#### [Word: Heading 4] Client Name

# [Word: Heading 1] Performance Report

### [Word: Heading 3] May 2023 & Financial Year-To-Date

##### [Word: Heading 5] Your Company Name

[Word: Normal] 6 June 2023

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# [Word: Heading 1] Executive Summary

[Word: Normal] AI generated draft executive summary.

**How to apply your firm’s brand colours and text formatting with 1-click…** Summary below. [Find out more in our illustrated step-by-step 1-click report branding guide](https://ask.aider.ai/help/customise-report-branding).

## [Word: Heading 2] Action points:

1. **Set up a custom Word Design Style Set:** Using this template, modify the Word Styles for normal text (“Normal”) and headings (“Heading 1” – “Heading 5”). You can change the text colours, font, text size, bold or not, paragraph spacing, etc. This template shows you what Word Style each bit of report content is using, so you can easily see how your customisation will look. Once you are happy with your style customisation, click on “Design” in Word menu, right-click on “This Document’s Style Set” and select “Save…” Your custom Style Set should now be listed in the Style Sets Gallery next to the “Themes” button.
2. **Apply your custom Word Design Style Set to your reports:** When you download a report for a client, simply open the report, enable editing, then click on “Design” in Word menu and select your custom Style Set listed in the Word Style Sets Gallery. The entire report should now reflect your firm’s custom text styling.
3. [Word: Normal] AI generated draft key action point.

# [Word: Heading 1] Section Heading

### [Word: Heading 3] Section Sub-Heading

# [Word: Heading 1] SMB-friendly Insight Name

## [Word: Heading 2] Standard insight name or action summary

* [Word: Normal] Insight trend summary
* Insight detailed action point where relevant

