

Leadership program client report template

Editable employer-sponsor report · Complete and review before sharing

1. Scope and decision

Provider: []. Employer client: []. Program / cohort: []. Enrolled count: []. Baseline window: []. Program end: []. Follow-up window: []. Evidence cutoff: []. Report version / approver: [].

Decision this report supports: [continue, change support, request missing evidence, or another bounded decision].

2. Findings with the right base

Behavior / measure version	Matched count / eligible base	Finding and source
[behavior 1]	[n / N; coverage %]	[source-specific change or level]
[behavior 2]	[n / N; coverage %]	[source-specific change or level]

Inclusion rule: [required time points, question versions, numeric states, observer continuity and opportunity rules]. Explain any difference between the enrolled population and the eligible comparison base.

What the finding supports: [bounded descriptive statement]. What it does not establish: [causality, financial ROI, generalization or other limits].

3. Missing evidence and next actions

Evidence state	Count / interpretation
Missing follow-up	[]
Not observed	[]
No opportunity	[]
Changed observer or question	[]
Other / overlapping states	[state rule to avoid double counting]

Next action	Owner	Review point
[]	[]	[]
[]	[]	[]
[]	[]	[]

4. Sharing and revision checks

Authorized audience: []. Restricted material excluded: []. Linked-source access checked by: []. Small-group disclosure review: []. Source register / calculation version: []. Correction contact: [].

If new evidence arrives: preserve the issued version, record what changed, recalculate only affected measures, and explain any new denominator. A date field is not an automated reminder; assign the actual follow-up method and owner.

Before sharing, remove all placeholders and verify each number against the approved evidence. Keep any individual coach report separate and share it only with its authorized audience.