



Briefd

FRAMEWORK REFERENCE

The Monthly Consulting Report Narrative Template

A 6-part framework for independent strategy advisors
and consultants on retainer
sendbrief.io

Why the monthly update is your most important retention document

The proposal gets the engagement. The final report closes it. The monthly update is what keeps the client paying in between. It arrives at the moment when no deliverable has just landed, no milestone is being celebrated, and the client is left to form their own assessment of whether the retainer is earning its fee. That assessment is shaped almost entirely by what the update says and how it says it.

Clients experience retainer value in two ways: directly, through the work itself, and narratively, through the story the update tells about that work. Most advisors and consultants spend the majority of their time on the former and almost none on the latter. The monthly update is the only document in the engagement that shapes the second. It is the only place where the client's perception of value is actively authored rather than simply experienced.

The failure mode is activity reporting. Listing what was done, rather than what changed because you were there, turns judgment into a checklist. It commoditises the very thing a strategy advisor is paid for. A well-constructed engagement update does not describe the month. It makes the case, implicitly and precisely, that the work being done at this fee cannot be done without someone with this judgment.

The 6-Part Narrative Framework

Each move serves a distinct function in the narrative. Together they build a document that demonstrates value rather than reporting activity.

01 Context Anchor

Reconnects this month to the engagement's stated purpose. One sentence that re-establishes the strategic stakes before any progress is described.

"This month's work continued to focus on restructuring the leadership decision-making process ahead of the Q3 expansion."

Not this: "This month we had four meetings and reviewed three documents."

02 This Month's Progress

What moved, not what was done. Deliverables framed as outcomes, not tasks.

"The governance proposal reached alignment across all three business unit heads, removing the primary blocker to Phase 2."

Not this: "We finalised the governance proposal and presented it to stakeholders."

03 Key Outcomes

Decisions reached, risks removed, alignments achieved. The concrete proof of value.

"Two competing strategic positions were resolved into a single agreed direction, eliminating the need for an external arbitration process."

Not this: "We made good progress on the strategic alignment work."

04 Honest Assessment

What slowed progress, with the cause named. Transparency here preserves trust. Vagueness destroys it.

"Finalising the market entry model was delayed by late data delivery from the client's finance team. This will be resolved in the first week of next month."

Not this: Omitting friction entirely, or padding the update to conceal it.

05 Next Month's Direction

Intended priorities, not committed deliverables. Framed as direction, not promises.

"The focus next month will be on completing the stakeholder mapping exercise and preparing the board presentation draft."

Not this: "I will deliver X, Y, and Z by [date]."

06 Closing Line

One sentence. Reinforces the relationship without sentiment. No forward-looking affirmations.

"This engagement continues to be well-positioned for the Q3 timeline."

Not this: "Thank you for your continued partnership. I look forward to our next check-in."

Target length for a complete engagement update using this framework: 250 to 400 words.

What belongs in the update. What does not.

INCLUDE

- Decisions reached and their downstream implications

- Risks identified or removed, with specificity

- Alignments achieved across stakeholders

- An honest account of what slowed progress, with cause named

- Intended next-month priorities framed as direction

LEAVE OUT

- Hours logged or tasks completed without outcome framing

- Forward commitments not explicitly made in the engagement

- Rationale not grounded in the month's actual work

- References to engagement duration

- Closing sentiment or relational affirmation

- Any language that reads like a timesheet

Where the framework breaks down

OBSERVATION 01

The notes are always messier than the structure assumes. The framework tells you what six things to write. It cannot assemble a month of voice memos, document fragments, and half-finished thoughts into the prose that fills them. The gap between knowing the structure and having the material organised to meet it is where most updates stall.

OBSERVATION 02

The voice is the hardest part. Executive-grade prose sounds like the advisor, not like a template. That register takes time to establish and is inconsistent under deadline pressure. A framework can describe the tone. It cannot produce it.

OBSERVATION 03

The month rarely fits neatly into six moves. Some months have three things in Move 3 and nothing in Move 4. Knowing the structure does not make that judgment call for you. It only tells you which judgment call needs to be made.

Briefd was built to close that gap. Drop a month of captures (notes, voice memos, documents) and it assembles the narrative using this framework, in your voice, connected to each client's specific goals and engagement history. Your first narrative is included. No card required.

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