Management reporting / 01

# ASK WHAT EACH MEASURE MEANS

Use measures already in your reports. Record references and questions, not figures or formulas.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

**Metric A: neutral measure label / report reference / management question to discuss**

**A: CFO definition in plain language or reference / unit / business or entity scope**

**A: reporting-period coverage / source-owner role / definition question still open**

**Metric B: neutral measure label / report reference / management question to discuss**

**B: CFO definition in plain language or reference / unit / business or entity scope**

**B: reporting-period coverage / source-owner role / definition question still open**



Preparation only. Not accounting, tax, investment or credit advice, KPI selection, forecasting or data validation. No accuracy or comparability conclusion. Keep figures private.

Management reporting / 02

# COMPARE THE REPORT CONTEXT

Keep A and B separate. Ask the CFO to explain differences; matching labels do not settle the question.

**A: report-version 1 / report-version 2 / comparison I want explained**

**A: definition, unit, period or scope difference to ask about / CFO reply reference**

**A: explanation in my own words / unresolved limitation / follow-up role**

**B: report-version 1 / report-version 2 / comparison I want explained**

**B: definition, unit, period or scope difference to ask about / CFO reply reference**

**B: explanation in my own words / unresolved limitation / follow-up role**



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# FOLLOW A CORRECTED REPORT

Check what is documented. These checks do not certify the numbers or approve a management decision.

- [ ] Each measure connects to a management question
- [ ] Definitions and units have provider explanation references
- [ ] Business scope and reporting periods are identified
- [ ] The two report versions have distinct labels
- [ ] Differences and limitations remain questions for the CFO
- [ ] Replacement reports point back to the earlier version
- [ ] Recipient roles and private delivery ownership are recorded
- [ ] Figures, credentials and management decisions stay outside this worksheet

**Metric label / earlier report / replacement report / correction explanation reference**

**Recipient roles needing the replacement / delivery owner / private delivery reference**

**Unresolved question / follow-up owner / management decision reserved for later**



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# QUESTIONS FOR THE FRACTIONAL CFO

Use the two metric cards to make the reporting conversation concrete.

**Definitions: how will a measure connect to its management question and explanation?**

**Context: where are units, business scope, period coverage and source roles documented?**

**Comparison: how will you explain definition, period or scope changes between reports?**

**Limits: where will unresolved questions and limitations remain visible?**

**Corrections: how are replacement versions and affected recipient roles identified?**

**Scope: who owns preparation, explanation, corrections, delivery and later questions?**



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Management reporting / 05

# COMPARE REPORTING RESPONSIBILITIES

Use Provider A and B in every box. Keep management decisions separate from reporting support.

**Provider A / B / discussion dates / same metric and report-version references**

**Definition records, comparison explanations, limitations and deliverables - A / B**

**Correction process, recipient updates, private delivery and follow-up ownership - A / B**

**Included work, exclusions, fee basis, timing and unresolved engagement terms - A / B**

## READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai if you choose, then start a Fractional CFO request for management-reporting support. Share a non-sensitive summary so participating pros can compete with proposals. Compare deliverables, responsibilities, exclusions, timing and terms. A private reporting and engagement discussion may be needed.

**One request. Every pro's best offer.**

Start a request

Participation varies. A private reporting and engagement discussion may be needed before confirming scope.

Planning guide: https://www.pickyourpro.ai/services/fractional-cfo/management-reporting

U.S. Small Business Administration: Manage your business (official reference)



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