fluentBoards

Client Report

TEMPLATE

Keep it to one page. Replace everything in brackets and delete any line that doesn't apply.

Client	Project or plan	Reporting period	Prepared by
[Client name]	[Project or plan name]	[Month or milestone]	[Name, date]

1. Summary

[Two sentences: how the period went and the one thing the client should remember.]

2. Work Completed

[Group the work by type instead of listing every task.]

Type	What we did
Updates	[e.g. WordPress core and 14 plugins, tested on staging first]
Fixes	[e.g. booking form notifications restored on Oct 14]
Content	[e.g. new team bio, holiday hours on all location pages]
Other	[Anything else delivered this period]

3. Time Used

[Hours logged against the plan or estimate. Show it in months you went over, too.]

Category	Hours used	Hours included
[e.g. Maintenance]	[ ]	
[e.g. Content changes]	[ ]	
[e.g. Fixes]	[ ]	
Total	[ ]	[ ]

4. What's Next

[The work planned for the next period and any upcoming milestone or renewal.]

5. What We Need From You

[Anything that blocks the next step, with a date.]

Item	Due date	Owner
[e.g. Photos for the new team page]	[Date]	[Name]
[e.g. Approval to renew the form plugin license]	[Date]	[Name]