Name of Procedure	Monthly Client Reports
Policy Statement	This SOP will outline guidelines for producing monthly reports for package clients
Frequency of Use	Monthly, report is due by the 3rd working day of each new month

Purpose

Sending our package clients monthly reports at the same time as they receive their invoices has the following benefits:

- Improves our communication
- Allows us to add value for our clients, so they benefit from our experience
- Gives our internal teams an overview of what's happening with this client
- Creates transparency as we show how our time has been spent
- Creates accountability through linked files such as monthly KPI's and project update sheets
- It gives Justine and understanding of what's been happening with this client so she can include relevant info in the email covering this report.

Policy:

It is our policy as of 1st October 2018 that this SOP is followed by all relevant team members.

Responsibility

The Lead VA is responsible for producing monthly reports for their own clients and liaising with internal team for their contribution.

Procedure

1. Download the Monthly Report Template *(located here)* OR go to your client's 'monthly progress reports' folder in Drive. Rename the doc (Save As) 'Monthly Progress Report yyyy mm' in the same folder.
2. **Summary of all Projects Report:**
    a. In ProWorkFlow, print the 'summary of all projects' report for your client. *Click to see video on how to do this*.
    b. Save the report in the client's Google Drive folder (client name – monthly progress reports – PWF reports) in the following name format 'yyyy mm' i.e. 2018 10. Copy the link for this doc and save on page 2 of

the Monthly Report Template as a hyperlink for the “Time on Task Report” text.

c. Now you can update the 2 graphs in the task template.
    i. The *allocation of monthly package hours* graph should remain the same month to month, this graph shows how the client’s package is split up. *Please check it each month to ensure it remains accurate.*
    ii. The *how we spent this month* graph is a breakdown of how we spent the month. You’ll need to look at the PWF report you’ve just printed and summarise the hours for the last month by type of service. **By right clicking on the graph you can edit both the type of service and hours. Double check your figures in the Excel page with the PDF report you saved** – totals should balance to the closest hour.
    iii. Check to make sure that the graph is easy to read, you may have to move some of the text boxes, so they don’t overlap.

3. **Populating the Report Template:** Now we move to the linked docs section on page 2 of the monthly report. This is where your planning comes in and we show detail for those clients who like to know. You will have the following links:
    a. *Time on Task Report* (ALL CLIENTS) – link to the PWF summary as per step 2.b. above.
    b. *Project Update* (ALL CLIENTS) – link to a spreadsheet you create in Google docs which shows status of all projects (completed in the past month and in progress). As you’re updating this, use the spreadsheet to manage your team. *Here’s an example* of the spreadsheet which should contain the following columns:
        i. Project
        ii. Status
        iii. With
        iv. Hours
        v. Notes
    c. *Marketing Statistics* (for clients we do marketing for) – here are 2 examples and again, as you’re compiling or reviewing these use the information to roll out any changes in strategy or useful info for your team.
        i. *Example 1* – Facebook and Mailchimp client
        ii. *Example 2* – List Building and marketing support client

If you're unsure about which linked reports you need for your client, check with Justine.

Once the above docs have been finalised for the month, double check the links on the monthly report template are working (and I would suggest sharing this folder from Drive with your client).

4. Almost done, now simply update the rest of the 2-page monthly report. If you need help with this, again tell Justine you're having trouble.

Checklist (before sending report to Justine):

Month, Year has been changed	☐ Yes
Correct client name	☐ Yes
You've put thought into (and collaborated with your team) on: • Biggest win • Suggestions for improvement • For your attention • *Your proof of done (completed tasks) • *Your proof of doing (tasks in progress) * The proof and doing and proof of done lists can be taken from your project update spreadsheet (point 3.b. above). Listing them here gives the client a snapshot of what's been achieved and is being worked on by us. If there are a lot of tasks summarise by outcome (i.e. launched new online course).	☐ Yes
Double check all links are correct	☐ Yes
All fonts are correct (Open Sans)	☐ Yes
Double check the Time on Task report balances with the graph and matches what you see in PWF.	☐ Yes

Key SOP Information

Responsible for doing process	Lead VA's
Ensuring the process is done	Justine
Frequency	☐ Daily ☐ Weekly ☑ Monthly ☐ Quarterly

Version Control

Author:	Justine Parsons	Approved:	Justine Parsons
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