

REPORT CHECKLIST

- Timing and expectations: When is the report due and in what preferred format? Don't guess.
- Content needs:
 - Objectives of project.
 - Measures of success and final results.
 - Value being delivered, not on an annualized basis.
 - Hard evidence and observed behavior supporting results, not conjecture.
 - Documents and handouts as appropriate, with commensurate detail/sources.
 - Specific next steps required to preserve momentum and results.
- Delivery and environmental needs:
 - Appropriate for format: slides, hard copy document, and so on.
 - Confidentiality marked on report and preserved in environment.
 - Clear distinction between work product and your own intellectual property.¹
 - Multiple media (e.g., hard copy of slides, electronic version of text).
 - Include your name prominently in several places (cover, cover sheet, end).
 - Hard copy bound or placed in high-quality binder; consider color, client logo.

¹Anything you've inserted from your prior knowledge base, such as a strategy model, remains your proprietary work. Anything you've developed specifically for this client with client resources (e.g., a field compensation system) is work product owned by the client.