

Quality Storytelling Checklist: Turning Data into Board-Level Insight

◆ 1. Clarity & Focus

- ✓ Did I limit this to the **most important metrics (5–7 max)**?
 - ✓ Is the **main message obvious within 30 seconds**?
 - ✓ Have I removed unnecessary detail?
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◆ 2. Trend & Context

- ✓ Did I show **trend over time** (not just a point)?
 - ✓ Did I include **benchmark or target comparison**?
 - ✓ Is it clear whether performance is improving or declining?
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◆ 3. Translation (Critical)

- ✓ Did I translate clinical/technical language into **plain English**?
 - ✓ Would a non-clinical board member understand this immediately?
 - ✓ Did I avoid acronyms or explain them clearly?
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◆ 4. The “So What?” Test

- ✓ Did I clearly explain:
 - Why this matters?
 - What risk it represents?
 - Why the board should care?

👉 If this is missing, the report fails

◆ 5. The “Now What?” Test

- ✓ Did I clearly state:
 - What action is being taken?
 - What the board’s role is?

- Whether this is **monitor, discuss, or decide?**
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◆ 6. Prioritization

✓ Did I highlight:

- 1–2 **high-risk issues**
- 1 **stable issue**
- 1 **success story**

👉 Balance builds credibility

◆ 7. Dashboard Effectiveness

✓ Are visuals:

- Simple
- Clean
- Easy to interpret

✓ Is color used:

- Intentionally (not excessively)?
 - Consistently?
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◆ 8. Board Engagement

✓ Does this report naturally prompt:

- Questions?
- Discussion?
- Decision-making?

✓ Did I include at least **one discussion prompt?**

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