

Client reporting map

Map requirements, metrics, sources and review for one client report.

A client-specific reporting requirements record

A source and metric definition map

A completed illustrative reporting route

A free worksheet from ailevrg.com/guides/automated-client-reporting

Choose one current client report and its approved requirements. Use anonymised examples if sharing the worksheet.

01 Requirements

Client and useful reporting decision

Current agreement and owner

Required sections and variations

Period and comparison basis

02 Metrics and sources

Metric definitions and calculations

Authorised sources and identifiers

Validity and collection dates

Missing or changed source rule

03 Preparation and review

What software may assemble

What AI may explain

Evidence the reviewer receives

Human owner of each exception

04 Test and upkeep

Client variations to test

Starting complete-job effort

Acceptance and correction measures

Approved-change route and review date

Two invented reporting routes

Invented teaching example. No client outcome is claimed.

Shared method

Collect authorised monthly inputs, reconcile definitions and keep source identifiers.

Client a

Requires an agreed breakdown and commentary on changes between full months.

Client b

Requires a different grouping and an account-owner decision on a changed requirement.

Missing source

Mark the affected section incomplete and hold conclusions that depend on it.

Review

The reporting reviewer checks comparisons and evidence; the account owner resolves changed requirements.

An illustrative reporting route

1. Account owner

Confirm requirements

Use the client's current agreement and approved variations.

2. Software

Collect and reconcile

Join authorised inputs with consistent metric definitions and periods.

3. AI-assisted step

Prepare observations

Describe supported changes and show the records used.

4. **Reporting reviewer**

Resolve gaps and approve

Check missing sources, comparisons and proposed explanations before release.

The route is invented to show the responsibilities. It is not a client screenshot or a claim of fully autonomous report delivery.