MONTHLY RETAINER REPORT

[Client Name]

[Month Year]

Prepared by *[Your Name]*

Executive snapshot

METRIC 1	METRIC 2	METRIC 3	METRIC 4
[Value]	*[Value]*	*[Value]*	*[Value]*
[+X% MoM]	*[+X% MoM]*	*[+X% MoM]*	*[+X% MoM]*

Summary

One paragraph: What happened this month. Lead with the most important change. Be honest about what underperformed. End with one sentence about direction for next month.

HEALTH	HOURS THIS MONTH
[🟢 On track / 🟡 Needs attention / 🔴 At risk]	*[XX hours]*

WORK DELIVERED

Tasks completed this month

#	TASK	STATUS	LINK / NOTES
1	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
2	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
3	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
4	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
5	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
6	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
7	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
8	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
9	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
10	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
11	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*
12	*[Task description]*	*[Done / In progress / Carried over]*	*[URL or note]*

> **Tip:** Link to every deliverable. Clients forget what you did unless they can see it. A linked task list is your proof of value.

INSIGHTS & ANALYSIS

What worked

2-3 things that performed well. For each: what you did, why it worked, whether it's repeatable.

What didn't work

1-2 things that underperformed. For each: what you expected, what happened, what you're changing. No spin — honesty builds trust.

Market / competitive insight

One observation about their market, a competitor move, or an industry trend. Shows you're thinking beyond the task list.

Data snapshot

[Paste your GA4 / Search Console / ad platform charts here]

NEXT MONTH PLAN

Priorities for *[Next Month]*

#	TASK	PRIORITY	DEADLINE
1	*[Planned task]*	*[High/Med/Low]*	*[Date]*
2	*[Planned task]*	*[High/Med/Low]*	*[Date]*
3	*[Planned task]*	*[High/Med/Low]*	*[Date]*
4	*[Planned task]*	*[High/Med/Low]*	*[Date]*
5	*[Planned task]*	*[High/Med/Low]*	*[Date]*
6	*[Planned task]*	*[High/Med/Low]*	*[Date]*
7	*[Planned task]*	*[High/Med/Low]*	*[Date]*
8	*[Planned task]*	*[High/Med/Low]*	*[Date]*

Dependencies from you

List anything you need from the client to execute next month's plan. Approvals, content, access, decisions. Be specific with deadlines.

Scope or budget discussion

Flag here if you need to discuss scope changes, budget adjustments, or strategic pivots. Better to raise it in writing first than surprise them on a call.

Please reply to confirm priorities or flag any changes before *[date]*.

Our next call: *[date and time]*