

OUTLIERS CFO EXCELLENCE CENTRE™

Board Reporting Toolkit™

Report finance to the board with clarity

CFO / Finance Reporting Team · Flagship Edition 2026

Outliers Professionals Ltd — publication-ready resource for the CFO Excellence Centre Resource Library

1. Full Guide

This toolkit helps the CFO report finance to the board with clarity and impact — a clear board finance pack, decision-grade KPIs, insightful commentary and a reporting cadence.

Operating lifecycle

1. Plan — the reporting calendar and pack structure
2. Build — the board finance pack and KPIs
3. Comment — insight, not just numbers
4. Review — quality-assure before issue
5. Present — clear board communication

Maturity model

L1 Initial	L2 Developing	L3 Defined	L4 Managed	L5 Optimised
Reactive / manual	Core but unstandardised	Standardised & controlled	Measured & automated	Predictive & value-creating

Key components

- Board finance pack
- KPI & metric design
- Commentary & insight
- Reporting calendar
- Quality & controls
- Board communication

2. Templates & Contents

Board finance pack template

Standard structure for the board finance pack.

Finance KPI library

Reusable KPIs for board reporting (supplied as a working XLSX).

Management commentary guide

Write commentary that explains the 'why'.

CFO dashboard template

One-page executive scorecard (supplied as a working XLSX).

Variance analysis template

Explain performance against budget.

3. Checklists

- Reporting calendar in place
- Board finance pack to a clear standard
- KPIs relevant and decision-grade
- Commentary provides insight
- Reporting quality assured

- Reporting issued on time
- Board receives a clear, balanced view

Governance Structure

Board reporting is coordinated by the CFO and finance reporting team, approved before issue to the board:

Layer	Role
Board / Audit Committee	Oversees financial reporting, controls, risk and capital
CFO	Owns the finance function and agenda
Finance leadership	Run FP&A, control, treasury, reporting
Finance business partners	Connect finance to the business
Finance team	Deliver close, reporting, analysis and controls

Reporting Example

Standard report: executive summary · performance vs target (RAG) · key metrics · risks & actions · decisions sought.

Metric	Current	Target	RAG	Action
Reporting timeliness	5 days	≤5 days	Green	Maintain
KPI relevance	High	High	Green	Maintain
Commentary quality	Good	High	Amber	Deepen insight
Restatements	0	0	Green	Maintain

Board Reporting Section

Illustrative one-page board summary (replace with live data):

Item	Status	Commentary
Board reporting	Green	Timely, clear finance reporting
Insight	Amber	Commentary deepening
Quality	Green	No restatements
Decisions sought	—	Note reporting position

Notes & Disclaimer

This resource is a professional finance management template, not accounting, tax, legal or financial advice. Calibrate frameworks, KPIs, thresholds and figures to your organisation and confirm accounting, tax and regulatory specifics against current applicable standards and law and professional counsel. Bracketed fields [like this] and sample figures are editable placeholders.