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**What is a Managing Directors Report?**

In a nutshell, it outlines the business challenges or opportunities you want to discuss with the board. It gives a direction to the meeting and means that the discussion remains focused.

In advance of the first meeting, it introduces yourself and your business to your Advisory Board so they know what topics you are looking to discuss with them.

As you go through The Productivity Programme it keeps your board members updated on progress.

It also serves as a record of your time on The Productivity Programme and shows the positive changes you have made to your business and how far you have come since the first meeting!

**Why do we ask you to complete one?**

We have found that the businesses who get the most from our programmes prepare and share information from the beginning of the process and throughout so that their board can stay informed and provide contextualized support.

**Who reads the Managing Directors?**

Your Advisory Board Members!

**What should you include in your Managing Directors Report?**

We’ve suggested a basic outline for your first meeting. However, it’s not exhaustive, you are the person who knows your business best.   
Please include the most relevant information on the challenges and opportunities you want to discuss with your advisory board, the more detail you can include in each report the better understanding your board will have on how they can best help you in each meeting.

This report template does change as you go through the programme – don’t worry we won’t ask you about the company’s history before every meeting!

**What do you do with your Managing Director Report once its complete?**

Please send it back to us via [programmes@bethebusiness.com](mailto:programmes@bethebusiness.com)

We use it as a sense check that we have a good mix of people on your board but also means that as soon as your board members are confirmed we can share it with them. Being able to share your Managing Directors Report in advance means that your board members can start thinking about your challenges and opportunities and what they are going to bring to the first meeting.

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| **Date** |  |
| **Your name** |  |
| **Company name** |  |

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| **Introduction: Who are you? What does your company do?** *Tell us about your company, your background and what you do* |
| **Think about the product you offer, what is your main product?** *Are any particularly growing or shrinking? Have you got any product launches/expansion on the horizon?* |
| **Think about your customers and channels – who are your major customers and what channels does the business use to communicate/sell to them?** |
| **Describe your market - how do you compare to your competitors? What is regulation like in your industry?** |
| **Who is currently employed in your business? Do you have the right people in the right roles? Do you have an organisation chart you can share?** |
| **If you are happy to, please can you provide some basic financials details for your business** *Revenue, costs and profit for the last few years and your projection for this financial year.* |
| **What is the vision for the development or growth of your business, and what sort of plans do you currently have in place to achieve this?** If you have a business plan, please think about sharing it |
| **Describe any challenges or barriers you are currently experiencing that might prevent you from achieving your productivity objectives, business growth and personal aspirations?** |
| **What is the one thing that you would most like to get from the Advisory Board relationship?** |