build.
4. **The report nobody reviews.** Twelve reports a year, zero changes — the client is politely reading yesterday’s report forever. Rescue: the keep/stop/start ledger is three lines and it ships; report five must differ from report one.

Variations

- **Quarterly version:** same loop, quarter cadence, deeper spine — for clients who fire people monthly and don’t need a monthly paper trail.
- **Internal reporting:** replace “client” with “the department you serve”; the so-what question survives the translation almost unchanged.
- **Multiple clients:** one deck per account, but the loop and the calendar are identical — the point of the kit is that the report becomes a routine, not a re-invention.
- **Online:** the checklist becomes a recurring form (the folder’s FormLM block), the report a link, the send a scheduled email — the loop does not care what medium carries it.

Facilitation notes

- Write the meeting's first sentence before you build the first slide: "this month, the one thing that changed is ____". If you cannot fill the blank, the month had no story — say so, briefly, and spend the meeting on next month.
- The client who sends data late gets the checklist card, not a reminder email. Polite architecture beats impolite memory.
- Length is a feature: the report that fits in ten minutes of reading gets read. The one that takes forty gets skimmed and resented.
- Your fee is justified by the "so what", not the "what happened" — any tool can do the latter since last year.

Put it on the wall

Print `monthly-client-report-activity-poster.pdf` (A3): the loop, the spine, the cut rules, the watch-outs — one sheet at the desk, one copy folded into the client's first-month packet.

Props in this folder

- `monthly-client-report-prop-cards.pdf` — poker-spec print sheet (63.5 × 88.9 mm, bleed and cut guides): master, data checklist, three-sentence spine, send calendar, cut card, watch-out, branded backs and blanks
- `monthly-client-report-run-sheet.pdf` — the print edition: this guide + the report review, bound as one A4 document with bookmarks (`-Letter.pdf` is US Letter)
- `monthly-client-report-activity-poster.pdf` — the whole loop on one A3 desk sheet
- `monthly-client-report-guide.md` · `-debrief.md` · `-start-here.md` — the delivery guide, the report review sheet, the one-page start here
- `monthly-client-report-license.md` — what you may do
- `SKILL.md` · `monthly-client-report.zip` — the machine-readable manifest, and the whole folder in one download

Agent version

Every file in this folder has a stable public URL — an AI agent can fetch the card deck, the review sheet and this guide with three curl commands (see `SKILL.md`), or turn the data checklist into a recurring collection form. The paper version needs a desk and a calendar you defend. Keep the "so what" human; that sentence is the invoice.

Monthly Client Report — Report Review Sheet

The report goes out monthly; the review is what stops it from decaying. Use with `monthly-client-report-guide.md`. The keep/stop/start ledger is the compressed version; this sheet is the full one, run every third report or after any renewal conversation.

How to run this review

- Every third report, or right after a renewal or an angry email — whichever comes first.
- Bring three things: the last three reports, the ledgers, and the meeting notes where the client talked about something other than your report.

- Review the loop, not the layout: did collection, spine, cut, send and ledger each do their job?

Read the five leaks

1. **Collection drift** — the checklist grew ad-hoc asks; collection became a scavenger hunt again. The hour you save on day 3 you pay back double on day 9.
2. **Spine rot** — sections where the chart arrived before the sentence. The client's eyes glazed at exactly that section; the meeting notes will show you which.
3. **The cut that never cuts** — the report is longer than report one. A chart nobody referenced twice is decoration you are paying yourself to maintain.
4. **Calendar slips** — sent late once, the rhythm broke; now the client asks “where's the report?” and the answer is an apology. Predictability is the feature; the PDF is just its carrier.
5. **Ledger silence** — keep/stop/start lines collected, nothing changed. Three ignored lines teach the client that their feedback is a ritual, not an input.

The six review questions

1. **The hour count.** How long did assembly take this quarter versus last — and which phase ate the difference? → Targets: loop cost; a report whose cost grows while its readership shrinks is on its way to being an invoice line item.
2. **The so-what test.** Pick one section at random: could the client repeat its “so what” back in the meeting? → Targets: spine quality; the sentence you wrote is real when it survives their retelling.
3. **The dead charts.** Which charts went unreferenced in three consecutive meetings? → Targets: the cut; delete them without ceremony — the section gets shorter and sharper.
4. **The bad-news minute.** When was the last miss that got page one and minute one — and what did it buy? → Targets: trust compounding; buried misses get exhumed at renewal, surfaced misses get forgiven monthly.
5. **The renewal read.** If the contract came up for renewal today, which line of the ledger is the client's argument — yours or theirs? → Targets: the report's real purpose; it exists to make renewal boring.
6. **The next-report change.** One change to the loop for the next report, with the date it lands. → Targets: durability; report five must differ from report one, visibly.

Failure modes of the review

Failure mode	Why it happens	The rescue
Formatting therapy	The review becomes a font argument	Only the five leaks get airtime; colors are not a leak
The polite ledger	Client says “it's great”, you believe it	Ask “what should we cut next month?” — the answer is the useful one
Quarterly amnesia	Ledgers live in the report folder, reviews never happen	The review sits on the same calendar the report sits on — same day, every third month
One client, one truth	What works for account A quietly breaks for B	Compare ledgers across accounts; the pattern is the practice's standard

What this is not

This is not a quality scorecard and not a way to automate the judgment away. It is the quarterly maintenance on the one asset a retainer really is: the rhythm of showing up, every month, with a sentence the client can repeat. Reports decay silently; this sheet is the noise.