

CLIENT REPORTING

A workflow for a clearer first draft.

Turn approved, aggregate metrics and context into a structured report draft - then check every claim before it leaves your team.

THE LOOP

Approved inputs



Draft + math



Human review



Team delivery

INSIDE

Fictional sample input and output / Tool-agnostic setup / Reusable prompt / Human review checklist / Limitations and safe-use notes

01 / START WITH SAFE INPUTS

01 / SAMPLE INPUT

Make the data small and clear.

The example below is fictional and uses aggregate values only. Start with a report you already understand, and record metric definitions before drafting.

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Reporting period: April 1-30 (fictional)

Comparison period: March 1-31 (fictional)

Campaign: Paid search (generic label)

Leads: April 160 | March 142 | target 150

Spend: April $4,000 | March $3,700 | target $3,800

Context: Ad copy changed mid-April. No verified explanation
for the lead change is available in this input.

Known caveat: Lead quality has not yet been reviewed.

Audience: Agency account lead; concise, factual tone.

Request: Draft a short update; show calculations and flag
questions. Do not infer causes or recommend spend changes.
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MINIMUM-NECESSARY INPUT

- Include the reporting window, comparison window, metric name, value, unit, target (if used), source, and known caveat.
- Remove client names, emails, account IDs, credentials, row-level records, and confidential notes.
- If the tool or data permission is unclear, do not paste client data. Test with fictional or approved aggregate data instead.

02 / READ THE DRAFT SKEPTICALLY

02 / SAMPLE OUTPUT

A narrative draft, not a verdict.

FICTIONAL EXAMPLE / DRAFT FOR REVIEW

Paid search - April

Paid search recorded 160 leads, up 18 from March's 142 (+12.7%), and above the stated target of 150. Spend was \$4,000, up \$300 (+8.1%) from \$3,700. Using the supplied totals, cost per lead was \$25.00 in April and approximately \$26.06 in March, a decrease of about 4.1%.

Ad copy changed during April. The supplied data does not establish whether that change caused the movement. Lead quality has not been reviewed, so volume alone is not a complete performance assessment.

Before sending: confirm the period and source totals; validate the target and cost-per-lead math; ask the account lead whether the change is relevant context; add any approved lead-quality finding. No spend recommendation is included.

CHECK THE MATH

- Leads: $(160 - 142) / 142 = +12.7\%$ (rounded to one decimal place).
- Spend: $(\$4,000 - \$3,700) / \$3,700 = +8.1\%$ (rounded).
- Cost per lead: $\$4,000 / 160 = \25.00 ; $\$3,700 / 142 = \26.06 (rounded); change is about -4.1%.

Derived figures still require independent verification against the source export.

03 / SET UP ONE REPORTING CYCLE

03 / TOOLS + SETUP

Keep the workflow deliberately simple.

TOOLS YOU NEED

- A spreadsheet or CSV export you are authorized to use.
- An AI assistant approved by your agency and client for the specific data and task - or fictional data if approval is unclear.
- Your existing report format and a human reviewer who knows the metrics.

ONE-TIME SETUP

01

Choose one report

Record its cadence, audience, assembly time, required metrics, and approver.

02

Map the source

Write down each metric definition, unit, time window, comparison window, and source.

03

Prepare safely

Remove identifiers and unnecessary detail; use approved aggregate data only.

04

Draft, then check

Use the reusable prompt, independently verify calculations, and resolve flagged questions.

05

Deliver as usual

A named person approves the final report; a person sends it using the team's normal process.

06

Measure the pilot

For three cycles, log assembly time, review time, corrections, and usefulness.

04 / PROMPT + HUMAN REVIEW

04 / REUSABLE PROMPT

Ask for evidence, not confidence.

Prepare an internal-first draft of a recurring agency client report. Use only the supplied facts. Do not invent data, causes, benchmarks, attribution, recommendations, or commitments.

Return: (1) concise current/comparison values and changes; (2) show the arithmetic and rounding; (3) separate facts from interpretation; (4) list missing definitions and questions for a human; (5) label the result DRAFT - HUMAN REVIEW REQUIRED.

Do not send or publish anything. Do not ask for client names, credentials, account IDs, or confidential data. If the input is ambiguous, ask rather than guess.

Approved reporting summary: [paste approved, minimum-necessary, non-sensitive aggregate data only]

REVIEW BEFORE ANYTHING LEAVES YOUR TEAM

- Source totals, reporting periods, definitions, filters, time zones, and targets match.
- Absolute changes, percentage denominators, rounding, and cost-per-result math are correct.
- No unsupported cause, benchmark, attribution, strategy, or commitment remains.
- Tone, spelling, client context, and any contract-specific reporting language are appropriate.
- No confidential or unapproved data was entered; all questions and gaps are resolved or stated.
- A named person approved the final version before it is shared.

05 / LIMITATIONS + DELIVERY

05 / SAFE USE

What this workflow does not do.

- It does not connect to client systems, validate live metrics, determine attribution, choose strategy, approve reports, or deliver them automatically.
- AI-generated text may be wrong or incomplete. Check each number and statement against a traceable source.
- Compatibility and privacy depend on your exact tools, plan, settings, terms, agreement, and jurisdiction. Verify before using real information.
- Never enter passwords, API keys, personal data, row-level client data, or confidential client details. None is needed for this template.
- If you cannot verify a number or substantiate a claim, remove it or ask the account lead.

DELIVERY + USE

Keep this guide and prompt with your reporting checklist. Duplicate the structure, add only data you are authorized to process, and complete the review checklist before sharing. The sample is fictional; do not present it as client work.

If received from a storefront purchase, follow the download or library instructions shown by that storefront and retain a local team

NO TIME-SAVINGS PROMISE

Record your own starting time, review time, and corrections over several reporting cycles. Results depend on your source data, metric definitions, tool permissions, and reviewer judgment. Any time-saved figure is an estimate for your situation, not a guarantee.

WORKWISE AI

Practical workflow experiments for agency teams.

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