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| **FINANCIAL REPORT PLAN** | | |
| **Completed by** |  | |
| **Workplace/organisation** |  | |
| **Date completed** |  | |
|  | | |
| **Report Details** | | |
| **Financial services work you will do in relation to the report** | |  |
| **Required work outcome** | | **Purpose of report:**  **Deadline:** |
| **Organisational goal** | |  |
| **How the report addresses the organisational goal** | |  |
| **Organisational priority** | |  |
| **How the report addresses the organisational priority** | |  |
|  | | |
| **Method, Technique, and Tools to be Used in Statistical Analysis** | | |
| **Statistical method to be used:**  *A different statistical method must be used for each report.*    **Description:**  *Provide a short description only.* | | |
| **Why is this appropriate for the financial services work you will carry out in this task?** | | |
| **Why is this appropriate for the required work outcome?** | | |
|  | | |
| **Statistical analysis technique to be used:**  *A different statistical analysis technique must be used for each report.*    **Description:**  *Provide a short description only. Include why this is appropriate for the required work outcome.* | | |
| **Tool to be used in statistical analysis & modelling:**    **Description:**  *Provide a short description only. Include why this is appropriate for the required work outcome.* | | |

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| **Data and Information Needed**  *All statistical reports, data, and information identified here, as well as the sources for these, must be current and relevant.* | |
| **Statistical Report (Internal)** |  |
| **Description of data in report**  *Provide a short description of the data contained in the report.* |  |
| **Source** |  |
|  | |
| **Statistical Report (External)** |  |
| **Description of data in report**  *Provide a short description of the data contained in the report.* |  |
| **Source** |  |
|  | |
| **Other data needed** |  |
| **Source** |  |
|  | |
| **Sampling technique to be used in analysing data**  *A different sampling technique must be used for each report.* |  |
| **Description**  *Provide a short description only. Include why this is appropriate for the purpose of the report.* |  |

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| **Organisational Requirements for Reports** |
| **Format/Template to be used:**  *Specify the name of the organisational format/template you will use in producing the reports. You may use more than one (1).* |
| **Protocols for producing reports:** |