YOUR
LOGO

**COMPANY NAME**

BOARD REPORTING & KPI DASHBOARD PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to support the development of your board reporting framework and KPI dashboards. Our services are designed to enhance visibility into key metrics, streamline reporting, and enable informed decision-making for leadership and investors.

# Project Objectives

The objectives of this engagement are:

- Design a board reporting structure that aligns with company goals
- Develop automated or semi-automated KPI dashboards
- Ensure metrics are relevant, timely, and clearly visualized
- Reduce manual reporting effort and enable strategic insights

# Proposed Services

Our board reporting & dashboard services include:

- Definition of key metrics across financial, operational, and strategic domains
- Creation of reporting templates and board decks
- Design and implementation of KPI dashboards (Excel, Google Sheets, or BI tools)
- Optional integration with financial or CRM systems
- Monthly reporting assistance or board prep support

# Scope of Work

Scope includes:

- Discovery and stakeholder interviews to define reporting needs
- Mapping of KPIs to data sources and performance drivers
- Dashboard design and board deck format creation
- User training or handoff documentation
- Optional recurring reporting services

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Target Date |
| Discovery & Design | Interviews, goal alignment, and KPI selection | [Start Date] |
| Template & Dashboard Build | Develop board deck and KPI dashboards | [Date] |
| Review & Training | Walkthrough and refinement | [Date] |
| Ongoing Support (optional) | Monthly or quarterly board reporting | [Completion Date] |

# Pricing

Estimated cost breakdown for board reporting and dashboard development:

|  |  |  |
| --- | --- | --- |
| Service | Description | Fee |
| Discovery & Design | Define KPIs, reporting goals, stakeholder needs | [Amount] |
| Dashboard Build | Create visual dashboards in chosen tool | [Amount] |
| Board Deck Template | Format and visuals for recurring presentations | [Amount] |
| Ongoing Support (optional) | Monthly or quarterly reporting assistance | [Amount] |
| Total Estimated Fee |  | [Total] |

# About Us

[Your Company Name] is a financial and strategic advisory firm specializing in performance management and board communication.

- Experience: [X] years working with VC-backed startups and mid-sized companies
- Expertise: KPI alignment, reporting automation, investor readiness
- Mission: To help leaders focus on what matters most through clear, consistent reporting

# Case Studies / Testimonials

Case Study: [Client Example]

- Project: Board reporting package + SaaS dashboard for Series B startup
- Outcome: Reduced CFO prep time by 60%, improved board alignment and data confidence

Testimonial:
“[Your Company Name] helped us create a reporting structure that made board meetings faster and more strategic.” — [Client Contact]

# Terms and Conditions

Payment Terms: 50% at engagement start, 50% upon delivery of final dashboard and templates.
Client Responsibilities: Provide access to data sources and availability for feedback sessions.
Adjustments: Additional automation, integrations, or revisions beyond original scope may be quoted separately.

# Acceptance

To approve this Board Reporting & KPI Dashboard Proposal and begin services, please sign below.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Name: [Client Name]
Title: [Title]
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_