

# Board Report Format Chooser Worksheet

Use this worksheet to decide whether the next board-reporting artifact should be a dashboard, a memo, or a board-ready scorecard.

## 1. Name the board job

What does the room need this artifact to do: inspect, interpret, or repeat?

Which single board question should this format support?

## 2. Score each option from 1-3

Dashboard: stable metrics? recurring inspection? narrow scope?

Board memo: one narrative shift? clear caveats? recommendation needed?

Board-ready scorecard: repeatable metrics? confidence labels? board rhythm?

## 3. Pressure-test trust

Are the definitions stable enough to survive another board cycle?

Which metrics are directional, decision-grade, or board-grade?

What still breaks trust before the packet is final?

## 4. Watch for the stop-and-scope signal

If the team still disagrees on the metric, the owner, or the confidence bar, do not pick a prettier format yet.

Write the unresolved issue in one sentence:

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## 5. Make the call

Choose one: Dashboard / Memo / Scorecard / Stop and scope first

What should this artifact help leadership do next?

Who owns keeping it honest between meetings?