

BLUEPRINT · REPORTING

The Board Pack Blueprint

What a great monthly board pack actually contains — and what it leaves out. A reference for founders, CFOs and chairs who want their finance reporting to drive decisions, not consume the first 40 minutes of every board meeting.

THE TEN-MINUTE TEST

A board pack should be readable in ten minutes and actionable in fifteen. If your directors are still asking what happened on page eight, the pack has failed before the meeting begins.

One-page rule. If the CEO can't summarise the month on a single page — before the appendices — the business doesn't yet know what matters.

THE STRUCTURE

#	Section	Pages	Owner	Purpose
1	CEO letter	1	CEO	The story of the month in plain English. Wins, losses, decisions needed.
2	Board KPI dashboard	1	CFO	Six to ten metrics, RAG status, vs. budget and prior period.
3	Financial summary	2	CFO	P&L, balance sheet, cashflow — actuals, budget, variance, commentary.
4	13-week cashflow	1	CFO	Rolling cash position with three scenarios on one page.
5	Commercial update	2	CRO	Pipeline, bookings, churn, NRR — the leading indicators.
6	Product & people	1–2	CTO/CPO	Roadmap progress, hiring, retention, key risks.
7	Decisions sought	1	CEO	What the board is being asked to approve, debate, or note.
8	Appendices	as req.	Various	Detail. Cap table, covenants, customer concentration, risk register.

THE KPI DASHBOARD

Six to ten metrics. No more. The discipline of choosing forces clarity about what the business actually optimises for.

Metric	Why it matters	Cadence
ARR / MRR (recurring revenue)	The only revenue number that compounds. Track new, expansion, churn separately.	Monthly
Net Revenue Retention	The single best predictor of long-term enterprise value.	Monthly
Gross margin %	If this trends down, no growth rate fixes it. Watch it weekly.	Monthly
Cash runway (months)	Always shown alongside burn rate and net new ARR.	Monthly
CAC payback (months)	How long until a new customer pays back what you spent to win them.	Quarterly
Pipeline coverage (x)	Pipeline value divided by quota. Below 3x is a forward warning.	Monthly
Employee NPS / retention	People are the leading indicator of every other metric.	Quarterly
Top customer concentration	% of ARR from top 5 / 10 customers. Investors will ask.	Monthly

WHAT TO LEAVE OUT

EVERY LINE OF THE GL

Directors don't need account-level detail. Aggregate to the level a board can actually act on.

VANITY METRICS

Page views, app downloads, LinkedIn followers. If it doesn't change a decision, it doesn't belong.

LAST QUARTER'S SLIDES REHEATED

Every section earns its place each month. Cut what hasn't moved or doesn't matter.

SURPRISES

Bad news in a board pack should never be new. Pre-brief the chair and key directors 48 hours ahead.

THE PRE-READ DISCIPLINE

The pack lands 72 hours before the meeting. Period. This single rule, more than any template, transforms board meetings from reading sessions into decision sessions.

Want a worked example? We'll send a redacted board pack from a real Series B Australian SaaS engagement — including the dashboard, commentary structure and decisions log. Email hello@reshaip.com.