METRICFLOW

AUTOMATED CLIENT INTELLIGENCE

# Automated Client Report

A data-driven client report designed for API, MCP, CSV, or JSON generation with reusable metrics, narrative variables, tables, and branded output.

PREPARED FOR

Aperture Mobility

Northstar Systems · Mara Klein · 4 August 2026

**Document contents**

| PERFORMANCE | CHANGE | CONFIDENCE |
|---|---|---|
| 74% | +12% | High |
| Current period | Against baseline | Evidence reviewed |

# Client summary

Generate a concise period summary from controlled variables with reporting date, service, portfolio, status, and key message.

| Document control | Detail |
|---|---|
| Owner | Mara Klein |
| Reference | NS-051-2026 |
| Effective date | 4 August 2026 |
| Status | Ready for review |

# Metrics and trends

Render supplied metrics consistently with units, comparison periods, targets, direction, confidence, and source. **Review record:** Assign the owner, evidence, dependencies, decision date, and next action.

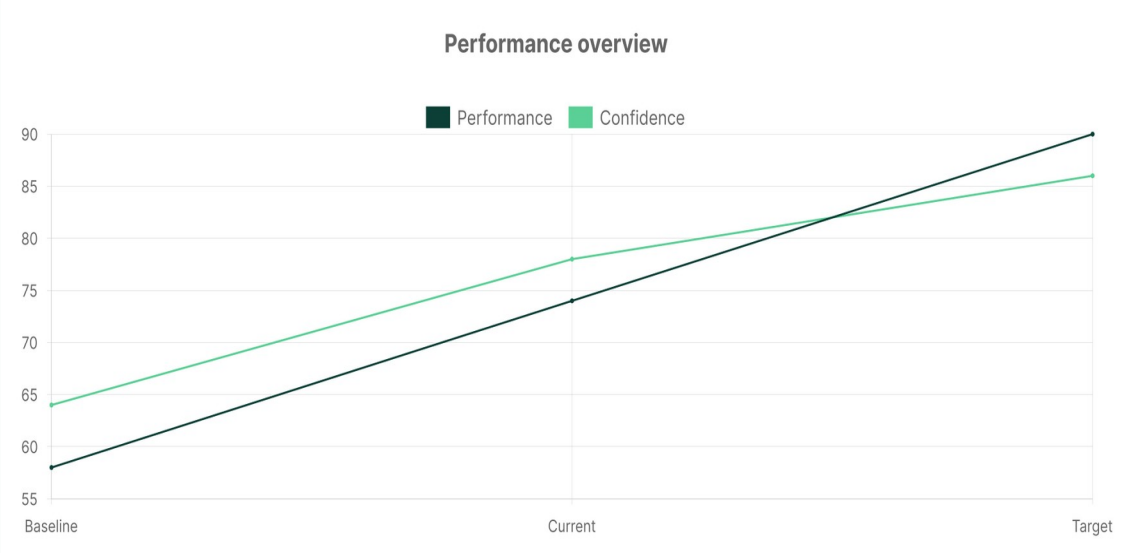


*Figure 1: Illustrative performance profile*

# Narrative explanation

Combine approved narrative variables with explicit fallbacks so missing data never creates misleading or broken prose.

| Topic | Decision or outcome | Owner | Due |
|---|---|---|---|
| Narrative explanation | Outcome recorded | Mara Klein | 4 August 2026 |
| Follow-up | Confirm completion evidence | Client team | To be agreed |

# Exceptions and risks

List only material exceptions with severity, evidence, customer impact, containment, owner, and expected resolution. **Review record:** Assign the owner, evidence, dependencies, decision date, and next action.

# Activity and deliverables

Summarize completed, in-progress, deferred, and upcoming work from repeatable structured inputs. **Review record:** Assign the owner, evidence, dependencies, decision date, and next action.

# Recommendations

Translate the data into prioritized, evidence-based recommendations with value, effort, dependency, and owner. **Review record:** Assign the owner, evidence, dependencies, decision date, and next action.

# Next period

Publish commitments, milestones, requested customer inputs, meeting dates, and measurable next-period outcomes. **Review record:** Assign the owner, evidence, dependencies, decision date, and next action.

# Data notes

Declare source systems, cut-off time, transformations, definitions, missing data, revisions, and automation run reference. **Review record:** Assign the owner, evidence, dependencies, decision date, and next action.