

# Client Report Template

Free template. Adapt to your client and service type. Not professional advice.

## REPORT INFORMATION

CLIENT:	
REPORTING PERIOD:	
PREPARED BY:	
DATE SENT:	

## EXECUTIVE SUMMARY

3-5 sentences. Lead with results, not activity. This is the section clients actually read.

[ Enter summary here ]

## WORK COMPLETED THIS PERIOD

List deliverables completed. Be specific with names so clients can verify.

ITEM	STATUS	NOTES
[ Deliverable name ]	Completed	[ Brief impact or context ]
[ Deliverable name ]	Completed	
[ Deliverable name ]	Completed	

[ Deliverable name ]	In Progress	[ Expected completion ]
[ Add rows as needed ]		

**KEY METRICS**

3-5 metrics that matter to this client. Compare to last period. Match metrics to the engagement.

METRIC	LAST PERIOD	THIS PERIOD	CHANGE	CONTEXT
[ e.g. Organic Sessions ]	[ 1,240 ]	[ 1,476 ]	[ +19% ]	[ context ]
[ e.g. Keyword Rankings (top 10) ]	[ 8 ]	[ 12 ]	[ +4 ]	[ context ]
[ e.g. Leads from Organic ]	[ 6 ]	[ 9 ]	[ +50% ]	[ context ]
[ e.g. Email Open Rate ]	[ 28% ]	[ 31% ]	[ +3pts ]	[ context ]
[ Add or remove rows as needed ]				

**RETAINER USAGE (if applicable)**

Show hours used vs available. Note overages or underage. Prevents billing disputes.

<b>HOURS THIS PERIOD:</b>		/ __ available
<b>ROLLOVER:</b>		hours from previous period
<b>RUNNING BALANCE:</b>		

[ Notes: e.g. Ran 2 hours over due to unplanned content sprint -- flagging for awareness. ]

**WINS THIS PERIOD**

Two or three specific wins with numbers where possible. Two strong wins beat three weak ones.

1. [ Win 1 -- specific, with a number if possible ]
2. [ Win 2 -- e.g. 'Target keyword moved from page 3 to #5 on page 1' ]
3. [ Win 3 -- optional ]

## ISSUES AND BLOCKERS

Include the bad stuff. Proactive transparency builds trust. 'No issues this period' is a valid entry.

ISSUE	IMPACT	STATUS	ACTION NEEDED
[ e.g. Homepage copy delayed ]	[ Holding up A/B test ]	[ Waiting on client ]	[ Client to approve by date ]
[ e.g. Ad account billing ]	[ Campaigns paused 3 days ]	[ Resolved ]	[ None: monitoring ]
[ Add issues, even minor ones ]			

## NEXT PERIOD PLAN

3-5 priority items. Not a full backlog -- just what you're focused on next.

1. [ Priority 1 -- e.g. 'Launch A/B test on homepage hero section' ]
2. [ Priority 2 -- e.g. 'Publish two new blog posts' ]
3. [ Priority 3 -- e.g. 'Complete Q2 keyword research and share for approval' ]
4. [ Priority 4 -- optional ]
5. [ Priority 5 -- optional ]

## CLIENT ACTION ITEMS

What you need from the client. Approvals, assets, decisions. Include a due date for each.

ITEM	OWNER	DUE DATE
[ e.g. Approve April content calendar ]	[ Client Name ]	[ April 3 ]
[ e.g. Send Q2 campaign brief ]	[ Client Name ]	[ April 7 ]
[ e.g. Review and sign off on landing page copy ]	[ Client Name ]	[ April 5 ]

