

Board Reporting Pack Checklist

KPI Systems & Board Reporting — Sample Template

Instructions

Run this checklist before every board meeting so the pack goes out complete and on time, not assembled the night before.

Checklist — Worked Example

Item	Owner	Due	Status
KPI dashboard pulled & reconciled	Strategic COO	T-7 days	Done
Financial summary vs. forecast	Finance Lead	T-7 days	Done
Risk register reviewed	Strategic COO	T-5 days	Done
Deck assembled & circulated for review	Strategic COO	T-3 days	In progress
Board asks finalized with CEO	CEO	T-2 days	Not started

Blank Checklist

Item	Owner	Due	Status

Notes

Deck circulated 3 days ahead this cycle instead of the usual 2, giving board members more prep time before a funding discussion.