

## Weekly Summary Report Template

*Summarizing your week can be a difficult task without a playbook to follow. Some people can be long winded while others are the definition of brevity. The template outlined below and the example weekly summary will help increase effective communication around your organization, keep management informed, and create ownership for team members. A few helpful tips below will help set you up for success:*

1. Know your role and what you are responsible for
2. Understand what is most important to your manager
3. Create dashboards and or reports so that you can easily plug and play information related to your Core KPIs

### **Date**

MM/DD/YYYY



### **Headline = Title + Weekly Report + Date Ending Week**

Including your title and the date are both important. The title helps the recipient (or reader if the report is forwarded) understand who compiled the information and where it is coming from within the organization. Including the date helps both the report creator and recipient be able to search for historical updates if needed.

Tip: Include the headline as your email subject line if sending via email.

## **Core KPIs/Metrics, Progress, Insights & Findings**

This section is for big picture progress that gives a health status on the department or role. Keep this section to 2-3 KPIs or the ones you (or your team) are solely responsible for. Make sure you and your manager are in agreement on what KPIs should be in this section. Include the progress towards each of the KPIs (on/off track as well as % to goal) and any analysis or insights you've done to give more context. It is important to understand what your manager truly cares about and what they are looking for but do not go down a rabbit trail, less is more.

### **What did you complete this week?**

Include any deliverables or tasks that were completed this week that would be important to the reader. It can be helpful to include a status of the item or next steps if it exists. Stay away from building an exhaustive list that includes your 9-5 every detail.

Did you audit the inbound leads? Send 3 Proposals? Set a meeting with the stakeholders on that renewal you've been obsessing over?

### **What are you focused on next week?**

Where will your time, energy, and focus be next week? Include in this section the top priorities for you or your team. It can be helpful to tie this into the KPI's section for action items that may relate to the progress of a core metric you may be responsible for.

## **Project Updates**

Do you or your team have any ongoing projects or initiatives that you need to report on? Make sure to include the project name, status of project and updates (good or bad). You can also include a look ahead on what the team will tackle next on this initiative, this helps keep your manager up to speed.

## **Challenges and Roadblocks**

Don't be afraid to share "bad news" or your vulnerabilities. A truly good manager wants to know the good, the bad and the ugly - they don't like surprises down the road. Include in this section items that are holding you and/or your team back from succeeding towards goals or initiatives. Is there an integration broken? Do you need them to help gain buy-in from other stakeholders on a project? Make sure to loop your manager in so they can help you, no one reads minds.