

What a monthly operations report should show

An example of the records, open decisions, and follow-up work that make an IT report useful to leadership.

Illustrative example with fictional findings and statuses. This is a sample reporting format, not an actual client report or a statement of SEA performance.

Start with decisions and open exposure

The executive summary should identify what changed, what remains unresolved, and which decisions need leadership attention. A status label is useful only when the underlying evidence and scope are clear.

- Example decision: approve the proposed maintenance window for a service update.
- Example open item: confirm the owner of an application recovery procedure.
- Example completed item: document the result of a bounded restore test.

Example record: restore verification

Fictional status: one selected test completed; broader recovery readiness remains under review. A restored file or service does not establish that every system can be recovered.

- Scope: record the selected system, backup date, and isolated test environment.
- Evidence: retain the execution log and the owner's check that the recovered item is usable.
- Limitations: record excluded systems and dependencies that were not tested.
- Next action: agree on the next test and its acceptance criteria.

Example record: service-request handling

Fictional status: an ownership rule is ready for a limited pilot. The report links the proposed change to an approved task and identifies the person who can authorize it.

- Evidence: a permitted workflow walkthrough and the proposed routing rule.
- Human control: review ambiguous assignments and stop actions outside the approved boundary.
- Measurement: handling time, misrouted requests, and reviewer effort, compared with an agreed baseline.
- Next action: obtain approval for the pilot scope and rollback conditions.

A useful record for every finding

Make open work traceable from one reporting period to the next. Completed work should remain distinguishable from proposed work, monitoring signals, and unverified claims.

- Finding, affected scope, and business implication.
- Evidence reference and date checked.
- Responsible owner and current status.
- Decision required, next action, and due date.
- Acceptance criteria and the record used to close the finding.

Use the report to set the next month's work

Review priorities, capacity, and dependencies with the named lead. Record any change in scope and keep additional implementation work visible before committing to it.

- Which unresolved items deserve attention first?
- Which decisions are waiting on the client or a vendor?
- What can be completed within the current engagement?
- What requires a separate proposal or a different specialist?

Apply this to your organization

Explore [Run IT](#) or [contact Social Enterprise Advisors](#) to discuss your priorities.