

Define the monthly handoff.

For an internal portfolio-company operating pack. Adapt roles and timing to the purpose of the review.

01 Purpose, scope and deadline

Which meeting and decisions? Which companies, period, currency and units?

02 Submission owner and source

Who supplies each measure? Where are definitions and source versions recorded?

03 Preparation and agreed checks

Who assembles the pack? Which comparisons and validation checks are required?

04 Exceptions and escalation

Where are missing evidence, differences, owners and next actions tracked?

05 Reviewer and acceptance

Who decides readiness and the permitted treatment of unresolved items?

06 Release and corrections

Where is the final version stored? Who communicates and records replacements?

READY FOR REVIEW

- ☐ Definitions and reporting periods are explicit.
- ☐ Sources and versions can be traced.
- ☐ Missing figures remain visible; estimates are labelled.
- ☐ Exceptions have owners, next actions and reviewer decisions.