

LEADERSHIP & GOVERNANCE · TEMPLATE

Monthly Management Report Template

For leadership teams who need a monthly reporting pack organised around decisions rather than departments, built to surface signal instead of accumulating metrics.

How to use this: Populate this template monthly, applying the inclusion test to every metric before it makes the core pack, and run the quarterly review section every three months to remove anything that isn't driving decisions.

Inclusion Test

Apply this test to every candidate metric before it earns a place in the core pack.

- ☐ If this metric moved significantly, a named leader would change what they do next month
- ☐ The metric has a clear, single owner accountable for it moving
- ☐ The metric is leading or near-real-time, not purely a lagging historical record
- ☐ The metric connects to a decision the business could realistically make this cycle

Core Pack: On Track Against Plan

Metric	This Month	Target / Plan	Trend	Owner Commentary

Core Pack: Where Risk Is Concentrated

List only the risks that are live and specific this month, not a standing generic risk register.

What is the single biggest risk to plan this month, and who owns responding to it?

What early-warning signal made this visible, and when did it first appear?

What decision, if any, does this risk require from the leadership team now?

Core Pack: Decisions Needed This Cycle

Decision Needed	Owner	Options on the Table	By When

Appendix / Self-Serve Detail

Metrics that are useful context but did not pass the inclusion test: move here rather than deleting entirely.

List the metrics demoted to appendix this quarter, and why they didn't pass the inclusion test:

Quarterly Reporting Review

- ☐ Reviewed every core-pack metric against whether it drove an actual decision in the last three months
- ☐ Removed or demoted any metric that generated no discussion or decision across the quarter
- ☐ Confirmed every remaining metric still has a clear, current owner
- ☐ Checked the pack length and format still allows a leader to read it fully in under ten minutes