Monthly report for a sample client

Engagement: Product delivery **Period:** 1 to 31 October 2026 **Accountable architect:** Zigmas Slušnys

SUMMARY

One objective is on track, one needs a decision from you, and one was delivered last month. Four releases were signed this month, and all automated tests passed. Agent usage stayed inside the agreed cap, and the monthly fee is unchanged.

DECISION NEEDED FROM YOU

Retry failed card payments automatically, or also email the customer?

Automatic retries alone fit the current plan. Adding customer emails needs access to your email provider and moves the milestone by about three days.

Option A: retries only
Stays on plan for 19 November.

Option B: retries and emails
Milestone moves to 22 November.

Please reply by 5 November. Until then, the team continues with work that does not depend on it.

OBJECTIVES

OBJECTIVE	STATUS	PROGRESS	NEXT MILESTONE
Move billing to the new platform	On track	4 of 7 milestones	Invoice history migrated, 12 November
Reduce failed card payments	Decision needed	2 of 5 milestones	Retry rules live, 19 November
Invoice exports for finance	Delivered	3 of 3 milestones	Delivered 30 September

SIGNED RELEASES

DATE	RELEASE	TESTS	ROLLBACK CHECKED	SIGNED BY
27 Oct	Billing: invoice service on the new platform	214 passed	Yes	Z. Slušnys
21 Oct	Card payments: failure reasons recorded for every attempt	58 passed	Yes	Z. Slušnys
12 Oct	Security fix: PDF library upgraded	96 passed	Yes	Z. Slušnys
7 Oct	Billing: tax rules moved to a shared service	87 passed	Yes	Z. Slušnys

Each release has its acceptance criteria, test evidence and rollback plan attached in the decision log.

RISKS

- **Open:** about 2% of old billing records have no tax code. We fix them during migration. No effect on the deadline if confirmed before 10 November.

NEXT MONTH

- Migrate invoice history and run both billing paths in parallel
- Retry rules for failed card payments, after your decision

RECOMMENDATIONS

- **Offer annual billing.** Customers on annual plans renew less often, so fewer payments can fail.
- **Self-serve plan changes.** About a fifth of support requests this month asked for a plan change.
- **Remove the unused export service.** It has had no traffic for six months and still needs security updates.

From our product, technical and growth reviews. Add any of these as an objective, or ignore them.

Sample document. The client, objectives, figures and releases in this report are fictional. They show the format of the monthly report that every engagement receives.