How scalable is your portfolio reporting process?

8 Questions to pressure-test whether your reporting runs on process, or on a handful of people who happen to know where things are.

01 Can every material variance be traced to specific assets? ☐

02 Can every asset variance be explained? ☐

03 Is commentary preserved between periods? ☐

04 Can executives see who supplied the explanation? ☐

05 Can previous assumptions be retrieved? ☐

06 Can portfolio reporting be produced without that one key employee? ☐

07 Can an executive answer the next "why?" without sending someone away to investigate? ☐

08 Can you publish investor-quality reports once performance summaries are verified? ☐

SCORE YOURSELF

7–8	3–6	0–2
Strong. Holds up under scrutiny and scale.	**Fragile.** Gaps will show under growth.	**At risk.** Dependent on people and spreadsheets.