INTRODUCTION: Project Status Reports

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What This Is

Five different formats and types of status information for summarizing and communicating project status to the team and Management.

- Document formats to capture status on one page and easily hand out, post, or email
- Simple 3-slide set for presenting top-level status to management in meetings
- One-page format for summarizing status on multiple projects

Why It's Useful

Regular status reports help ensure that the team has clear visibility to the true state of a project and that Management stays properly informed about project progress, difficulties, and issues, by periodically getting the right kinds of information from the project manager. Frequent communication of project status and issues is a vital part of effective project risk management.

The reports should let management know whether the project is on track to deliver its outcome as planned, and must highlight to management any place where their decision-making or direct help is needed.

How to Use It

1. Review the included status report formats and select the one that seems most appropriate for your needs, or create your own hybrid.
2. In communication planning with your team and stakeholders during the project front-end, decide on the initial period for the status report and who should receive it. This can be documented in your Communications Plan.
3. Decide on appropriate definitions for indicators in the report. For example, if you choose a format that calls for a 'red, yellow, green' indicator of project health: Green can mean the project is on track for hitting schedule, cost, and requirements (scope) goals, and there are no major issues; Yellow can mean early warning of potential risk to either cost, schedule, or scope, and refer the reader to the Issues section for details; and Red can mean that one or more serious issues have put project success in jeopardy. Adjust these definitions to fit your project's critical success factors and goals.
4. The project manager then creates and sends this report at the agreed-upon frequency to the recipients. Note that you don't have to wait until the Execution Phase of the project to start sending status reports – updating the team and stakeholders during the earlier project phases is a good way to increase project knowledge and decrease risk. It is essential to be periodically updating the team and stakeholders by the Execution Phase at the latest. Also, you can change the frequency of the reports as necessary—a bi-weekly report can become weekly during a time of intense project activity.
5. Pay attention to the type and level of detail the report suggests. Sometimes communication with management can be of low quality because too MUCH information is provided, and busy executives can't determine what actions they need to take to help the project.

Special note for small projects: If you're on a relatively short timeframe project or a project with a very small team—say a very short feature enhancement to an existing product or an internal department project, or any similar, very straightforward effort—it may seem like no formal status reporting is needed. Before you reach this conclusion think about the following:

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INTRODUCTION: Project Status Reports (continued)

How to Use It (continued)

Special note for small projects: (continued)

- *What status tracking and "reporting" will be helpful for your team members (and their managers)?* Even if there are just a few of you, it can still be helpful to keep everyone on the same page with what's done, what's not, and what issues need to be worked. Actually, this can be very important for small projects, because by definition your team members are probably working on multiple other projects at once. You need to keep status of YOUR project in front of everyone so nothing gets dropped. See Formats 1 and 2: these formats provide two different ways to convey current status simply through keeping track of planned vs. actual work.
- *Who are the project stakeholders besides those few people doing work on your project?* Stakeholders are those who have some reason to care about the outcome of your project. They could be customers or users of the project's eventual deliverable; they could be managers with staff assigned to the project; they could the ones providing the budget for the program. Do these people need to be informed of status along the way? What would they like to know about how the project is progressing? See Format 4: it shows how to summarize the project, status, and issues, in 'slide format' for easy reading. And of course, this info can simply be used as bullets in an email to the right people.

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Project Status Report Formats

(1) Project Status Report – Periodic Progress Summary

Content: A template for a 1 – 2 page report summarizing progress on a project. The format is "what we did last period," "what we're doing next period," and "issues we're working on now." The report is formatted to allow stakeholders and team members to quickly assess a project's status, progress, and key current activities.

Bottom Line: The "what we did" and "what we are going to do" sections help establish a rhythm for the team as well as keep management apprised of progress and alerted to early indications of slip. The "Issues" section helps expose project risk areas early, focus attention on tasks to mitigate them, and communicate a possible need for help from outside the immediate project team.

Note: When a project is running smoothly, there should a visible correlation between one report's "Upcoming tasks for this period" and the next report's "Key accomplishments last period." Most of the task descriptions should just change their action verbs to past tense. If there is little correlation between what you intend to do each week and what you ended up accomplishing, the project is probably experiencing problems such as inadequate resources, unclear requirements, or convergence on solutions that meets requirements.

Summary Progress Report

To: {distribution list} **From:** {project manager}

Subject: Summary Progress Report, _____ Project **Date:** mm/dd/yy

Project Name:		**Report Period:**	
Project Manager:		**Phone, E-mail:**	
Project Description:		**Project Priority:**	

Project Status Summary: ____Green ____Yellow ____Red

Key accomplishments last period:
List brief 1- or 2- sentence descriptions of what was accomplished in this last period:

- Include important schedule milestones if any occurred in this last period.
- Include any events that significantly reduced risk in the project.
- Include key tasks that closed an issue that was marked "open" on the previous report.

Upcoming tasks for this period:
List brief 1- or 2-sentence descriptions of what you plan to accomplished this next period.

- Include important schedule milestones if any that will occur in this period.
- Include any upcoming events that will significantly reduce risk in the project.
- Include key tasks that will move an open issue toward closure.
- Include any item you specifically need Management's help on – and what actions you need.

Issues:
List the principal open issues.

- Include any item you specifically need Management's help on – and what actions you need.
- Identify an owner of the issue – who is driving the resolution.
- Include a task in the "Upcoming tasks for this period" that will move this issue toward closure.
- Don't try to track all project issues in this report. Just list the principal ones along with any progress toward closing them.
- If resolving the issue needs management action, be specific about what action is needed and by when.

(2) Project Status Report – Major Task Completion

Contents: Presents status for a project phase, with emphasis on reporting completion status of major tasks.

Variations: a) This format can be used to give status on current phase or you can expand it to include all major phases. **b)** You can reduce the level of detail in each phase and report on a smaller number of major milestones. **c)** Some people prefer to leave out "percent complete."

Bottom line: This status report is a good summary for a team and functional managers. By providing planned and actual start and end dates for the various tasks/milestones, it lets you see at a glance whether the project is on schedule. It is not a complete picture for reporting to executives, because it does not provide highly targeted and summarized information on issues they need to understand where to focus their attention to assist the project. At most, the Status or Comments column could be used to convey some of that information.

Project Name: Biz1 Data Warehouse **Status Date:** ___________________

PROJECT STATUS	Planned Start Date	Actual Start Date	Planned Complete Date	Actual Complete Date	Percent complete	Status or Comments
Business Analysis						
Review current capabilities						
Develop requirements						
Refine requirements						
Develop Deliverable						
Source Data Analysis						
Develop Data Model						
Develop Data Transformations						
Data Conversion Analysis						
Legacy system review						

2	**Lab Information System upgrades**	IT		4	8/14/05	1 week	
3	**UK2 Pilot line Construction**	Construction	1	3	2/02/06		3 months
4	**Process2 development**	Process		3	8/01/05		
5	**Process3 development**	Process	1	2	3/03/06		
6	**Mfg capacity ramp Drug1**	Capacity		4	5/05/05	3 weeks	
7	**Etc.**						
8							
9							
10							
11							
12							

NOTE: “Resets” refers to the number of times the project has been re-scoped and re-planned and the Completion date re-baselined.