Monthly client reporting checklist

CHECKLIST TEMPLATE

Business _____ Location _____ Date _____

Monthly report

In the first week of each month

TASK	TIME	INITIALS
Data		
☐ Pull the month's data from analytics, ads, search and social platforms		
☐ Check the date range and filters are right		
☐ Compare with last month and the same month last year Check any big change against the platform before you report it.		
Insights		
☐ Write what changed and why, in plain language		
☐ Show progress against the client's goals		
☐ Recommend two or three next steps		
Review and send		
☐ Have a second person check the figures and the writing		
☐ Send the report on the agreed day		
☐ Book or confirm the review call		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____