

The Best-in-Class Board Pack Checklist

A great board pack will set your board up for success. Use the checklist below to find out if your board pack is hitting the mark and identify opportunities for improvement.

Focus

- Is it clear why each report is being shared with the board, and why now?
- Does each report demonstrate a clear link to the organization's strategic goals and initiatives?
- Has management clearly articulated the direct "ask" of the board?
- Does each report summarize key actions with owners and deadlines?

Critical thinking

- Does each report address the key questions that are on directors' minds?
- Do reports provide a balanced analysis, giving a forward-looking view as well as looking backward, and considering the internal and external context?
- Does management offer actionable insights by answering two key questions in their reports: "What are the implications?" and "What will we stop, start, or do differently as a result?"

- If management is using slides to share information, are those slides sufficiently detailed or accompanied by a memo so they can be easily understood without a voice-over?
- Is each report tailored to the board's specific needs and sufficiently strategic?
- Is the board pack shared in a timely manner to allow sufficient review and meeting preparation?

Great communication

- Are the key messages clearly presented at the start of each report?
- Is the content of each report well-structured, with headings that signpost the writer's logic?
- Is the writing in each report engaging and easy to read?
- Are graphs and data tables accompanied by a written narrative that explains the key insights?
- Is the board pack an appropriate length, because it includes only the most relevant information?